



# USAID'S INVESTMENT FACILITATION ACTIVITY IN THE DRC (USAID INVEST)

## AN INTRODUCTORY GUIDE TO THE COFFEE SECTOR IN THE DRC

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## Acronyms

4C	Common Code for Coffee Community
ACR	African Coffee Roasters
AfDB	African Development Bank
ANAPI	Agence Nationale pour la Promotion des Investissements
ASOP	Action Sociale et d'Organisation Paysanne
BIO	Belgian Investment Company for Developing Countries
BRLA	Business Registration and Licensing Agency
CAM	Coopérative Agricole Muungano
CCKA	Coopératives de Caféculteurs de Kalehe
CDC	Commonwealth Development Corporation
COOPADE	Coopérative Paysanne de Développement
COPAK	Compagnie des Produits Agricoles du Kivu
CPCCK	Cooperative des Planteurs de Cafés de Kabare
CRS	Catholic Relief Services
DFC	Development Finance Corporation
DGDA	Direction Générale des Douanes et Accises
DRC	Democratic Republic of Congo
ECI	Eastern Congo Initiative
EIB	European Investment Bank
FEC	Fédération des Entreprises du Congo
FOB	Free on Board
GDP	Gross Domestic Product
HACOFKO	Hamburg Coffee Company
ICA	International Coffee Association
IFAD	International Fund for Agricultural Development
IFC	International Finance Corporation
KACCO	Kalehe Arabica Coffee Cooperative
KfW	Kreditanstalt Für Wiederaufbau
MFI	Microfinance Institutions
Minagri	Ministry of Agriculture
MT	Metric Ton
NGO	Non-governmental organization
ONAPAC	L'Office national des produits agricoles du Congo
PASA-NK	North Kivu Agriculture Sector Support Project
PEJAB	Projet d'entrepreneuriat des jeunes dans l'Agriculture et l'Agrobusiness
RWH	Rebuild Women's Hope
SCA	Specialty Coffee Association
SCPNCK	Société Coopérative des Planteurs Novateurs de Café du Kivu
SIDI	International Solidarity for Development and Investment
SME	Small and medium size enterprise
SMICO	Société de Microcrédit Congolais
SOPACDI	Solidarité pour la Promotion des actions café et le Développement Intégrale

SOPROCOPIV	Solidarité pour la Production et la Commercialisation des Produits Industriels et Vivriers
SVC	Strengthening Value Chains
TMB	Trust Merchant Bank
UN MDG	United Nations Millenium Development Goals
UNESCO	United Nations Educational, Scientific and Cultural Organization
US	United States
USADF	United States African Development Fund
USAID	United States Agency for International Development
WCR	World Coffee Research

## I. Foreword

**This report, produced by USAID’s Investment Facilitation Activity in the DRC (USAID Invest, or the Activity), provides an overview of the coffee sector in the DRC.** It highlights production trends, challenges, and opportunities. It profiles relevant sector stakeholders across the value chain, including existing coffee farmers and processors, roasters, exporters and major international customers. It also describes existing enabling organizations, such as government agencies, NGOs, development programs and relevant financial institutions.

The objective of the report is three-fold:

1. Provide an understanding of trends and opportunities for growth in the DRC coffee sector.
2. Provide investors an overview of existing actors and opportunities to invest in the coffee value chain.
3. Finally, by highlighting the critical constraints for growth, assist supporting government and development agencies in identifying opportunities for intervention.

**USAID Invest is a five-year investment facilitation program funded by USAID.** The program provides advisory services to cooperatives, local companies and investors, with the ultimate goal of mobilizing investments and employment creation in the agribusiness and related sectors in the DRC. Stakeholders interested in knowing more about the DRC’s coffee sector, financial institutions interested in increasing their activities in the sector, and cooperatives and private companies interested in identifying new lenders and financial partners are encouraged to connect with USAID Invest directly at [DRCInvestActivity@chemonics.com](mailto:DRCInvestActivity@chemonics.com).

Of note, this report uses the \$ symbol to refer to values in US dollars.

## II. Executive Summary

**The growth of the global coffee market creates opportunities to scale sustainable coffee production.** Coffee is one of the most popular drinks consumed globally. In 2019, global exports of green coffee beans amounted to \$17 billion, while global coffee consumption is estimated to be worth \$460 billion in 2022. Brazil and Vietnam account for more than half of global production of green coffee. Other large producers include Colombia, Indonesia, Ethiopia, and Honduras. The largest importers of green coffee are Europe and North America, which are the largest coffee markets and where most roasters are based. The industry is projected to continue to grow due to increased demand within producing countries and emerging economies that have not traditionally been major coffee consumers. More and more consumers are paying attention to the ethics of coffee production and within the supply chain. Consumer preferences are driving strong growth in sustainability-oriented standards in the coffee sector.

**Coffee production in the DRC is small, but there is potential for coffee to become a viable core industry.** In 2019 and 2020, according to the International Coffee Organization, the DRC produced 23,400 tons and exported 11,000 tons of coffee, with a market value of \$14 million. While this is a small amount compared to the value of exports of mining products of almost \$10 billion, coffee is an important source of revenue for farmers involved in its production. The sector has significant potential for growth, as evidenced by multiple factors, such as:

- A. **The DRC provides an ideal environment for the cultivation of high-quality gourmet coffees.** Arabica is cultivated in the eastern highlands and lower lakesides of North Kivu, in the northern lakeside of South Kivu, and in the eastern part of Ituri province. The Arabica growing regions are known for their abundant rainfall, high elevations, and fertile volcanic soils.
- B. **DRC produces some high-quality specialty coffees and has become the last frontier for importers of specialty coffee.** Multiple specialty coffee traders, such as Supremo, Atlas Coffee, Hacofco, and Trabocca, procure coffee from the DRC, which highlights the high quality that can be achieved by local coffee. In 2019, at the DRC Taste of Harvest cupping competition organized by the African Fine Coffee Association, twelve DRC coffees were scored at least 80 out of 100 hundred, qualifying them as specialty coffee.
- C. **The DRC previously had a thriving coffee sector.** Exports of coffee from the DRC averaged 100,000-120,000 tons per year at its 1980s peak. The decrease in exports during the 90's was due to a combination of factors, which included the dismantling of the export quota system by the International Coffee Association, the impact of the wilt disease, and the effects of the civil war.
- D. **Exports from peer countries in East Africa are significantly higher than those of the DRC.** In 2020, Uganda exported 321,000 tons of coffee; Tanzania 50,000 tons; Kenya 46,000 tons; Rwanda 20,000 tons; and Burundi 17,000 tons. A factor contributing to lower exports in the DRC is the informal trading networks from Uganda and Rwanda, who purchase a portion of the DRC's coffee beans, then label the coffee as Ugandan and Rwandan in origin. Smallholders sell their dried parchment coffee to middlemen and agents who in turn deliver the coffee parchment to buyers in the two neighboring countries.

**Unleashing the potential of the coffee sector requires scaling up initiatives to support producers in improving farming and processing practices.** Current production yields are often low, because coffee trees are aged and due to poor farming practices. Quality is hampered due to lack of appropriate processing equipment. The lack of coffee pulpers and hullers, often results in farmers using traditional processing methods that damage the coffee beans, thus impacting the exportable quality of the coffee.

**The coffee sector has seen a small resurgence over the last decade, as a result of improved political stability, increasing interest from coffee traders and roasters, and support from NGOs and donors.** From



2010 to 2019, production and exports of coffee increased by 28% and 38% respectively. The potential quality of DRC coffee has spurred the interest of some large international coffee players. In 2017, Olam International acquired Virunga Coffee, the largest coffee exporter in the DRC, based in North Kivu. Nespresso expanded its 'Reviving Origins' initiative to the DRC. The initiative supports farmers to produce high-quality specialty coffee from South Kivu and has resulted in the creation of the "Kahawa ya Congo" Nespresso brand. Starbucks, partnering with USAID and the Howard Buffet Foundation, developed the Kawa Bora Ya Kivu brand, a DRC specialty coffee. Support from development programs such as USAID's Kawa Bora Ya Congo and UK Aid's ELAN RDC have focused on improving coffee quality, production, promotion and increasing farmer incomes. Smaller local and international traders such as Coffeelac and Copak have contributed to the development of the sector by investing in the development of the value chain and opening market opportunities. Copak facilitated Organic certification of 12,000 coffee farmers in North Kivu province while Coffeelac built coffee processing facility with a production capacity of 10,000 tons of coffee per year that includes a roastery and cupping lab. NGOs such as Rikolto, Agriterra and Sustainable Growers are also particularly active in supporting farmer cooperatives.

**Coffee cooperatives play a central role in the sector, centralizing support to farmers and market opportunities.** The Réseau des Cooperatives des Producteurs de Café-Cacao de la RDC (GIE RCPCA-RDC) groups 49 coffee cooperatives and 84,000 farmers. They are clustered in South Kivu (18), Goma (13), Butembo and Bemis (8), Ituri (5), and Idjwi (4). Fifteen out of the 21 largest coffee exporters are cooperatives. Combined, they group tens of thousands of farmers. Cooperatives such as SOPROCOPIV, Coopade, AMKA, SCPNCK, and SOPACDI, provide support to farmers, implementing good agricultural practices (GAP), gaining international certification (e.g. organic and fairtrade), building relationships with reputable international buyers, and facilitating access to technical assistance from NGOs and donors and funding from financial institutions.

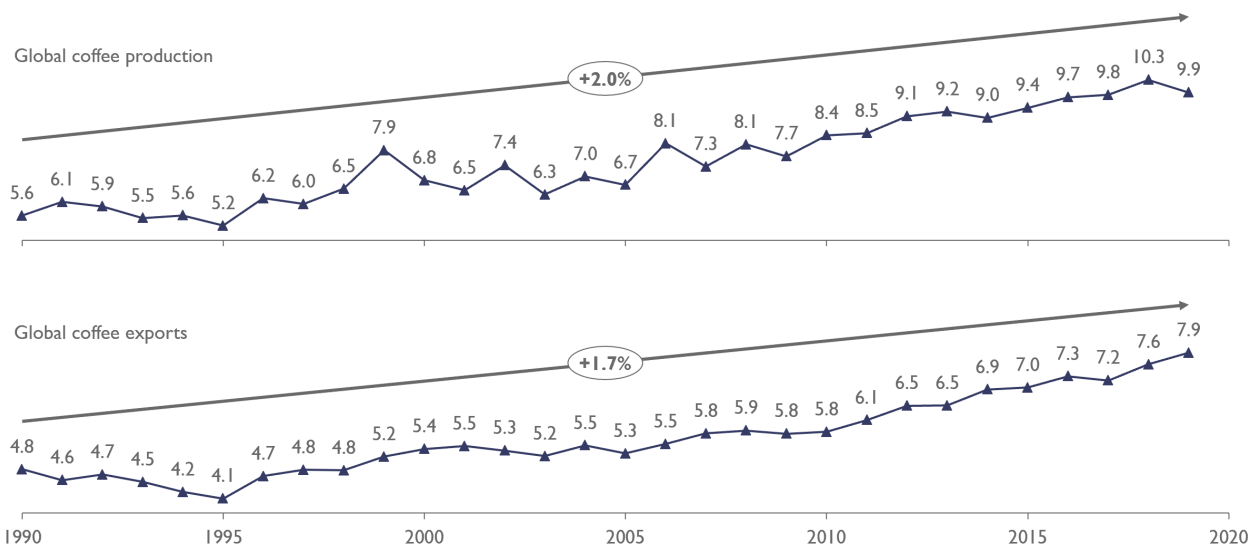
**Access to finance is a critical constraint for coffee producers and exporters, particularly farmers and cooperatives, creating an opportunity for financial institutions and impact investors.** The activity of local financial institutions in the agriculture sector, and more specifically in the coffee sector, is limited given the inherent risks of the agricultural sector. Harvests are affected by weather conditions, actors such as cooperatives often lack collateral, and capex investments typically have long pay-back periods. EquityBCDC and Trust Merchant Bank, partnering with international development banks such as DFC and EIB, are the most active local institutions. A few microfinance institutions also offer loans to small processors. To expand its activities into the agriculture sector, SMICO recently set up the AgriEst Guarantee Fund. The fund has an initial capital allocation of \$400,000 and the ambition to grow to \$3 million with additional commitments from donors and investors. In general, loans have a maximum tenure of one year, and monthly interest rates that can reach 2.5%, which make them unaffordable for many organizations. In parallel to local financial institutions, several international impact investors such as Alterfin, Root Capital, and SIDI are providing seasonal loans to a few local cooperatives. Given the existing demand and potential of local coffee production, there is also room for financial institutions to increase their activities in the sector. The strengthening of the governance of existing cooperatives and the development of existing guarantee funds such as AgriEst are some of the initiatives that may improve the access to finance of local players.

### III. The global coffee market

#### A. Market overview

**Global production of coffee reached 9.9 million tons in 2019/2020, of which 7.9 million tons were exported.** South America is the largest producer of coffee contributing more than 50 percent of global production. Brazil consistently produces 30-40% of the world’s supply and is the world’s largest exporter, with 2.4 million tons of coffee exported. Vietnam is the second largest producer with 1.6 million tons exported. Vietnam focuses primarily on production of Robusta coffee, and accounts for 40% of the world’s Robusta production. Other large producers include Colombia, Indonesia, Ethiopia, Honduras, Uganda, and India. These eight countries account for 83% of global production and exports. The DRC exported 11,000 tons, making the country the 25th largest exporter. In terms of yields, Vietnam produces 2.8 tons of coffee per hectare, and Brazil 1.9 tons per hectare, which are well above yields registered in African producers such as Ethiopia (0.7 tons/ha), and Uganda (0.55 tons/ha)<sup>1</sup>.

**Figure 1. Global production and exports of coffee (million tons)**

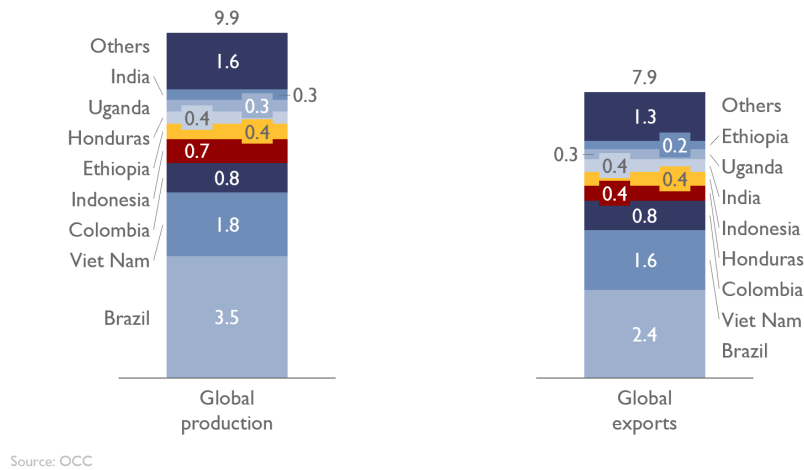


Source: ICO

**Arabica coffee accounts for nearly 60% of global coffee production.** Arabica is grown throughout Latin America, Central and East Africa, India and in parts of Indonesia and Vietnam. Between June 2020 and June 2021, global production of Arabica coffee reached 6.1 million tons. Brazil was the largest producer of Arabica coffee with nearly 3 million tons of Arabica harvested. Robusta grows at lower altitudes than Arabica and is cheaper to produce. Robusta coffee is grown across East and West Africa, throughout Southeast Asia, the Middle East, and Brazil. Global production of Robusta reached 4.4 million tons between June 2020 and June 2021. Vietnam was the leading producer of Robusta with nearly 1.7 million tons produced in 2020-21. Nearly 95% of coffee grown in Vietnam is Robusta. Brazil was the second largest producer of Robusta with 1.2 million tons.

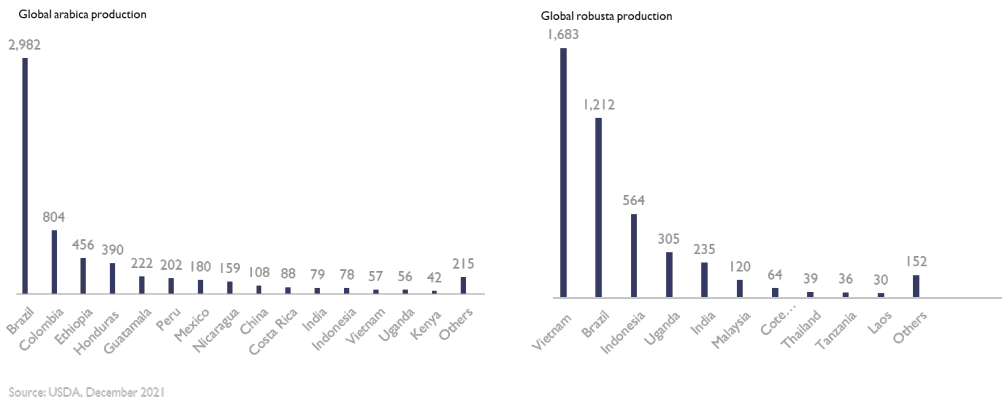
<sup>1</sup> Faostat

**Figure 2. Main coffee producers and exporters in 2019/2020 (million tons)**



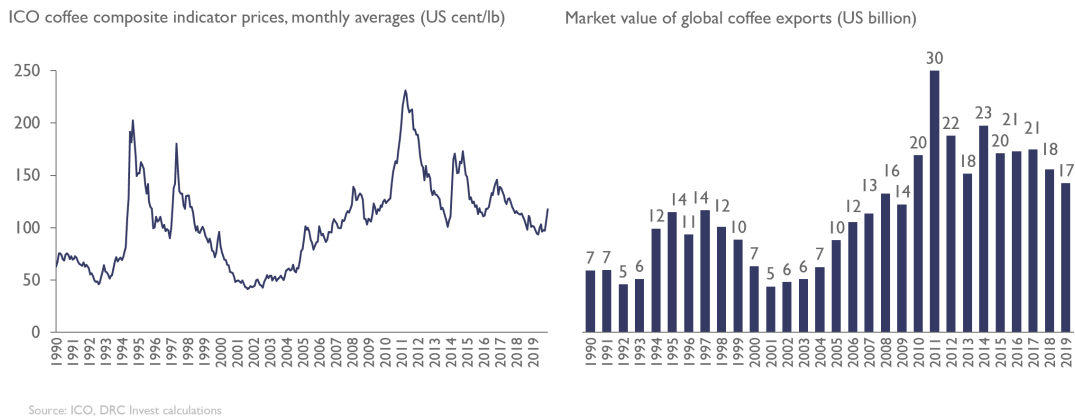
**The quality and price of coffee beans depend, to a big extent, on the post-harvest process.** Coffee cherries can be processed in two main ways: dry processing, and wet processing. Wet processing requires access to washing stations, involves a water-based depulping of coffee cherries, and can result in premium prices of up-to 20%. Dry processing requires less investment in facilities and machinery but results in lower quality coffee beans.

**Figure 3. Global Arabica and Robusta production, 2020-21 (in '000 tons)**



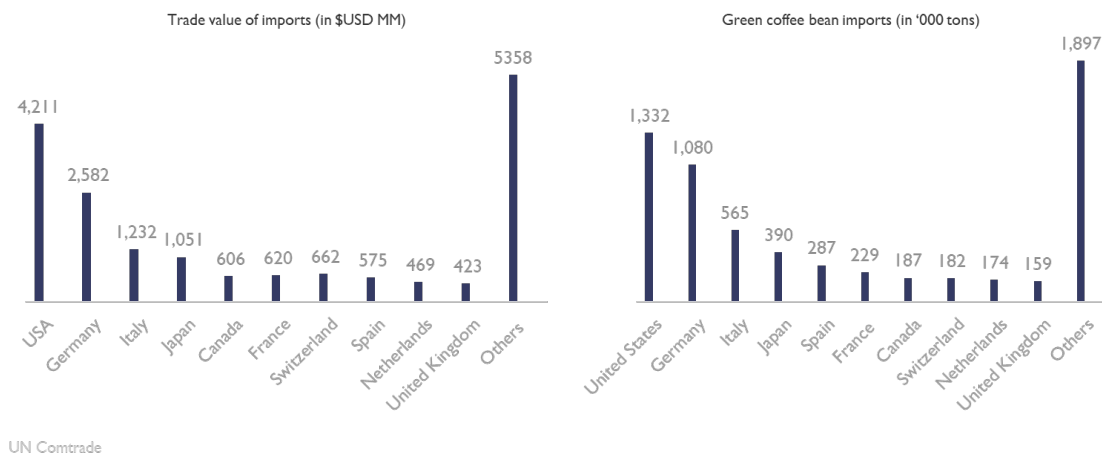
**The trade value of global green coffee exports was \$17 billion in 2019.** Coffee prices fluctuate significantly from one country to another, from month to month and from year to year. Based on available export data and average ICO coffee composite coffee prices, the global value of exported coffee beans can be estimated at \$17 billion in 2019. This is somewhat in line with the total market value of coffee exports over the last decade, although significantly lower than the peak value of 30 billion recorded in 2011.

**Figure 4. Average coffee prices and market value of global coffee exports**



**The largest green coffee importers in the world are in the European Union and North America.** European countries imported 3.6 million tons of green coffee in 2020<sup>2</sup>. Germany is the largest importer in Europe with slightly over a million tons of green coffee beans with a market value of \$2.6 billion, followed by Italy. In North America, the US imported over 1.3 million tons of green coffee beans in 2020 with a market value of \$4.2 billion.

**Figure 5. Global green coffee imports, 2020**

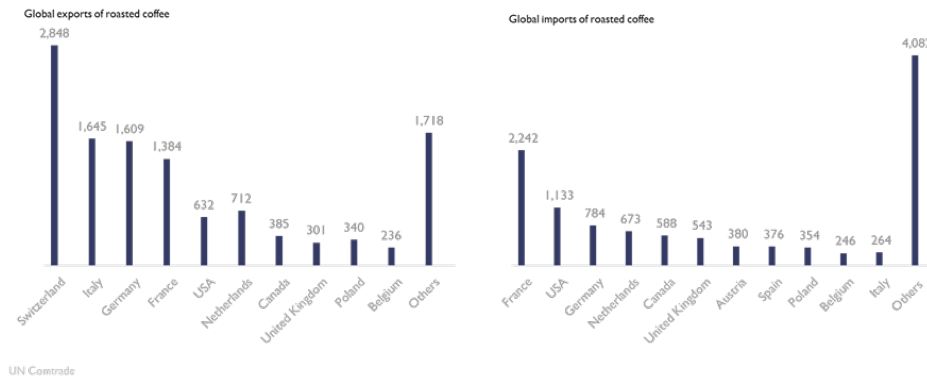


**The largest roasters and exporters of roasted coffee are found in Europe and North America.** These are the largest coffee markets, where large coffee roasters such as Nestle and Starbucks have their processing facilities. The value of global exports of roasted coffee reached \$11.7 billion in 2020. European countries are the largest producers of roasted coffee, led by Switzerland (exports of \$2.8 billion), Italy (\$1.6 billion),

<sup>2</sup> CBI. (2021, December 7). *What is the demand for coffee on the European market?* CBI Ministry of Foreign Affairs. Retrieved March 2022, from <https://www.cbi.eu/market-information/coffee/trade-statistics>

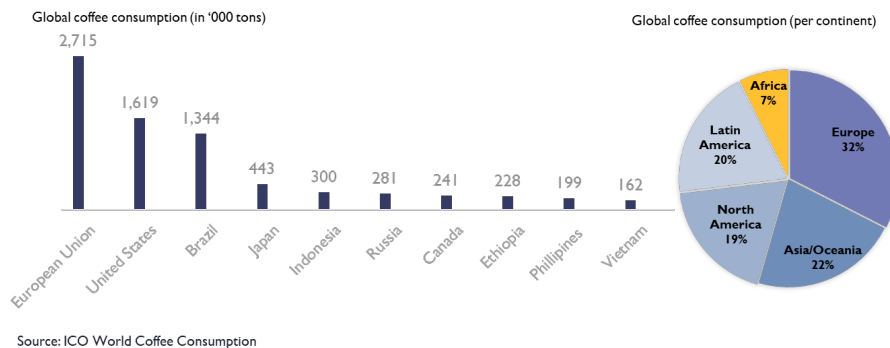
Germany (\$1.6 billion), and France (\$1.4 billion). France, the US, and Germany are also the top importers of roasted coffee.

**Figure 6. Trade value of roasted coffee, 2020 (in \$ million)**



**Coffee is one of the most widely consumed drinks in the world.** Coffee consumption was estimated to be worth \$460 billion in 2022<sup>3</sup>. The industry is projected to grow due to increased demand within producing countries and emerging economies that have not traditionally been major coffee consumers. European countries account for 32% of global coffee consumption, with 2.7 million tons of coffee consumed in 2021<sup>4</sup>. Asia as a region, is the second largest coffee consuming area in the world making up 22% of global coffee consumption, up from 10.9% in 2000<sup>5</sup>. Leading coffee consuming countries in Asia are Japan (444 thousand tons), Indonesia (300 thousand tons), and Vietnam (162 thousand tons). The United States is the largest coffee consuming country with 1.6 million tons of coffee consumed in 2021.

**Figure 7. Global coffee consumption, 2020-21**



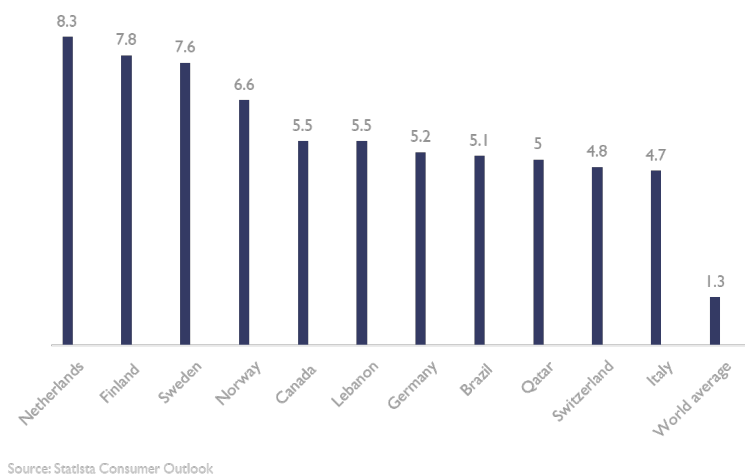
<sup>3</sup> Statista. (2022). *Coffee Highlights*. Statista. Retrieved 2022, from <https://www.statista.com/outlook/cmo/hot-drinks/coffee/worldwide>

<sup>4</sup> CBI. (2020a, September). *Entering the European market for specialty coffee*. CBI Ministry of Foreign Affairs. Retrieved 2022, from <https://www.cbi.eu/market-information/coffee/specialty-coffee/market-entry>

<sup>5</sup> International Coffee Organization. (2014). *Coffee Consumption in east and southeast Asia* (No. 112-4). <https://www.ico.org/news/icc-112-4e-consumption-asia.pdf>

The global average of coffee consumed per capita is around 1.3kg of coffee per person annually<sup>6</sup>. The per capita figures are measured by dry weight of coffee rather than brewed volume of roasted coffee which varies from market to market. European countries are the biggest coffee consumers on a per-capita basis. In the Netherlands, the average person consumes 8.3 kg of coffee per capita, with Finland second at 7.8 kg and Sweden third with 7.6 kg per capita.

**Figure 8. Per capita coffee consumption, 2020 (kg per capita)**



## B. Global trends

**Coffee consumers across the globe are increasingly seeking higher-quality gourmet coffees.** Coffee consumers today are more knowledgeable about coffee production, roasting, and brewing. Key features of gourmet green coffee beans are distinguished based on place of origin, altitude, and methods of processing. The country where the coffee comes from impacts its taste and quality due to the region's soil composition, humidity, and climate. Altitude effects quality because coffee grown in higher altitudes tend to grow slower and produce more vibrant taste profiles. During processing, implementing dry or wet processing will impact the final flavor of the beans. In dry processing, the coffee cherry gets dried before the removal of the outer layer of fruit. This technique gives the bean a sweeter, fruitier taste. In washed processing, the fruit gets removed before drying, giving the beans a cleaner but more acidic flavor<sup>7</sup>. The highest-quality green beans are almost identical in size, shape and color, and this similarity influences the appearance and consistency of the green coffee.

**Gourmet coffee is measured using the Specialty Coffee Association's (SCA) classification system.** The classification system grades green coffee based on defects categorized into primary and secondary defects. The classification is based on a scale of 1-10, with Grade 1 being the top score. Once the green coffee has been graded, it is roasted and assessed again using a process called 'cupping.' During cupping, coffees receive a grade from 0-100 from a certified Q-grader who evaluates the roasted coffee quality. These grades are crucial to buying and selling high quality coffees as they are usually more expensive, and preferred by consumers who value taste and quality. Specialty coffee is used to describe coffee which

<sup>6</sup> Note: World population in 2020 was 7.79 billion. Global consumption of coffee in 2020 was estimated at 9.99 billion kg.

<sup>7</sup> Joe's Coffee Garage. (2019). *Why choosing high quality coffee beans matters*. Retrieved 2021, from <https://joesgaragecoffee.com/blog/why-choosing-high-quality-coffee-beans-matters/>

receives a grade one green coffee score and a cupping score of 80+ on roasted coffee. Premium coffee is green beans which receive a grade two in green coffee grading and a cupping score of 80+ on roasted coffee.

**Figure 9. SCA scoring protocol for specialty coffee**

SCA green bean classification				SCA cupping score classification		
Primary defect	# of defects	Secondary defect	# of defects	Total score	Quality	Classification
Full black	1	Parchment	2-3	90-100	Outstanding	Specialty
Full sour	1	Hull/husk	2-3	85-89.99	Excellent	Specialty
Pod/cherries	1	Broken	5	80-84.99	Very good	Specialty
Large stones	2	Insect damage	2-5	>80	Below specialty	Not specialty
Medium stones	5	Partial black	2-3			
Large sticks	2	Partial sour	2-3			
Medium sticks	5	Floater	5			

Source: Specialty Coffee Association

**More and more consumers are paying attention to the ethics of coffee production and within the supply chain.** Consumer preferences are driving strong growth in sustainability-oriented standards in the coffee sector. Sustainable coffee emerged in the coffee sector over the last thirty years, with non-governmental organizations (NGO's), private sector actors and other industry stakeholders collaborating with roasters, retailers and consumers to promote the benefits of sustainable coffee against conventionally produced coffee. In 2020, 53% of US coffee drinkers preferred coffee that was good for the environment, for farmers, and for farming communities<sup>8</sup>. Sustainable coffee is associated with coffee brands that promote a higher-quality, and socially and environmentally friendly coffee.

**Labels and voluntary sustainability standards (VSS) are increasingly being adopted by coffee producers and coffee processing companies.** Labels such as UTZ, Rainforest Alliance, Organic and Fairtrade allow farmers to receive an increased price, known as a premium, to support farmer livelihoods and their local communities. Europe is the largest global market for certified coffee. The future growth of sustainable certified coffee depends on the willingness of the coffee industry's major roasters to bring sustainable coffee into the mainstream as well as by end-consumers who continue to push for transparency, traceability, and improved sustainability across the coffee value chain.

**Figure 10. Coffee certifications<sup>9</sup>**

Certification	Description
<b>UTZ</b>	Coffee produced uses production methods that protect forests, promote climate-smart farming practices, respect human rights and improve sustainable livelihood opportunities (merged with the Rainforest Alliance in 2020)
<b>Rainforest Alliance</b>	Standard designed to conserve ecosystems, protect biodiversity and waterways, conserve forests, reduce agrochemical use, improve livelihoods, and safeguard the rights and well-being of workers and local communities
<b>Organic</b>	Requires coffee to be grown without the use of synthetic nutrients as well as practices for plant protection and soil conservation.
<b>Fairtrade</b>	Coffee that carries the Fairtrade label indicate that producers are paid a Fairtrade Minimum Price.
<b>4C</b>	Sustainable production and post-harvest processing of the green coffee bean.
<b>Fair for life</b>	Responsible supply chains taking account of human rights, fair working conditions, and the promotion of sustainable agricultural practices.

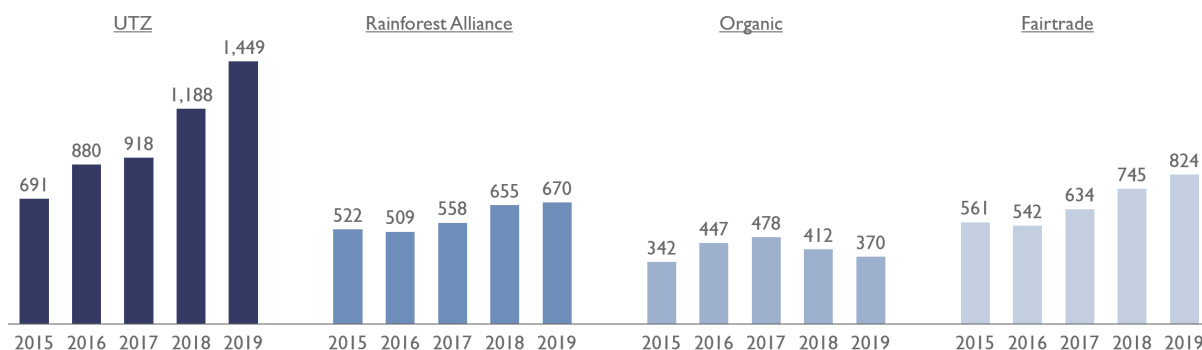
<sup>8</sup> National Coffee Association. (2020, April). *NCA releases Atlas of American Coffee*. NCA. Retrieved 2022, from <https://www.ncausa.org/Newsroom/NCA-releases-Atlas-of-American-Coffee>

<sup>9</sup> This list includes the major certifications present in the DRC.

<b>C.A.F.E Practices</b>	Ensures that Starbucks sources sustainably grown and processed coffee by measuring farms against quality, economic, social, and environmental criteria
<b>AAA Program</b>	Nespresso certification that focuses on high quality, productivity, and social and environmental sustainability

Source: CBM

**Figure 11. Estimated global standard-compliant coffee production volumes ('000 tons)**



Source: ITC

**Climate change has the potential to affect global coffee production.** A study by the Inter-American Development Bank suggested that by 2050, about half of land used for high-quality coffee will be unproductive. There are multiple platforms like Coffee&Climate, Global Coffee Platform, Specialty Coffee Association, and the Sustainable Coffee Challenge that are knowledge hubs for market actors looking to understand the effects of climate change on the coffee sector. Temperature and rainfall conditions are the main drivers when it comes to coffee yields, which in turn impacts global supply. To grow coffee properly, coffee crops require specific temperature, light and humidity levels. As temperatures rise, good coffee may become increasingly difficult to grow because coffee cherries will ripen too quickly. Land that was previously suitable for coffee cultivation is now witnessing unpredictable weather patterns, which has negative impact on coffee yields year on year.

**Figure 12. Climate smart coffee platforms**

Organization	Climate smart initiatives
Coffee & Climate	Founded in 2010 by the shareholders International Coffee Partners (ICP) and GIZ. Promotes climate resilient livelihoods and minimizing carbon emissions while enhancing the carbon storage potential in coffee farms
Global Coffee Platform	The platform works on increasing demand and supply of sustainably produced coffee to ensure the viability of the coffee sector. The multi-stakeholder structure is represented by producer organizations, coffee trade and industry actors, and civil society organizations.
Specialty Coffee Association	A nonprofit trade association that promotes coffee value chain activities that make the sector more sustainable and equitable.
Feed the Future Alliance for Resilient Coffee	USAID program that consolidates the best climate practices and expertise from professionals and provides services, on-farm interventions, co-investment opportunities that supports resilience in the sector.
CCAFS	Platform provides research on climate-smart technologies and practices that support large scale agricultural projects that are sustainable
Sustainable coffee challenge	Launched by Conservation International and Starbucks, the platform consists of 155 partners stimulating demand for sustainable coffee.

Source: Crossboundary Research

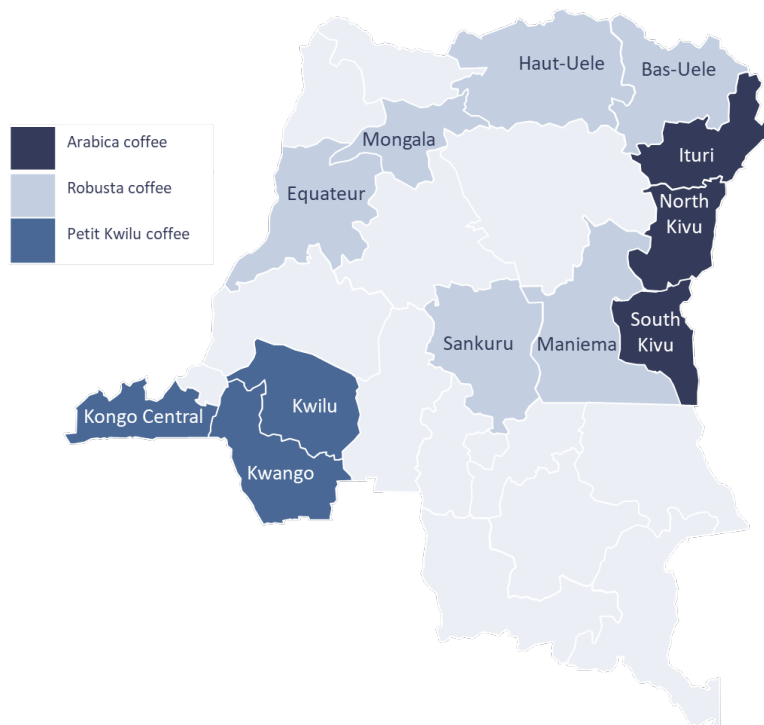


## IV. The coffee sector in DRC

### A. Production and exports

**The DRC enjoys favorable conditions for the production of Arabica and Robusta coffee.** The DRC boasts a diverse range of climates and geographic conditions that result in coffee of unique flavors. Arabica is cultivated in the eastern highlands and lower lakesides of North Kivu, in the northern lakeside of South Kivu, and in the eastern part of Ituri province. This vast area is located near the equator, with abundant sunshine and rainfall, high elevations, and fertile volcanic soils, that provide an ideal environment for specialty Arabica cultivation. Arabica has a lower acidity than Robusta, and due to its high-altitude growing conditions, Arabica beans develop slowly, producing a more flavorful coffee<sup>10</sup>. Robusta grows in lowlands and is grown throughout the northeast, central provinces, and western provinces of the DRC, mainly in areas surrounding the Congo Basin. Robusta tends to be a more disease-resistant plant than Arabica, is less expensive to maintain, and yields more coffee annually. The western region of the DRC is also home to Petit Kwilu coffee, which is a higher quality Robusta variety that has smaller beans and a milder and less bitter taste than the common Robusta. Petit Kwilu is suitable for making espressos or blends with a strong taste. Average yields at approximately 390 kg/ha<sup>11</sup> are low compared to leading producers in the region such as Rwanda, Ethiopia, and Uganda. In North Kivu, yields can range between 280 and 560 ha/kg while in Ituri they are typically lower.

**Figure 13. Map of coffee growing regions in the DRC**

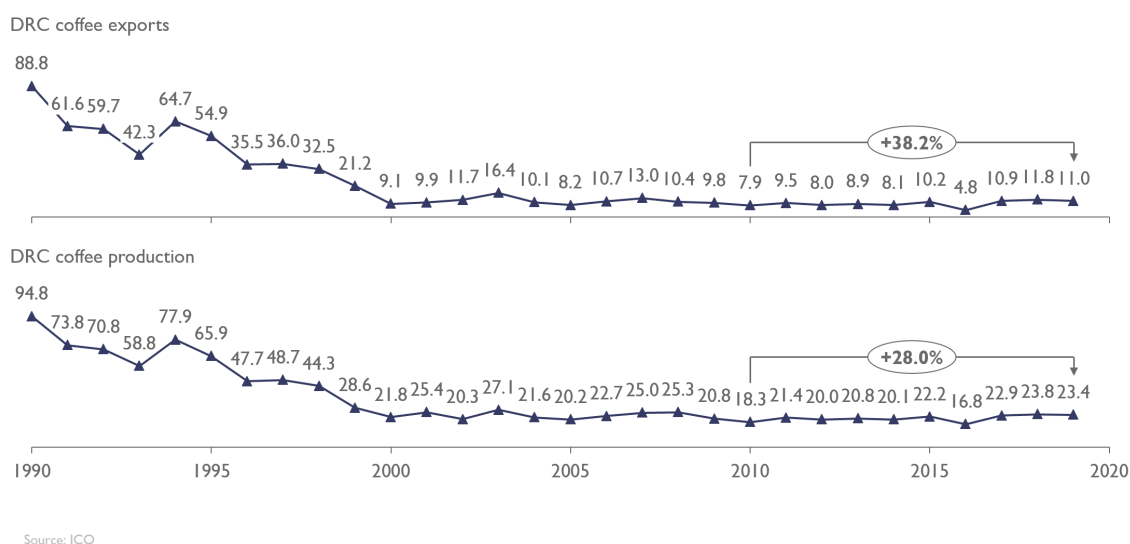


<sup>10</sup> Olam. (2014). *Olam Specialty Coffee: Virunga Coffee Company DRC*. Olam Specialty Coffee. <https://www.olamspecialtycoffee.com/mwdownloads/download/link/id/93/>

<sup>11</sup> Faostat

**Official production and export volumes in the DRC are well below the peak volumes of the 1980s, but the sector has witnessed a small resurgence since 2010.** Production and exports of coffee have seen a steep decline over the past thirty years. Exports of coffee from the DRC averaged 100,000-120,000 tons per year at their 1980s peak. By 2020, 23,400 tons of coffee were produced, of which 12,300 tons of coffee were exported. The coffee wilt disease and the effects of war contributed to the decline of the sector in the DRC. The wilt disease is also common and causes death of the coffee trees it infects. The coffee wilt disease first occurred in the mid-1980's and affected up to 90% of plantations in some growing regions. The fungus lives in the soil and enters the coffee tree through wounds at the base of the tree or on the roots. In addition, the spread of war in 1996, poor governance, and the resulting deterioration of infrastructure all compounded to reduce outputs of the Congolese coffee sector. Changes in international policy also affected coffee exports. In 1989, the International Coffee Association (ICA) liberalized the coffee sector following the dismantling of the export quota system. The ICA had implemented a quota system, from 1962 to 1989, from which coffee production in excess of consumer demand was withheld from the market<sup>12</sup>. Coffee prices dropped as a result of oversupply at the end of the economic clauses of the agreement, and the consequence for many producing countries in Africa, including the DRC, was a stalled coffee sector.

**Figure 14. Coffee production and exports in the DRC (in '000 tonnes)**



**DRC produces some high-quality coffees and has become the last frontier for importers of specialty coffee.** While the mining sector accounts for the lion's share of DRC exports, agriculture is a critical source of employment. Coffee is one of the DRC's main agricultural export products. With the value of coffee exports amounting to \$14 million in 2019, coffee is an important source of revenue for farmers involved in its production. Multiple specialty coffee traders and producers procure coffee from the DRC, which highlights the high quality that can be achieved by local producers. In 2019, at the DRC Taste of Harvest cupping competition organized by the African Fine Coffee Association, twelve DRC coffees scored at least 80 out of 100 hundred, qualifying them as specialty coffee. At a similar event organized by ELAN in Bukavu, also in 2019, 25 local coffees received scores above 80. The high quality of these coffees has attracted an

<sup>12</sup> International Coffee Association. (2019). *History: ICO*. Retrieved 2022, from [https://www.ico.org/icohistory\\_e.asp](https://www.ico.org/icohistory_e.asp)

increasing number of specialty coffee importers in recent years. Producing specialty coffees requires good quality seeds, well maintained plantations, and respecting strict processing requirements.

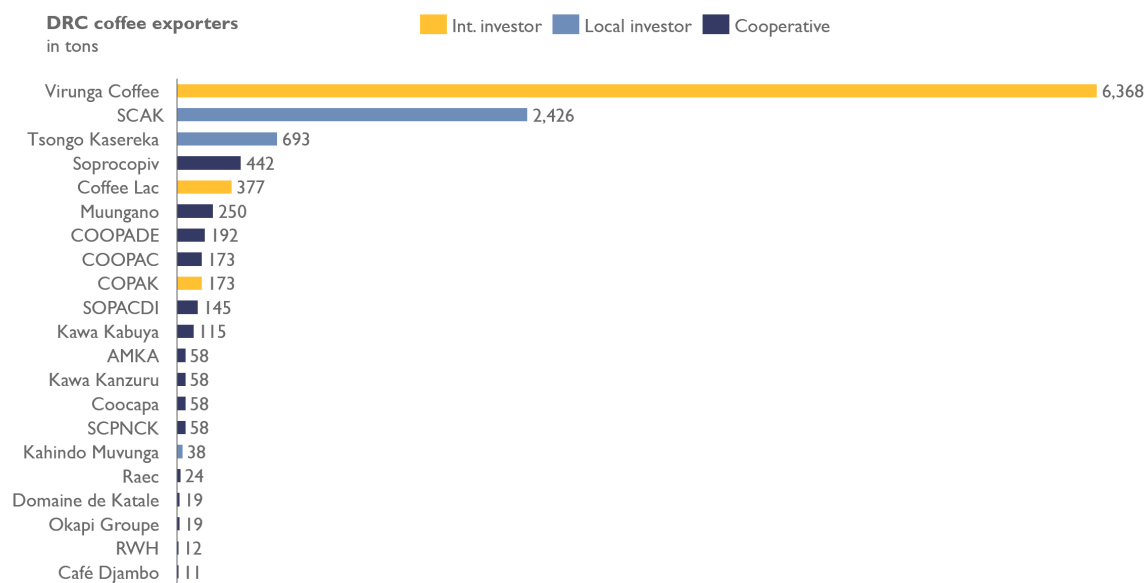
**Figure 15. Coffee, agricultural, and total exports from the DRC, 2019 (in \$ million)**



Source: UN Comtrade, Atlas of Economic Complexity, Center of International Studies at Harvard University and WB WDI database

**Twenty-one organizations account for all the coffee exports from the DRC.** They include Virunga Coffee, a subsidiary of Singapore-based multinational Olam, which accounted for 6,368 tons and 54% of exports in 2019; and SCAK, a Congolese company based in Beni, which accounted for 2,426 tons and 21% of exports in the same year. Other organizations exporting at least 10 containers per year include Tsongo Kasereka (a Congolese company), SOPROCOPIV (a local cooperative), Coffeelac (an international investor), CAM and COOPADE. Arabica accounts for 54% of total exports (in weight), and Robusta for the remaining 46% (2019 figures).

**Figure 16. DRC coffee exporters, 2019 (in '000 tons)**

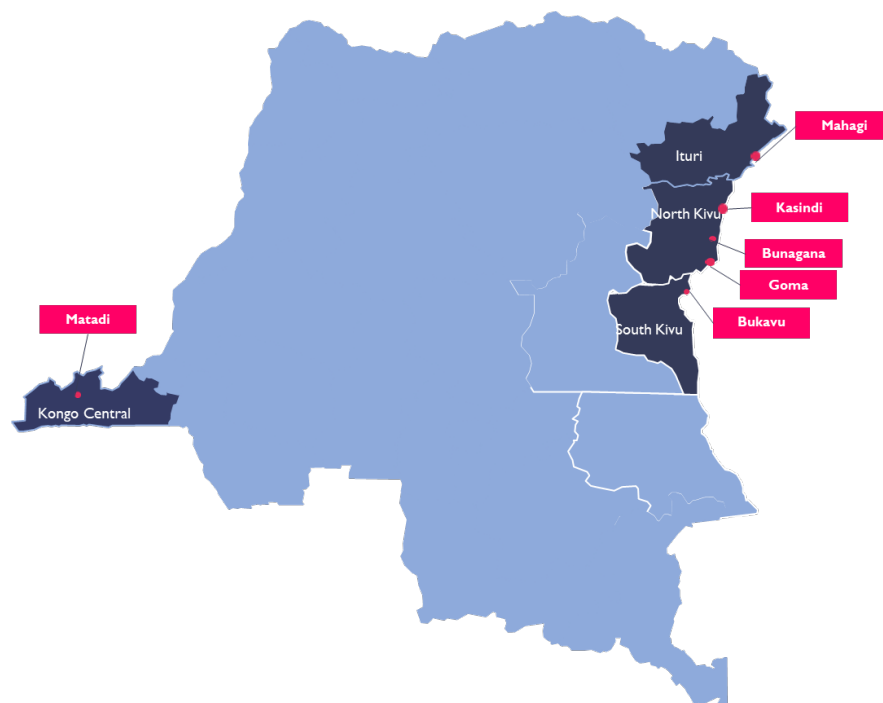


Source: Elan DRC

**The quality and price of coffee beans depend, to a large extent, on the post-harvest process.** Coffee cherries can be processed in two main ways: dry processing, and wet processing. Wet processing requires access to washing stations, involves a water-based depulping of coffee cherries, and can result in premium prices of up-to 20%. Dry processing requires less investments in facilities and machinery but results in lower quality coffee beans.

**The long distance to the nearest ports and the condition of existing infrastructure results in relatively high transport costs.** Coffee from the east is typically shipped via the ports of Mombasa, Kenya and Dar es Salaam, Tanzania while coffee from the west is shipped via the port of Matadi. Coffee from North Kivu is typically exported through one of four transit points: Kasindi, Bunagana, Ishasha and Goma. Coffee from South Kivu is typically exported through the border post of Bukavu, called Ruzizi II, while coffee from Ituri transits from the post of Mahagi. In the west of the country, the main export point is the port of Matadi. Coffees from Equateur and Mongala province reach Matadi through river transport on the Congo River. Coffees from Kwilu, Kwango, and Kongo Central are transported by road. The distance between the coffee-growing region in North Kivu and South Kivu and the ports of Mombasa and Dar es Salaam is 1,750 km and 1,600 km respectively. The poor road infrastructure makes these distances an even larger obstacle for coffee exporting. According to local exporters, logistics operators charge \$2,000 to transport a container of coffee from Kigali to Mombasa. Yet exporters in Goma, a 165km distance from Kigali, are charged \$4,500 to deliver a container of coffee to Mombasa<sup>13</sup>. This price premium is driven by higher administrative and insurance costs in the DRC.

**Figure 17. Map of key coffee exit points**



**Despite existing obstacles, several international players are targeting and developing the local market.** Buyers such as Starbucks and Nespresso purchase specialty green coffee from the DRC. Starbucks entered the DRC specialty market through the Kawa Bora Ya Kivu project initiated by USAID and the Howard Buffet

<sup>13</sup> Interview with Gilbert Makelele, President of the GIE-RCPCA, the coffee and cocoa cooperative platform

Foundation in 2012. Nespresso partnered with USAID’s Feed the Future program to support local farmers and build a new origins coffee line in 2019. International roasters work with established importers to help source their coffee. Green coffee importers play a vital role in discovering and delivering coffees to roasters on time and in the right quality. Key coffee importers active in the region are Atlas Coffee Importers, Supremo, Trabocca, and Sustainable Harvest (formerly Twin Trading).

**An increasing number of local cooperatives and private companies are gaining certification of voluntary sustainability standards such as UTZ, Fairtrade, and Organic.** There are about 15 cooperatives and seven private companies that hold at least one voluntary sustainability standard certification. Existing cooperatives, even the smallest ones, are increasingly eager to be certified. This interest is notably motivated by the fact that certification allows access to more buyers and business opportunities. Some of these organizations are located in conflict areas and manage to work with a variety of partners who are reassured by certifications that guarantee good practices.

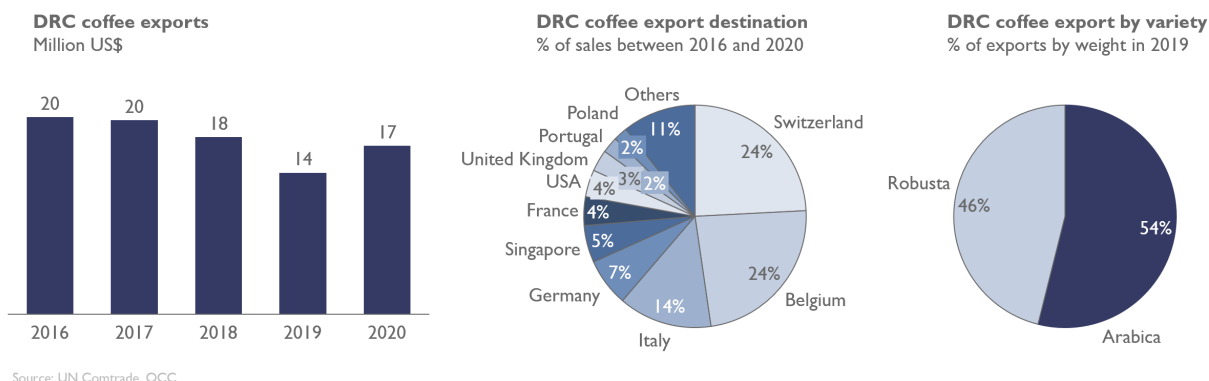
**Figure 18. Organizations in the DRC with voluntary sustainability standard certification**

Name	Certification
<b>Cooperatives</b>	
Amka	Fairtrade, Organic
Coopade/Coop-Ca	Fairtrade, Organic
Cooperative Agricole Amani	Organic
Cooperative Agricole Muungano	Fairtrade, Organic
Cooperative Capcki	Organic
Cooperative des Cafeiculteurs Tuungane	Organic
CPNCK	Organic
Coopérative Kawa Kanzururu	Fairtrade, Organic, Fair for Life
Kawa Kabuya	Organic
RAEK (Regroupement Des Agriculteurs Et Eleveurs De Kabare)	Organic
Sopacdi	Fairtrade, Organic
Sopade	Organic
Soprocopiv	UTZ, Organic, Fair for Life
Sycoodep	UTZ, Organic
<b>Private companies</b>	
COPAK	UTZ, Fairtrade, Organic
ETS COOPAC	UTZ, Fairtrade, Organic
Ets. Tsongo Kasereka	UTZ
SCAK	UTZ, Organic
Virunga Chocolat SARL	Fairtrade
Virunga Coffee sarl	UTZ, Fairtrade, Organic, Rainforest Alliance
Sycoodep	UTZ, Organic

**A significant share of coffee production is believed to be smuggled across the border to Uganda and Rwanda<sup>14,15</sup> and unaccounted for in official statistics.** It is difficult to know the exact amount of Congolese coffee that is sold as Rwandan or Ugandan beans, but testimonies from Congolese coffee operators say the practice is common. According to experts interviewed for this report, Rwanda sources 30% of its coffee from the DRC. Smuggling of coffee, along with gold and ivory, began in the 1960s and 1970s due to nationalization and economic mismanagement. Coffee smuggling has continued to expand in response to domestic problems related to low farm-gate prices, high export taxes, and weak transportation infrastructure.

**Europe, Singapore, and the US account for almost the totality of exports.** Switzerland, Belgium, and Italy combined account for 62% of exports value, and the top ten export destinations for 89%. Several of the world’s leading buyers of specialty coffee (e.g., Counter Culture Coffees, Higher Grounds Trading Co, Le Sequoia, Twin Trading, etc.) purchase and market DRC’s coffee. Many of these firms have invested in improving the quality of coffee grown in the country. Belgium and Switzerland, with buyers such as Sucafina, Supremo, Nestle and Olam, are the largest export destinations.

**Figure 19. Coffee exports from the DRC**



## B. Domestic market

**Coffee consumption in the DRC is still low but there are opportunities for growth.** The DRC produces high quality coffee beans, yet per capita consumption, estimated at 0.13 kg<sup>16</sup>, is low. Nevertheless, in urban centers in Kinshasa, Lubumbashi, and Goma, a growing number of coffee shops and roasters such as Virunga Coffee, La Kinoise, Le Petit Chalet, and Café Carioca, are helping increase local consumption.

**Brands available in eastern DRC include local brands and brands from neighboring countries.** The northeastern section of the region bordering Uganda is primarily known for Robusta production, therefore there are numerous local roasters of cheaper Robusta coffee for the local working-class market. These bags of coffee are usually sold in 50g bags at a price ranging from \$0.20-0.40 per packet. The southern

<sup>14</sup> Great Lakes Coffee. (2018). *Green Coffee*. Retrieved 2022, from <https://greatlakescoffee.co.ug/coffee-in-drc/>

<sup>15</sup> Kamungele, K. K. (2015). *Improving Coffee Exports: Case of the DRC*. African Coffee Symposium. Retrieved 2022, from [http://www.iaco-oiac.org/sites/default/files/docspage/kamungele-dr\\_congo\\_coffee\\_iaco\\_0.pdf](http://www.iaco-oiac.org/sites/default/files/docspage/kamungele-dr_congo_coffee_iaco_0.pdf)

<sup>16</sup> International Coffee Organization. (2021). *Domestic Consumption by all exporting countries*. Retrieved 2022, from <https://www.ico.org/historical/1990%20onwards/PDF/1b-domestic-consumption.pdf>

region towards Lake Kivu is an area comprising a majority of the specialty coffee cooperatives from both the DRC and Rwandan sides of the lake. Roasters in this region focus on roasting quality Arabica beans for the middle and upper-class segments of the population.

**Figure 20. Price of sample roasted Arabica brands from the Kivu region in Goma**

Product	Origin	Qty	Price (USD)	Price per kg (USD)
Café Kiata	DRC	500g	6.00	12.00
Virunga Coffee	DRC	500g	5.00	10.00
Semliki	DRC	500g	7.00	14.00
Inganzo Coffee	Rwanda	500g	6.50	13.00
Morning Taste	Rwanda	500g	6.50	13.00
Café de Maraba	Rwanda	500g	6.50	13.00
SanCoffee	Rwanda	500g	6.00	12.00
Boneza Coffee	Rwanda	500g	7.00	14.00
Kivu Belt Coffee	Rwanda	500g	6.50	13.00
Kinunu Coffee	Rwanda	500g	6.50	13.00
Tora Coffee	Rwanda	500g	6.50	13.00
Kivu Kwetu	DRC	250g	3.50	14.00
Ihusi Coffee	DRC	500g	7.00	14.00
Gold Kivu	DRC	250g	4.00	16.00
Bourbon Coffee	DRC	500g	6.50	13.00

Source: Crossboundary Research

**Kinshasa is the DRC’s most significant coffee consuming area and the country’s economic hub.** Kinshasa is the third largest city on the African continent, with an estimated population of over 5.5 million inhabitants in the city and 10 million in its urban agglomeration, and is home to leading banks, foreign diplomatic missions, and government and non-governmental organizations. Coffee consumption is growing due to the growing middle and upper class, with a significant choice of local and international coffee brands. Retail prices of coffee in Kinshasa are significantly higher than in Goma, in line with its higher costs of living.

**Figure 21. Price of sample roasted coffee brands available in Kinshasa**

Product	Origin	Qty	Price (USD)	Price per kg (USD)
Graindor Moka	Guatemala, Ethiopia, Brazil	500g	11.00	22.00
Graindor Moka	Guatemala, Ethiopia, Brazil	500g	10.90	21.80
Graindor Espresso	Guatemala, Ethiopia, Brazil	500g	12.30	24.60
Virunga Pure Arabica	DRC	250g	6.00	24.00
Virunga Pure Arabica	DRC	250g	6.40	25.60
Virunga Pure Arabica	DRC	250g	7.10	28.40
Virunga Pure Arabica	DRC	500g	13.50	27.00
Virunga Pure Arabica	DRC	500g	13.20	26.40
Kawa Kivu Nyamulangira blend	DRC	250g	10.00	40.00
Kawa Kivu Mikendo Blend	DRC	250g	10.00	40.00
Kawa Kivu Sabyinyo Blend	DRC	250g	10.00	40.00
Kazuri Coffee	DRC	250g	7.30	29.20
La Kinoise Robusta	DRC	250g	6.60	26.40
La Kinoise Café Arabusta	DRC	100g	2.20	22.00
La Kinoise Café Arabica	DRC	100g	2.20	22.00
Belle France Pur arabica	Brazil	250g	3.80	15.20
La Kinoise Mochaccino	DRC	100g	4.70	47.00

## V. Main actors in DRC's coffee sector

### A. Overview

**The coffee value chain includes cooperatives, local traders, and private companies all playing significant roles in cultivation, processing, and trade of the commodity.** The coffee region in the eastern provinces of the DRC has a growing number of coffee cooperatives, which produce specialty K3 coffee in addition to multiple varieties of Arabica and Robusta coffees. Many cooperatives were established with support from donors, who provided technical assistance to promote access to knowledge in coffee cultivation and processing. Cooperatives organize farmers into groups in order to bring their green coffee beans to gathering centers where they are then mixed and processed in larger batches. The cooperatives are then able to market a larger quantity of uniform green beans. There are non-exporting cooperatives that work with exporters who find foreign buyers, negotiate the sales terms, and export the green coffee. There are also export cooperatives that compete with private traders by exporting directly to foreign buyers.

**Figure 22. Farmers sorting coffee at Kawa Maber Cooperative in Mahagi, Ituri Province**



Source: Kawa Maber

A summary overview of selected main actors in the DRC coffee value chain is presented in figure 23 below. In the following sections a summary profile of each organization is provided.



**Figure 23. Summary table of presented coffee market actors**

Name	Type of organization	Intervention zone	Type of coffee	# of farmers
<b>North Kivu</b>				
COOPAIDE	Cooperative	Lubero	Arabica	4,159
Kawa Kabuya	Cooperative	Lubero, Bashu	Arabica	3,000
Kawa Kanzururu	Cooperative	Beni, Rwenzori	Arabica	1,642
SOPROCOPIV	Cooperative	Lubero, Beni	Robusta, Arabica	20,636
Coffeelac	Local trader	Goma, Beni	Robusta, Arabica	N/A
Domaine de Katale	Local trader	Rutshuru	Robusta, Arabica	N/A
Jambo Safari	Local trader	Goma	Robusta, Arabica	N/A
Kahindo Muvunga	Local trader	Butembo, Beni	Robusta, Arabica	N/A
SCAK	Local Trader	Beni	Robusta, Arabica	N/A
Tsongo Kasereka	Local Trader	Butembo, Beni	Robusta, Arabica	N/A
Copak	Int'l trader	Beni	Robusta, Arabica	N/A
Virunga Coffee	Int'l trader	Butembo, Beni, Goma	Robusta, Arabica	N/A
Café Kivu	Local roaster	Goma	Arabica	N/A
Groupe Olame	Local roaster	Goma	Arabica	N/A
Kwetu Kwenu	Local roaster	Goma	Robusta, Arabica	N/A
<b>South Kivu</b>				
AMKA	Cooperative	Minova	Arabica	2,099
KACCO	Cooperative	Kalehe	Arabica	2,064
Muungano	Cooperative	Kiniezi	Arabica	4,355
RAEK	Cooperative	Kahuzi-Biega	Arabica	900
Rebuild Women's Hope	Cooperative	Idjwi	Arabica	1,000
SCPNCK	Cooperative	Idjwi	Arabica	2,135
SOPACDI	Cooperative	Minova	Arabica	11,600
Tumaini Coffee	Cooperative	Kabare	Arabica	1,000
Alpha New	Local roaster	Minova	Arabica	N/A
COOPAC	Local roaster	Minova	Arabica	N/A
<b>Ituri</b>				
Kawa Maber	Cooperative	Mahagi	Arabica	2,300
Grains D'OR	Local trader	Mahagi	Arabica	350
<b>Ubangi</b>				
SOPAGRI	Local trader	Karawa	Robusta, Petit Kwilu	2,500
<b>Kinshasa</b>				
La Kinoise	Local roaster	Kinshasa	Robusta, Arabica	N/A

## B. Cooperatives



**SOPROCOPIV is an exporting cooperative based in Butembo, North Kivu that is dedicated to sourcing and processing coffee from North Kivu.** SOPROCOPIV is one of the largest coffee cooperatives in the DRC. In 2019, SOPROCOPIV exported 442 tons of coffee. The cooperative associates 5,036 Arabica farmers and 2,023 Robusta farmers certified with Fair Trade, Organic, and UTZ. The cooperative owns five washing stations across Lubero Territory. The cooperative also has its own processing plant with a crushing capacity of 1,200kg/h. For monitoring and quality assurance, the cooperative has enrolled 26 agronomists, four supervisors and an internal control manager. Its focus on good processing techniques has led to the development of more consistent and higher quality coffees.



**Coopade is an export cooperative dealing with specialty coffee from Lubero and Beni Territories in North Kivu.** In 2019, Coopade was the 7th largest exporter of green coffee in the DRC with 192 tons exported. The cooperative has 4,159 members (1276 women and 2883 men) certified in organic and UTZ<sup>17</sup>. The members have been working to improve coffee quality in collaboration with the Virunga National Park and Farm Africa, a non-profit focusing on developing farmer incomes. The cooperative currently has eleven washing stations, of which four are women-led.

Figure 24. Coopade single origin coffees



Source: Cafe Cult



Source: Virunga Origins



**AMKA is an exporting cooperative that focuses on producing high grade Kivu-3, fully washed Arabica coffee.** The coffee from AMKA is certified Fair Trade and Organic. These certifications illustrate the positive socio-environmental impact of the cooperative, which is an attractive element for socially conscious buyers. The cooperative currently has 2,099 members, including 631 women (29%), who cultivate Arabica coffee spread over 917 hectares. The cultivated lands are located in Masisi (North-Kivu) and Kalehe (South-Kivu) territories. These locations allow coffee production on the shores of Lake Kivu at an altitude between 1100 and 1500 meters, making this coffee a prized specialty coffee.

<sup>17</sup> Farm Africa. (2019). *Virunga National Park Coffees: Specialty Arabicas on the border of the Virunga National Park*. <https://www.farmafrica.org/downloads/resources/virunga-park-coffees.pdf>

Figure 25. AMKA drying tables on the shores of Lake Kivu



Source: AMKA



**SCPNCK is an exporting cooperative involved in the production, processing and marketing of Arabica coffees from Idjwi island in South Kivu.** SCPNCK produces organic Arabica Kivu 3 coffee as well as Arabica Kivu 4 and Kivu 7 coffee. The K3 green beans are exported to international clients while K4 and K7 are exclusively sold locally. The territory of Idjwi is dominated by mountains, allowing the production of coffee at an average altitude of 1,600 meters. Therefore, the cooperative has chosen to focus on specialty coffee to satisfy the growing international demand for the product. SCPNCK has 2,844 members, of which 433 are women. The cooperative currently possesses 16 washing stations. In 2019, SCPNCK exported 58 tons of green coffee.



**SOPACDI is a specialty Arabica cooperative with 11,600 members in the Minova territory of South Kivu.** SOPACDI was founded in 2003 by Joachim Munganga as a means to bridge ethnic conflict in the community and to tap into the international specialty coffee market. Arabica coffee is grown in the Minova region between Lake Kivu and the mountain range of Mitumba, which has at an altitude ranging from 1460-2000 meters. The cooperative grew in 2008 with funding from Twin Trading in the UK. Twin Trading provided funding to assist SOPACDI with business skills and to begin rehabilitating the farms and improving the infrastructure, including building the first washing station. Today, SOPACDI coffee has four certifications ranging from Fair Trade, UTZ, Organic, and FTO (SPP). In 2019, Sopacdi exported 145 tons of coffee.

Figure 26. Sopacdi single origin coffees



Source: Equal Exchange



Source: Gardelli Coffee



Source: Skylight Coffee Company



**KACCO is a Coffee Producers Cooperative located across 15 villages in Kalehe Territory, South Kivu.** The cooperative is made up of 2,064 coffee-growers, of which 548 women. KACCO is a beneficiary of USAID’s Kawa Bora Ya Congo program. In 2016, the cooperative obtained a purchased from Starbucks, with a guaranteed price of \$6/kg. The contract allowed to receive working capital for its coffee processing operations from Coffee Lac and export facilitation services from Falcon Coffee<sup>18</sup>.



**Muongano is an Arabica coffee cooperative based on the Minova hills overlooking Lake Kivu.** The coffee is grown in the Kiniezi region of South Kivu, which has an altitude ranging from 1400-1800 meters. This environment is conducive to growing specialty Arabica coffee with a bourbon flavor profile. The cooperative has grown from 350 members in 2009 to over 4,300 farmers investing in specialty coffee. In 2019, Muungano exported 250 tons of Arabica coffee. The cooperative exports up to

five containers per year of specialty coffees to Europe and the US, though they have the capacity to export nine containers per year. Muungano’s coffee is roasted by established roasteries such as Higher Grounds, Kaldi’s Coffee, and PT’s Coffee. Muungano is certified Fair Trade and Organic. It owns two washing stations and a micro-washing station. Most of the farmers (95%) deliver fresh cherries to the cooperative and 5% of them wet process the coffee at the farm level.

**Figure 27. Muungano single origin coffees, US market**



Source: Bird Rock Coffee Roasters

Source: Higher Grounds

Source: Mistobox



**Kawa Kabuya cooperative is made up of 3,000 coffee producers in North Kivu.** The farmers are organized within 52 micro-washing stations scattered throughout the territories of Lubero and Bashu in Beni territory. Kawa Kabuya has received crucial development support from Rikolto and Agriterria, who have helped the cooperative improve the quality of its coffee while providing critical jobs across their washing stations. In 2019, Kawa Kabuya exported 114 tons of coffee. In previous years, the cooperative reached

<sup>18</sup> Feed the Future. (2017). *KACCO- A case study for Congolese banks learning to finance specialty coffee*. USAID. Retrieved March 2022, from <https://banyanglobal.com/wp-content/uploads/2018/11/KACCO-A-Case-Study-for-Congolese-Banks-Learning-to-Finance-Specialty-Coffee.pdf>

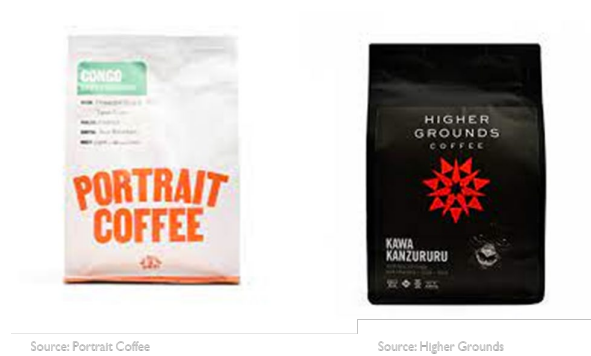
as high as 14 containers. Roughly 64% of the revenues received by Kawa Kabuya is re-invested back into the cooperative while the remainder is used to pay taxes, milling costs, and salaries<sup>19</sup>.

**Figure 28. Kawa Kabuya single origin coffees**



**Kawa Kanzururu is a specialty coffee cooperative based on the slopes of Mount Ruwenzori in Beni Territory, North Kivu.** The mountainous region has fertile volcanic soil and a high altitude which are perfect for growing coffee. The Arabica coffees grown by cooperative members are certified Fairtrade and Organic. Kawa Kanzururu boasts 1,642 farmers, of which 350 are women, and operates 22 coffee micro-washing stations that each cater to between 50-100 farmers. Kawa Kanzururu partners with the Virunga National Park and Farm Africa to support good agricultural practices and access new market opportunities for cooperative members. The cooperative exports green beans to specialty importers in the US and in Europe. In 2019, the cooperative exported 58 tons of green coffee.

**Figure 29. Kawa Kanzururu single origin coffees, US market**



<sup>19</sup> La Difference. (2020). *Kawa Kabuya: One of the leading coffee cooperatives in the region*. Retrieved 2022, from <https://www.la-difference.com/case-study-kawa-kabuya>

## COOPERATIVE KAWA MABER

**C.K.M.L.**  
Siège social : NDRELE  
B.P : 19 BUNIA/ITURI  
Email : [kawamaber@gmail.com](mailto:kawamaber@gmail.com)

Kawa Maber is a specialty Arabica coffee cooperative based in the Mahagi region of Ituri province. Kawa Maber consists of 2850 producers including 671 women and 506 youth structured around 22 micro-washing stations. The cooperative has invested considerable resources in promoting and training cooperative members. The

cooperative first began exporting in 2014, when it exported 17.1 tons of commercial specialty coffee to the USA followed by 33.42 tons in 2015. The cooperative officially began operations in 2014 though most of the founding members already had years of experience working together through FPCAI (Federation of Arabica Coffee Producers of Ituri). FPCAI was an association founded in 2003 through the United Nations Development Program (UNDP), which had launched a socio-economic reintegration program to combat ethnic conflict in the region. The coffee producers from varying ethnic factions were grouped into 32 coffee farming unions that totaled 200 to 300 to coffee producers each. The farmers learnt how to process coffee while also resolving community conflicts<sup>20</sup>. In 2014, Rikolto launched a coffee project to revitalize high quality Arabica coffee in Ituri, and they requested support from FPCAI. UNDP also supported the new project by building micro-washing stations and additional processing infrastructure.

## RAEK Katana

**RAEK Katana is a specialty coffee cooperative that has been producing certified organic Arabica coffee for export since 2015.** The coffee is produced on the hills across Lake Kivu in the Kabare Territory of South Kivu province,

just near the Kahuzi Biega National Park. This area has excellent growing conditions with an altitude of 1,400 to 1,800 meters. RAEK is a social cooperative which strives to improve the living conditions of small producers in Kabare. The cooperative supports farmers by facilitating organic certification as well as through reforestation with the planting of shade trees. The cooperative has been successful in increasing the price offered to cooperative members, which has also allowed farmers to protect biodiversity of the park. Raek manages its own export process, and outsources its milling to Jambo Safari, a Goma-based processor. This structure makes RAEK attractive to buyers as contracts can be settled directly with the cooperative.

**Figure 30. Raek management team in Kabare**



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<sup>20</sup> Rossignol, A. R. (2016, November). *Kawa Maber: A Committed and United Cooperative Working to Produce Exceptional Coffee!* UNDP. Retrieved January 2022, from <https://www.cd.undp.org/content/rdc/en/home2/presscenter/articles/2016/11/11/kawa-maber-a-committed-and-united-cooperative-working-to-produce-exceptional-coffee-.html>



**Rebuild Women's Hope (RWH) is a cooperative led by women located on Idjwi island in Lake Kivu.** Idjwi Island offers ideal conditions for growing Arabica coffee, enabling RWH to produce high-quality coffee. RWH built two coffee washing stations between 2016-2017 with donations from Strauss Coffee and Hala, and with a loan from Coffee Lac. The cooperative produces up to 100 tons of Arabica coffee, though only exported 12 tons in 2019. The remainder of their coffee is sold to local traders. A key focus of RWH is empowering women and raising the standard of living for its members. RWH provides training in literacy and numeracy, bread making and gardening. In 2020, RWH opened a maternity and pediatric center with funding from Mozzo Coffee.

**Figure 31. RWH cooperative members in Idjwi Island, South Kivu**



Source: Shift Impact



**Tumaini Coffee is a specialty coffee cooperative established in 2015 in Kabare Territory, South Kivu.** The cooperative has 1000 members. The members are mainly made up of vulnerable women of pygmy origin and demobilized youth. When the cooperative commenced, farmers were still processing coffee at their homes using a labor-intensive method that was inefficient and led to small quantities of parchment coffee at low and varying levels of quality. In 2017, Tumaini partnered with USAID's SVC program, which linked the farmers to inclusive value chains while increasing household incomes and access to nutrient-rich crops<sup>21</sup>.



**CCKa is a cooperative based in the Kalehe district of South Kivu.** CCKa has 1881 members of which a majority come from vulnerable communities, including widows and orphans. Approximately 85% of cooperative members are smallholder farmers that are certified in Organic and UTZ through support from USAID's Kawa Bora ya Kivu project. Through the project, CCKa was able to build a relationship with Nespresso, through their Reviving Origins produce line.

### **Congo Umoja**

**Congo Umoja farmers produce specialty Arabica coffee, grown between Lake Kivu and the Mitumba mountain range of South Kivu.** Umoja farmers produce fully washed Arabica coffee, grown in volcanic soil at an altitude of 1,480-2,000. The cooperative consists of 11,600 members and produce coffee that is certified Fairtrade and Organic.

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<sup>21</sup> Technoserve. (2018). *Congolese farmers rebuild with coffee and courage*. Retrieved 2022, from <https://www.technoserve.org/blog/congolese-farmers-rebuild-with-coffee-and-courage/?fbclid=IwAR27ImUBQOldF04LyTES45N-44KmA1BHo6x5SWNpm2ShKjZMVIU1kyTvblk>

Congo Umoja exports its coffee to Mighty Peace Coffee, a specialty coffee importer headquartered in New York.

**Figure 32. Congo Umoja micro-lot specialty coffees**



### C. Local traders



**SCAK is a coffee exporter based in Beni, North Kivu.** SCAK exports both Robusta and Arabica coffee. SCAK was the second largest exporter of green coffee from the DRC in 2019 with 2,426 tons exported. The company is managed by Guillain Maliona, a Congolese businessman from Butembo, and Belgian investor Michel Defays. It has 36 agronomists that work directly with farmers prior to the coffee being collected, processed, and exported. The annual production from its network of coffee farmers and suppliers is roughly 50% Robusta and 50% Arabica. SCAK partnered with Elan RDC to set up infrastructure for quality production of Arabica coffee as well as the development of nurseries for better quality Robusta seedlings. SCAK is also an active member of the Association of Cocoa-Coffee Exporters (ASSECCAF).



**Tsonga Kasereka (Tsokas) is a private trading company based in Butembo, North Kivu.** company specializes in green coffee procurement, processing, and export to the international market. In 2019, Tsokas exported nearly 700 tonnes of coffee. Tsokas is run by Kisumba Kamungele, who holds a Master's degree in Coffee Economics from the University of Trieste in Italy and a Masters in Engineering from the University of Laval in Montreal. Kisumba also serves as the President of the DRC chapter of the Fine Africa Coffee Association (AFCA) and the Executive Director of Café Africa.



**Jambo Safari is one of the leading holding companies in eastern DRC** with businesses in coffee milling as well as tea, fuel supply, transportation, and real estate. The company has a coffee processing factory for hulling, grading, sorting, and packaging of green coffee. Jambo Safari has a modern facility developed according to ICO guidelines and produces green coffee beans for roast or export.

**Ets. Kahindo Muvunga Muvunga is a private exporter of raw agricultural commodities based in Butembo, North Kivu.** Muvunga has been exporting coffee since 2002. The company sources its Arabica coffee from Lubero and Robusta coffee from Beni. Muvunga partnered with the Elan RDC program to support internal capacity building efforts to bolster extension services to farmers and reach more producers with training in Good Agricultural Practices (GAP). In 2019, Muvunga exported 38 tons of green coffee.





**Sopagri is a coffee trading company that processes and exports Robusta coffee varieties from Ubangi and Kongo Centrale Provinces.** The farms in Kongo Centrale produce agricultural products near the Mayombe Forest and Luki Biosphere Reserve, an area that has been exposed to heavy poaching and deforestation by local communities. In collaboration with WWF & Café Africa, Sopagri provides sustainable alternatives to the local inhabitants through the production of Petit Kwilu, which is a Canephora variety of Robusta only found in the DRC. In Ubangi province, Sopagri works with 2,500 coffee farmers in Karawa Territory and Gemena. The company supports the smallholder farmers with training in good agricultural practices, provided by Café Africa. The Robusta from this region is exported using the port city of Akula, from which the green coffee beans are transported to Kinshasa using the Congo River.

### **Grain D'OR**

**Grain D'OR** is a coffee processor and exporter based in Mahagi Territory, Ituri Province. The coffees are grown in the Djegu and Kpandruma highlands of Mahagi, which are situated at an altitude between 1,700-2,100 meters above sea level. The company works with 350 smallholder farmers who produce naturally processed, K3 Arabica. Naturally processed coffee is preferred in parts of the Middle East. Grain D'OR was established by Miru Lubenga, a coffee trader with more than 30 years of experience in processing and exporting coffees from North Kivu and Ituri.

### **Domaine de Katale**

**Domaine de Katale is a private coffee processing and export company based in Rutshuru, North Kivu.** Domaine de Katale was purchased by Victor Ngezayo in January 2021. The plantation covers a total of 5,000 ha, of which 3,000 ha contains planted coffee trees. Domaine de Katale sources its coffee through extensive networks of growers that produce both Robusta and Arabica coffee. Farmers on the plantation received training from the ELAN RDC program in good agricultural practices as well as in the creation of coffee nurseries.

## **D. International traders**



**Virunga Coffee, a subsidiary of Olam International, operates in the Kivus and is the DRC's largest coffee exporter.** In 2019, Virunga exported 6,368 tons of coffee, accounting for 54% of total official exports. The company focuses on improving production and processing through its diversification of treatment methods, promotion of the establishment and commercialization of tree nurseries, distribution of improved planting materials and ensuring that its expanding network of producers have access to training in Good Agricultural Practice. Since 2012, Virunga Coffee has established 7 washing stations in North and South Kivu and supported 2,300 smallholder farmers who are now Organic certified. Virunga Coffee is a subsidiary of Olam Specialty Coffee, a global specialty trading house that connects European roasters with quality specialty green coffees from across the globe.



**Coffeelac sources coffee from smallholder farmers organized in a network of farmer groups across rural areas in North Kivu, South Kivu, and Ituri.** The company has an array of collection centers and washing stations to collect and process the coffee cherries. Coffee cherries are handpicked by farmers and then brought to one of Coffeelac's washing stations where they are sorted and quality checked. After drying, the parchment is sent to Coffeelac's mill, based in Goma. The mill is modern with the capacity to process over 10,000 tons of coffee annually<sup>22</sup>. It includes a processing facility, warehouse, and cupping lab. Coffeelac also

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<sup>22</sup> Elan RDC. (2018). *Coffeelac*. Elan RDC. Retrieved 2022, from <https://www.elanrdc.com/east/2018/11/14/coffeelac>

provides farmers with access to finance and technical support. Coffeelac exported twenty containers of coffee in 2019. Coffeelac also roasts and packages premium coffee for DRC market. Coffeelac Roastery partnered with a Goma-based restaurant, Le Petit Chalet, under a private label agreement, Kawa Kivu to exclusively source, roast, and package five unique blends of specialty coffee (Nyiamulagira, Nyiragongo, Mikeno, Karisimbi and Sabinyo).

**Figure 33. Coffeelac warehouse in Goma, North Kivu**



Source: Telerama



**COPAK is a trading company specializing in the promotion, cultivation, processing, and export of cash crops from its base in Beni, North Kivu<sup>23</sup>.** Copak was the ninth largest exporter of coffee in 2019, with 173 tons exported. Copak operates from Beni and Mutwanga in North Kivu, from where the company currently sources coffee as well as cocoa through the cooperative, Sycoodep. Sycoodep is a cooperative representing 20,000 farmers, of which 12,000 have been Organic certified. Copak is managed under a holding company called Envirium Life Sciences, which is a green, industrial holding company focusing on the production, processing and supply of natural products for the Food and Beverage, Cosmetic and Health Care Industry.

## E. Local roasters

**There has been a resurgence in small, locally based roasters across the DRC.** Locally roasted coffee has grown with increased local consumption. In addition to Coffeelac, local roasters include Café Kivu, La Kinoise, and Alpha New.



**Café Kivu is a Goma-based coffee company that seeks to capture most of the value addition in the coffee value chain at origin.** The company sources, roasts, packages, and markets locally grown Arabica coffees from the Kivu region. Café Kivu roasts its coffee using an energy efficient, cost-effective electric roaster connected to a solar hybrid plant. The company has developed a specialty brand called Semliki Single Origin (SSO). SSO retails in Goma at \$7/unit and currently sells between 300-500kg per month of the product in the local market. The company's goal in 2022 is to scale production to

<sup>23</sup> *Compagnie des Produits Agricoles du Kivu.* (n.d.). Eko Warehouse. Retrieved December 2021, from <https://www.ekowarehouse.com/copak/profile>

two tons per month and export roasted coffee. To do so, Café Kivu is aiming to have SSO pass all standards for distribution in global markets.

**Figure 34. Semliki Single Origin Coffee**



Source: Café Kivu



**LPHA-NEW SARL**

**Alpha New is a Goma-based coffee exporter, roaster, and local distributor of specialty K3 Arabica coffee.** The company works with a network of 220 farmers from Minova, South Kivu to produce 40 tons per year of green coffee for export to Europe and US. They also produce small amount of grounded coffee for the local market. The company operates a washing station in Kishiji, South Kivu and is currently building a second one in the village of Buisha. The company markets green coffee beans and roasted and packaged Arabica coffee under the brand name Alfajiri. Alpha New is currently working on receiving various licenses for selling branded coffee in the US market and recently created a joint venture with an American NGO to help facilitate this process.



**Olame Sangara is a Goma-based coffee roastery that roasts Arabica coffee produced from the company's own coffee plantation in Minova, South Kivu.** The company is solely owned by Tresor Olame Sangara, a local entrepreneur and supply chain specialist. The Olame plantation employs three full-time staff and 60 farmers that produce up to two tons of Arabica coffee annually. The remainder of the coffee is purchased from small holder lots in the Minova region. In Goma, Olame Groupe has a roaster with the capacity to roast up to 200kg of coffee per day. When the roaster is not in use, Olame leases its machine to local companies roasteries.

**Figure 35. Olame groupe's Arabica coffee**





**LA KINOISE coffee is made by LA BOITE Sarl, a Congolese woman-led company run by Tisya MUKUNA, a young woman entrepreneur.** La Kinoise offers three varieties of coffee products, namely ARABICA coffee, MOCHACCINO coffee and ARABUSTA coffee. The company was created in 2018 and commercialized its first brand of coffee in 2020. As of March 2022, La Boite had planted 8 ha of Robusta coffee on its 20 ha of land in Mont-Ngafula, a municipality located on the outskirts of Kinshasa.

**Figure 36. La Kinoise coffee product offerings**



Source: La Kinoise



**Kwetu Kwenu is a coffee and cocoa processor based in Goma, North Kivu.** The company was started by young Congolese entrepreneur, Isaac Kisembo, in 2015. The name Kwetu Kwenu means “from us, to you,” in Swahili and the company’s vision is to portray the passion and quality of Congolese products to consumers across the region. Initially, Kwetu Kwenu was roasting and packaging coffee from the Beni and Mahagi regions of eastern DRC. In 2019, the company moved its headquarters to Goma from where it sells its coffee in 250g and 500g bags to supermarkets and restaurants across Goma, Kinshasa, and Lubumbashi.

**Figure 37. Kwetu Kwenu Managing Director Isaac Kisembo**



Source: Kwetu Kwenu



## VIRUNGA COFFEE

**Virunga Coffee is a specialty Arabica coffee roastery based in Goma North Kivu.** The company is owned by COOPAC, founded by Emmanuel Rwakagara Nzugize (not linked to exporter, Virunga Coffee, which is a subsidiary of Olam). Emmanuel has over twenty years of experience in the international coffee trade and in the certification of coffee certification. The roasted coffee beans are sourced from SOPACDI cooperative, also founded by Emmanuel.

COOPAC manages the whole coffee value chain from the harvesting of cherries at the optimal stage of maturation, to wet processing, and drying of the parchment into final processing marketable green coffee. COOPAC sources its specialty coffee from across North Kivu, South Kivu, and Ituri provinces, which are then exported to international markets. The remainder is used to roast for its Virunga Coffee brand. COOPAC acquired the ZENGU-NIOKA coffee plantation, which supports smallholder farmers in Mahagi and Djugu territories of Ituri province. These farmers are in the process of obtaining Organic and Fair Trade certifications. The Virunga coffee line aims to gradually increase sales within the DRC and European markets while promoting sustainable coffee production system.

**Figure 38. Virunga coffee brand**



Source: COOPAC

## F. Specialty importers

**Congolese cooperatives and exporters usually sell their specialty coffee directly to specialized social impact importers, and at times small-scale roasters.** The market for specialty coffee is relatively small and highly specialized, with its own characteristics of supply and demand. Many specialty coffee importers prefer working directly with producers or cooperatives as competition in this market segment is based on quality and on building long-term relationships, rather than on competing with price<sup>24</sup>. In order to be able to sell directly to specialty importers, cooperatives and exporters must be able to prove that cupping score of the coffee is at least 80 points, though some may ask for higher. A few small roasters import directly from producers and cooperatives who have very high-quality beans and are willing to engage in long-term relationships. Congolese traders have opened up direct trade relationships with various specialty coffee importers from across the globe.

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<sup>24</sup> CBI. (2020, September). *Entering the European market for specialty coffee*. CBI Ministry of Foreign Affairs. Retrieved 2022, from <https://www.cbi.eu/market-information/coffee/specialty-coffee/market-entry>



**Supremo is a Belgian-based green coffee buyer.** Supremo began sourcing organic coffees in 2014 due to increased demand from their roasting clients. Nearly 50% of the coffee sourced from Supremo is organically produced. The company has the capacity to blend 10 MT of green coffees per hour for roasting clients across Europe from its warehouse in Antwerp, Belgium<sup>25</sup>. Supremo focuses on building partnerships with green coffee exporters at origin and with coffee roasters in Europe. In 2013, Supremo partnered with the ECOM Group which helped the company increase its reach and knowledge of coffee producing areas across the globe. The ECOM Group is the world's largest coffee miller and the second largest coffee trader<sup>26</sup>. Supremo works directly with farmers and purchases fully washed coffees from cooperatives and plantations across North and South Kivu provinces.



HIGHER GROUNDS  
COFFEE

**Higher grounds coffee is an American specialty importer and roaster of organic coffee sourced directly from smallholder farmers.** Higher grounds are active across the coffee value chain, sourcing coffee directly from farmers and cooperatives through their own importing company, Cooperative Coffees. Cooperative Coffees pays an additional \$0.30 per lb premium to farmers over the global fair trade organic floor price, which is already about 40 percent more than the regular market c-price. The premium is paid to producers that improve coffee quality and for social impact projects within the farming communities. Cooperative Coffees also pre-finances cooperatives with working capital. Higher Grounds also has a nonprofit, On the Ground, which supports farming communities in South Kivu with programs focusing on gender equity training, creating alternative income generating activities, and credit and savings groups<sup>27</sup>. In the DRC, Higher Grounds sources Congolese specialty coffee from Kawa Kanzururu cooperative in North Kivu and Muungano Cooperative based in South Kivu<sup>28</sup>.



SUCAFINA

**Sucafina Specialty is a Swiss coffee trading house that provides innovative solutions to enhance social impact returns for coffee farmers.** Sucafina focuses on sustainability by aligning itself with the United Nations Millenium Development Goals (UN MDG). One key innovation is how Sucafina utilizes digital farmer identities with blockchain-enabled ledgers through the Farmer Connect platform. The company is a founding member of Farmer Connect, a block-chain application that helps farmers connect to the supply chain with a farmer ID. Through the application, farmers can confirm their identification and income in order to be eligible for loans.<sup>29</sup> Sucafina provided OPEX financing to coffee cooperatives in South Kivu as

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<sup>25</sup> Supremo. (2021). *About Supremo*. Retrieved 2022, from <https://www.supremo.be/nl/about-supremo>

<sup>26</sup> ECOM Trading. (2020). *ECOM Heritage*. Retrieved 2021, from <https://www.ecomtrading.com/heritage/>

<sup>27</sup> Young, T. Y. (2019, December). *Gender Equity in the DRC*. Higher Grounds Coffee. Retrieved 2022, from <https://www.highergroundstrading.com/blogs/news/on-the-ground-update-gender-equity-in-drc>

<sup>28</sup> Higher Grounds Coffee. (2021). *Higher Ground Coffee: Congolese Farming Partners*. Retrieved 2022, from <https://www.highergroundstrading.com/pages/dr-congo>

<sup>29</sup> Sucafina. (2021). *Sucafina: Our Approach*. Retrieved 2022, from <https://www.sucafina.com/apac/about/approach>

part of the SVC program. Sucafina provided \$47,000 of working capital to four washing stations, in addition to working capital to Alpha New, for \$24,750<sup>30</sup>.

**In 2021, Sucafina secured a \$500 million two-year credit facility through 16 banks.** The facility uses blockchain-based platform Komgo in order to digitize trade documentation. Komgo is a Swiss fintech company that is owned multiple trade finance banks. Sucafina uses Komgo's stock monitoring tool to automate weekly stock reconciliation between all Sucafina's 80 warehouses across the globe.<sup>31</sup> In addition, Sucafina supports farmers through the certification compliance process as well as supporting farmers in good agricultural practices in order for them to improve the quantity of yields and quality of coffee. The company sources coffees that are certified in Rainforest Alliance, UTZ, Fair-Trade, Fair-Trade Organic, and Organic. The company launched the Farm Gate Initiative, which lets roasters provide farmers with additional cash payments to increase the farmgate price.



**The Hamburg Coffee Company (HACOFCO) is a German-based green coffee importer that focuses on direct and long-term relationship with producers and roasters.** Hacofoo focuses on working directly with local producers and exporters within producer countries. This allows Hacofoo to focus on building long-term relationships to provide the most necessary support to coffee partners. In 2021, Hacofoo sourced specialty Arabica coffees from Kawa Kanzururu and Kawa Kabuya cooperatives, both based in the northern mountain region of North Kivu province<sup>32</sup>.



**Atlas Coffee Importers is a Seattle-based specialty coffee trading company founded in 1998.** The company focuses on building mutually beneficial relationships between coffee growers in producing nations and coffee roasters across North America. As a trader of specialty coffee, Atlas pays premium prices for the high-quality coffees that it sources. Atlas Coffee sources specialty Arabica in the DRC from Muungano cooperative, which is located near Minova, South Kivu<sup>33</sup>.



**Trabocca is a social impact importer of green coffee beans that are certified, and traceable from coffee trees at origin to final consumer.** Trabocca works directly with farmers and cooperatives at origin to build long-term and direct relationships with the growers of coffee. Trabocca facilitates supply chains built on Fair for Life certification. Trabocca sources single origin Arabica coffee from Sopacdi cooperative, whose coffee is certified Fairtrade, Fair for Live, and Organic<sup>34</sup>. Trabocca supported Sopacdi with the payment for the Fair for Life certification process.

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<sup>30</sup> Tetrattech. (2021, January). *FEED THE FUTURE DEMOCRATIC REPUBLIC OF THE CONGO STRENGTHENING VALUE CHAINS ACTIVITY FIRST QUARTER REPORT (Q1)*. USAID. [https://pdf.usaid.gov/pdf\\_docs/PA00XC4N.pdf](https://pdf.usaid.gov/pdf_docs/PA00XC4N.pdf)

<sup>31</sup> Atkins, J. A. (2021, October). *Coffee Trader Sucafina secured \$500 million borrowing facility*. GT Review. Retrieved March 2022, from <https://www.gtreview.com/news/europe/coffee-trader-sucafina-clinches-us500mn-borrowing-facility/>

<sup>32</sup> Hacofoo. (2021, March). *HACOFCO: Offer List*. Retrieved March 2022, from [https://www.kestar.ro/files/downloads/hacofoo\\_offer\\_2021\\_03\\_15.pdf](https://www.kestar.ro/files/downloads/hacofoo_offer_2021_03_15.pdf)

<sup>33</sup> Atlas Coffee Importers. (2021). *Muungano Cooperative*. Retrieved 2022, from <https://www.atlascoffee.com/coffees/muungano-cooperative/>

<sup>34</sup> Trabocca. (2021). *Congo Sopacdi Cooperative*. Retrieved March 2022, from <https://www.trabocca.com/our-coffees/congo/south-kivu/sopacdi-co-operative/>



**This Side Up is a small Dutch-based specialty coffee importer that sources certified Arabica coffee from farmers in South Kivu province.** The goal for This Side Up is for farmers to earn an equal share of the coffee sector’s profits. The company facilitates a transparent supply chain in which farmers importers, and roasters collaborate in order to solve logistical and quality hurdles across the coffee value chain. In the DRC, This Side Up works with two cooperatives, Raek Katana and SCPNCK<sup>35</sup>.

**Figure 39. This Side Up’s cost breakdown to SCPNCK cooperative**

Price	Value Chain Activity
\$2.75	Price SCPNCK pays to farmers for coffee cherries
\$1.98	Premium SCPNCK pays out partially to farmers and to re-invest in upgrades
\$2.27	SCPNCK’s wet and dry processing costs
<b>\$7.00</b>	<b>Total cost paid to SCPNCK cooperative</b>

Source: This Side Up<sup>36</sup>



**Mighty Peace Coffee is a social impact coffee importer that sources ethical green coffee from cooperatives in the DRC.** Mighty Peace collaborates with coffee suppliers that promote ethical practices that include environmental sustainability, organic certification, and high labor standards. As part of its mission, Mighty Peace aims to share the stories of Congolese farmers to inspire, educate, and end cycles of poverty and conflict. The company works with cooperatives that total 9,000 farmers across eastern

DRC, including SCPNCK and Congo Umoja<sup>37</sup>. Mighty Peace Coffee has offices in the US and Europe from where it supplies specialty coffee roasters with high-quality Congolese coffees.



**Mutombo Coffee is a specialty importer and roaster of certified Arabica coffees from the Lake Kivu region of the DRC as well as other origins areas from across Africa.** The company was created in 2020 by former Congolese basketball player, Dikembe Mutombo. Mutombo Coffee sources green beans from sustainable, organic, and fair-trade farming cooperatives then ships the beans to their roasting facility in the US. The green beans are then left to age in oak whiskey barrels prior to being roasted<sup>38</sup>. The roasted coffee is sold directly through Mutombo Coffee’s website to clients across North America.

<sup>35</sup> This Side Up. (2022). *This Side Up: Team*. Retrieved 2022, from <https://thissideup.coffee/about>

<sup>36</sup> This Side Up. (2020). *Katana Congo*. Retrieved 2020, from <https://thissideup.coffee/katana>

<sup>37</sup> Nyembo, G. N., & A.R.R. (2021, January). *Etude du Retour Social sur Investissement dans la filière Café en République Démocratique du Congo (RDC)*. Rikolto. Retrieved February 2022, from [https://assets.rikolto.org/paragraph/attachments/drc\\_sroi\\_coffee.pdf](https://assets.rikolto.org/paragraph/attachments/drc_sroi_coffee.pdf)

<sup>38</sup> Mutombo Coffee. (2020). *The barrel aged coffee process*. Retrieved March 2022, from <https://mutombocoffee.com/the-barrel-aged-coffee-process-brew-tips/>



Figure 40. Mutombo coffee products range



Source: Mutombo Coffee



**Walter Matter is Swiss-based, family-owned, independent coffee trader specializing in coffee and cocoa.** Founded by Walter Matter CafeMA International, is a platform committed to improving farmers' living conditions through sustainable agricultural practices. CafeMA sources FLO-Fairtrade certified coffee, sourced solely from smallholder farmers cooperatives and represents 8% of the FLO-Fairtrade volume traded worldwide<sup>39</sup>. Though Walter Matter mainly focuses on sourcing cocoa from the DRC, the company has ventured into the Congolese specialty coffee sector. In 2020, Walter Matter purchased its first container of K3 Arabica coffee from the region from Kawa Kanzururu cooperative<sup>40</sup>.



**Falcon Coffees is a specialty coffee importer that works to organize, train, and connect smallholder farming communities in producing countries with the urban markets across the globe.** To support the development of the specialty coffee sector in the DRC, Falcon worked alongside a non-profit, Eastern Congo Initiative, and local exporter, Coffeelac, to support local farming communities in South Kivu province. Falcon, along with Coffeelac, supported the Rebuilding Women's Hope cooperative, based on Idjwi island in South Kivu. Falcon provided the female coffee farmers with training, coffee equipment and access to international markets. The support also expanded to cooperatives in Kabare and Kalehe territories in South Kivu, including access to working capital, agronomy training, and post-harvest processing. Falcon Coffees partnered with Starbucks to import the specialty coffees from the local cooperatives<sup>41</sup>.



**African Coffee Roasters (ACR) is a certified organic coffee roaster based in Kenya.** The company is majority-owned by two entities in Denmark: Coop Danmark and IFU, the financial vehicle of the Danish government<sup>42</sup>. The company's mission is to develop the shortest and most efficient coffee supply chain providing shelf-ready products from Kenya to consumers world-wide. ACR has its own coffee product line called, The Big Five,

<sup>39</sup> Walter Matter. (2020). *Sustainability*. Retrieved 2022, from <https://www.wama.ch/sustainability/>

<sup>40</sup> Saliboko, M. S. (2020, May). *Shipping coffee from Congo in corona times: an obstacle course*. Rikolto. Retrieved February 2022, from <https://www.rikolto.be/nl/nieuws/koffie-uit-congo-verschepen-corona-tijden-eeen-hindernissenparcours>

<sup>41</sup> Peiper, H. P. (2017, July). *Congo coffee takes center stage as latest exclusive roastery beverage*. Starbucks. Retrieved February 2022, from <https://stories.starbucks.com/stories/2017/congo-coffee-star-of-latest-exclusive-roastery-beverage/>

<sup>42</sup> Onsare, R. O. (2020, June). *Africa Coffee Roasters*. LinkedIn. Retrieved March 2022, from <https://www.linkedin.com/pulse/african-coffee-roasters-acr-ronald-onsare/>

made from organic and specialty coffee from five coffee producing nations in Africa - Kenya, Ethiopia, Rwanda, DRC, and Uganda. For their DRC brand, ACR sources specialty Arabica green coffee from Coopade cooperative, located in the Lubero Territory, North Kivu.

**COLRUYTGROUP** **Colruyt Group is a Belgian family-owned retail corporation that is managing the Colruyt supermarket retail stores and the Graindor coffee product range.** Colruyt Group source green coffee beans that are sustainable and raise the living standard of the coffee farmers. All our Graindor coffees are certified Fairtrade or Rainforest Alliance. Colruyt Group sources specialty Congolese Arabica coffee from Kawa Kabuya cooperative. Starting in 2017, Colruyt Group guaranteed Kawa Kabuya a contract for 28.5 tons of green coffee beans per year with a premium above \$1.00 per kg. Colruyt Group supported Kawa Kabuya with pre-financing for harvest seasons<sup>43</sup>. The Graindor product range is sold across supermarkets in Belgium as well as being exported for consumption in Kinshasa supermarkets.

**Figure 41. Graindor Kivu ground coffee**



Source: Graindor



**Counter Culture is a specialty coffee roaster that sources single-origin coffees from across the world to their roastery in North Carolina.** Counter Culture sources specialty coffee from single-family farms or cooperatives. In the DRC, the company sources organic coffee from the Buchiro washing station, which is run by Muungano Cooperative. In 2019, Counter Culture provided a seed grant to Muungano Cooperative to produce and distribute 50,000 coffee plants and 10,000 erosion-controlling trees to over 500 of its members<sup>44</sup>.

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<sup>43</sup> Rikolto. (2017, October). *Congolese coffee growers export second container of coffee to Belgium's biggest retailer, Colruyt Group*. Retrieved March 2022, from <https://www.rikolto.org/en/news/congolese-coffee-growers-export-second-container-coffee-belgiums-biggest-retailer-colruyt-group>

<sup>44</sup> Counter Culture. (2020). *Muungano Cooperative, 2019*. Retrieved March 2022, from <https://counterculturecoffee.com/seeds/muungano-cooperative-2019>

Figure 42. Counter Culture Buchiro single origin coffee



Source: Counter Culture



**Strauss Coffee is an Israeli-based coffee importer and roaster.** Strauss Coffee launched a global initiative to buy green coffee directly from and invest in women growers' associations in developing countries, enabling them to produce better quality beans. In 2016, Strauss coffee partnered with Congolese coffee exporter, Coffeelac, and non-profit Shift Social Impact to support women coffee farmers from the RWH cooperative in Idjwi. The cooperative was given new machinery including a washing station as well as training in agronomy. The initiative also built a new water supply for the washing station and the surrounding community, replacing the need to source water from Lake Kivu<sup>45</sup>.

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<sup>45</sup> More than a cup. (2017). *Establishing cooperative, female-led farming programs with the aim of encouraging local independence and sustainability*. Retrieved 20202, from <https://morethanacup.coffee/congo/>

## VI. Organizations and programs supporting the coffee sector in DRC

### A. Development programs

**Several donors, NGOs and development programs are supporting the coffee value in the DRC.** Development programs mainly focus on improving coffee quality, production and increasing farmer incomes. Activities vary from incorporating best agricultural practices, to facilitating shared learning amongst cooperatives through exchange visits, implementing certification schemes, and promoting youth and gender mainstreaming. The underlying premise for promoting certifications is that global demand for socially and environmentally friendly certified coffee continues to grow, and consumers are motivated to pay price premiums for coffee that meets certain standards. Activities include also expanding international market opportunities and facilitating access to capital.



**Kahawa Bora Ya Kivu was a joint coffee project funded by USAID and the Howard G. Buffett Foundation that ran from 2012 to 2016.** The purpose of the project was to address the challenges faced by smallholder farmers in promoting specialty coffee from the Kivus. The project collaborated with key stakeholders across the coffee value chain, including cooperatives, processors, roasters, buyers, exporters, research institutes and government entities. The project

helped three cooperatives to increase access to working capital and increase their production capacity. Starbucks first entered the DRC market by purchasing eleven containers of specialty Arabica from these cooperatives.

Kahawa Bora Ya Kivu was implemented by Eastern Congo Initiative (ECI), World Coffee Research (WCR) and Catholic Relief Services (CRS). WCR provided agricultural technology to improve soil fertility and intercropping. This included the introduction of 25 new coffee varieties as well as strategies for intercropping coffee with beans<sup>46</sup>. CRS funded three coffee washing stations and de-pulping machines, which facilitated coffee processing and the export of 11 containers of specialty Arabica sold to Starbucks. ECI organized workshops and strengthened cooperatives providing technical assistance on governance, financial management, marketing, human resources management, and business planning.

**Figure 43. Kahawa Bora Ya Kivu achievements**

Target Area	Achievement
Production	<ul style="list-style-type: none"> <li>750,000 Arabica coffee plantlets and over 47,000 agroforestry plants distributed</li> <li>Creation of Organic Pest Management (OPM) and Organic Soil Fertility (OSF) systems to strengthen cooperatives' knowledge of soil fertility and pest management</li> </ul>
Processing	<ul style="list-style-type: none"> <li>Construction of three washing stations with 800 m2 of drying tables</li> <li>Three de-pulping machines donated for cooperatives' mini-washing stations</li> <li>Construction of a coffee cupping laboratory at ONAPAC in Bukavu</li> </ul>
Exporting	<ul style="list-style-type: none"> <li>Export of 11 containers of specialty-grade coffee to Starbucks</li> </ul>



**The Feed the Future Strengthening Value Chains (SVC) Activity, led by Tetra Tech and funded by USAID, supported the coffee value chain in South Kivu province.** The program ran from 2016 to 2021 with the goal of supporting

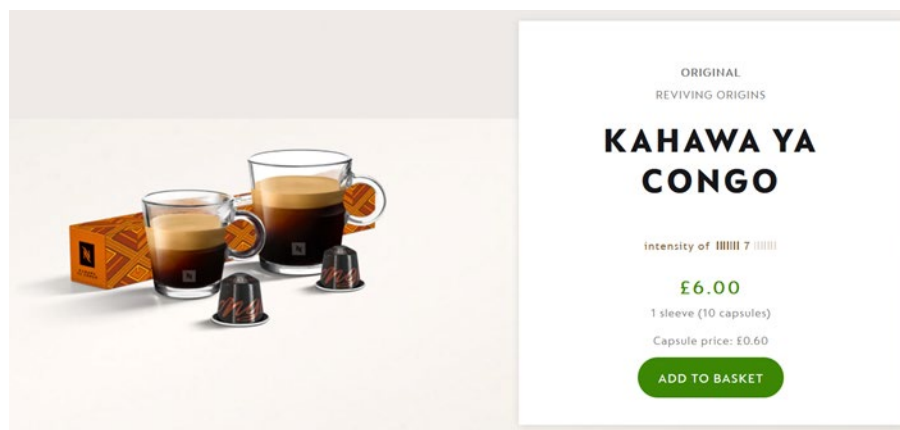
15,000 coffee farming households to increase their yields by 30 percent and promoting local processing

<sup>46</sup> Resteghini, T. R. (2007). *KIVU SPECIALTY COFFEE PROJECT HELPS DRC ERADICATE POVERTY*. Borgen Project. Retrieved February 2002, from <https://borgenproject.org/tag/eastern-congo-initiative/>

to export 50 containers of specialty coffee. By focusing on specialty coffee, farmers could achieve higher and more stable prices for their coffee<sup>47</sup>.

**As part of the project, Nespresso and USAID signed an MOU to collaborate to improve coffee farmer livelihoods by rebuilding and promoting the coffee industry in South Kivu.** Nespresso formed a partnership with OLAM and its local subsidiary, Virunga Coffee, to implement its 'Reviving Origins' initiative, a global project started in 2011 investing in coffee regions affected by civil conflict, economic hardship, and natural disaster. The 'Reviving Origins' initiative in the DRC supports farmers to produce high-quality specialty coffee from South Kivu meeting Nespresso requirements and has resulted in the creation of the "Kahawa ya Congo" Nespresso brand.

**Figure 44. Nespresso's 'Reviving Origins' Kawa Ya Congo**



Source: Nespresso

**SVC supported twenty cooperatives to meet the demand for organic certified coffee.** Sopade, Amka, CPCK, and Sopacdi were provided funding to build new washing stations. Cooperatives were also assisted in getting organic certification from Ecocert<sup>48</sup>. SVC worked with Olam and Airtel to set up a premium payment scheme for cooperatives, including mechanism to monitor the payment and report the information transparently to Nespresso. SVC also drafted a South Kivu Specialty Coffee Sector Strategy along with ONAPAC. The strategy identified key investments and initiatives to catalyze inclusive growth of the coffee sector in South Kivu.

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<sup>47</sup> Technoserve. (2017). *Technoserve launches major new coffee projects in three continents*. Retrieved February 2022, from <https://www.technoserve.org/news/technoserve-launches-major-new-coffee-projects-on-three-continents/>

<sup>48</sup> USAID & TetraTech. (2020). *Feed the Future Democratic Republic of the Congo Strengthening Value Chains Activity*. USAID. Retrieved 2022, from [https://pdf.usaid.gov/pdf\\_docs/PA00WK8Z.pdf](https://pdf.usaid.gov/pdf_docs/PA00WK8Z.pdf)

Figure 45. Cooperatives supported by the SVC program

Region	Cooperative	# of washing stations	# of members
<b>Kalehe</b>	Sopacdi	4	11,733
	Coopade/ Coop. Ca	1	4,518
	Muongano	2	4,245
	Kacco	3	3,401
	Ccka	2	2,433
	Amka	1	2,099
	Copak	0	1,750
	Umoja Wetu	1	834
	Sopad	2	250
<b>Idjwi</b>	Rwh	2	3,050
	Cpnck	16	2,388
	Cocaii	-	-
<b>Kabare</b>	Raek	2	2,100
	Cpck	2	2,261
	Tumaini	0	1,047
<b>Walungu</b>	Copaeki	1	1,731
<b>Mwenga</b>	Coan	0	420
	Cenicrale	-	-
<b>Uvira</b>	Furaha	-	-
	Cocat	-	-

Source: SVC report



**Élan RDC was a market systems development program funded by the UK government that ran from 2014-2021.** The program was implemented by UK-based development organization, Adam Smith International. In the coffee sector, Elan RDC, worked with traders to support production, processing, access to finance, and to improve sector governance. Elan assisted producer associations and cooperatives to improve good agricultural practices and provided financing for infrastructure such as washing stations and coffee labs to improve coffee quality during the processing phase. Elan also supported coffee sector stakeholders as they engaged with the government to promote reforms in sector policies.

**Farm Africa is a non-profit that works to build farmer incomes and reduce smallholder poverty in eastern Africa.** Farm Africa has collaborated with the Virunga National Park to support two local cooperatives, Coopade and Kawa Kanzururu, which group over 7,000 coffee farming families that live on the border of Virunga National Park, along the slopes of the Rwenzori Mountains and Lake Edward, where populations have encroached on the park looking to earn an income by cutting down trees for charcoal production. With support from the European Union and USAID, Farm Africa and the Virunga Foundation have worked with the cooperatives to support sustainable management of coffee fields while reducing pressure on the Park's resources. Activities have included the development of plant nurseries and the distribution of 200,000 coffee seedlings, the adoption of shade trees and training in good agricultural practices. Cooperative staff were trained in coffee quality control and given cupping equipment to monitor coffee quality. This included support in establishing partnerships with specialty importers and roasters, as well as support for

cooperative leadership to attend coffee trade shows<sup>49</sup>. Both cooperatives were able to achieve Fairtrade and Organic certification for their members.

### **Gorilla Coffee Alliance**

**The Gorilla Coffee Alliance is a five-year USAID-led sustainable coffee initiative launched in 2021 to improve the coffee production around Kahuzi-Biega National Park.** Kahuzi-Biega National Park is a UNESCO World Heritage Site as well as one of

the few remaining parks with lowland gorillas. The growth of population in the area combined with limited economic opportunities are putting significant pressure on the national park, which has led to poaching and deforestation. The Gorilla Coffee Alliance, a collaboration between USAID, Nespresso, Olam, TechnoServe, and ECI, aims at reducing pressure on the national park by helping farmers developing sustainable livelihoods<sup>50</sup>. The program will support 8,500 farming households, through TechnoServe, with training and access to high-quality coffee seedlings and shade trees to improve production. ECI, through its Asili platform, is supporting communities to improve access to health clinics and clean water points. Water sources and clinics are being built near the project's operating zone and where coffee washing stations are located.



**Rikolto supports the development of coffee grower organizations.** Rikolto is a Belgian agricultural development organization that supports coffee producers to establish quality coffee processing cooperatives and facilitates access to international coffee buyers. Rikolto is currently working with Kawa Kabuya, SCPNCK,

Kawa Maber, and Kawa Kanzururu. Rikolto has set up a coffee lab in Butembo to test and evaluate the quality of green coffee locally, allowing the cooperatives to better respond to the quality demands of buyers. Rikolto also works with local banks and social lenders to facilitate access to credit<sup>51</sup>.



**Sustainable Growers works with women farmers to improve their professional approach to growing and trading specialty coffee.** The organization supports female farmers to form direct relationships with coffee cooperatives, processors, importers, and roasters. The support aims at building economic independence of farmers through knowledge, information, and market access. Sustainable Growers

partners with 4,500 farmers in North and South Kivu. A key goal of the program is to support women as they gain knowledge about the entire coffee value chain. The farmers participate in training programs to increase the volume of high-quality coffees.



**Agriterra is an international development organization that specializes in cooperative development.** The organization was founded in the Netherlands by Dutch farmers' organizations to increase international peer-to-peer agricultural

cooperation. Agriterra currently provides extension services to local cooperatives. Agriterra created Kawa Kivu, a platform that markets specialty Arabica coffee producers in the provinces of North and South Kivu<sup>52</sup>. The cooperatives under the

platform are Kawa Kabuya, RAEK, SCPNCK, AMKA, and SOPACDI. Agriterra supports farmer cooperatives

<sup>49</sup> Farm Africa. (2019a). *Virunga Coffee*. Retrieved March 2022, from <https://www.farmafrica.org/dr-congo/virunga-coffee>

<sup>50</sup> Kujirakwinja, D. K. (2021, October). *A NEW COFFEE ALLIANCE TO ENHANCE RURAL LIVELIHOODS AND WILDLIFE CONSERVATION IN THE DEMOCRATIC REPUBLIC OF THE CONGO*. Nespresso. Retrieved 2022, from [https://nestle-nespresso.com/news/A\\_New\\_Coffee\\_Alliance\\_to\\_Enhance\\_Rural\\_Livelihoods\\_and\\_Wildlife\\_Conservation](https://nestle-nespresso.com/news/A_New_Coffee_Alliance_to_Enhance_Rural_Livelihoods_and_Wildlife_Conservation)

<sup>51</sup> Nyembo, G. N., & A.R.R. (2021, January). *Etude du Retour Social sur Investissement dans la filière Café en République Démocratique du Congo (RDC)*. Rikolto. Retrieved February 2022, from [https://assets.rikolto.org/paragraph/attachments/drc\\_sroi\\_coffee.pdf](https://assets.rikolto.org/paragraph/attachments/drc_sroi_coffee.pdf)

<sup>52</sup> Agriterra. (2018). *Kawa Kivu*. Kawa Kivu. Retrieved January 2022, from <http://kawakivu.com/>

to professionalize. Technical support includes education programs and cooperative assessments to improve the governance and financial management of the cooperatives. Agriterra then facilitates market linkages for the cooperatives with international buyers. This includes supporting the cooperatives with sending samples to potential buyers and partial financing for attending trade shows.



**The Projet d'Appui au Secteur Agricole dans la Province du Nord Kivu (PASA-NK) is a 10-year (2015-2025) government program aimed at sustainably improving food security and household incomes in North Kivu.** The project is funded by the International Fund for Agricultural Development (IFAD) at \$33.78 million, the Congolese government at \$5.95 million with the remainder from smaller donors. Due to political instability in the DRC from 2015-2018, the project did not officially launch until December 2018. Arabica coffee was chosen as one of four crops that are supported within the project, with support going to coffee value chain support actors as well as the development of rural infrastructure. Rikolto was chosen as the development partner to support coffee activities. Rikolto is supporting the structuring of coffee growers in Rutshuru Territory. Rikolto is supporting the structuring of 13,800 coffee growers in Rutshuru, Lubero, and Beni Territories. As of 2021, the project had supported 8,267 coffee farmers. In addition, three million coffee seedlings have been distributed out of a target of 13 million at the end of the project.



**The United States African Development Foundation (USADF) has provided grants and debt financing to local coffee cooperatives.** USADF provides annual enterprise expansion funding to assist cooperatives, farmer associations, and businesses that have developed a plan for scaling operations to new markets. USADF measures grant success by the number of sustainable jobs created, increased income, increased food security, and improved social conditions. The USADF Coffee Program was launched, in collaboration with Ethos Agriculture, to provide direct capital investment combined with local technical assistance to local coffee actors. USADF and Ethos Agriculture designed an online learning portal to connect coffee market actors to training curriculum and materials, research, and partnership opportunities. In the DRC, the USADF Coffee Program is supported by Action Sociale et d'Organisation Paysanne (ASOP). Total financing for local enterprises can range from \$100,000 to \$1 million and can be used for operational assistance, scaling and market linkage. USADF funding has already supported select local coffee cooperatives to take over more of the value chain by expanding from growing coffee beans to financing for processing materials to wash, dry, and package green coffee<sup>53</sup>. SCPNCK cooperative was given working capital for raw material purchases to ensure adequate supply of cherries for processing, and the installation of a coffee laboratory to improve to overall coffee quality<sup>54</sup>. Muungano cooperative was given financing for a washing station and to establish a working capital fund to ensure a more consistent supply chain to members.



**USAID Invest is a 5-year (2021-2026) investment facilitation platform that mobilizes private capital for high-impact businesses in the DRC.** USAID Invest has been supporting key coffee value chain actors including cooperatives,

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<sup>53</sup> USADF [US African Development Foundation]. (2020, June 30). *USADF- CPNCK Transforms the Lives of Ex-Militants in the DRC through Coffee* [Video]. Youtube. <https://www.youtube.com/watch?v=yIhiwCfHp7s>

<sup>54</sup> USADF. (2021, March). *USADF Active Projects: Coffee Expansion Production for Muungano*. Retrieved February 2022, from <https://www.usadf.gov/country/cd>



processors, and exporters, by developing their operating capacity and helping the companies raise capital. This includes planning for investor due diligence, reviewing business plan and pitch materials, and structuring deals using an array of financing mechanisms. USAID Invest has also provided support to social impact funds by linking the financiers to eligible coffee businesses that need investment to grow. USAID Invest is implemented by a consortium composed of international development consulting firm Chemonics International Inc. and mission-driven investment advisory firm CrossBoundary.



**Cooperatives are supported by platforms such as the Réseau des Cooperatives des Producteurs de Café-Cacao de la RDC (GIE RCPCA-RDC).** GIE RCPCA-RDC aims at improving the living conditions of cocoa and coffee farmers and their families, while working to increase the cultivation and commercialization of sustainably produced cash crops. Currently the forum comprises a total of 49 cooperatives with a total of 84,000 farmers in the coffee and cocoa sectors.

## B. Relevant government institutions



**The National Office of Agricultural Products of Congo (ONAPAC) supports local value chain actors involved in export crops.** ONAPAC provides technical assistance and extension services to coffee farmers. ONAPAC is involved in the grading and approval of cocoa for exports. It also ensures that warehouses, factories, and processing facilities are in compliance with international standards. Periodically, they publish sector reports and international prices. In 2021, ONAPAC forayed into the processing and exporting of Congolese coffee. USAID financed a \$40,000 coffee lab at the ONAPAC office in Bukavu, through the Kahawa Bora ya Kivu project, to help build their capacity to improve the quality of local coffee<sup>55</sup>. Onapac acquired a roasting plant with a processing capacity of 600 kg/hour, which is operated under a public-private partnership with COCOI (acronym for the Congolese Trade and Investment). COCOI has a ten-year renewable license to use ONAPAC's coffee processing machines and facilities. In return, COCOI will buy the coffee nationally and process it in ONAPAC factories, with both parties sharing operating and labor costs. The objective is to roast as much locally grown coffee as possible to boost production and consumption nationally.



**The National Investment Promotion Agency (ANAPI) is an advisory body of the DRC government in the field of investment promotion and business climate.** Under the supervision of the Ministry of Planning, ANAPI has advocated for measures to boost the coffee sector in relation to the legal and judicial frameworks of the country. ANAPI recommended the government strengthen investment protection mechanisms along the coffee and cocoa value chain by empowering commercial courts. It also recommended that the government abolish excessive taxes on exports by strictly applying the Agricultural Code, in particular article 73, which stipulate taxes may not exceed 0.25% of the value of exported products<sup>56</sup>.

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<sup>55</sup> Smith, K. J. (2016, June). *DRC Coffee Might be Served at a Starbucks Near You*. USAID. Retrieved January 2022, from <https://www.usaid.gov/news-information/frontlines/may-june-2016/drc-coffee-might-be-served-starbucks-near-you>

<sup>56</sup> Zoom Eco. (2018, June). *ANAPI préconise huit mesures pour booster les filières café-cacao*. Retrieved 2022, from <https://zoom-eco.net/secteur-public/rdc-anapi-preconise-huit-mesures-pour-booster-les-filieres-cafe-cacao/>



**The National Agency for the Promotion of Exports (ANAPEX) is a government agency that promotes the export of Congolese goods.** The organization promotes industrial, agricultural, and artisanal goods that are made in the DRC. ANAPEX also supports local firms with export guidance and assistance to ensure maximum safety and visibility of Congolese products on the international market. The organization is empowered carry out studies on the possibilities of exporting Congolese products and on the characteristics of the external market on behalf of the public sector and private sector. In addition, ANAPEX supports the government by making proposals for the development of a comprehensive national trade policy. This includes identifying specific constraints and problems relating to exports and proposing appropriate solutions in collaboration with exporters and government authorities. The agency is collaborating with the International Trade Center, an agency of the World Trade Organization (WTO), to improve export promotion and market diversification for Congolese-based market actors. ANAPEX was created in 2020 under the Ministry of External Commerce.

## VII. Relevant financial institutions

In the DRC there are 15 registered banks and 21 microfinance institutions, 71 savings and credit cooperatives, of which only a few have a significant activity in the agriculture sector and the coffee value chain. Some international impact investors and private organizations are also active in the coffee value chain.

### A. Local financial institutions

**EquityBCDC and Trust Merchant Bank (TMB) are the main banks active in the agricultural sector.** They offer seasonal loans and, in some instances, longer-term investment loans. Medium and long-term investment loans are intended for large agribusinesses and can exceed \$1 million. Smaller operators such as cooperatives have generally only access to seasonal loans. These loans, of a term of up to 12 months, typically range from \$100,000 to \$400,000 and have monthly interest rate of 1.3% to 2.5%. A common obstacle for cooperatives and other actors in the coffee value chain to access commercial funds (especially for CAPEX), is their lack of collateral.

**EquityBCDC is planning to increase its loan portfolio to the agriculture value chains in the DRC.** It is planned that credit to the agriculture value chains represents 30% of the outstanding loan portfolio in the coming years. The bank has partnered with the Development Finance Corporation (DFC) to develop instruments targeting the sector.

**TMB has been active in providing loans to agribusinesses and traders especially in the maize value chain in the former Katanga province.** TMB partners with the European Investment Bank (EIB) which has granted TMB loans to promote on-lending to micro-firms and small businesses. Target sectors include food production, farming, logistics, hospital care, small-scale information technology firms<sup>57</sup>. TMB

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<sup>57</sup> Knight, C. (2021, 11 July). A Congo private sector bank brings bank accounts to the poor and small firms. European Investment Bank. Retrieved May 2022, from <https://www.eib.org/en/stories/congo-private-sector-bank>

benefits also from EIB technical assistance to improve lending practices, credit management and digitalization<sup>58</sup>.

## B. Microfinance institutions

**Microfinance institutions have small balance sheets and limited activities in the agriculture sector.** In 2019, the microfinance sector including SACCOS had an outstanding credit portfolio of \$153.22 million and according to the central bank the agriculture sector represented about 2.9% or \$4.44 million. The leading four MFIs (FINCA, Baobab, Visionfund and SMICO) account for about 70% of the total lending of the microfinance sector.

**MFIs offer loans of up to \$100,000, a limit mandated by the Central Bank, with maturity that typically goes up to two or maximum 36 years.** SMICOs, grants loans of between \$60,000 and \$100,000, repayable in 12 months with a monthly nominal interest rate of 2% to 2.5%. Under special circumstances, they have issued credit with a ticket size higher than \$100,000. Given the high interest rates, coffee cooperatives and other borrowers tend typically to work with alternative lenders, such as impact funds.

**FINCA was a partner financial institution along with EquityBCDC for the DFC guarantee scheme.** Under this credit guarantee scheme, it received an allocated guaranteed capital of \$1.75 million giving it a potential to issue \$3.5 million loans in the agriculture sector (based on a 50% risk coverage). At the end of the program, the utilization rate of the credit guarantee scheme was 99.9%.

**To promote lending in small scale agricultural companies, SMICO's founders have launched the AgriEst Guarantee Fund.** The fund has an initial capital allocation of \$400,000 and has the ambition to grow to \$3 million with additional commitments from donors and investors. The fund targets enterprises, cooperatives and agricultural associations operating in the provinces of Tanganika, Maniema, South Kivu, North Kivu, Tshopo and Ituri. AgriEst covers 50% of working capital and investment loans with a maximum term of 12 and 36 months respectively. To be eligible, cooperatives and associations must have a minimum of 50 members, a turnover of at least \$10,000 and recorded financial statements. To date, three cooperatives have benefited from the guarantee. AgriEst is open to expanding the number of partner financial institutions beyond SMICO and is looking for blended finance (subsidy to cover operational costs, first loss capital, second loss capital) to scale its activities in the agriculture sector.

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<sup>58</sup> EIB technical assistance program for financial sector operations in West & Central Africa. Retrieved May 2022, from [https://www.msmeфинансета.eu/wp-content/uploads/2021/08/EIB-TA-for-FS-Operations-in-West-and-Central-Africa-TA-AA-000959-001-brochure\\_english.pdf](https://www.msmeфинансета.eu/wp-content/uploads/2021/08/EIB-TA-for-FS-Operations-in-West-and-Central-Africa-TA-AA-000959-001-brochure_english.pdf)




### C. International impact funds

A few international impact funds are active investors in the Congolese agricultural sector. SIDI, Root Capital, and Alterfin have been investing in the DRC since the early 2000. Impact funds finance farmer cooperatives and agricultural enterprises that benefit local farmers. Compared to traditional financial institutions, international impact investors are less averse to risk. Often, they cover a long list of countries from headquarters or few regional offices to minimize costs, and lack on-the-ground presence in the DRC. This factor limits their capacity to engage with new clients and develop new opportunities.

Impact investors provide technical assistance, seasonal working capital loans and, in few cases, investment loans. Seasonal loans range from \$75,000 to over a million repayable in 12 months with interest rates between 8% and 12%. CAPEX loans are rare and granted only to long-term clients. When granted their tenures generally spread over a period of up to 5 years.

To qualify for a loan from impact investors, borrowers must have an operating track record of 2 to 3 years. Companies must have also a minimum turnover of \$250,000 and selling for the export market. Organizations that have an Operational Self-Sufficiency (OSS) in the range of 80%- 90% at minimum with a positive trend are preferred. Impact investors prioritize investments that have significant social and environmental impact. Businesses whose activity involves a minimum of 100 farmers, and which benefit from environmental and social certifications are favored.

Figure 46. Eligibility criteria of selected agriculture-focused impact investors

Criteria			
Minimum years of operation:	2	3	2
Impact, compliance and certification:	Benefits for smallholder farmers should be demonstrated (e.g., by fair-trade label)	Positive impact for smallholder farmers or rural communities	Benefits for smallholder farmers should be demonstrated (Social/Environmental label)
Profitability indicators:	90% OSS and positive trend	-	OSS 80% and positive trend
Collaterals:	Fixed assets collateral	Purchase order / Supply contract can be enough	Personal guarantee and/or fixed assets collateral highly recommended
Minimum number of farmers:	150	-	100
Minimum loan amount:	\$US 100,000	\$US 200,000	\$US 75,000
Minimum yearly sales:	\$US 500,000	\$US 250,000	\$US 250,000
Target market:	Agriculture	Agriculture	Agriculture
Reporting requirement:	-	-	Audited accounts highly recommended but not compulsory
Export:	Yes	Yes	Yes

Source: Alterfin, Root Capital and SIDI

## D. Development finance institutions

**DFIs' direct investments in the Congolese agricultural sector have been limited.** Few DFIs, such as Bio Invest, CDC, DEG, FMO and IFC are active in the agriculture sector, but the numbers of transactions completed over the last decade has been small with a cumulative value of less than \$150 million<sup>59</sup>. The coffee sector has not received any investment direct investment from DFIs. The small activity of investors in the sector is the result of the limited development of large-scale commercial agribusiness companies in the DRC and the inherent risks of the agricultural sector.

**The small scale of coffee sector operators limits opportunities for DFIs.** DFIs typically grant loans in excess of \$2 to 5 million, but few actors in the coffee sector have the capacity to absorb such amounts. Only two operators export more than 2,000 tons of coffee, and only five export more than 300 tons. Given the few direct investment opportunities in the Congolese coffee sector available, DFIs channel most of their support through local financial institutions. BIO Invest and KfW, for instance, have invested in the Fairtrade Access Fund covering Africa and Latin America and managed by Incofin, which has provided funding to some coffee cooperatives in the DRC.

**The African Development Bank (AfDB) is also partnering with EquityBCDC to channel its support to the agriculture and coffee sectors in the DRC.** AfDB is implementing the Youth Entrepreneurship Project in Agriculture and Agribusiness (PEJAB<sup>60</sup>). The PEJAB, with a budget of \$57.1 million, aims at financing 2 million agricultural projects over the next 5 years and contributing to the creation of nearly 10 million jobs in the DRC.

**The World Bank offers support to the agricultural sector through the National Agriculture Development Program.** This \$520 million project aims to improve agriculture productivity and market access of smallholder farmers in selected project areas in the DRC by providing subsidies to farmers to allow them to fund agri-Inputs (seed, fertilizers etc.) and equipment. The pilot is planned in the Kasai region.

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<sup>59</sup>Plantations et Huileries du Congo in 2013 and 2015 but also African Milling in 2018

<sup>60</sup> PEJAB is an acronym in French standing for Projet d'entreprenariat des jeunes dans l'Agriculture et l'Agrobusiness

## VIII. Opportunities and challenges

**The DRC coffee sector has the potential to significantly increase the quality and volume of its coffee exports.** As already highlighted, the DRC enjoys favorable soil and climatic conditions for the production of high-quality Arabica, and it produces already some high-quality specialty coffees. Nevertheless, the country's total coffee production is small, also when compared to its regional peers in East Africa. The global growth in demand for coffee, and in particular of specialty coffee, which accounts for one of every two cups sold in the US, creates significant opportunities for the DRC. While production in some of the largest production countries like Brazil and Colombia are expected to suffer from variable climatic conditions<sup>61</sup>, the DRC has significant potential to increase its production, now a fraction of what it was 40 years ago.

**Figure 47. 2019 Coffee exports from East Africa (in '000 tons)**



**The DRC can increase the value and reputation of Congolese coffee by promoting specialty and sustainable coffee.** The increase in demand for specialty coffee creates opportunities for more farmers to scale production of certified coffees that command a higher price in the international market. DRC's diverse coffee growing regions provide different characteristics and flavor profiles. There is a need to market specific target regions for their diversity in coffee characteristics. The sector can create marketing strategies that promote the elements which can appeal to international buyers and consumers.

**Partnerships with international buyers and supporting farmer cooperatives in improving farming and processing practices are critical to increase the quality of local coffee.** Current production yields are generally low, because coffee trees are often aged and due to poor farming practices. Quality is hampered due to lack of appropriate processing equipment. The lack of coffee pulpers and hullers often results in farmers using traditional processing methods that damage the coffee beans, thus impacting on the exportable quality of the coffee. Over the past decade, producer organizations, exporters, private sector companies and donors have come together to revitalize the coffee sector in the DRC. The influx of development financing in North and South Kivu from organizations like Elan RDC and USAID, as well as

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<sup>61</sup> McGrath, M. M. (2022, January). *Climate change: Key crops face major shifts as world warms*. BBC. Retrieved April 2022, from <https://www.bbc.com/news/science-environment-60141387>

private sector initiatives from the likes of Nespresso and Starbucks, have served to build a foundation for better quality Congolese coffee and highlight the potential for further growth.

**Figure 48. Determinants of crop productivity**

Farm practice	Definition
Coffee variety/species	Varieties have different characteristics which impacts productivity
Crop density	The optimal number of trees per hectare which varies depending on variety and the production system
Harvesting method	Manually picking cherries can let coffee trees grow taller and subsequently improve yield
Plant position	Determines how much sunlight a tree receives, which directly affects growth and yield
Soil preparation	Make production areas more resilient during periods of drought or high temperatures
Pruning	Pruning allows plants to recover after being harvested by producing new branches
Crop age	Coffee trees are renewed when productivity gets particularly low

**Cooperatives and socially conscious traders can support coordinated procurement of inputs, joint marketing and sharing of technical assistance.** Increased cooperation between smallholder farmers and key stakeholders can reduce and spread processing costs amongst actors. For farmers to earn more, they need to work with stable partners who have access to suitable processing equipment. Supporting cooperatives and traders to purchase processing equipment such as washing stations will improve productivity and quality. When these actors also have access to premium markets, they can sign advanced contracts which can open credit lines with financial institutions. This allows cooperatives to pay farmers on time for their harvest and fulfill their contractual obligations.

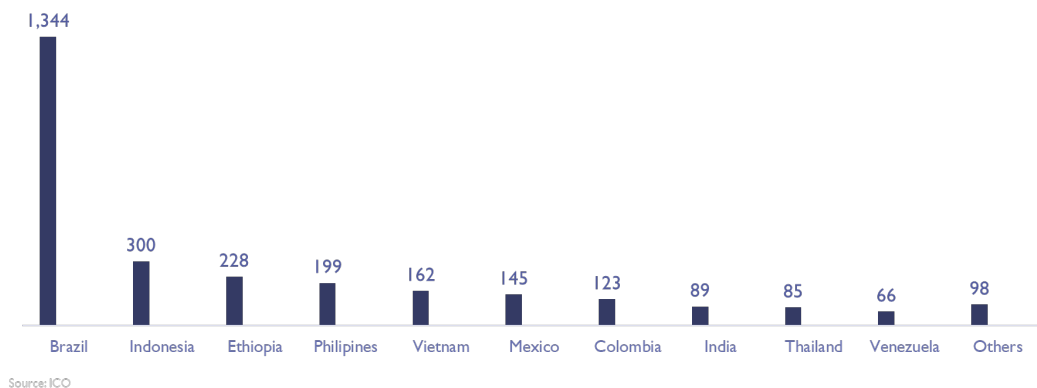
**Cooperatives need to improve their management practices to increase their access to required working capital and capex funding.** Farmer cooperatives and other coffee intermediaries face a significant obstacle in their limited access to credit. A few microfinance institutions, local banks and impact funds provide working capital and seasonal loans to local cooperatives. Nevertheless, interest rates offered by local banks and MFIs are typically very onerous, and the reach of impact investors is still limited. To improve access to required financing, it is necessary to attract a larger pool of investors focused on achieving both financial returns and long term positive social impact. At the very same time, cooperatives and other local stakeholders need to improve their management practices to be able to access these funding sources.

**Local roasteries could earn significantly higher margins by scaling the transformation of green beans into branded coffee for the international market.** There is growing interest from global consumers in the origin of coffees. Congolese coffee roasteries can navigate a path to higher earnings if they can penetrate international markets. However, to tap into the international market, Congolese roasters require financing for working capital and capital expenditure. Exporting roasted coffee means roasters must produce efficiently so they may also cover the costs of packaging, transport, and storage. One of the main challenges has been identifying and entering key markets for locally roasted coffee. A few local roasters, such as Virunga Coffee and La Kinois, have been able to sell their brands to the European market through e-commerce channels. Alpha New, a Goma-based roastery, is using an alternative model by creating a joint venture with an American partner. Alpha New exports green coffee to the US, from where its coffee partner roasts and packages the coffee.

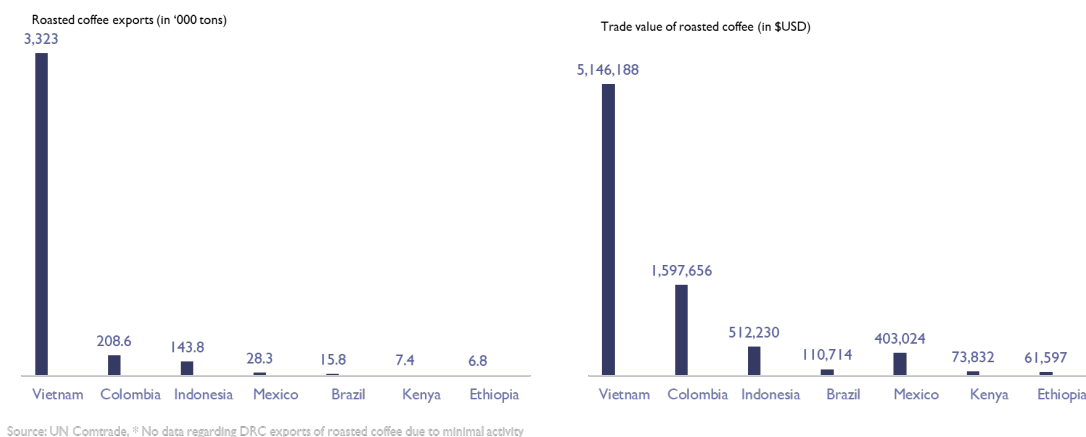
**Increasing domestic consumption can serve as a buffer for farmers against international price volatility.** Domestic coffee consumption in the DRC is still low. Producing countries such as Brazil and Indonesia offer a blueprint to increasing domestic consumption. The Brazilian domestic coffee sector was supported by a

multimillion-dollar marketing campaign by its government in the 1980s. Government support helped increase Brazil’s total consumption from 390,000 tons in 1985 to 1.3 million tons in 2020. Over this time, Brazil was able to raise per capita consumption from 2.2 kg a year to 6 kg a year<sup>62</sup>. In Indonesia, the two largest roasters produce over 60 thousand tons annually. In the DRC, roasters such as Petit Café and Café Kivu are developing a niche market for specialty coffee serving retail coffee shops, supermarkets, and hotels. La Kinoise, a Kinshasa-based roastery, has been successful in promoting an affordable coffee for Kinshasa consumers, produced from coffee beans grown in Kinshasa.

**Figure 49. Domestic coffee consumption from producer countries, 2021 (in ‘000 tons)**



**Figure 50. Roasted coffee exports from producer countries, 2020**



**To tap into the roasted coffee market is challenging and will require building local quality standards and developing marketing channels.** The amount of master roasters and Q-graders (graders of roasted coffee using the Specialty Coffee Association standards) in the DRC is small. The roasting process, when done well, is complex and involves heating the green coffee to transform the sugars, proteins, and acids contained in each coffee bean into aromas of coffee flavors based on the profile. In modern coffee

<sup>62</sup> Carrington, B. C. (2020). *Better Returns for East African Coffee Producers*. International Trade Center. [https://cupofexcellence.org/wp-content/uploads/2020/04/more-from-the-cup\\_final\\_hi-res-2.pdf](https://cupofexcellence.org/wp-content/uploads/2020/04/more-from-the-cup_final_hi-res-2.pdf)



roasting, this process blends scientific data logging with a roaster's intuition. Capacity building activities in partnership with established coffee organizations can help local roasters develop skills on cupping, barista training, and roasting. This can gradually improve the quality of roasted coffees and make them adequate for the domestic market as well as international markets. An in-depth assessment of the conditions for market access internationally could help local roasters understand international standards for exporting roasted coffee. Increased research on consumer preferences, trends, distribution channels, logistics and transportation options are needed for targeted international markets<sup>63</sup>.

**The DRC's weak transportation infrastructure and related red tape are a major hindrance to the growth of the coffee sector.** The transport sector is a key enabler to increase coffee output and the competitiveness of coffee value chain actors. However, nearly all of the DRC is landlocked, and the poor conditions of transportation infrastructure exasperates economic inequalities across the provinces and between urban and rural areas. The transport system in the DRC was designed as an integrated network of roads, rivers, and railways connecting all regions of the country. The transportation system in the DRC has never fully developed due to weak institutional capacity, limited financial resources allocated to the sector, and the impact of war<sup>64</sup>. For coffee farmers, the deficiencies in transportation and road infrastructure translate into lower farm-gate prices. In the absence of critical transport and rural roads, farmers often lack access to profitable market opportunities and struggle to shift from subsistence trading of coffee to more productive forms of trade. For coffee traders in eastern DRC, road networks can be paralyzed for lengthy periods due to insecurity caused by armed groups and illegal fees. Several armed groups as well as government agencies and the military erect barriers and extort traders. The impact of these issues is that the coffee sector's trade flows are slow and not cost-effective.

**Reforming the regulatory environment to reduce fiscal pressure and red tape can make exports more competitive.** In 2015, the government signed a ministerial order officially bringing down the FOB export taxes on agricultural products from 3.5% to 0.25% of the total FOB cost. Previously, all the procedures imposed by regulatory authorities and government officials required as many as 57 signatures and 7 stamps<sup>65</sup>. Despite these changes, the Fédération des Entreprises du Congo (FEC), noted that there were still 61 payments required (fees, duties, taxes and royalties). These payments include 12 to the central government, 20 to public establishments and services, 23 to the provinces, and 6 to the decentralized territorial entities. According to FEC, 15 of the collections had no legal basis and did not appear in the taxes, duties, levies and fees set by the Ordinances-Laws n°18/003 and 18/004 of March 13, 2018. An additional 26 of the collections were deemed to be redundant or contradictory. A further 5 payments required were exempted by Law No. 11/022 of December 24, 2011. Consequently, export collections still represented 16.25% of the FOB value in the western region of the DRC and 7.25% FOB value from the east of the country, against 1% in neighboring countries<sup>66</sup>. FEC requested that the government review the duties, taxes and royalties imposed on the agricultural sector as well as the legal basis for each tax. In

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<sup>63</sup> Downie, R. D. (2018, March). *Assessing the Growth Potential of eastern Congo's Coffee and Cocoa Sectors* (No. 18307). Center for Strategic and International Studies. [https://csis-website-prod.s3.amazonaws.com/s3fs-public/publication/180307\\_Downie\\_CongoCoffeeCocoa\\_Web.pdf](https://csis-website-prod.s3.amazonaws.com/s3fs-public/publication/180307_Downie_CongoCoffeeCocoa_Web.pdf)

<sup>64</sup> World Bank. (2018, December). *Implementation Completion Results Report: DRC Multi-Modal Transport Additional Financing* (IDA-H5950). <https://documents1.worldbank.org/curated/en/384251547237922911/pdf/drc-icr-133218-01082019-636827544467919205.pdf>

<sup>66</sup> FEC. (2021, January). *CONFLIT AVEC ONAPAC REMARQUES ET SUGGESTIONS DE LA FEC POUR ALLEGER LA FISCALITE ET PARAFISCALITE SUR L'AGRICULTURE ET L'EXPORTATION DES PRODUITS AGRICOLES DE LA ROC.*

December 2020 and January 2021, the Prime Minister’s office convened a set of workshops to address fiscal issues related to agricultural exports. This would allow the government to simplify and reduce required payments. It was recommended that the government reviews the administrative procedures and documents required to export coffee to limit the collection of duplicative duties, taxes and fees and make the sector as competitive as East African nations.

**Figure 51. Tax rates of green coffee exports (Eastern Africa)**

Country	Tax rate	State Agencies	Total FOB cost per container
Rwanda	1%	NAEB, Ralis	\$238.08
Tanzania	1%	Coffee Board, BRLA, TAEX, Minagri	\$238.08
Uganda	1.93%	Uganda Trade Portal, UEPB, Minagri	\$461
DRC	0.25%	DGDA, SQAV, OGEFREM, DGRAD	Varies per region
	16%	ONAPAC, OCC, OGEFREM, SEGUCE	Varies per region

Source: FEC

\*Additional Illegal taxes in DRC worth up to 7% of FOB may be paid to security agencies, CEFUMA, and CNPR