

## AGRICULTURAL POLICY REVIEW FOR COFFEE PROMOTION IN NEPAL

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### ABSTRACT

*Coffee is one of the important cash generative crops in the mid hills of Nepal. Coffee, being an important high value crops, is mostly grown in marginal areas with minimum use of improved technologies. In line with the focus of agricultural policies, the concerned organizations have not taken adequate initiatives for the promotion of coffee cultivation. In Nepal majority of coffee is wet processed, which is considered best method for good quality coffee. However, there is lack of updated manpower and improved technologies to work in this regard. As a result of which, quality of Nepalese coffee is below international standard. Around 65 percent of Nepalese coffee is exported and the rest amount is processed and supplied in the domestic market. Majority of coffee is exported through personal contact of traders rather than institutionalized marketing channel. Therefore, there is gap between what policies have stated and what actually implemented in the real fields for the promotion of coffee.*

**Key words:** Agricultural policies, production, processing and marketing of coffee.

### INTRODUCTION

Coffee is one of the important cash generative crops in the mid hill regions of Nepal (Gautam and Dhakal, 1994). Historically, it is believed that a saint named Hira Giri in Aanchaur, Gulmi district, introduced coffee for the first time in Nepal from Myanmar in 1944 (Bastola, 2007). Initially, coffee spread to several districts through the initiation of individual farmers as well as by an ADB/N supported programs. From the mid-seventies, coffee was grown as a commercial crop. During mid-eighties, the coffee production in some districts was quite high. However, during late eighties marketing problems and poor returns from the crop forced many farmers to cut down their mature trees (Shrestha, 2004 as cited by Bastola, 2007).

Presently, coffee is cultivated in around 40 districts, but it has been producing commercially in about 20-22 hill districts. In Nepal, coffee is predominately grown by resource poor and small scale farmers under marginal upland condition (Shrestha et al., 2008) and mostly they don't use chemical fertilizers and pesticides in the production process. In most of cases, coffee\_cultivation is using unproductive, fallow and the lands prone to degradation and thus it helps to conserve soil erosion, degradation of land and also provides 20-25 percent extra income than traditional cereal crops like maize and millet (Chaudhari et al., 2008). Coffee cultivation has an enormous potential to provide farmers a good employment and income generation opportunities especially in the mid-hills regions where there is a huge amount of land and suitable climatic condition for growing the coffee successfully.

In Nepal, coffee was initially known as the drink of the foreigners, tourists and expatriate, but nowadays, it has become popular among the Nepalese and therefore has received numbers of domestic consumers (Shrestha, 2004 as cited by Bastola, 2007).

In terms of area coverage and production, Nepalese coffee has tiny presence in comparison with the world production and area. However, Nepalese highland and organic coffee is known in the international markets owing to its high quality cupping and sound aroma (Poudel et al., 2009). Especially Nepalese coffee has high demand in Japan, America, South Korea, Germany and the Netherlands. However, in comparison with demand in the

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international market, Nepalese coffee has low production and below the standard quality specified by the developed countries.

Most of the coffee grown in Nepal is considered organic as coffee is grown in the natural condition and most of the farmers do not use chemical fertilizers and pesticides during cultivation and processing. There has been growing interests from both government and non-government sectors for promoting organic coffee and farmers are also motivated to produce coffee owing to higher demand in the international market.

Considering the importance of high value crops including coffee and with the view of expanding the production and productivity, government has promulgated several agricultural policies, strategies and guidelines for the promotion of production, processing and marketing of high value crops. For instance, the Coffee Policy 2004 was promulgated with an aim of fostering production and marketing of coffee.

In this context of emerging coffee as a valuable commodity, it is worthwhile to evaluate the focus and implication status of agricultural policies for promoting the production, processing and marketing of coffee in the country.

## **OBJECTIVES**

The main focus of this study is to analyze the content and implication status of agricultural policies, strategies and guidelines for strengthening the production, processing and marketing of coffee in the domestic as well as international market. Specifically, the objectives of this study are as follows:

1. To review agricultural policies for promoting the production, processing and marketing of coffee,
2. To analyze the implication status of agricultural policies for promoting coffee business.

## **METHODOLOGY**

The research is of exploratory type and the sources of data are primary as well as secondary. For gathering the relevant information for this study, the interviews were conducted with policy makers, farmers involved in coffee production, coffee processors and traders who are involved in the trading and marketing of coffee.

For the secondary data, papers published in different journals, technical books and annual publications, policy review and impact studies etc were used. Specifically the analyzed policies for this study were: Coffee Policy 2004, Periodic Plans: 9<sup>th</sup> and 10<sup>th</sup> Five Year Plan, Three Year Interim Plan (2007-10), Agriculture Perspective Plan (APP), Three Year Strategies Plan of Coffee, National Agriculture Policy 2005, Nepal Agri-Business Promotion Policy 2007 and Implementation Strategies 2009, Biodiversity Policy 2006, Coffee Policy 2004, Impact Evaluation of APP 2007 etc.

## **REVIEW OF AGRICULTURAL POLICIES**

Some of the policies have special focus on promotion of coffee. These policies with their focus have been mentioned in the following paragraphs.

### **AGRICULTURE PERSPECTIVE PLAN (APP)**

The APP (1994/95-2014/15) is long term strategic policy for accelerating agricultural growth by increasing the factor productivity, transforming the subsistence based agriculture into commercial one by strengthening the production pockets, reducing poverty by providing the employment opportunities and promoting the involvement of private sectors in the development of agriculture. One of the prioritized outputs of APP is to promote high value crops. For this it has prioritized different crops for different ecological zones of the country including Terai, mid hill and high hills. For instance, high hill for apple, mid hills for

citrus, nevertheless, coffee has not recognized as a high value crop for the mid hill region of Nepal by APP though it has great scope of expanding in the mid hill regions. The huge marginal landscape of mid hills, which are prone to depredate and marginal, can be tapped for the commercial production of coffee. The APP emphasize paradigm shift from subsistence oriented farming to market oriented farming through a land use system based upon sound ecological principles and conducive agricultural policies. Though APP has not focused especially coffee as one the high value crops, the subsequent agricultural policies and strategies have paved the way for the promotion of coffee as high value and exportable commodity.

#### PERIODIC PLANS

The Nineth (1997-2002) and the Tenth (2002-2007) Five Year Plans have focused to increase production and productivity of high value crops for poverty reduction and protection and promotion of agricultural biodiversity and environment (NPC, 2002). For the first time Nineth plan prioritized promotion of coffee plantation to fulfill the long term strategic plan of APP (NPC, 1997). The Tenth Plan had also targeted to increase the production of coffee but strong emphasis has not been given for import substitution and promoting the export of coffee. The Tenth Plan has focused on production support on coffee and started to give 50% subsidy on the sampling of coffee to the farmers (NPC, 2002). However, the Nineth and Tenth Plans could not pave the way for large scale production of coffee considering its commercial importance and speciality in the marginal areas of mid hill regions. In line with the Agriculture Perspective Plan (1994/95-2014/15), the Ninth Plan initiated the Pocket Package Approach (PPA) for the different agricultural commodities, however, the production pockets for the coffee was not specified. Additionally, the Ninth and Tenth has not given importance for the promotion of organic agriculture adequately.

#### THREE YEAR INTERIM PLAN (2007-2010)

The Three Year Interim Plan (2007-2010) came with the focus of transforming subsistence based farming into commercial one and conserving, protecting and utilizing agricultural biodiversities via development and dissemination of environmentally friendly technologies. This reveals that this plan has apparently given significance to the organic production of high value crops. Realizing the potentiality and emerging role of coffee on the national income and improving farmers' income, this plan has included the coffee, among other 22 valuable commodities, as a priority commodity and fixed target of 685 MT from the base year of 360 MT. The Three Year Plan emphasized mid hill areas for the promotion of coffee production (NPC, 2007).

#### NATIONAL AGRICULTURAL POLICY (NAP) 2006

The NAP came as a main document to provide clear direction for the development of agriculture sector in line with APP and to specify major promotional areas of agriculture sector. The NAP's main objectified areas are to commercialize agricultural commodities based on comparative advantage and speciality of geographical setting to make agricultural products more competitive in the regional and international markets and to conserve and promote the natural resources, agro-biodiversity and environment (MOAC, 2006). The NAP strategically prioritized the areas having specific potentiality for promoting the high value commodities in order to get higher return. The NAP has stressed over the use of the upland and marginal public and private lands for commercial production of high value crops and such stipulated areas could be apt for growing coffee especially of organic one. In the context most of the coffee is grown organically, this policy can be said has spotlighted significantly for fostering coffee as high value crops in the mid hill regions. However, the coffee has not got high focus in comparison with other high value agricultural commodities.

#### COFFEE POLICY 2004

The coffee policy has formulated to pave the way for involving the private sectors, NGOs, cooperatives and other members based organizations for promoting the production, processing and marketing of coffee in a sustainable and organized way. This policy came to bring momentum in the business of coffee in the context whereas other agricultural policies did not stress visibly for the promotion of coffee. The emphasis of coffee policy is to substitute the import and promote the export of coffee expanding area under coffee production and finally to conserve the ecological environment of mid hills area (MOAC, 2004). This policy has focused on developing the modern technologies for the production and processing of coffee with the active participation of government and private sectors. Importantly, the policy has also given priority to develop necessary manpower for promoting the production and processing of coffee; encouraging the manufacturing of necessary machines and equipments for the coffee processing within the country. Additionally, this policy stressed to coordinate with foreign countries consulates located in Nepal for exporting the coffee; messages about important of organic coffee and other promotional activities conducted and promoting the organic coffee production. Equally, this policy focuses to establish laboratory for improving the quality aspect of coffee; higher education and trainings and conducting the research for promoting production, processing and marketing of coffee. Nevertheless, this policy doesn't focus for the development of special pockets for organic coffee, which is paramount importance for the strengthening the organic coffee in the country.

#### AGRICULTURAL BIODIVERSITY POLICY-2007

The main point of this policy is to protect, promote and use of agricultural biodiversity for sustainable development of the agricultural sector and furthermore focused to conserve and promote traditional knowledge, skills and practices of farming. Therefore, this policy has undoubtedly emphasized for the promotion of organic production of high value agricultural products owing to its significance for biodiversity conservation and high demand in international market. With the center of attention of escalating the organic production, this policy can be said to have a strong promotional character for organic production like coffee and other crops (MOAC, 2006).

#### AGRI-BUSINESS PROMOTION POLICY (ABP)-2007

The ABPP is likely to contribute significantly towards the promotion and development of the high value crops developing commercial pocket areas based on the specialty and possibility of concerned areas. Though the concerned organizations (DOA, DADOs) have focused for the development of pockets of other high value crops, the center of attention of this policy isn't for establishing the production pockets of the coffee with view of the expanding its production and productivity with the additional support of necessary infrastructures. The ABPP further stresses on the demand lead training for promoting agri-business to increase knowledge and skills of the producers, processors and other activities of commercial production of the high value crops (MOAC, 2007). Moreover, this policy clearly mentioned about promotion and development of organic production zone to support and to increase the volume of organic production of agriculture commodities. Since most of the farmers are cultivating coffee without using the chemicals, this policy is highly positive for fostering organic coffee production. In the same way, ABPP also has stated to develop the organic certification of the organic products so as to provide legal guarantee of purity and to meet the international standard of the organic products.

## NATIONAL TECHNICAL STANDARD FOR ORGANIC AGRICULTURE SYSTEM (NTSOAS) 2008

Of late, the government has promulgated National Technical Standard for Organic Agriculture System 2008, a specific guidelines for promoting organic cultivation. The NTSOAS is in line with the guidelines of IFOAM<sup>2</sup> and has focused on specific land arrangement for organic production; prohibits contamination of agrochemicals in crops production, processing and storage; limit the use of chemical fertilizers and un-decomposed organic matter and urban waste; protect farmers from getting fair prices from their agricultural products and to develop organic certification system. The NTSOAS has further cleared the way for promoting the organic production and processing of high value agricultural products.

## IMPLICATION STATUS OF AGRICULTURAL POLICIES

## COFFEE PRODUCTION

Even though most of the agricultural policies focused on promotion of high value crops, the area expansion and production of coffee has not increased adequately (see the table 1 for details). In the recent years, even the production of coffee is decreasing instead of increasing with escalating the areas under the coffee cultivation.

Table1. Area and production of coffee in Nepal in different Years

Particulars	2000/01	2001/02	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09
Area (Ha)	424	596	764	925	1078	1285	1396	1450	1531
Production (Mt.)	88.7	139.2	187.5	217.6	249.8	300.4	460.2	276	267.6

Source: MOAC (2009)

Mostly the coffee producers grow the coffee in small scale with 100-150 plants. In some districts farmers have grown coffee in maximum of 6-8 ropani areas. This trend depicts that farmers are not ventured yet into large scale production of coffee. Besides area coverage and production, the productivity of Nepalese coffee is also comparatively low than the productivity of other countries. At present, the productivity of green bean is 300 Kg per hectare nonetheless; the productivity of coffee can go as high as up to 3,000 kg per hectare (AEC, 2006). Though most of the farmers don't use chemical inputs while cultivating the coffee, the production can't be said pure organic as most of coffee is not grown under strict supervision and specified guidelines of organic production system.

There are limited manpower/coffee experts for supporting the farmers for coffee cultivation. Normally, farmers don't get required suggestions/advices from the concerned organizations about cultivation practices of coffee. However, in some cases District Coffee Producers Associations (DCPA), District Cooperative Association Union (DCAU) and village level farmers' cooperatives motivate the farmers for organic production of coffee because organic coffee has higher demand in the international markets and thus farmers can get higher prices than conventional products.

The trainings, which are considered crucial for providing the new knowledge and skills to the coffee farmers about the production, however, such supports, are provided inadequately. District Agriculture Development Offices (DADOs), Tea and Coffee Development Board (TCDB), National Coffee and Tea Development Programs (NCTDP) have responsibility of providing technical services to the coffee growers, have very limited programmes and support for promoting coffee cultivation in the country. Coffee related programs are not prioritized programs of the DADOs. Mostly the DADOs, district level

<sup>2</sup> International Forum for Organic Agriculture Management

government organizations, don't provide production inputs such samplings and fertilizers etc. However, farmers have established their own nurseries for the coffee samplings.

Some NGOs like Helvetas, is supporting the coffee farmers via Coffee Promotion Project (CoPP) in nine districts<sup>1</sup>. Its focus is on promotion of quality coffee production rather than area expansion of coffee and therefore CoPP has been helping farmers for promoting the organic coffee. However, its coverage and level of support is not sufficient to meet the need and requirement of majority of the farmers for wider expansion of coffee cultivation in the concerned districts.

#### CERTIFICATION OF COFFEE

Certification is particularly useful because it allows for consistency of characteristics, improves market transparency, provides marketplace credibility and captures the demand and price incentives of niche markets (Lewin et al. 2004, LYON, 2009). In Nepal certification for organic coffee is in rudimentary phase. From the government side, established mechanism has not developed yet for promoting the organic certification. However, Gender Equity and Environment Division (GEED) of MOAC has recently prepared National Technical Standard for Production and Processing of Organic Products for promoting organic production, processing and certification of organic products. National Coordination Committee for Organic Agriculture Processing System has also been established for facilitating this process.

NGOs especially Hevetas, Nepal Permaculture Group and some private organizations are catering the technological need of organic coffee producers to some extent. Nonetheless, the role of CoPP/Hevetas is appreciable for supporting organic methods of coffee production and inspection, certification and marketing. Considering the importance of organic coffee certification for the promotion of organic coffee production, CoPP has started (in 2005) Internal Control System (ICS<sup>2</sup>) in collaboration of District Cooperatives Federation, Gulmi for the certification of coffee. From the experiences of Gulmi, this system has also started in the Lalitpur district. The ICS is an aim of gaining experience on requirements of ICS, expenses needed for the system and identify cost effectiveness and sustainability and appropriateness of ICS in Nepal (CoPP/Helvetas, 2009).

In the organic production, certification process is expensive one in case of Nepal because only small amount of coffee has been produced so far and thus traders and companies are not actually ready for supporting in the certification process. International agencies such as National Association for Sustainable Agriculture, Australia (NASAA) (Australia) and Japanese Agriculture Standard (JAS) have involved in the certification of coffee. Aforesaid, only NASAA, an Australian organization is certifying the organic coffee especially of Gulmi district and have just started in the Lalitpur district. Thus small fraction of coffee is sold as certified organic coffee in the international market.

#### COFFEE PROCESSING

Processing method of coffee has great role for the quality coffee production. In Nepal generally two methods of processing are practiced namely, dry and wet processing. However, presently, most of coffee is wet processed in which farmers harvest ripe fresh cherries and sell to the pulping centres and then the cherries are pulped, fermented, washed and dried to produce dry parchment at the pulping center. Dry parchment is collected by processor/traders and hulled at the central processing unit to produce green beans (Shrestha, Sharma, and Mishra (2008) and then the green beans are exported.

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<sup>1</sup> Sindhuli, Kavre, Lalitpur, Kaski, Parbat, Syangja, Palpa and Gulmi.

<sup>2</sup> Local people are strengthened technically for inspecting, monitoring and evaluating the cultivation practices of coffee with regards to international guidelines for organic products. Times to time technical supports are provided from the NASAA.

But quality of coffee in wet processing rely on operational processes in the pulping centre and their management: quality of available water used in the pulping centre, types of pulping machine, fermentation duration, facilities available for drying, washing process, storage etc (CoPP/Helvetas, 2008). Basically, Producers' Association, Cooperative Union and private companies are involved in the final processing and packaging of coffee.

For working in line with agricultural policies (including coffee policy) and for processing and production of best quality of coffee, different government and non-government organizations have played significant role. The NTCDB and NCTDP provide pulping machines to the Coffee Producers Cooperatives and District Coffee Producers Associations (DCPAs) on 50% discount. However, due to increasing the business and involvement of even village level cooperatives in the pulping activities, there is high demand of pulping machines.

Besides distributing the pulpers, the NTCDB organizes training programs in coordination with DCPAs and Producers' cooperatives to the farmers and other persons who involve and can involve in the pulping and/or processing activities for improving the quality of coffee. Nonetheless, the numbers of trainings are very limited to strengthen the capacities of the farmers and other concerned persons in the business of processing. Because of low intensities of training concerning to processing and management, there are not adequate numbers of well trained persons either in cooperatives or in producers' associations. However, the NCTDP also doesn't provide adequate numbers of trainings so as to increase farmers' and processors' competencies for the processing of best quality coffee.

Though agricultural policies including the Coffee Policy have focused to develop modern technologies in the processing of high value crops, such improved technologies are not introduced and/or developed so far to support the processing of coffee. There are not adequate research activities for the generation of new technologies/or develop new practices in coffee processing. Moreover, there is not strong mechanism either in the government or nongovernment organizations to provide new technologies to the processors to improve processing practices and better off the quality of coffee. Additionally, as mentioned by the policies especially of coffee policy and Agribusiness Promotion Policies to promote the manufacturing of equipments and tools necessary of processing of coffee but such practice has not developed yet in Nepal. All required tools are imported from abroad and thus quality of processed coffee isn't uniform owing to varied sorts of processing machines.

#### MARKETING OF COFFEE

Market is vital aspect of coffee business for getting higher return. Among the different agricultural products produced and exported from Nepal, coffee is growing as a competitive one with 7.3% share of country's total of 15% agricultural export share (FAOSTAT/World Bank, 2006). Participation in international trade with the developed countries will offer great opportunities to Nepalese coffee. But, at the same time, quality obligatory for agricultural products set by these countries are very high that Nepal in many situations may fails to meet these criteria (Adhikari and Adhikari, 2005). In the world market, the demand of organic and highland coffee is high. Due to climatic peculiarity of mid hills of Nepal and thus the coffee produced in these regions have great scope in international markets.

At present, more than 65% of Nepalese coffee is exported especially to Japan, Europe and USA in the form of parchment by the coffee mills and 35% of the total product is processed and supplied in the domestic market (Gautam and et al, 2008). Nepal exports only super quality green bean to overseas markets. Medium and low quality green beans are roasted, grinded and sold in the domestic markets.

Generally, there are four value chains found in Coffee sub sector (Fig. 7).

Nevertheless, there are not established marketing channels for selling Nepalese coffee in the international market directly by producer cooperatives and District level producers associations. Majority of the coffee is exported in the international arenas through personal contact of the traders rather than institutionalized exporting mechanism. Thus there is no certainty of getting market and good prices of Nepalese coffee in the international market. Additionally, there is no transparency in the marketing of coffee: actual price of Nepalese coffee in the international markets is unknown to the producers, cooperatives and producers associations. The traders generally don't disclose the actual prices of Nepalese coffee in the international markets. This has created confusion among the producers.

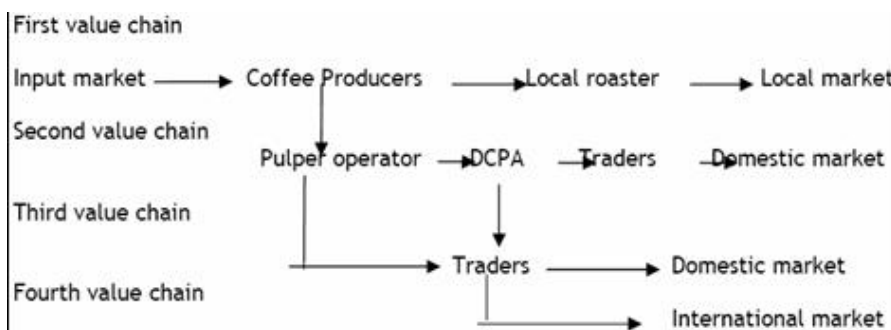


Fig. 7: Different value chains of coffee sub-sector.

In general Nepalese coffee is getting 3.5 times more price than Indian coffee in the world market due to high quality (Pathak, 2004 cited by Bastola, 2007). Nonetheless, market of Nepalese coffee is hitherto very limited because of lack of well developed marketing channels and low volume of production. In case of local market main constraints for the growth of Nepali coffee is due to lack of awareness about coffee among the local consumers. For fostering the marketing of coffee, the NTCDB organizes Coffee Day annually and provide information regarding the coffee to lure the domestic as well as foreign consumers'. The Coffee Day is organized especially for the promotion of marketing of coffee.

Nevertheless, so far limited activities have organized to promote the coffee in the international market by the government and nongovernment organizations. The production of coffee in Nepal is less than the quantity and quality demanded by traders, in this context, it is necessitated to escalate the productivity and quality of coffee in consideration with demand of international market.

Table 3: Export of coffee in different years

Years	2001/02	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09
Quantity (Kg)	9075	16861	24295	65000	100180	112000	127000	88100
NRS (000)	2455	5205	5947	19662	40117	107800	114300	792900

(Source: AEC, 2009)

District Cooperative Federation, Gulmi is the only exporter of certified organic coffee (Certified from NASAA). It mainly exports to Japan and South Korea. Another effort to promote coffee export was done by Highland Coffee Promotion Company, Everest Coffee Company and Plantec Inc. to USA, Japan and Europe (Poudel and et al, 2009).

Though agricultural policies have focused for the strengthening the marketing of Nepalese coffee in the international market, the concerned government organizations have not been able for the promotion of export of coffee in the international market. This reveals that



there is clear gap what is stated in the policies and what is actually implemented in the field. Apparently, there is lack of research on marketing of Nepalese.

## **CONCLUSION**

Although most of agricultural policies have focused for increasing production and area coverage of high value crops like coffee, the area expansion and productivity is not expanding as expectation owing to several limiting factors: lack of sufficient motivation to the farmers, inadequate technical and material supports to the coffee producers, coffee is grown in the marginal area, producers don't adopt the improved cultivation practices, production pockets of coffee have not developed.

Certification is paramount importance for organic coffee but sufficient works has not been done in this regard. Actually, well established mechanism has not developed yet for the certification of organic coffee. However, international agencies such as NASAA, Australia and JAS, Japan are involved for certification of organic coffee in Gulmi and Lalitpur districts. Highland Coffee Promotion Company Limited has been able to certify organic coffee produced in the Palpa and Syangja districts.

In Nepal majority of coffee is wet processed and coffee processed by this method is considered good quality than dry processed method. Generally, cooperatives at the local level do preliminary processing (pulping, washing, fermenting etc) and prepare dry parchment. The DCPA do further processing and final processing is generally done by traders/trading companies at the central units. Due to lack of adequate well trained manpower and modern technologies, the quality of Nepalese coffee is not as demanded by the traders and international consumers.

At present, more than 65% of Nepalese coffee is exported especially to Japan, Europe and USA and 35% of the total product is processed and supplied in the domestic market. Nepal exports only super quality green bean to overseas markets. There are not established marketing channels for selling Nepalese coffee in the international market. Majority of the coffee is exported in the international arenas through personal contact of the traders rather than institutionalized exporting mechanism and thus there is uncertain market and reasonable price to the Nepalese coffee.

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