

USDA Foreign Agricultural Service

# GAIN Report

Global Agricultural Information Network

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POLICY

Required Report - public distribution

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## India

### Coffee Annual

### Bean Counters Lower Production and Exports Press Ahead

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**Report Highlights:**

India's MY 2018/19 coffee crop (Oct/Sep) is forecast at 5.5 million 60-kg bags as erratic rains and unusually high temperatures touched coffee growing regions. Domestic consumption is forecast higher with growth attributed to soluble coffee consumption. MY 2018/19 exports are forecast lower after strong MY 2017/18 numbers due to smaller carryover stocks and uncertainty with the future of the export incentive scheme.

**Commodities:**

Coffee, Green

**Production:**

FAS Post forecasts marketing year (MY) 2018/19 (Oct/Sep) coffee production at 5.5 million 60-kg bags (330,000 metric tons or, MT). The 2018/19 crop forecast is 100,000 60-kg bags lower than the official USDA 2017/18 crop estimate owing to unusually high temperatures and inadequate rains during the Northeast Monsoon that hindered Arabica plant development. Rising temperatures damaged coffee plants and led to stunted growth and moisture stress. Trade sources indicated a high incidence of white stem borer infestations on the MY 2017/18 Arabica crop. Growers have been advised by state governments to uproot and burn infested plants.

Robusta is the more popular variety and accounts for over 70 percent of India's coffee crop. The Arabica crop is entering the 'off-year' of the biennial production cycle and is expected to bear fewer fruit than last year. The Robusta crop is expected to produce slightly more fruit than last year owing to good rainfall and irrigation water availability. The Arabica harvest takes place from November to January while the Robusta harvest is December to February. Blossom showers during March and April are required for the development of coffee floral buds.

For MY 2018/19, blossom showers have been uniform and favorable for both Arabica and Robusta and should support plant development (bud enlargements, opening, and flowering). The normal rainfall requirement for blossoms is 25mm occurring in seven consecutive days for Arabica and 20mm in seven consecutive days for Robusta.

FAS Post forecasts Robusta yields at 1,206 kilograms per hectare and Arabica yields at around 440 kilograms per hectare.

According to the Indian Meteorological Department, during the period from March 1, 2018 to May 9, 2018, the coffee growing district in Chikmagalur (southern Karnataka) received 147.4 millimeters (mm) of rainfall (55 percent above normal). During the same time period, the Kodagu district of Karnataka received 221.7 mm rainfall (54 percent above normal) and the Hassan district of Karnataka received 148.9 mm of rainfall (61 percent above normal). Other major coffee growing regions in Tamil Nadu and Kerala received above normal rainfall, as well.

As reported by Post in [IN7126](#), the Coffee Board of India estimated MY 2017/18 production at 5.84 million 60-kg bags (350,400 MT) in its post-blossom (i.e., pre-monsoon) forecast. The Coffee Board is expected to lower the MY 2017/18 estimate based on field surveys. Post's estimate of the MY 2017/18 Robusta and Arabica coffee crop is 5.42 million 60-kg bags. Post estimate is lower than FAS Washington estimate of 5.6 million 60 kg bags, primarily due to the high incidence of white stem borer infestations that has affected the MY 2017/18 Arabica crop, and the erratic weather conditions specifically high temperatures that affected the Robusta crop.

For the MY 2016/17 crop, the Board revised its final estimate to 5.2 million 60-kg bags (312,000 MT comprising 95,000 MT of Arabica and 217,000 MT of Robusta). Post revised the MY 2016/17 production estimate to reflect the Board's final estimate.

## Area

Area harvested and plant inventory forecasts are higher compared to last year as older trees were replaced with newer trees ones that have since started bearing fruit. The southern states of Karnataka, Kerala, and Tamil Nadu account for 82 percent of planted area. The non-traditional lower-yielding areas of Andhra Pradesh, Orissa, and Northeastern India have seen a marginal increase in area, but planted area in these states is limited. With coffee estates in close proximity to protected forest reserves, there is limited opportunity for further area expansion. Growers are gradually shifting towards replanting to replace their aging plantations at an annual rate of 1-2 percent per year which leaves a difference of approximately 40,000 ha between harvested and planted area. Generally, the first fruit is expected from after the third year.

February and March rains are crucial for determining the crop yield. Pre-monsoon rains (blossom showers) in March and April have been above normal in all traditional coffee growing states. The well-distributed rains will provide irrigation and moisture for the Robusta plants.

White stem borer remains a major pest issue affecting the Arabica crop. Fungal diseases such as leaf rust and black rot are the most widespread coffee diseases in India.

Post revised its planted and bearing area to align with Coffee Board data for MY 2016/17. According to the Coffee Board data, the planted area in MY 2016/17 was 449,357 hectares, but the bearing area was 409,924 hectares. For MY 2018/19, FAS Post forecasts the planted area to increase to 450,000 hectares with the bearing area forecast at around 422,000 hectares.

**Table 1. India: Coffee Planted Area in Major States (in hectares)**

State	2014/15			2015/16			2016/17		
	Arabica	Robusta	Total	Arabica	Robusta	Total	Arabica	Robusta	Total
Karnataka	109,032	121,402	<b>230,434</b>	111,225	124,213	<b>235,438</b>	108,845	135,940	<b>244,785</b>
Kerala	4,203	81,253	<b>85,456</b>	4,217	81,284	<b>85,501</b>	4,228	81,642	<b>85,870</b>
Tamil Nadu	26,058	5,613	<b>31,671</b>	29,062	5,870	<b>34,932</b>	29,513	6,094	<b>35,607</b>
Andhra Pradesh	64,689	267	<b>64,956</b>	71,280	267	<b>71,547</b>	75,237	261	<b>75,594</b>
Odisha	4,140	-	<b>4,140</b>	(NTA)	(NTA)	<b>(NTA)</b>	(NTA)		
North Eastern Region	5,340	1,273	<b>6,613</b>	5,595	1,423	<b>7,018</b>	5,903	1,598	<b>7,501</b>
<b>Total</b>	<b>213,462</b>	<b>209,808</b>	<b>423,270</b>	<b>221,379</b>	<b>213,057</b>	<b>434,436</b>	<b>223,816</b>	<b>225,541</b>	<b>449,357</b>

**NTA- Non Traditional Area**

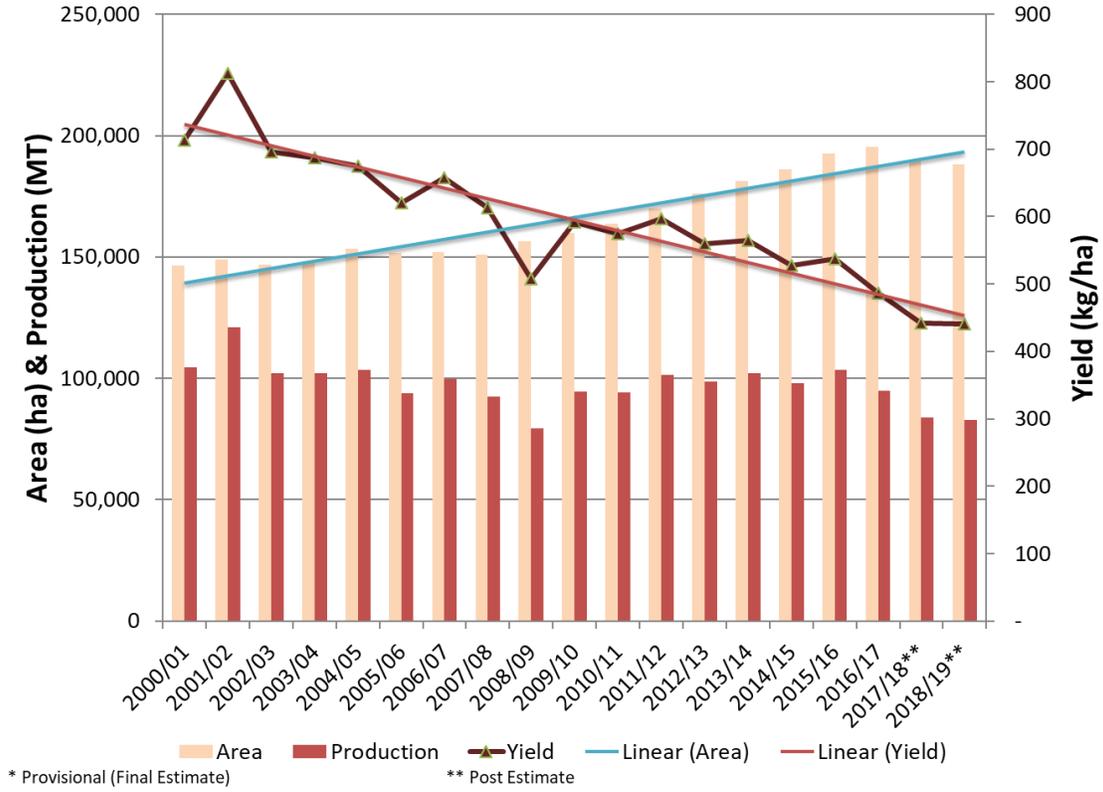
**Source: Ministry of Commerce and Industry, November 2017**

**Table 2. India: Estimated Number of Persons (permanent and casual labor) Engaged in Coffee Cultivation**

Karnataka	514,695
Kerala	44,186
Tamil Nadu	29,339
Non Traditional Area (Odisha and Andhra Pradesh)	65,427

**Source: Ministry of Commerce and Industry, November 2017**

**Fig 1a. Arabica: Area, Production & Yield**



**Fig 1b. Robusta: Area, Production and Yield**

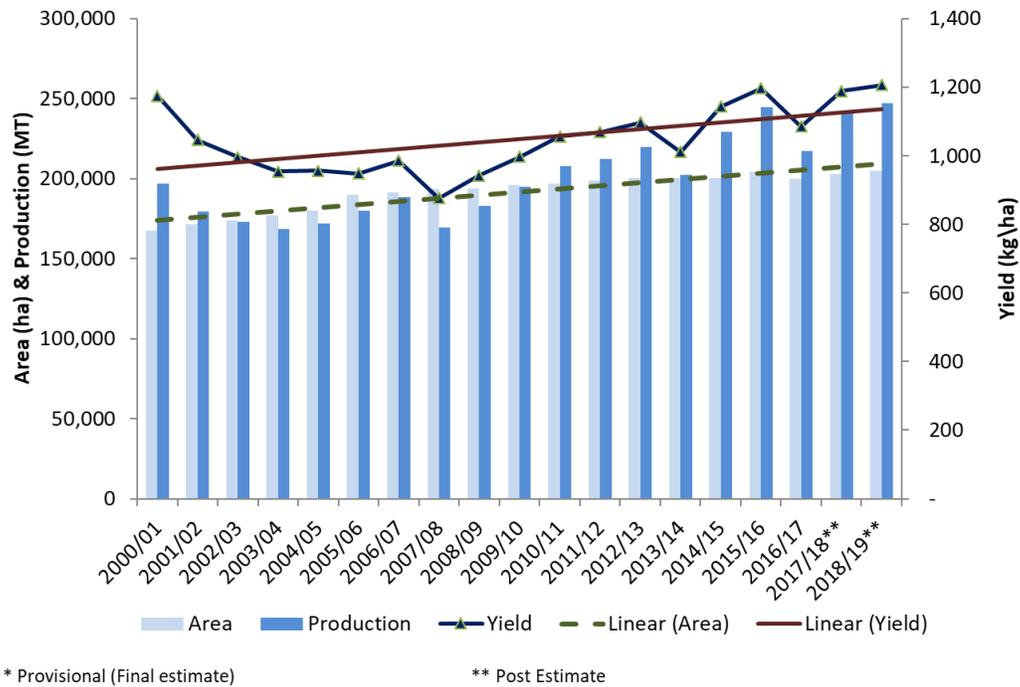


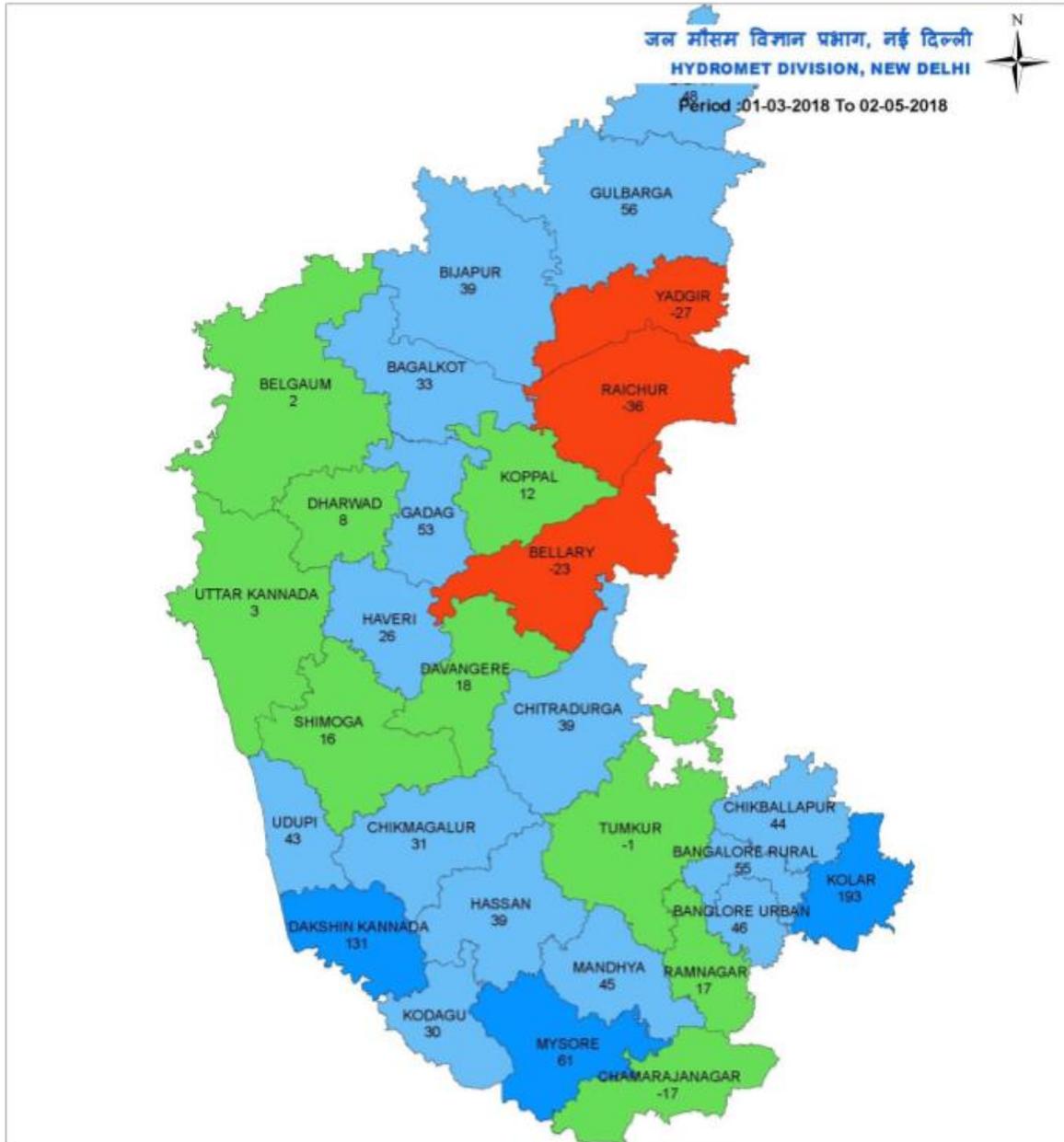


Figure 2. India: Districtwide Rainfall Departure Map for Karnataka State



भारत मौसम विज्ञान विभाग  
INDIA METEOROLOGICAL DEPARTMENT

**DISTRICT RAINFALL DEPARTURE MAP - KARNATAKA**



Legend  
 Large Excess [ 60% or more] Excess [ 20% to 59%] Normal [-19% to 19%] Deficient [-59% to -20%] Large Deficient [-99% to -60%] No Rain [-100%] NO DATA

Source: Indian Meteorological Department

**Inputs**

Recent increases in farm input costs along with the elimination of fertilizer and diesel subsidies have increased production costs for growers. With increasing off-farm employment opportunities, coffee planters have started experiencing shortages of skilled labor. Labor costs, which account for more than 50 percent of the cost of cultivation, continue to escalate. According to Coffee Board of India statistics, the general daily wage rate in the state of Karnataka increased by 8 percent from Rs. 257 (US\$3.80) to Rs. 277 (US\$ 4.10) per day between March, 2017 and November, 2017.

### India Coffee Types Dominated by Robusta

The Arabica plants are self-pollinating and are typically grown at higher elevation under rain-fed conditions. The plants are grown under shade to prevent variation in soil temperature and moisture levels as well as for protecting the plants in case of heavy rainfall. In India, there is a two-tier shade for Arabica crop. The higher canopy shade (30-40 feet) is mostly evergreen trees such as Indian rosewood / jackfruit while Dadap / Silver oak are used for the lower canopy shade (15-20 feet). The leaf litter from these trees acts as soil cover and prevents the direct impact of rain water and soil erosion. The planting space in Arabica crop is 6 feet by 6 feet with an average of 3,000 plants per hectare. The Robusta crop planting space is 10 feet by 10 feet with about 460 plants per hectare. As Arabica is a deep rooted plant, it is able to sustain itself during drought conditions, though Robusta, with its shallow roots, requires irrigation during the season. There has been a shift from Arabica to Robusta plantations due to the susceptibility of the Arabica crop to stem borer pest and leaf rust. With the changes in the distribution pattern of the rains in the last decade, the elevation at which Arabica is grown is pushing the cultivation to much higher altitudes. More than 60 percent of the labor working at the estates is contracted during the harvesting season.

**Table 3. India: Coffee Types**

Processing Method	Coffee Varieties Cultivated in India	
	Arabica	Robusta
Washed (wet processed)	Parchment / Plantation Coffee	Parchment
Unwashed (natural/dry processed)	Cherry	Cherry

### Policy:

#### Merchandise Export Incentive Scheme (MEIS) under review

The current rate of reward under the MEIS Scheme is set to expire on June 30, 2018. There is uncertainty on the decision regarding whether the scheme will receive an extension. Trade sources indicate that the Government of India may review the existing scheme, and make it compliant with the global trade norms. The MEIS reward rate can range from 3-7 percent of the FOB value of exports depending on the harmonized tariff schedule and coffee classification (green coffee, roast and ground, or instant/soluble)

### Consumption:

The MY 2018/19 consumption forecast is 1.25 million 60-kg bags (75,000 MT). Industry estimates indicate coffee consumption remained between 1.16 million 60-kg bags and 1.25 million 60-kg bags (70,000 – 75,000 MT) over the past few years. The Coffee Board of India has not published any consumption data since 2011.

One reason for the large variation in industry consumption estimates is the widespread use of chicory in the domestic market. Many popular instant coffees contain 20 to 49 percent chicory. The recent FSSAI draft notification as reported by Post in [IN8055](#) is attempting to regulate the chicory content in coffee-chicory mixture and consequently increase coffee content in soluble/instant coffee sector. Once the notification is finalized, the domestic soluble industry (organized and unorganized) will need to ensure that coffee-chicory mixture will contain at least 70 percent coffee. Trade sources indicate the notification as a positive step to increase domestic coffee consumption, but remain skeptical whether the available methodology to test the percentage of chicory content in the mixture exists or will be used.

Trade sources cite that instant/soluble manufactures are altering the percentage of coffee in blends to match consumer tastes and preferences around the country and to maintain commercial and financial competitiveness. Trade sources further indicate that while the ratio of roast and ground coffee consumption has traditionally been higher, the share of instant/soluble coffee has increased in recent years, especially in northern India, and will continue to remain high in MY 2018/19.

The bulk of India's coffee production is exported and the domestic industry focuses much of its marketing effort on export promotion. There are signs that the popularity of coffee is increasing with the spread of both foreign and home-grown coffee shops and restaurant chains. However, exports continue to siphon large amounts of coffee away from the domestic market and consumption estimates are largely unchanged. The instant/soluble coffee segment is almost entirely branded and packaged, and is dominated by a few multinationals, accounting for almost 90 percent of the total soluble coffee market.

Hundreds of western-influenced coffee shops have emerged across India's major and smaller "second tier" cities over the past decade. Coffee now competes against the once dominant tea in these cafes, especially among younger consumers. Aside from large coffee shop chains, artisanal coffee brands are emerging in metro cities but these remain a niche category as coffee sold at these cafes are priced at a premium.

A growing willingness to consume food and drink outside the home and increasing disposable income has helped fuel coffee consumption growth in recent years. Many firms have targeted young professionals; especially, women, but the pace of expansion appears to have slowed in recent years.

MY 2017/18 consumption estimates have been revised based on industry analysis, and Post discussions with industry stakeholders.

**Trade:**

Post's MY 2018/19 export forecast is 5.4 million 60-kg bags, marginally lower than FAS Washington forecast from last year. The uncertainty around the export benefit scheme and anticipated low carryover stocks for next year may prompt lower exports than the current year. A large percentage of the crop is still expected to be exported. November 2017 green coffee prices for Arabica Parchment and Robusta Cherry in Karnataka have fallen by 20 percent since the beginning of the year. Indian prices have tracked with global prices for both varieties. Arabica and Robusta prices have declined since January with reports of expected higher production in other major coffee producing countries.

According to the Coffee Board export data, the permits issued for coffee exports by volume for (October – May) in MY 2017/18 were higher by 16 percent compared to the previous year, but the unit

value per ton has fallen by 7 percent during the same period. Post estimates that MY 2017/18 exports will surpass MY 2016/17 export volumes and be a record export year. Strong exports in MY 2017/18 are being witnessed as the Indian Rupee has depreciated by more than 5 percent since the beginning of the year and this has provided support for exports. Another reason for strong exports is the export incentive scheme for exporters. The Merchandise Export from India Scheme (MEIS Scheme) is set to expire on June 30, 2018, and exporters are aligning a large volumes of shipments to take advantage of the reward rates and to help cut into what have been large carryover stocks. Large carry-over stocks from MY 2017/18 have supported strong export shipments for beans and soluble coffee. Italy, Germany and Russia were top export markets for green coffee, while Russia, Turkey and Indonesia were the top export markets for instant/soluble coffee in MY 2017/18.

Imports of green coffee for the purpose of re-export was dominated by Vietnam, Uganda, and Indonesia due to duty exemptions and lower overall prices.

**Delay in filing of return of confirmations (ROC) leading to over reporting of export data**

On January 28, 2018, the Coffee Board of India issued a circular instructing exporters to file their ROC/post shipment documents within 45 days from the date of export. Failure to file the proof of export will lead to non-issuance of new export permits. The delay in filing is leading to over reporting of export data, as the Coffee Board is not able to validate the actual shipments against the export permits that were issued. For more details please refer to the screenshot of the circular below for your reference. FAS Post uses the shipment data published by the Ministry of Commence, Government of India for its analysis



No. MAR/EXPORTS/2018/ 1A59

24<sup>th</sup> January 2018

**CIRCULAR**

Sub: **Coffee exports - Filing of Return on Confirmation (RoC)** through online e-permit system <https://indiacoffee.org/permit>.

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Coffee Board has introduced online system for coffee exports (e-permit system) for issue of export permit & ICO-Certificate of Origin against the online applications filed on <https://indiacoffee.org/permit>, with effect from September 2014. The facility of online filing/extension/cancellation of export permit and submission of return of confirmation (ROC) of exports has been extended by providing User-id and Password to all the registered exporters for both Indian and re-exported coffee.

The Return of confirmations (ROC)/ post shipment documents are required to be submitted to the registering authority as per the EXIM Policy. Coffee Board being a Registering Authority has fixed the time limit of 45 days from the date of export for submission of proof of shipments (ROC) against the permits issued. All the registered exporters have agreed to comply with the obligation to submit the proof of exports with the requisite documents viz., Export Permit having customs endorsement / ICO Certificate of Origin having customs endorsement/ Bill of Lading /Copy of invoice or Shipping Bill within the stipulated period at the time of initial registration. However, many of the Exporters are not complying with this obligation. Non-submission of return of confirmations on time by the coffee exporters has become major hindrance in compiling the coffee export statistics. In order to ensure timely submission of return of confirmations, the following condition has come into effect from the date of issue this Circular.

**"If the Exporters does not file the proof of shipments (Return of Confirmations) within 45 days from the date of export, Coffee Board reserves the right to stop approving the fresh permits applied by such Exporters till such time they complete filing of ROC for the permits already issued, excepting for permits which are cancelled".**

  
DIRECTOR OF FINANCE

To  
All the Registered Coffee Exporters.

**Copy to:**

- 1 DS to the Secretary, Coffee Board, Bengaluru
- 2 The President, Coffee Exporters Association, Bengaluru.
- 3 The Dy. Director (MR), Coffee Board for notifying the same in the Board's website

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**COFFEE BOARD**

(Ministry of Commerce & Industry - Government of India)

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**Table 4. India: Coffee Bean Retail Prices in Major Consuming Centers, Rs. per Kilo 1\**

Year	Bangalore		Chennai		Hyderabad	
	Arabica	Robusta	Arabica	Robusta	Arabica	Robusta
Average 2007	137	87	170	91	150	89
Average 2008	150	114	157	118	164	127
Average 2009	210	105	215	109	229	119
Average 2010	217	98	225	104	233	110
Average 2011	297	131	300	134	314	141
Average 2012	247	156	298	148	309	170
Average 2013	199	157	229	182	250	190
Average 2014	311	169	321	187	332	185
Average 2015	309	152	328	178	366	191
Average 2016	259	151	298	172	336	182
Average 2017*	248	163	283	179	300	179

1\ Exchange Rate equals Rs. 67.23 per dollar as of May 14, 2018

\*Average of data through November 2017

(Rs/kg of clean coffee beans of Arabic Plantation A & Robusta Cherry AB)

Source: Coffee Board of India

**Table 5. India: Uncured Coffee Bean Farm Gate Prices in Major Producing Centers, Rs. per 50kg 1\**

Year	Chikmagalur		Sakaleshpur		Madikeri	
	Arabica	Robusta	Arabica	Robusta	Arabica	Robusta
Average 2009	6,752	1,869	6,418	1,872	6,459	1,929
Average 2010	6,949	1,940	6,894	1,821	6,966	1,870
Average 2011	10,144	2,663	10,151	2,606	10,061	2,600
Average 2012	7,984	3,000	8,053	3,036	8,046	3,036
Average 2013	6,393	2,945	6,411	2,956	6,473	3,056
Average 2014	10,011	3,399	9,952	3,728	9,805	3,349
Average 2015	9,116	2,962	9,047	2,978	9,302	3,041
Average 2016	8,118	3,018	8,224	3,051	8,210	3,035
Average 2017*	7,993	3,481	8,027	3,448	8,027	3,447

1\ Exchange Rate equals Rs. 67.23 per dollar as of May 14, 2018

\*Average of data through November 2017

(Rs/kg of clean coffee beans of Arabic Parchment & Robusta Cherry)

Source: Coffee Board of India

**Table 6. India: Coffee Exports  
(Oct/Sep Marketing Year, Includes Re-Exports)**

S No.	Destination	MY 2011/12	MY 2012/13	MY 2013/14	MY 2014/15	MY 2015/16	MY 2016/17
		Quantity (MT)					
1	Italy	78,010	68,662	70,782	65,509	83,769	78,780
2	Germany	25,726	28,372	29,163	24,256	32,699	39,217
3	Russia	29,392	19,596	18,914	20,914	28,149	29,806
4	Belgium	18,007	18,055	13,641	14,830	20,125	18,828
5	Turkey	4,906	9,905	14,055	15,293	14,656	18,167
6	Poland	4,567	2,558	3,208	5,051	8,500	13,980
7	Spain	7,982	6,421	4,998	5,709	8,173	10,109
8	Libya	3,879	5,816	5,835	5,759	6,173	9,768
9	Jordan	7,506	10,337	7,741	6,772	8,643	8,672
10	USA	6,376	5,804	5,993	5,149	5,884	8,353
11	Slovenia	13,133	10,339	7,868	9,248	11,839	8,316
12	Australia	4,736	6,888	5,114	6,341	5,496	7,048
13	Ukraine	5,163	6,815	5,691	5,044	3,537	6,393
14	Malaysia	8,328	6,777	5,819	5,742	6,185	6,387
15	Others	92,559	85,221	89,818	81,152	101,631	111,580
	<b>TOTAL</b>	<b>310,270</b>	<b>291,566</b>	<b>288,640</b>	<b>276,769</b>	<b>345,459</b>	<b>375,404</b>

Source: Coffee Board of India (Database - November 2017)

**Table 7. India: Import Duty on Coffee and Related Products\***

HTS Code	Product description	MFN Basic Duty
0901.11	Coffee neither roasted nor decaffeinated	100%
0901.12	Coffee not roasted decaffeinated	100%
0901.21	Coffee roasted not decaffeinated	100%
0901.22	Coffee roasted and decaffeinated	100%
2101.11.10	Instant coffee flavored	30%
2101.11.20	Instant coffee not flavored	30%
2101.11.30	Coffee Aroma	30%
2101.11.90	Others	30%
2101.12.00	Preparations with a basis of extracts, essences or concentrates with a basis of coffee	30%

\*Owing to India's trade agreements, several countries can have lower than MFN duty rates on HTS 0901 and other tariff chapters.

**Table 8. India: Export Tax/Cess on Coffee and Related Products**

S No.	Product description	Basic duty
1	Green	0%
2	Roasted	0%
3	Soluble	0%

**Table 9. India: Import Tariff on Coffee and Related Products**

HS Code	Description	Standard Rate (Applied Rate)	Preferential Rate
<b>0901</b>	<b>Coffee, whether or not roasted or decaffeinated;</b>		
<b>0901.11</b>	Coffee nether roasted nor decaffeinated	<b>100%</b>	100% less 13 paise per kg
<b>0901.12</b>	Coffee not roasted decaffeinated	<b>100%</b>	100% less 13 paise per kg
<b>0901.21</b>	Coffee roasted not decaffeinated	<b>100%</b>	100% less 13 paise per kg
<b>0901.22</b>	Coffee roasted and decaffeinated	<b>100%</b>	100% less 13 paise per kg
<b>2101.11</b>	<b>Extracts, essences and concentrates of coffee, preparation with a basis of these extracts, essences or concentrates or with a basis of coffee:</b>		
<b>2101.11.10</b>	Instant coffee flavored	<b>30%</b>	-
<b>2101.11.20</b>	Instant coffee not flavored	<b>30%</b>	-
<b>2101.11.30</b>	Coffee Aroma	<b>30%</b>	-
<b>2101.11.90</b>	Others	<b>30%</b>	-
<b>2101.12.00</b>	Preparation with a basis of extracts, essences or concentrates with a basis of coffee	<b>30%</b>	-

**Policy:****Merchandise Export Incentive Scheme (MEIS) under review**

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**Marketing:****Indian Coffee Marketing System**

Common marketing practices include: 1) selling to exporters through an agent; 2) storing at a curing plant before selling; 3) selling at auctions; and 4) exporting directly. Small holders typically sell their parchment coffee (or dry cherry) to exporters through export agents and consolidators. The agent takes the coffee beans to the curing factory, where they are checked for quality against the standards of the destination country. Storing the coffee at a curing plant allows the coffee grower to retain ownership of

the coffee before selling it in order to take advantage of price movements. Larger producers typically sell at auctions organized by the Indian Coffee Traders' Association or export directly.

**Production, Supply and Demand Data Statistics:**

Coffee, Green	2016/2017		2017/2018		2018/2019	
Market Begin Year	Oct 2016		Oct 2017		Oct 2018	
India	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	415	449	420	440	-	450
Area Harvested	370	410	380	400	-	422
Bearing Trees	530	532	540	540	-	542
Non-Bearing Trees	100	100	100	98	-	97
Total Tree Population	630	632	640	638	-	639
Beginning Stocks	2,645	2,645	1,932	1,873	-	1,233
Arabica Production	1,583	1,583	1,440	1,400	-	1,380
Robusta Production	3,617	3,617	4,160	4,020	-	4,120
Other Production	-	-	-	-	-	-
Total Production	5,200	5,200	5,600	5,420	-	5,500
Bean Imports	1,292	1,306	1,250	1,300	-	1,250
Roast & Ground Imports	2	2	2	2	-	2
Soluble Imports	81	78	63	78	-	70
Total Imports	1,375	1,386	1,315	1,380	-	1,322
Total Supply	9,220	9,231	8,847	8,673	-	8,055
Bean Exports	4,250	4,273	3,960	4,310	-	3,750
Rst-Grnd Exp.	5	5	7	5	-	5
Soluble Exports	1,833	1,880	1,583	1,910	-	1,670
Total Exports	6,088	6,158	5,550	6,225	-	5,425
Rst,Ground Dom. Consum	550	550	520	525	-	530
Soluble Dom. Cons.	650	650	685	690	-	720
Domestic Consumption	1,200	1,200	1,205	1,215	-	1,250
Ending Stocks	1,932	1,873	2,092	1,233	-	1,380
Total Distribution	9,220	9,231	8,847	8,673	-	8,055

(1000 HA) ,(MILLION TREES) ,(1000 60 KG BAGS)