Survey on the impact of low coffee prices on exporting countries

Background

SURVEY ON THE IMPACT OF LOW COFFEE PRICES ON EXPORTING COUNTRIES

I. HISTORICAL AND RECENT MOVEMENTS IN COFFEE PRICES

Figure 1: ICO Composite indicator price, November 2016-December 2018

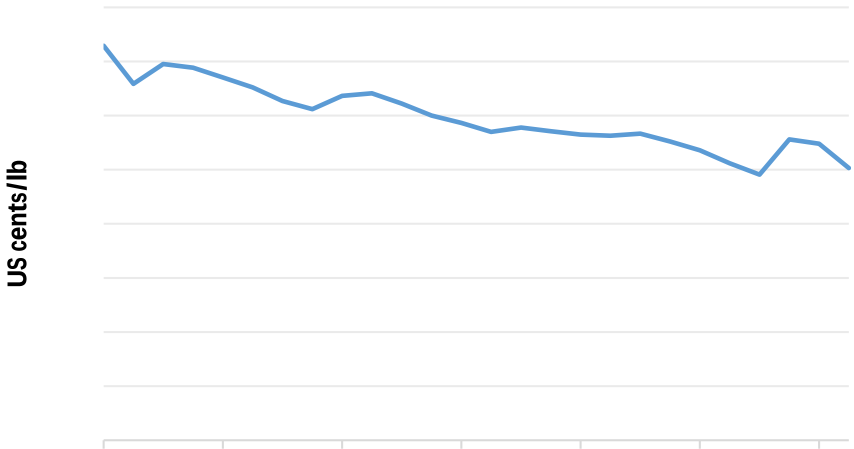


Figure 2: Group indicator prices

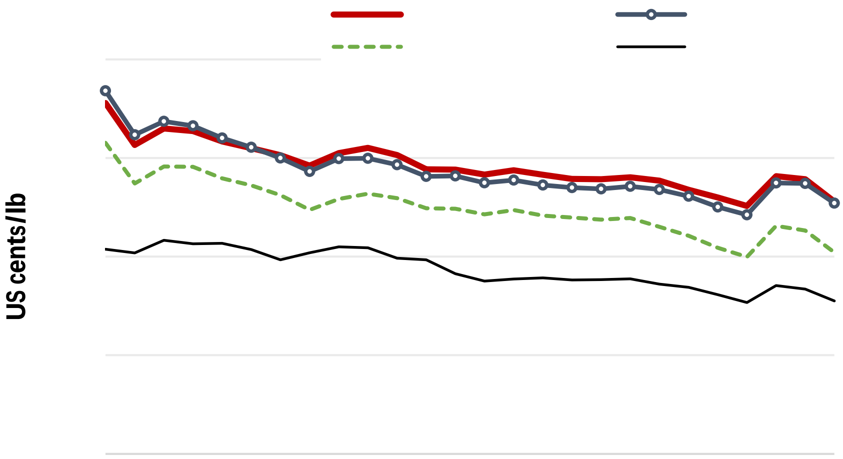
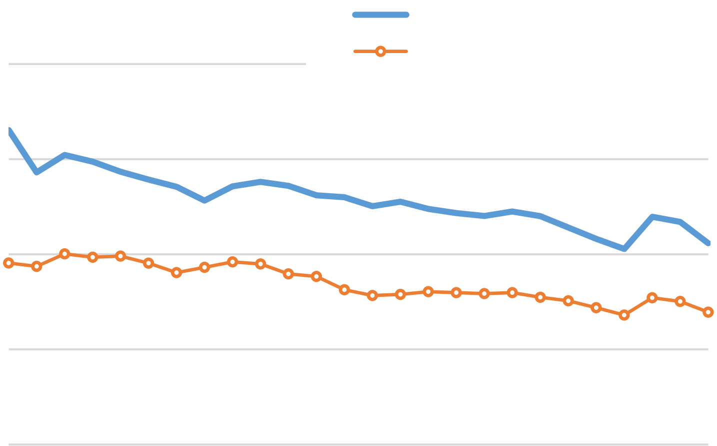


Figure 3: ICE New York and London Futures prices



II. RECENT MOVEMENT OF INPUT PRICES

Figure 4: ICO composite indicator and fertilizer index, November 2016=100

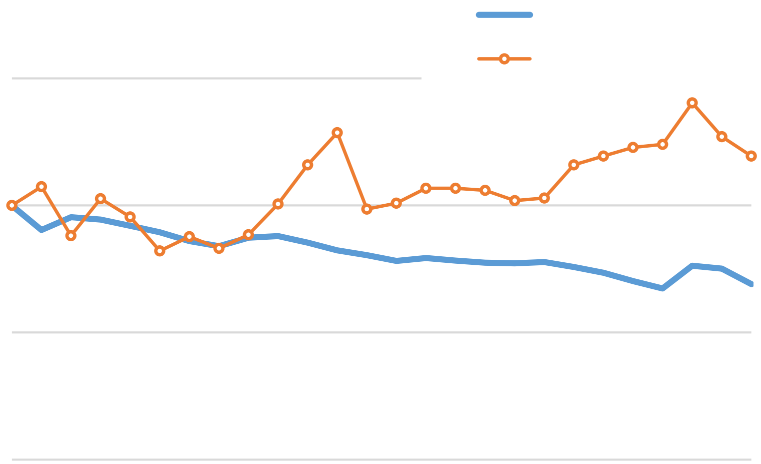
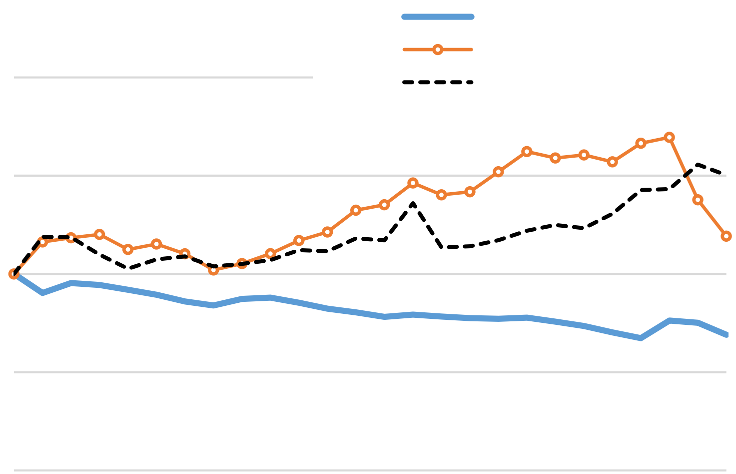


Figure 5: Petroleum products index, November 2016=100



III. SCALE OF THE COFFEE SECTOR IN SELECTED PRODUCING COUNTRIES

Areas under coffee production, coffee farmers and average farm size

Figure 6: Area under coffee in production

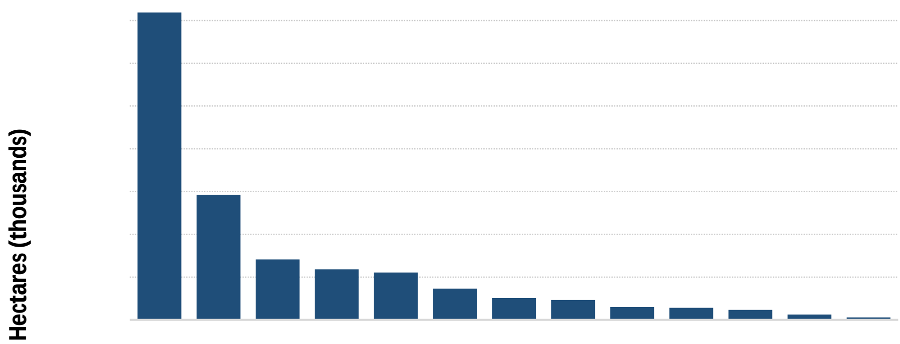


Figure 7: Total number of coffee farms

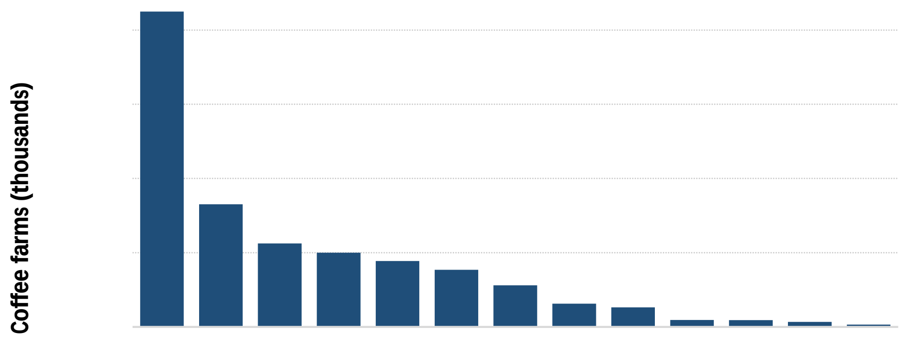


Figure 8: Average farm size

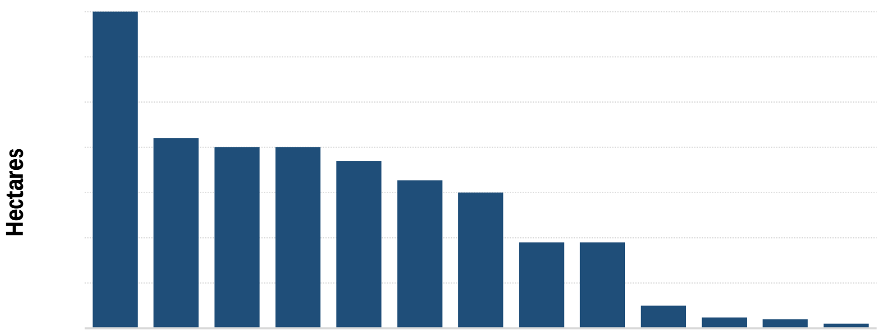
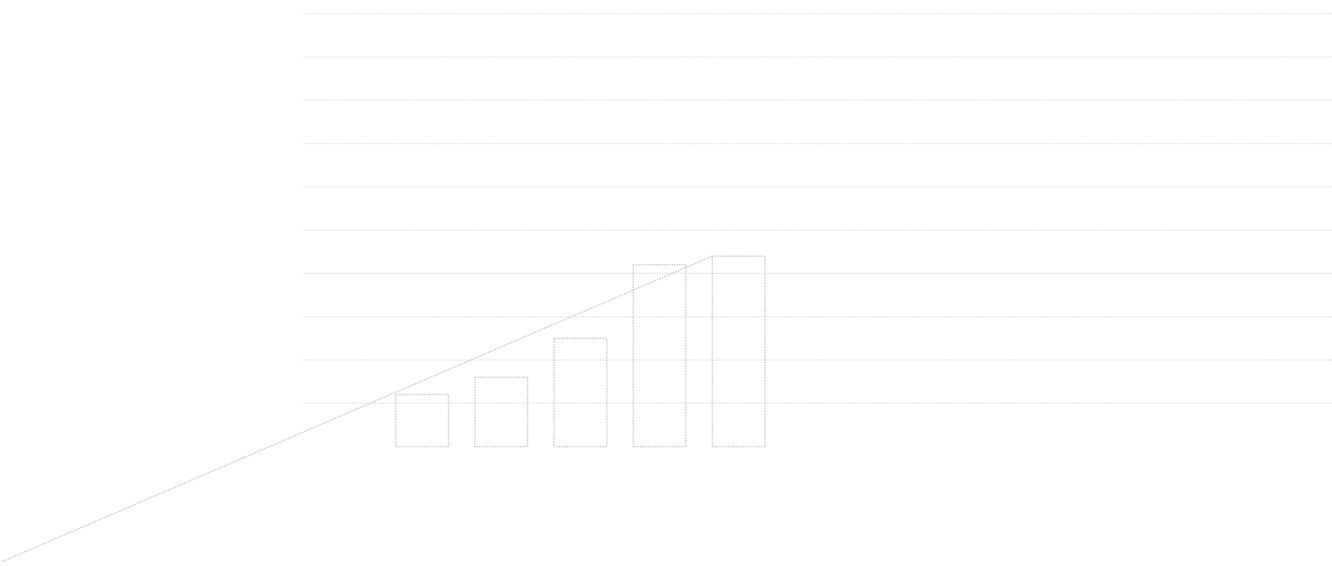


Figure 9: Distribution of farms by size (%)



Employment

Role of women

Figure 12: Percentage of female employees

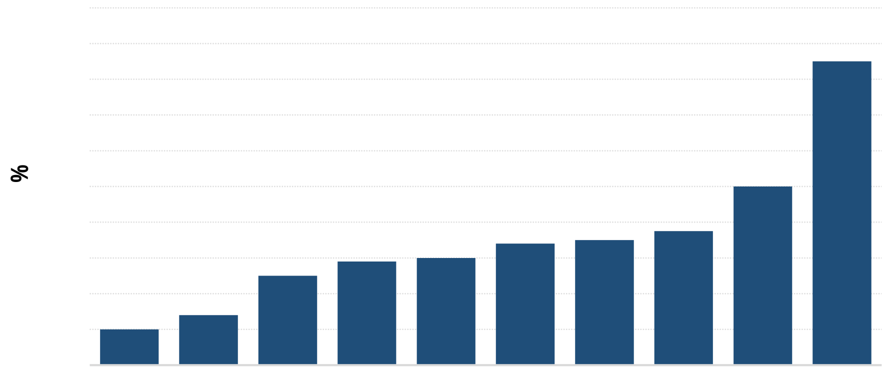
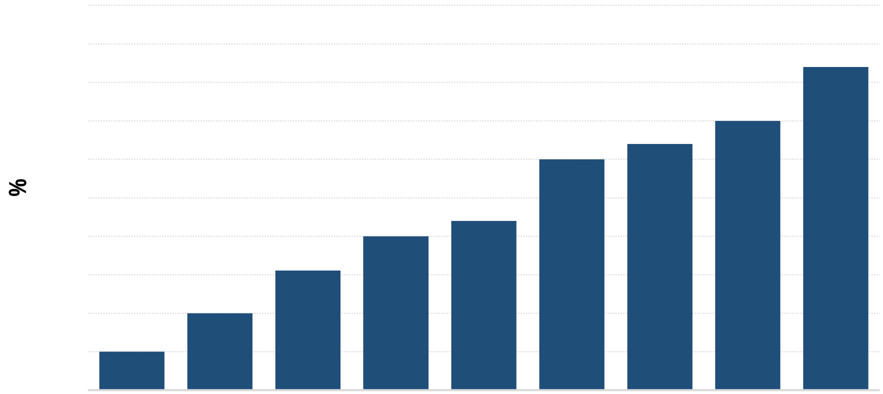


Figure 13: Percentage of coffee farms owned by women



Income

Figure 14: Share of farms for which coffee is the main source of income, 80% or higher

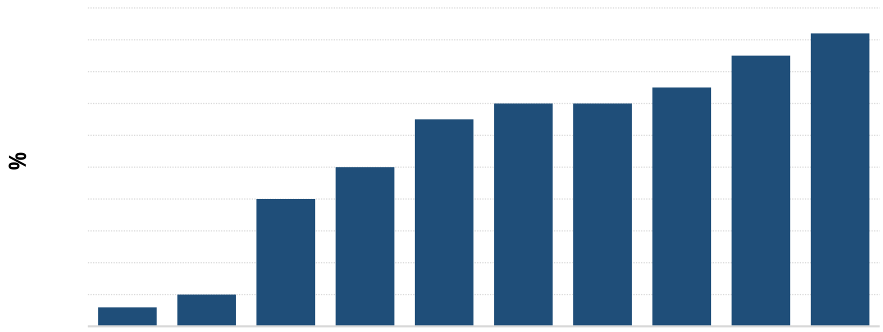


Figure 15: Annual change on the average price paid to growers for 1kg of coffee

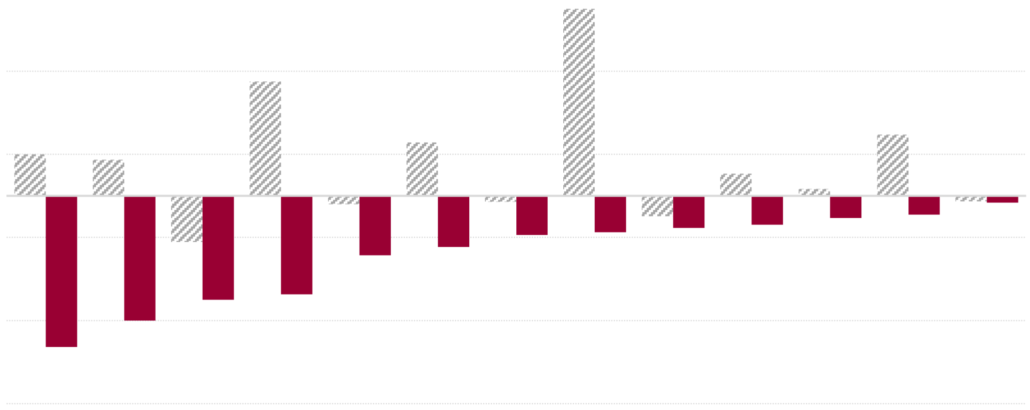
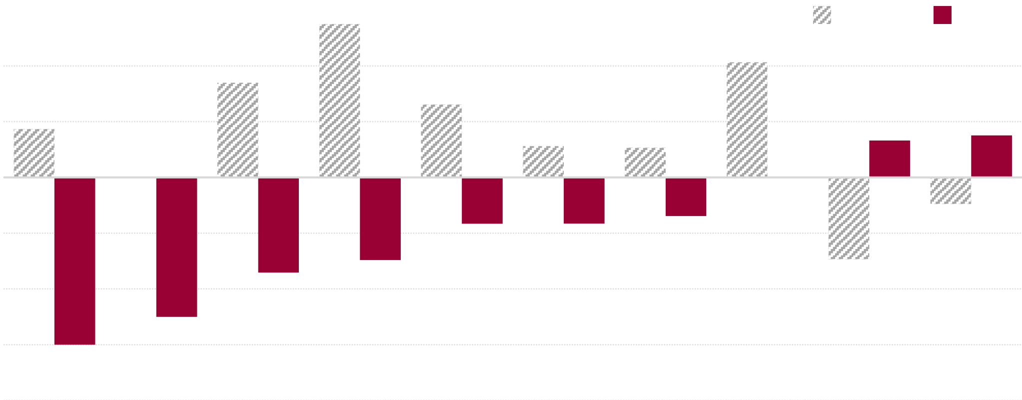


Figure 16: Annual change on the average total annual income of coffee farmers



Significantly higher, Moderately higher, Slightly higher, No difference, Slightly lower, Moderately lower Significantly lower

much of the coffee produced by female farmers is for specialty markets, which pay higher prices due to higher quality

Figure 17: Average annual income of female coffee farmers compared to male farmers

Trade relationships

Figure 19: Percentage of coffee production sold destination market

Figure 20: Effect of low prices on investment in the coffee sector

Figure 21: Reduction on coffee-cultivated area as a result of low prices

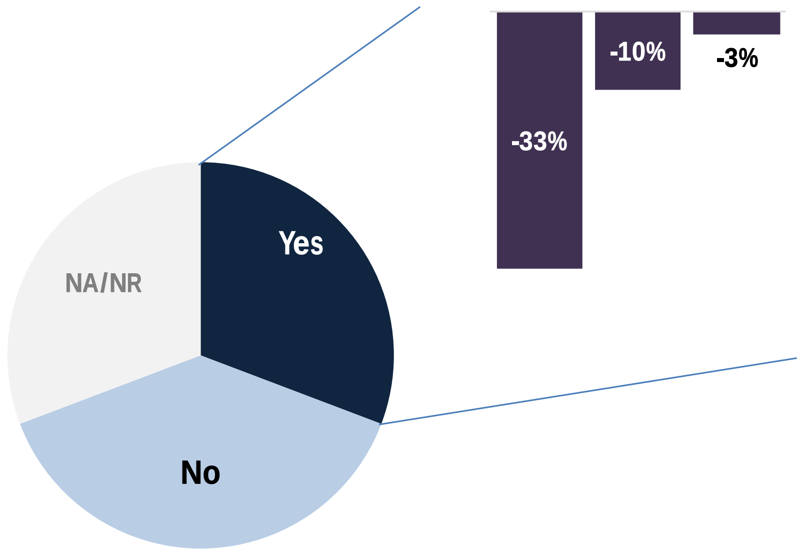
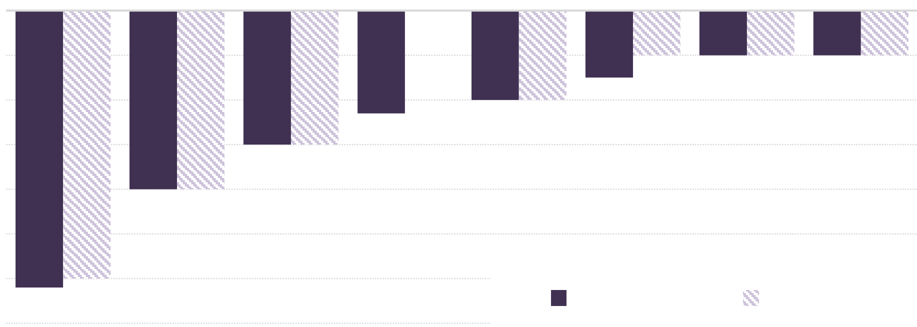


Figure 22: Decrease in investment in coffee plantations

Figure 23: Decrease in fertilizers and pesticides expenditure by farmers



B. Labour

Figure 24: Effect on the time dedicated by farmers to coffee production and processing

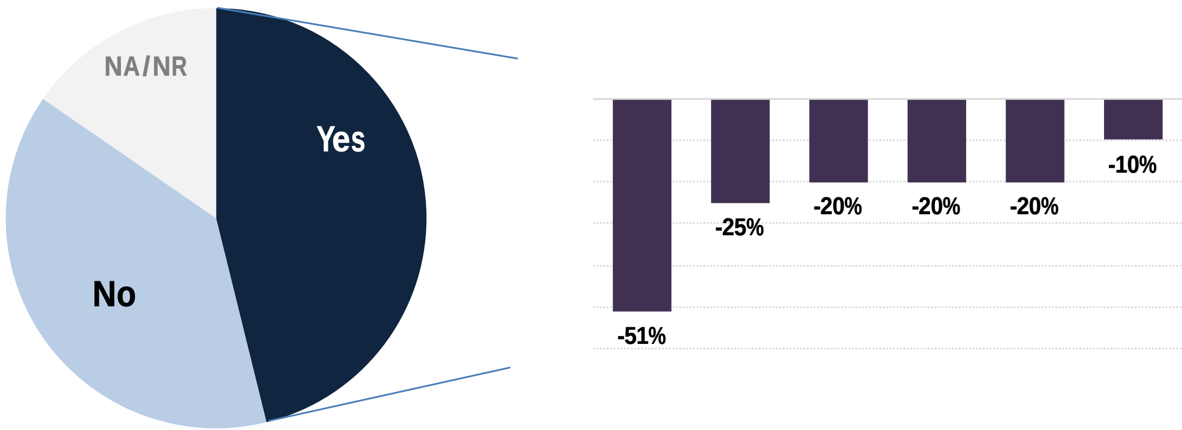
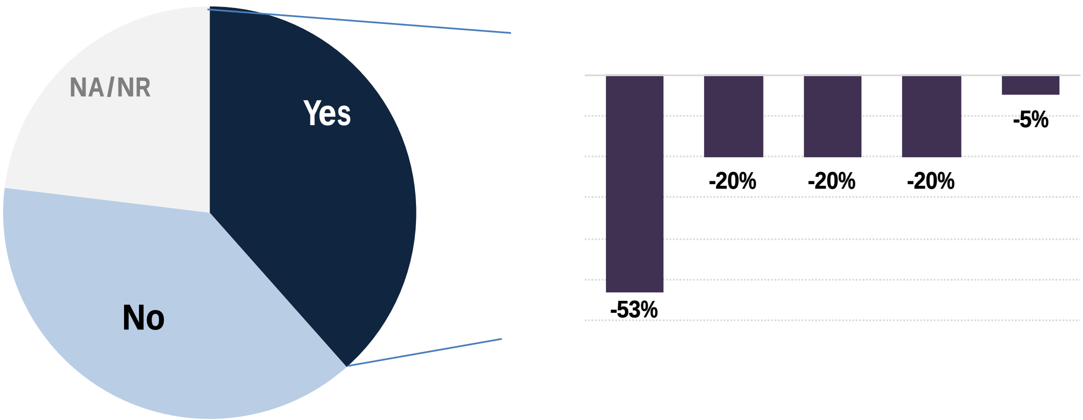


Figure 25: Effect on on-farm employment



C. Income

Figure 26: Effect on wages of on-farm coffee employees

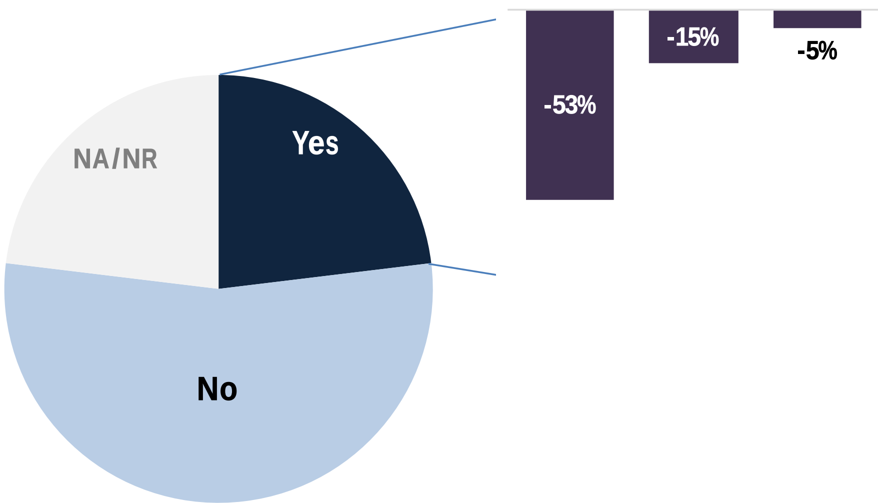


Figure 27: Effect on the average annual in-0.002 Tc 0.0766me of(-0.0cof(-0.f(-0.)6 (m36 (er)1

Figure 28: Social impact of low coffee prices in the coffee sector (13 countries)

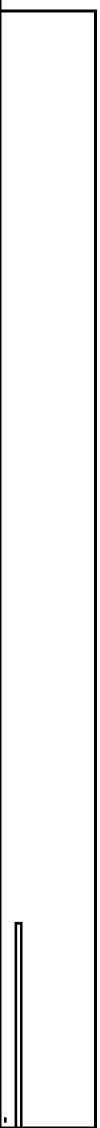
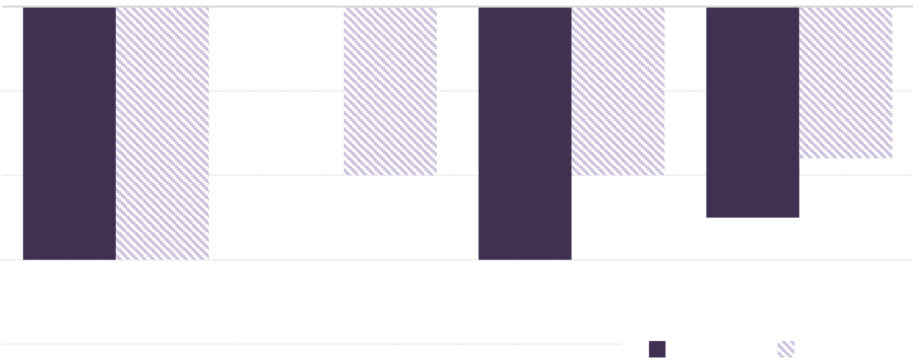


Figure 30: Impact on farmers migrating from coffee areas

Figure 32: Decrease in annual expenditure on health and education by coffee farmers



SUMMARY ACROSS COUNTRIES

Figure 33: Number of responses by area of impact

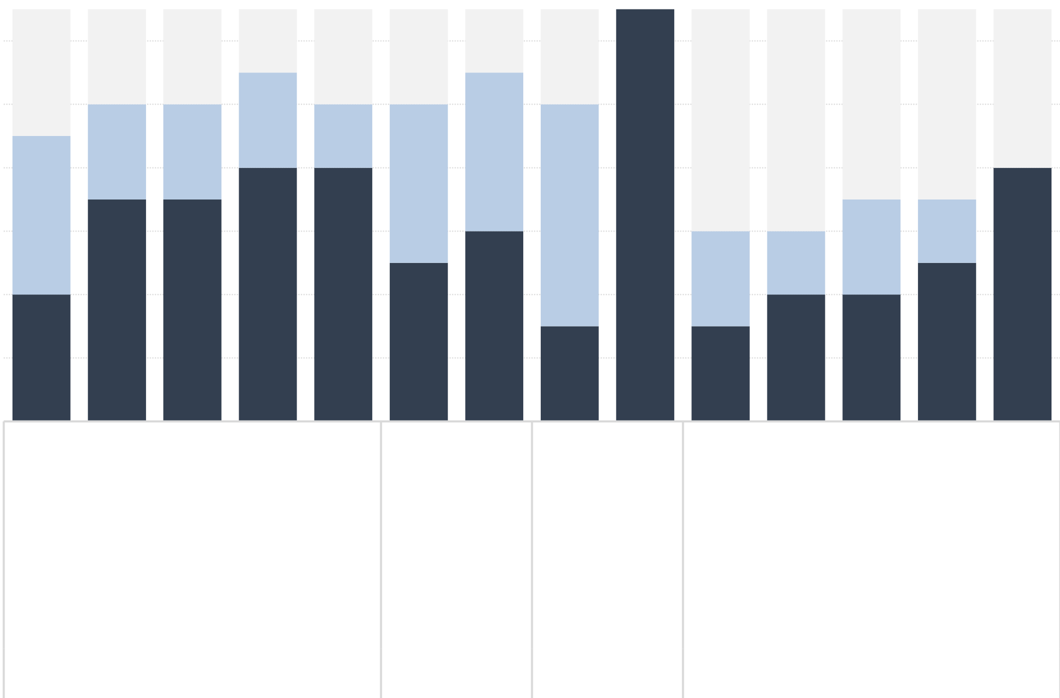
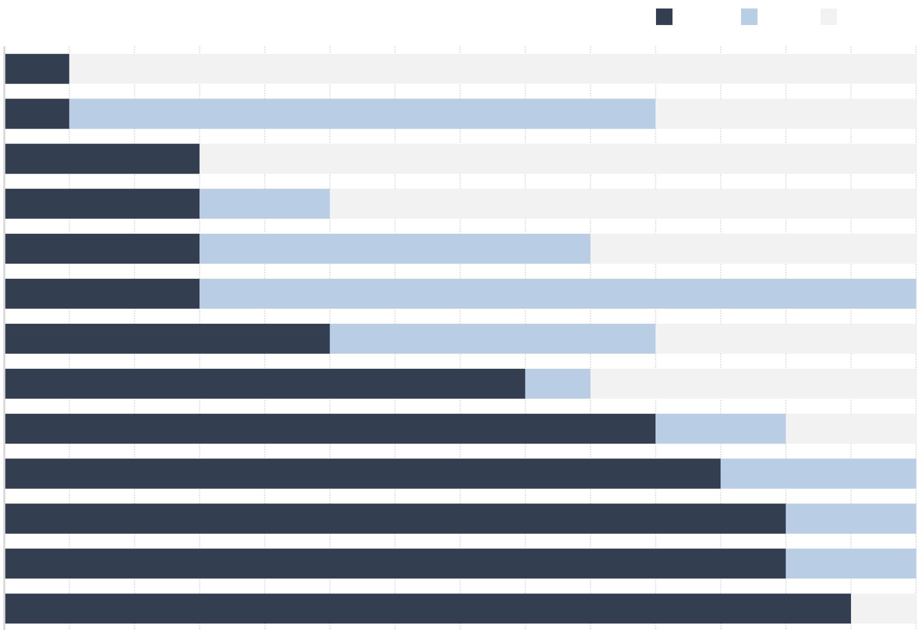


Figure 34: Number of responses by country



Number of factors on which low prices had an impact

V. CONCLUSIONS