



**INTERNATIONAL
COFFEE
ORGANIZATION**

ICC 121-4

E

Development of Coffee Trade Flows

Background

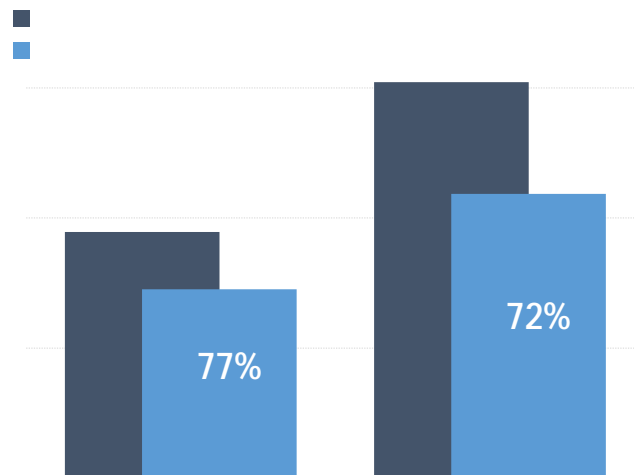
Action

DEVELOPMENT OF COFFEE TRADE FLOWS

I. INTRODUCTION

1

Figure 1: Share of exportable production in total production



This study uses export data, collected by the ICO from Member countries, with import data derived from the reported exports. The data focuses on yearly exports by volume (thousand 60-kg bags). It records all trade transactions at country level, from origin to destination countries, between 1992 and 1996, and, 2012 and 2016. Average volumes of trade flows (exports and imports) for the periods 1992-1996 and 2012-2016 were calculated to compare the evolution of coffee trends and to capture the production cycle, seasonal impacts and changes in the market.

II. EXPORTS

A. Development of export volume

Figure 3: Coffee exports volume and growth by region

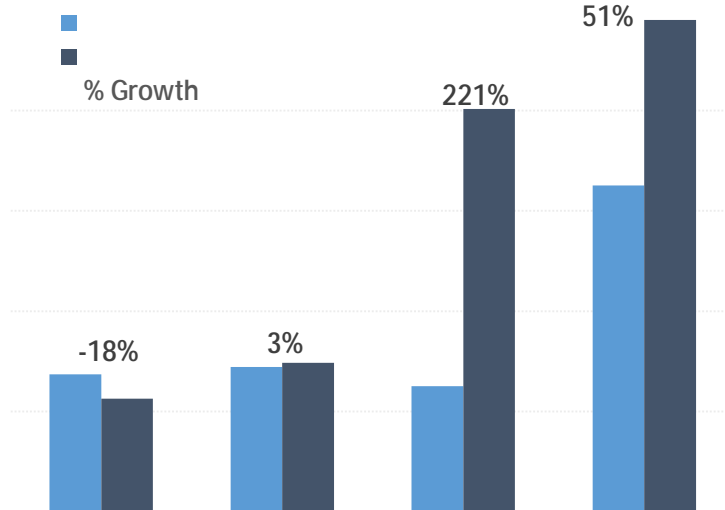
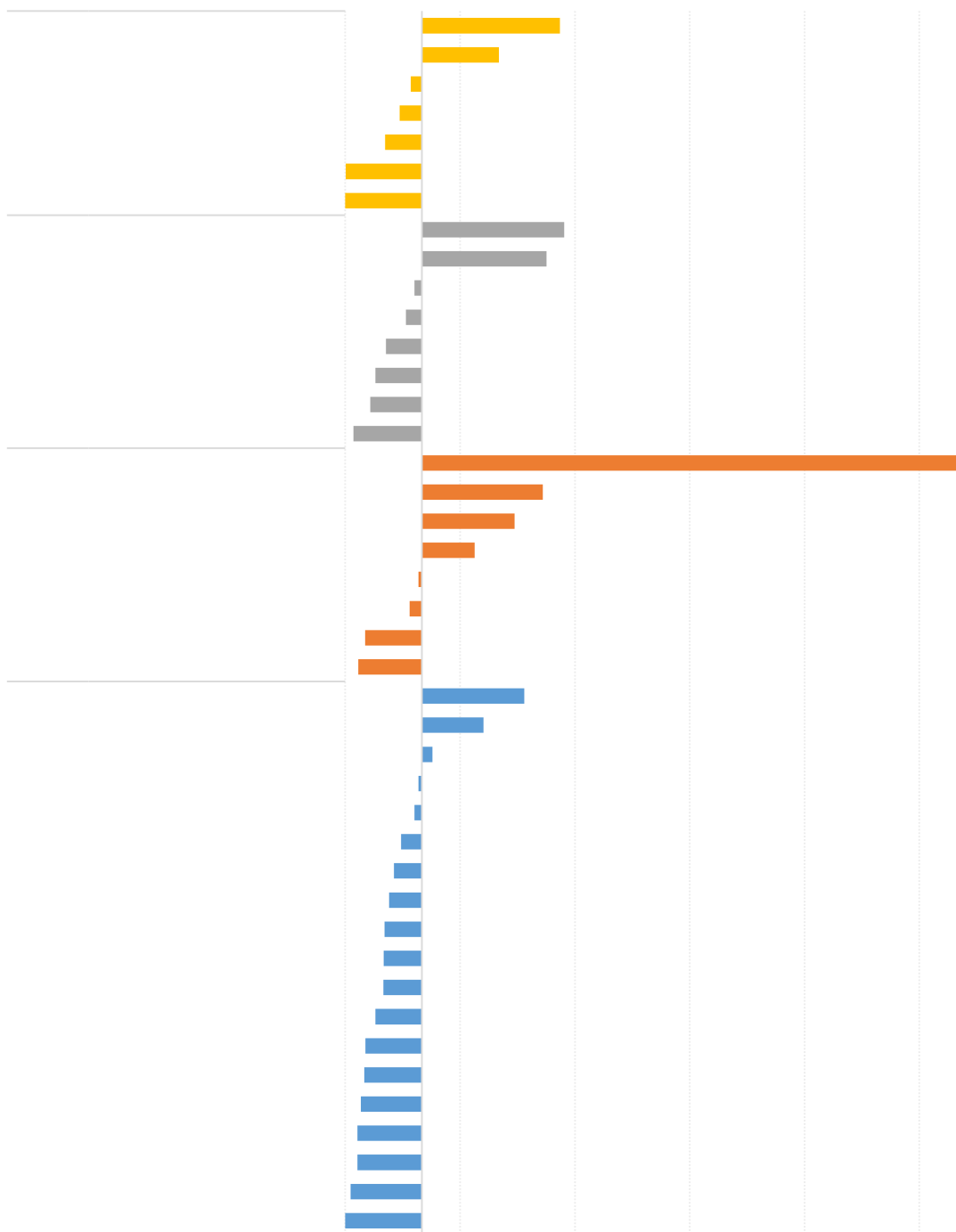


Figure 4: Growth of coffee exports by country between 1992-1996 and 2012-2016 (in %)



B. Concentration of exports

Figure

Table 1: HHI reference thresholds and HHI of concentration of coffee exports

Market characterization	HHI thresholds		HHI of Global Coffee Exports	
	CMA	US FTC	1992-1996	2012-2016

III. IMPORTS

A. Development of import volume

Figure 6: Coffee imports volume and growth by region

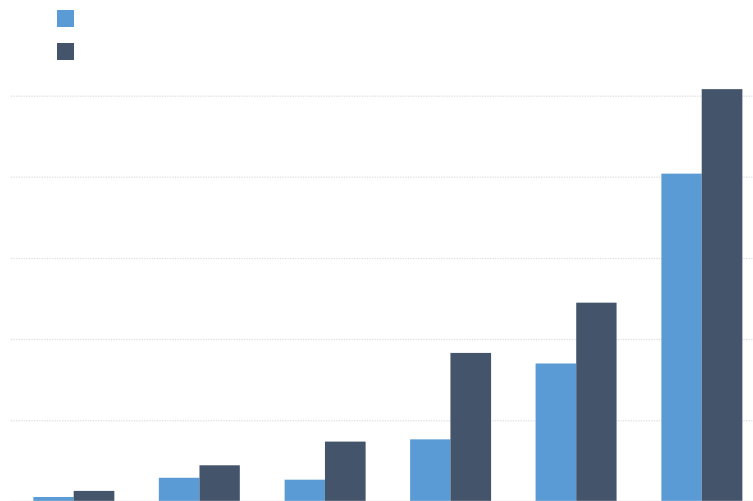
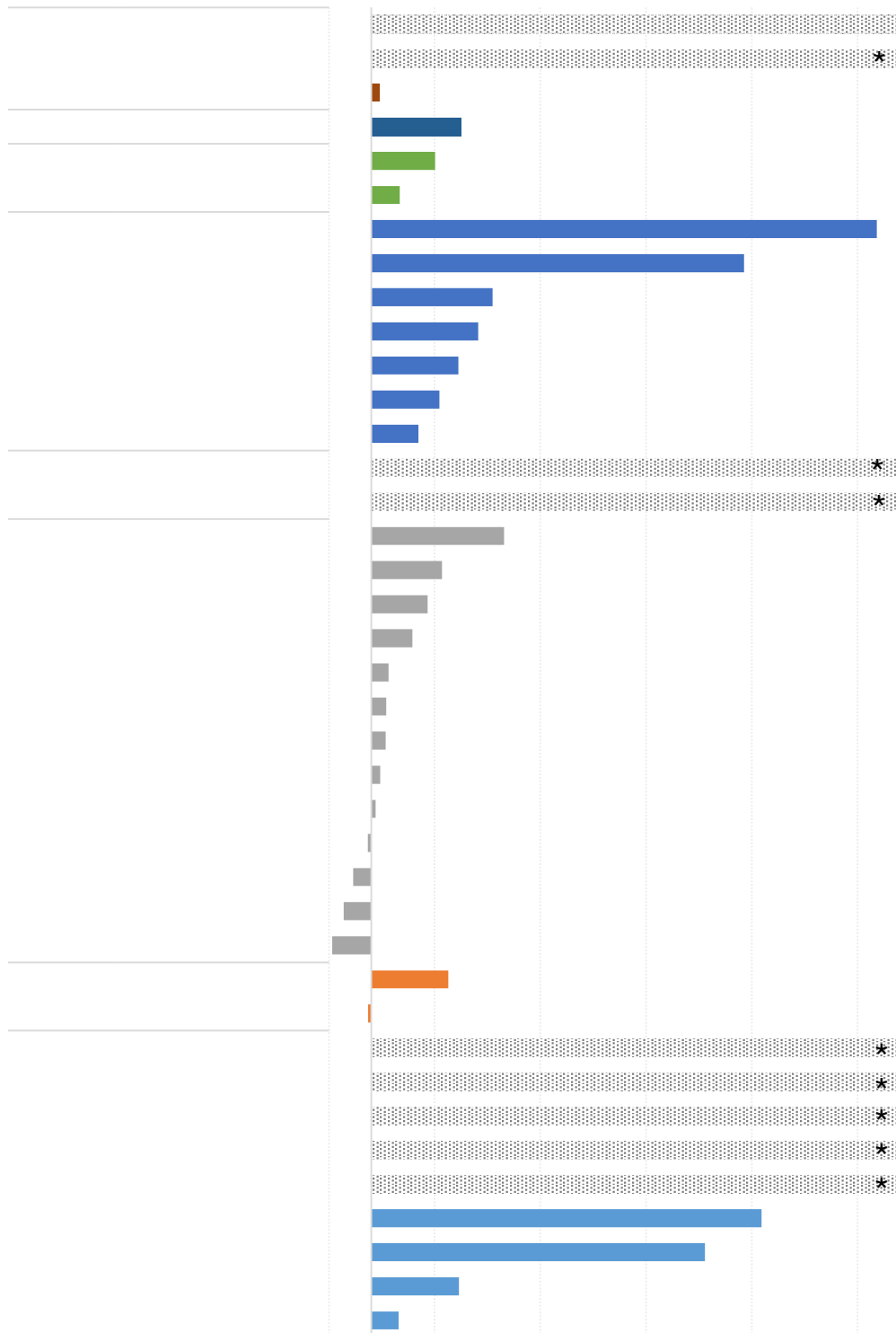


Figure 7: Coffee imports of producing countries (volume) and growth by region

Figure 8: Growth of coffee imports by country between 1992-1996 and 2012-2016 (in %)



B. Diversification of importers

Figure 9. Share of global coffee imports by country

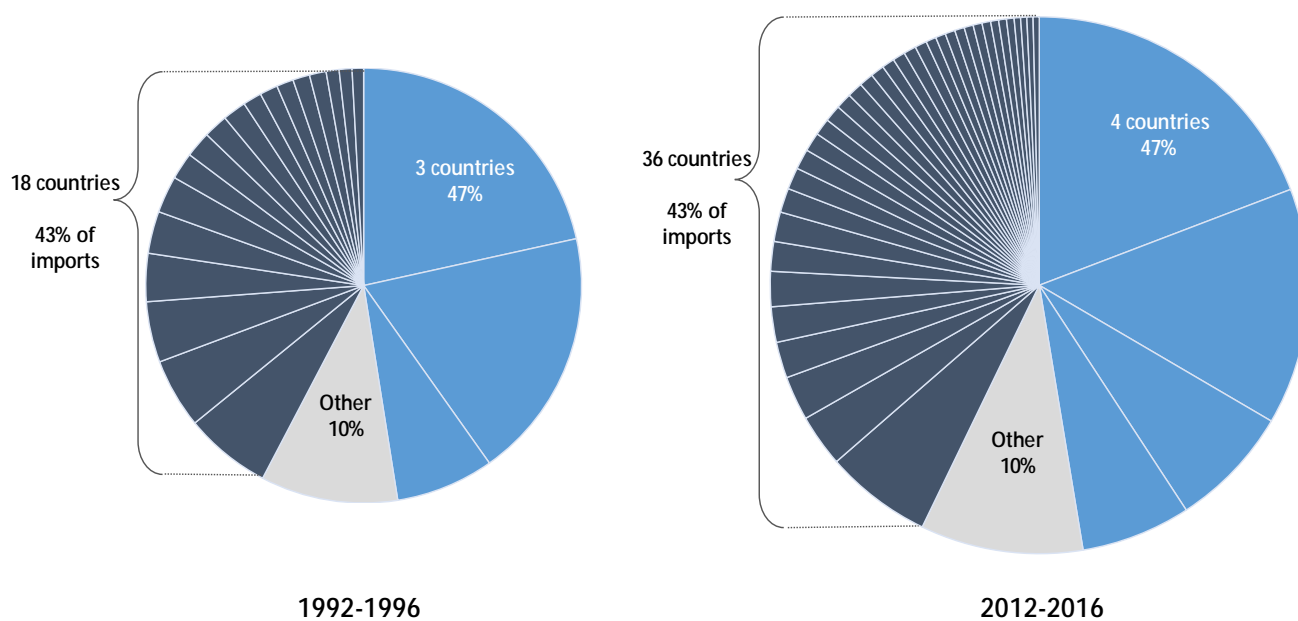


Table 2: HHI reference thresholds and HHI of concentration of coffee imports

Market characterization	HHI thresholds		HHI of Global Coffee Imports	
	CMA	US FTC	1992-1996	2012-2016

IV. COFFEE TRADE BY TYPE (ARABICA/ROBUSTA)
A. Exports

Figure 10: Coffee exports by type and market share (%)

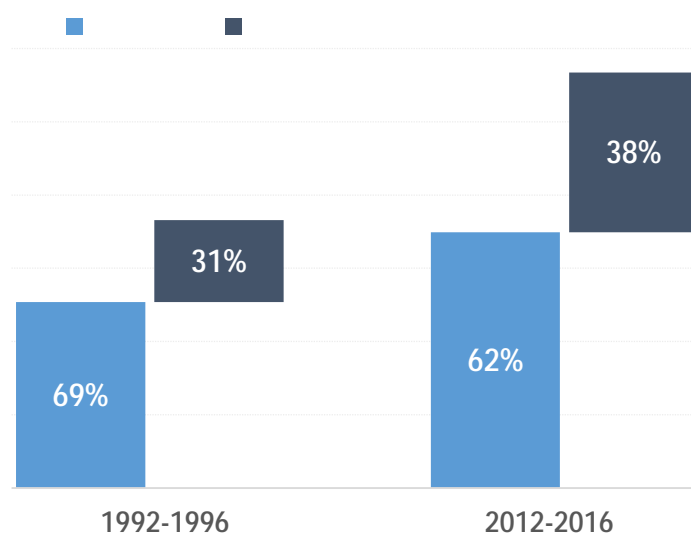
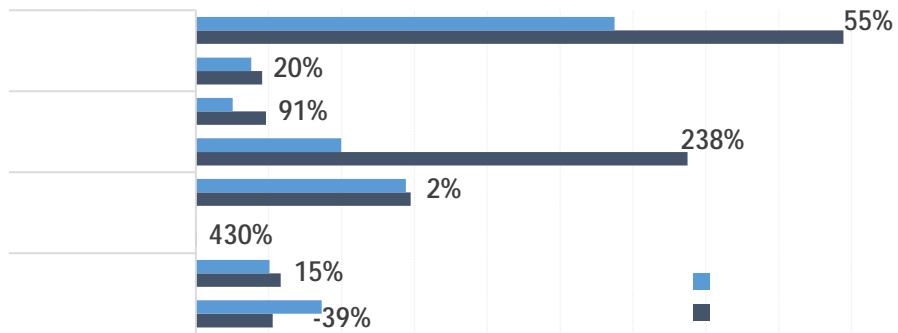
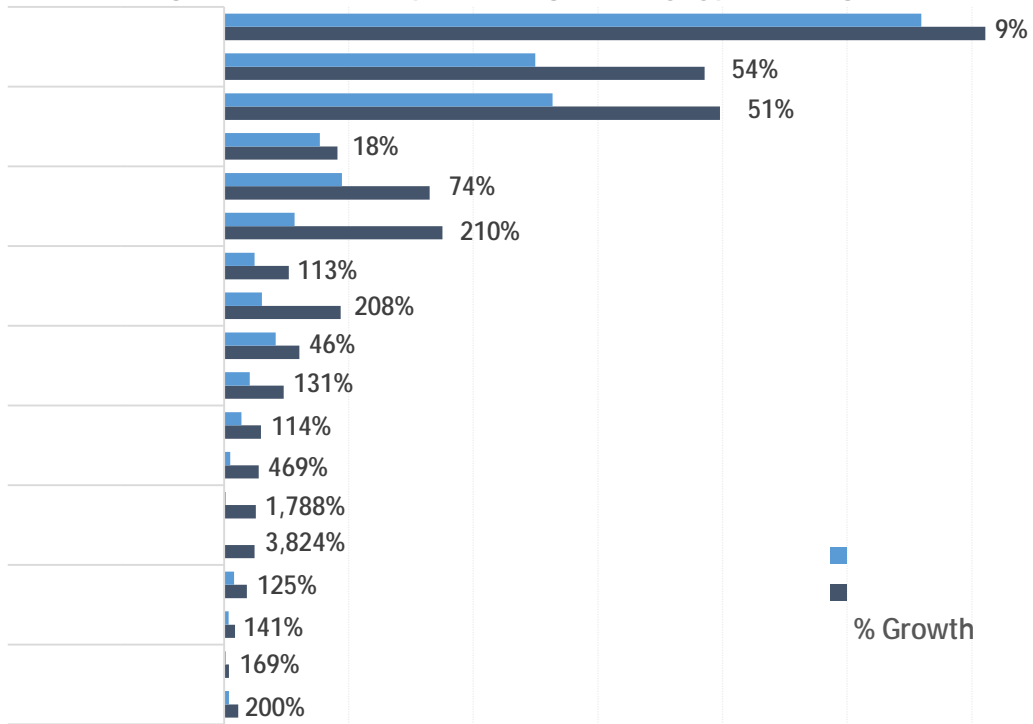


Figure 11: Coffee exports and growth by type and region



B. Imports

Figure 12: Coffee imports and growth by type and region



V. TRADE BY FORM OF COFFEE

Figure 13: Coffee exports by form and market share (%)

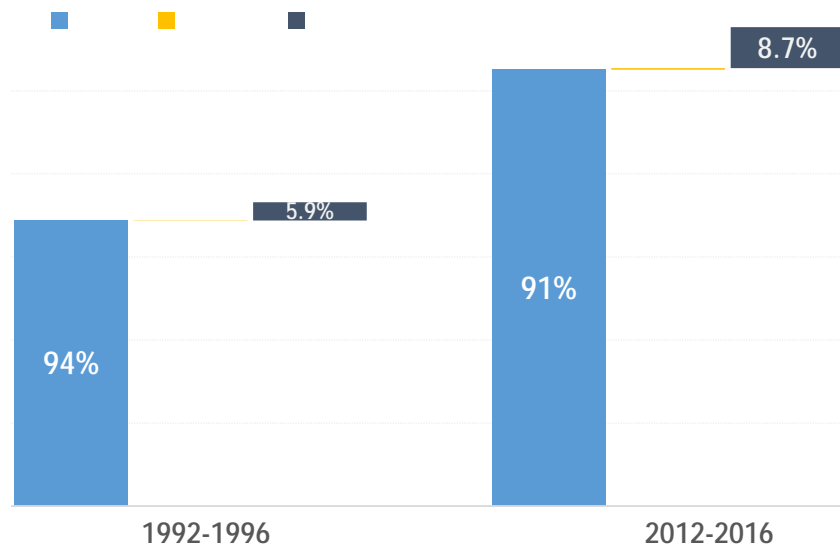


Figure 14. Coffee exports and growth by form and region

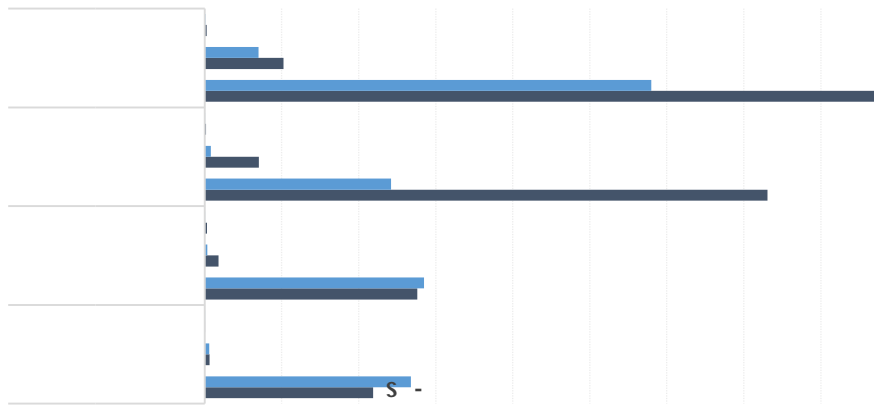


Figure 15: Coffee imports and growth by form and region

VI. CONCLUSIONS AND OUTLOOK

Over the period, coffee production and exports have increased by 61% and 57% respectively

On the exporting side of the market there is an ongoing trend towards higher concentration

On the importing side, there is a trend towards market diversification

While Arabica remains the dominant coffee type, comprising two thirds of global coffee exports, Robusta exports have grown faster over the past twenty years

The share of processed coffee has increased slightly, nevertheless more than 90% of coffee exports continue to be in green form

References

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Trade, Growth and Poverty

U.S. Department of Justice and the Federal Trade Commission. Horizontal Merger Guidelines

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Assessing the economic sustainability of coffee growing

Foreign Trade Regimes and Economic Development: Liberalization Attempts and Consequences

The Observatory of Economic Complexity. International trade data 2015-2016, Exports by country

The Economic Impact of the Coffee Industry

Figure A1a. Regional Global Coffee Trade flows 1992-1996



Figure A1b. Regional Global Coffee Trade flows 2012-2016

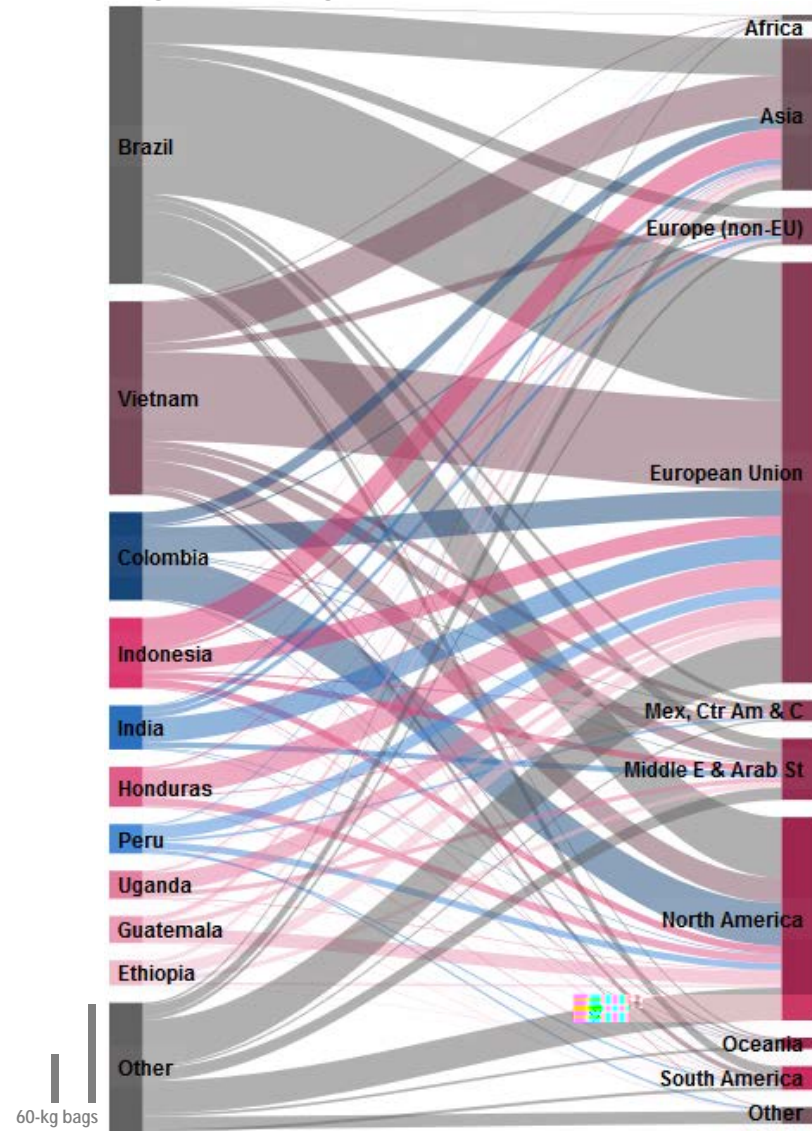


Figure A2a. Global Coffee Trade flows 1992-1996

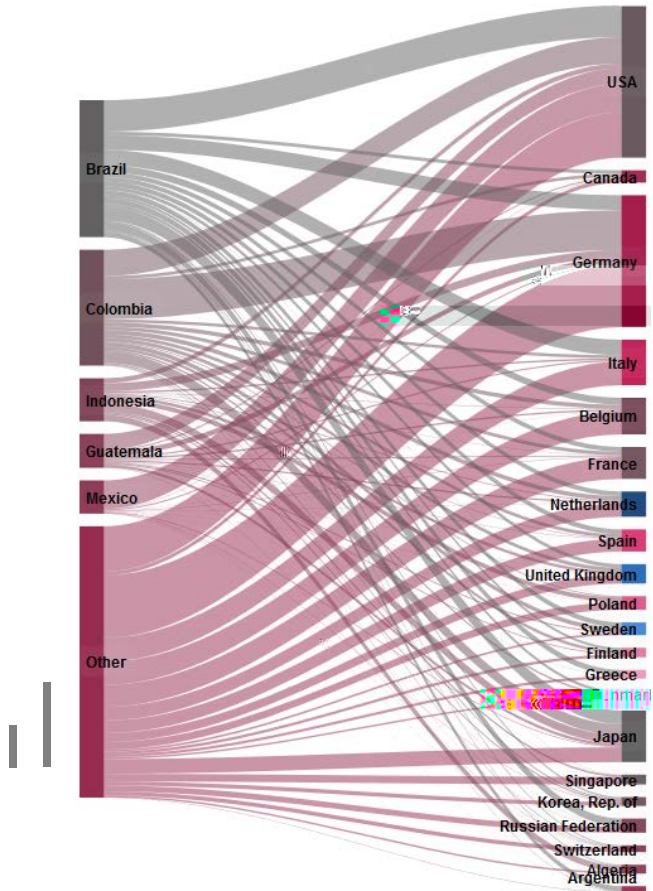


Figure A2b. Global Coffee Trade flows 2012-2016

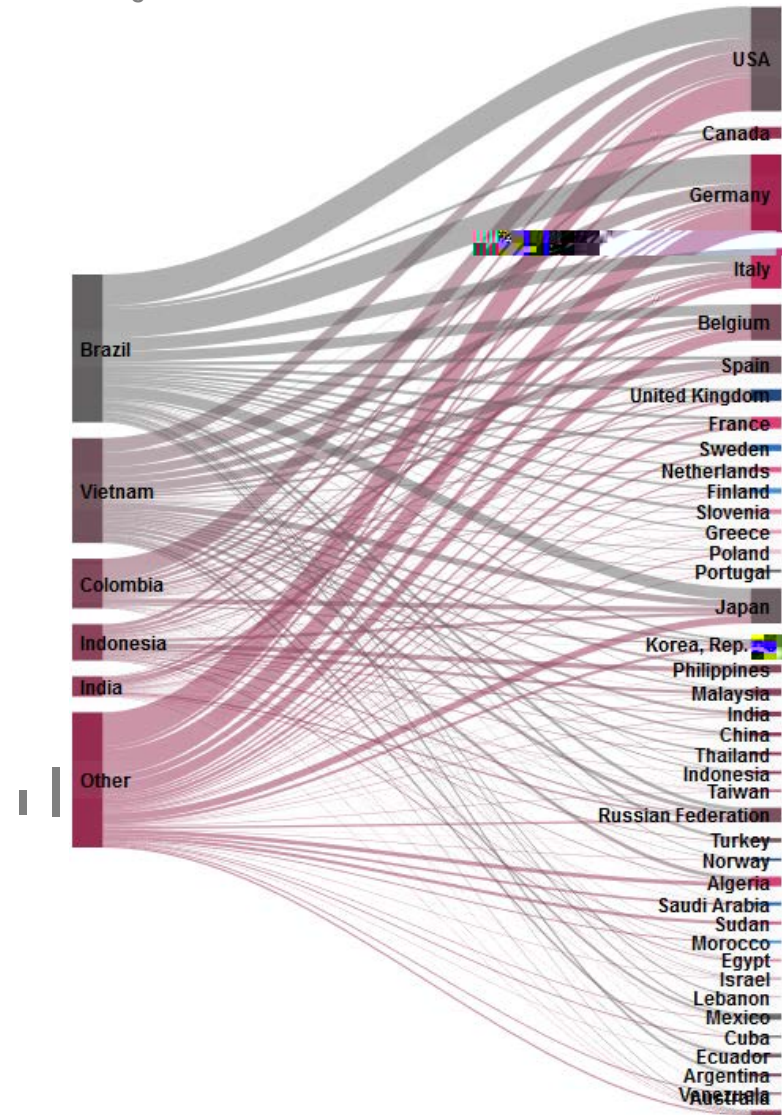


Figure A3a. Arabica Coffee Global Trade flows 1992-1996

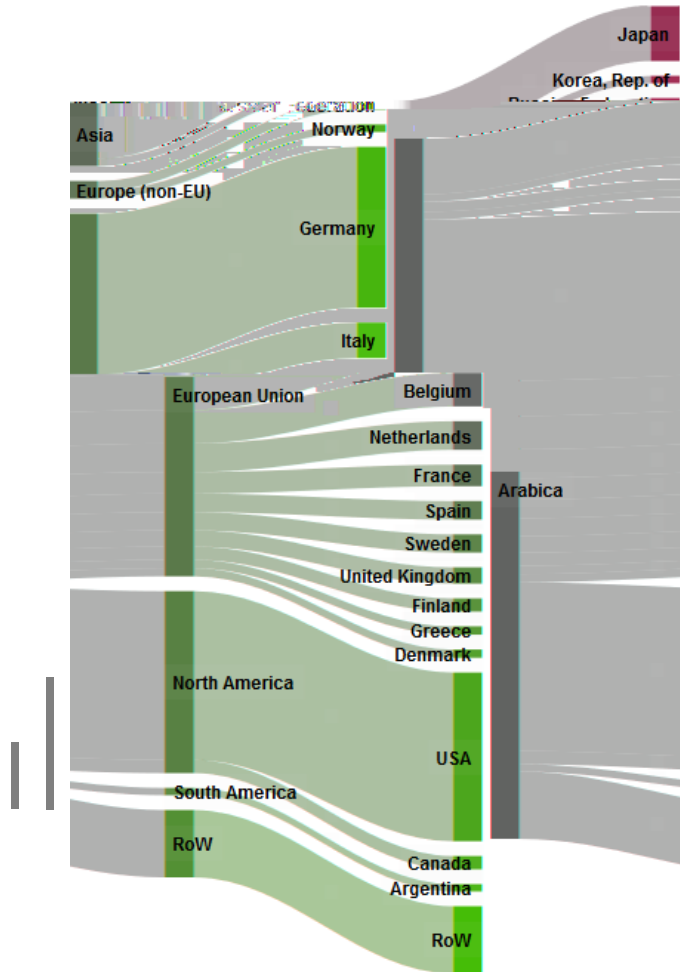


Figure A3b. Arabica Coffee Global Trade flows 2012-2016

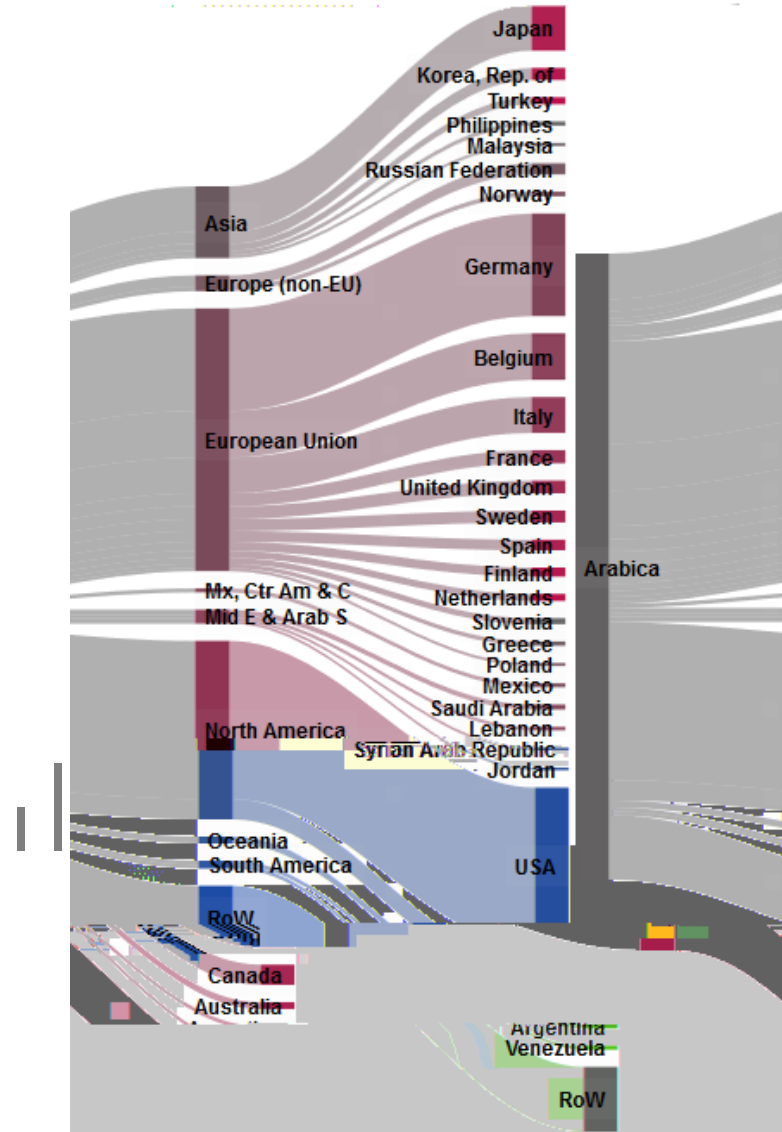


Figure A4a. Robusta Coffee Global Trade flows 1992-1996

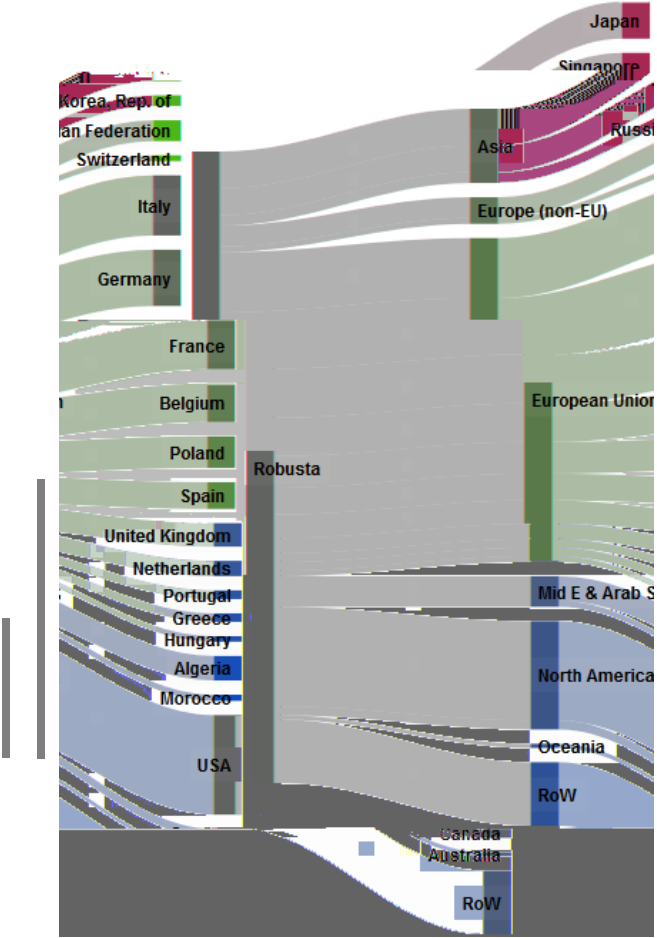


Figure A4b. Robusta Coffee Global Trade flows 2012-2016

