

Myanmar Coffee

Market Report and
Origin Trade Marketing Plan



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Index

Introduction	4
Green versus Roasted Coffee Exports	4
Environment of Opportunity.....	4
Regional Market Analysis	6
1) Asia-Pacific	6
<i>Japan</i>	7
<i>South Korea</i>	7
<i>The Philippines</i>	8
<i>China</i>	8
<i>Singapore, Malaysia and Taiwan</i>	9
<i>Asian Coffee Producers</i>	9
2) Australasia and New Zealand	10
3) North America.....	11
4) Europe	11
Market Strategy	12
Introduction: Commodity versus Specialty	12
Origin Branding.....	13
Myanmar’s Message	14
Market Entry Points	15
<i>Japan</i>	15
<i>South Korea</i>	16
<i>United States of America</i>	16
<i>Australia / New Zealand</i>	17
Market Development Activities	19
Quality Programs.....	19
Commercial Pilot Programs.....	19
Industry Events (Trade Fairs, Conferences)	20
Special Events	20
<i>Origin Trips</i>	20
<i>Cupping Roadshows</i>	21
<i>Industry Competitions</i>	21
Trade Media.....	21
<i>Press Releases</i>	21
<i>Feature Articles</i>	21
Internet / Social Media	22
Advertising.....	22
Sponsorships	22
Cupping Events / Competition	22
Calendar of Activities	23
Budget	31
Mya Zai Di Commercial Pilot Program.....	31
Myanmar Trade Press Editorial.....	31
Japan Market Development	31

Korean Market Entry / Seoul Café Show 2015.....	31
Myanmar Marketing Materials.....	31
Myanmar Origin Tour.....	32
SCAA Event Atlanta 2016.....	32
Australia / NZ Cupping Roadshow	32
SCAJ Event 2016	32
Seoul Café Show 2016	33

Introduction

Having only recently emerged from diplomatic isolation, Myanmar is not yet recognized as a coffee producing origin among industry professionals or consumers. Lacking an origin brand identity and with limited access to coffee market information and experience in international trade, most coffee sold by Myanmar's producers is presently consumed in low value domestic applications or as a generic commodity below global market value.

The country has significant potential as a grower of quality-differentiated specialty coffee capitalizing on favorable growing conditions, availability of water and the motivation of its people that can add substantial additional value to coffees produced.

This document seeks to address the obstacles to international market access faced by Myanmar's producers and proposes specific steps to develop an origin brand identity for promotion within select markets of the international coffee community. The result of this effort is expected to maximize the value of current green coffee exports and establish trade relationships for the sale of future high-value specialty coffee.

Green versus Roasted Coffee Exports

This document identifies market opportunities for *green coffee* exports only. Although some references are made to roasted coffee product opportunities in regional markets, the export of roasted coffee is not seen as a viable strategy for increasing the value of Myanmar's coffee sector.

The drawbacks of roasting at origin for export to consuming nations outweigh market opportunities, making the focus on high value green exports a better solution to increase industry value. Roasted coffee is highly perishable, which makes roasting is an activity best performed within the consuming market, close to retail customers. Although it may be possible for the coffee producing origin to maintain a retail and roasting presence in a foreign consuming country, the cost of doing so effectively negates any additional value earned through later stages of processing.

Coffee roasters and retailers in consuming markets invest significant resources into building their businesses. Exceptional performance leads to strong and trusted consumer brands. Roasting businesses maintain flexibility to purchase green coffees from multiple origins, which is necessary to compensate for shortages or fluctuations in source quality. Entering a consuming market at a disadvantage, in direct competition with the origin's potential green coffee clientele is a poor strategy. In specialty coffee, specialization is required to achieve success.

Environment of Opportunity

Myanmar is entering the world's coffee market at an opportune time as overall global exports and consumption are forecast at record quantities and inventory of available stocks are at their lowest level in the past 4 years.¹ The global coffee market is experiencing a trend of increased consumer demand coupled with higher costs and shrinking worldwide production that presents substantial opportunities for Myanmar's coffee producers.

Myanmar is entering the world's coffee market at an opportune time

While established coffee consuming markets demand more high quality specialty coffees, new regions to trade coffees of all quality levels are emerging in Asia² and Eastern Europe as those nations migrate to coffee from tea and evolve a domestic consumer café culture³. China alone doubled its coffee imports from 500,000 bags in 2009 to over 1 million in 2014 and is projected to become a major market for coffee with import volumes comparable to the United Kingdom by 2020⁴.

At the same time, Brazil, the world's largest coffee producer⁵ and India, the fifth largest producer⁶ are experiencing substantial increases in internal domestic consumption. Both are projected to be net consumers within the next few years, threatening the future of available commodity coffee supplies.

Despite a modest rebound of production in Brazil during the 2015 harvest season following two years of drought, coffee production volumes and quality worldwide regions are lagging from the combination of rising labor costs and shortages, urbanization of farming land and damage from unstable weather patterns. Mexico and Central America, specifically, continue to be hindered by the worst outbreak of coffee leaf rust disease since 1976⁷.

Due to limited global market information and access, nearly all of Myanmar's coffee is presently consumed locally within the price-sensitive domestic market or sold to opportunistic border traders from China who offer sellers prices substantially below international commodity value. Under these conditions, it is reasonable to anticipate an increase in the value of present coffee trade by exporting coffee to commodity-specific foreign trading partners even before realizing new gains from other productivity and quality improvement initiatives already underway. Overseas trade with new nations additionally promises to diversify risk and insulate Myanmar's coffee producers from local economic downturn or other factors affecting consumption in neighboring China.

Coffees meeting specialty standards for quality will benefit most in international trade, as they are sold at higher price premiums than any other category and with less price volatility. The high value market for specialty Arabica coffee is firmly established and continues to be the fastest-growing segment of coffee consumption in the United States⁸, as well as in major consuming countries of Northern Europe, Australasia and select Asian countries.

During the interim seasons while the specialty coffee production industry develops within Myanmar, the highest return on investment in international trade is expected to come from the export of subspecialty to low-grade specialty coffee with trading partners in the Asia-Pacific region.

Regional Market Analysis

As a new and relatively unknown origin for coffee production, opportunities exist for Myanmar in practically every coffee consuming region of the world. This section analyzes and priorities each.

1) Asia-Pacific

Since 1990, Asia has experienced the most dynamic growth in coffee consumption, an average of 4.9% from 2000 – 2012. As a result, the Asian coffee market has increasingly become the focus of the world coffee industry.⁹

Markets within Asia offer the most overall potential for the whole of Myanmar's coffee production industry, with near term opportunities to sell subspecialty grade crops and significant long-term potential to sell differentiated specialty Arabica coffee as consumption in the region and Myanmar's production industry matures. Furthermore, preferential freight costs and duty tariff rates exist Association of Southeast Asian Nations (ASEAN) countries (and between ASEAN members and key Asian consuming countries). These reduced costs give Myanmar a competitive advantage in the region, in some cases a significant advantage, over imports from other coffee producing nations.

Markets within Asia offer the most overall potential for the whole of Myanmar's coffee production industry

With the exception of the well-established Japanese coffee market (importing ~8 million bags annually), the markets of Asia are a relatively new and exciting opportunity for all coffee producers. Although small relative to their size of population, per capita coffee consumption across Asia is growing quickly. In China, consumption is extremely low but has doubled from only 930,000 bags to 1.8 million in just 4 years, as western-style cafes become a fashionable symbol of status. Although slow to adopt a national coffee drinking culture, China has the potential to quickly become a leading coffee consumer as the result of its large population.

The South Korean market has exploded onto the global coffee scene in just a few years; for purpose of illustration, the Seoul Café Show established five years ago now draws more than 100,000 attendees, 99% of whom are from within Korea. Korea's total coffee imports now exceed more than 2 million bags annually and the country is home to nearly half of the Q System's 4,000 Q Arabica and Q Robusta coffee graders. A small but dedicated specialty coffee movement grows in Thailand, Taiwan, Singapore and Malaysia. The Philippines has a similarly quick growing specialty coffee scene fueled by a young generation of white collar workers with disposable income and the fashionable perception of coffee as a western luxury.

Japan

Japan is the world's 4th largest coffee importing nation (behind the USA, Brazil and Germany) and easily the most valuable in all of Asia. Japanese buyers purchase coffees of all qualities from low quality Robusta used primarily as soluble coffee to the most expensive specialty Arabica auction lots sold each year.

The majority of coffee consumption in Japan is Arabica, accounting for 70-80% of the present day market; however, Robusta consumption has been growing at 4% annually since 2000.¹⁰

Brazil is the single largest origin at 29% of Japan's total imports, followed by Colombia (19%), Indonesia (14%) and Vietnam at 10%. It should be noted, however that *coffee imports from S.E. Asian countries have increased by 2.8% per year since 2000, while coffee from S. America have stagnated and Central America and Africa have fallen.*¹¹ The import of green coffee into Japan is duty free.¹²

Consumption in Japan is split evenly between in-home (31%) and out-of-home cafes or restaurants (29%) with the larger balance of consumption in the form of ready-to-drink (RTD) coffee products sold primarily in vending machines and convenience stores¹³.

Japan is a large and established market that is steadily growing and offers opportunities for purchasing coffee of all qualities from Myanmar with substantial premiums available for coffees of exceptional quality. Japan is recommended as a primary market for new business development activity for Myanmar's coffee exports.

South Korea

*South Korea's per capita coffee consumption is five times greater than the rest of the Asia-Pacific region and grew at 30% annually from 2009-2013*¹⁴. The trend that is expected to continue as younger generations embrace western style café culture. As of 2012 there were 12,000 specialty coffee shops in South Korea, representing a 60% increase from 2008.¹⁵

Approximately two thirds of green coffee imports into Korea are Arabica, one third is Robusta; however, evidence suggests that Arabica consumption is growing steadily at 5% while Robusta imports have been declining each year since 2000. Vietnam is the largest imported origin (31%), followed by Brazil (21%), Colombia (11%) and others primarily in Central and South America.

The majority of coffee consumption in Korea is in the form of soluble coffee and instant 3-in-1 drink mixes (43% combined), which include a combination of soluble coffee, powered dairy and sweetener in one product, followed by out-of-home consumption (32%) mostly in chain-based retail cafes and RTD products (24%)¹⁶. Trends indicate a steady shift to out-of-home consumption as café chains rapidly expand and independent café operators increase in numbers. In recent years Korean coffee chain operators have expanded internationally, developing a significant brand presence and exporting roasted coffee to abroad to China and the U.S.A.

South Korea is a young but aggressively developing market with immediate opportunities for the sale of subspecialty coffee from Myanmar and long-term opportunities for better quality specialty coffee as the market matures.

The Philippines

The Philippines produces coffee but is a net importer overall with *domestic consumption ten (10) times that of production*. From 2008 to 2012, total coffee consumption more than doubled and is presently estimated at 2.2 million bags. At 1.3kg per person, it boasts among the higher per capita consumption of coffee in Asia.

The Philippines is in an era of strong economic growth. In 2014 the economy of the Philippines expanded 6.1% and is forecast to continue at 6.4% and 6.3% in 2015 and 2016, respectively.¹⁷ This contributes to increased disposable income and higher consumer spending.

Nearly all coffees imported into The Philippines are from Asian countries, specifically Vietnam (54%) and Indonesia (44%)¹⁸, leading to an assumption that the vast majority of consumption is Robusta.

Coffee is a household staple among all economic classes in The Philippines, with a large percentage (up to 90%) estimated to be soluble coffee or 3-in-1 products (including RTD). With coffee drinking as cultural norm, transition to out-of-home specialty café consumption has occurred rapidly, fueled by a young and emerging class of white collar workers with an interest in western lifestyle trends.

Many of the young generation of new coffee drinkers in The Philippines and specifically Manila are employed in the business process outsourcing (BPO) industry that work long or varied work, making an influx of nearby cafés ideal waiting or social meeting points between shifts. As a result, *the specialty coffee shop industry of the Philippines is projected to sustain growth of 20 percent over the next five years*.¹⁹ Analysts attribute this expansion to the growing consumer preference for specialty coffee and the improving image of coffee in general.

The Philippines is a small but quickly growing consumer market for coffee that Myanmar is competitively advantaged to pursue as it transitions from Robusta to Arabica.

China

Coffee consumption per capita remains extremely low in China, less than .2 kg (approximately 5 cups) per person annually in urban areas but growing. Data from 1998 to 2012 shows an accelerating trend of coffee importation at an annual growth rate of 13.7% for all forms (green, roasted and soluble).²⁰ Based on a market study by research company Euromonitor International, China's total consumption of coffee grew from 1 to 1.6 million bags, representing an average annual growth rate of 9.5% for the period from 2006 to 2011.

The International Coffee Organization (ICO) summarizes China's coffee market in its official 2013 *Coffee in China* report as being, "something of a puzzle." Despite having extremely low per capita consumption when amortizing its present volume of

imports over 1.3 billion residents, its potential for growth is unlike any other on the planet, should it follow a similar path to coffee like Japan.

Unlike Japan, however, China is also a coffee producing nation undergoing large planting initiatives capable of meeting some of its own domestic demand, primarily in the Yunnan province neighboring Myanmar. In 2009 the International Trade Centre (ITC) estimated Yunnan's production at approximately 40,000 tons, predicting increases as much as 80% by 2016²¹ prior to announcements indicating that coffee cultivation would be promoted by the Yunnan and Pu'er governments. Consequently, domestic production in China (nearly all Arabica) exceeded 82,000 tons in the 2012/2013 harvest²² and continues to expand.

The same ICO report indicates that a "proliferation of sales outlets for coffee companies on every street corner in China's big cities indicates the existence of a potential for coffee consumption," noting that these same companies, "carry out promotion activities targeted mainly at the young, who are more receptive to change and to Western lifestyles."

Coffee consumption in China continues to increase, with organizations including national chain SPR Coffee and the China Coffee Association of Beijing estimating growth at between 15-30% annually, figures that are buoyed by an influx of expatriate coffee drinkers drawn by economic opportunities. There is unquestionably substantial interest and investment by coffee companies in China but as of yet, consumption continues to lag behind other Asian nations.

In the near term, opportunities exist for Myanmar to supply Hong Kong, neighboring countries with trade ties to China such as Taiwan or Korea and some Mainland Chinese coffee roasters or importers with green coffee. Effort should be made now to establish Myanmar as a preferable coffee origin among younger consumers, who are China's coffee drinkers of tomorrow.

Singapore, Malaysia and Taiwan

The smaller markets of Singapore, Malaysia and Taiwan have a well-developed specialty coffee culture and may also be gateways to larger trade volumes in other markets throughout Asia. Taiwan and Singapore, particularly, have among the highest percentage of Arabica consumption versus Robusta in the region, pay substantial premiums for high quality coffees and are also the hub of trade for regional companies that operate in other ASEAN countries and developing markets like China.

Asian Coffee Producers

Indonesia, Thailand and Vietnam are major coffee producing nations that also have growing internal coffee consumption and in varying degrees, burgeoning café cultures, that make these countries potential markets for sale of Myanmar coffee, though a lower priority than the consumer nations of Japan, South Korea and the Philippines.

- **Indonesia** is the 2nd largest consumer of coffee in the Asia region behind Japan and 8th largest consumer in the world, approximately 3.6 million bags in 2012.

While the majority of its internal consumption is from national production, Indonesia also imports around 1 million bags of coffee each year, mostly from Vietnam. Nearly all domestic consumption is presently Robusta, however, Indonesia is similarly impacted by the westernization of its youth and café culture. Indonesia, with a population of over 250 million, has seen an increase in coffee consumption by more than 6.6% annually since 2000. If continued at the same rate, Indonesia will become a consumer market larger than France by 2020.

- Coffee consumption in **Thailand** is estimated to be growing at an annual rate somewhere between 7% and 10% to approximately 1 million bags, mostly from internal production and almost entirely Robusta. The continued development of Thai specialty coffee culture should be of particular interest to Myanmar for two reasons: 1) its geographic location that reduces the cost and difficulty of transacting business between these two countries and 2) as an ASEAN member nation, Thailand's import tariff for coffee from Myanmar is only 5%, compared to as much as 40% for other producing countries.
- **Vietnam** has seen some of the most dynamic market growth in the Asia region, averaging 13% per year or more to internal consumption estimated by ICO at over 2 million bags in 2014. The vast majority of coffee consumed in Vietnam comes from domestic production, almost entirely Robusta. With a total population of 90 million, Vietnam as a growing base of young, well-educated consumer with disposable income²³ that historically leads to specialty coffee culture and demand for Arabica of better quality imported from other countries.

2) Australasia and New Zealand

The coffee markets of Australia and New Zealand are arguably the most sophisticated and competitive in the world. In 2014-15, this coffee segment is estimated to generate revenue of \$1.3 billion. Australian research company IBISWorld estimates that more than one billion cups of coffee are consumed in Australian cafes, restaurants and other outlets each year, representing a 65.0% increase over the past 10 years.

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This phenomenal growth is driven by Australia's booming coffee culture. As a result, instant coffee has fallen as a share of total coffee consumed.²⁴ The ICO estimates the total consumption of coffee in Australia at more than 1.5 million bags in 2013, an increase of 3% annually in the past 4 years. With an estimated population of only 25 million, that equates to annual per capita consumption of approximately 3kg per person.

Nearly all coffee consumed in Australia and New Zealand is prepared as espresso at per-capita consumption rates in metropolitan areas far outstripping their North American counterparts. The coffees of Myanmar exhibit characteristics like chocolate, berry-like dry natural processed coffee from Mexico or mild, sweet citric wet processed coffees of Central America and may provide a cost effective alternative for those origin sources in Australia.

3) North America

At 24 million bags of green coffee imports (~15% of world consumption) and valued at more than \$10 billion annually, the United States alone is second only to the whole European Union as a consumer of coffee and the world's single largest market for coffees differentiated by quality. The majority of green coffee imports into the USA come from Brazil (23%), followed by Colombia (15%), Vietnam (12%), Mexico (8%) and Guatemala (7%), Indonesia (6%) and many other origins.

Brewed specialty and coffee prepared as espresso, collectively "gourmet" as defined by the National Coffee Association's (NCA) *National Drinking Trends* report are consumed by more than one third of the population daily and growing at a rate of 3% annually, as sales of lower quality coffee remains flat or slightly lower. This quickly developing and high value espresso culture in the USA presents opportunities for dry natural processed coffee from Myanmar, which is ideal for espresso.

Although Myanmar faces a barrier to entry into the North American market due to its distance and direct competition from coffees of Mexico offering a similar profile, it cannot be overlooked due to its size and diversity. Visibility in the USA offers an additional benefit for Myanmar: as the global leader in the specialty coffee industry, *coffee businesses from around the globe and particularly Asia look to the USA for new trends* and opportunities that can be exported abroad.

4) Europe

The major importing countries of **Germany, Italy** and **France** are well-established coffee markets that are heavily reliant on Brazil and Vietnam for commodity coffees. Potential exists in these markets to introduce subspecialty coffees from Myanmar but should be considered a lower priority than others with greater or more immediate anticipated return on marketing investment.

An opportunity of higher value, however, exists in the small but quickly growing specialty markets for coffee found predominantly in the **United Kingdom** and **Scandinavia**, followed by **Germany, the Netherlands**, as well as Eastern European markets of **Poland, the Czech Republic** and **Russia**.

Scandinavia, specifically, is home to three of the four top coffee consuming markets per capita: **Finland, Sweden** and **Denmark** are countries of brisk development for specialty coffee culture. Although the markets of Europe should not be considered a high priority for the marketing and promotion of Myanmar coffees, they do offer potential for high value trade that can be attracted through promotion within the United States.

Market Strategy

Introduction: Commodity versus Specialty

The world coffee market is divided into two categories: *commodity*, exchange-grade generic Arabica or Robusta coffees that represent the vast majority (85-90%)²⁵ of world consumption, and *specialty*, the small 10-15% share of distinctive coffees possessing superior and uniquely identifiable sensory characteristics resulting from favorable plant genetics and growing conditions matched with cultivation, harvesting and processing best practices that result in a low number of defects.

Most commodity coffee contract trade volume is computer-driven activity conducted by institutional speculators through brokerages, thus creating extremely volatile world coffee commodity prices that give little or no consideration to actual global supply and demand or other real-world factors, such as the cost of coffee production.

By contrast, specialty coffees are usually traded by dedicated coffee importers and exporters or through direct trade relationships developed between the producer (farmer, cooperative or export group) and consumer, typically buyers representing a coffee roasting business from a consuming country.

As the *industry lacks a clear and universally accepted definition of the word "specialty,"* other methods of price differentiation are sometimes used exclusive of evaluated cup quality to reach higher-value markets. Organic certification or social and environmental program standards established by organizations, such as Fairtrade U.S.A. or International, Rainforest Alliance and others may increase the value of coffee when compared to commodity contract pricing but fall short of the price potential achieved by coffees of superior quality. As a result, these certification programs are often effectively applied as a hedging mechanism to gain additional value from commodity quality crops or to reach niche markets, such as buyers specializing in organics.

Specialty coffee prices are established:

- between buyer and seller at some negotiated premium differential tied directly to commodity market prices and fixed on conditions agreed to in advance by both parties;
- between buyer and seller at a fixed price negotiated for each lot of coffee *independent of the global market price of commodity coffee*; or
- at public or private auction (often online) organized by the producer, export trade association or third party independent entity.

In all three scenarios, specialty coffees are sold at higher price premiums *often 1.5 times, and as much as 20 times or more, the price of commodity coffee and with less price volatility than its commodity counterparts.*

Furthermore, the specialty coffee trade is historically a more reliable and predictable market option for coffee producers, since specialty coffee contract terms are generally agreed to early in the season or over long periods of time. Some specialty

coffee contracts are sometimes valid for multiple seasons with exclusivity arrangements that allow the seller guaranteed income and buyer, time to build producer brand recognition among end-user consumers. Specialty buyers tend to prefer direct lines of communication with producers in order to more effectively discuss preferences or otherwise conduct business in a fashion that is beneficial for long-term availability of suitable specialty coffee.

Origin Branding

Origin branding and producer marketing support plays a vital role in establishing the value of specialty coffee, with the highest premiums paid for coffees that not only exhibit exemplary characteristics but also are supported by sophisticated branding and marketing.

Origin branding and storytelling is a critical component of specialty coffee differentiation

In recent years, exceptional coffee-producing origins like Panama and individual estates like Hacienda Esmeralda (Panama) or Fina El Injerto (Guatemala) have built an valuable reputation through brand promotion and messaging coupled with consistent quality performance that enhances market reception of extraordinary prices.

Specialty coffees are branded and marketed by producers not only by country or regional origin designation, but by cooperative, mill or farm name, producer name, sometimes even as precise as individual production lot name. Grades assigned to coffees by in-country export authorities are used as a guideline but are not the ultimate measure of value within the specialty industry, as they give an indication of important sensory characteristics, such as flavor, which may vary dramatically in two samples of green coffee with the same in-country grade.

Origin branding and storytelling is a critical component of specialty coffee differentiation, as it:

1. *establishes a favorable bias of quality and value of coffee assessed by professional buyers that can dramatically impact sensory perception;*

Subjectivity is present in all industry standard methods of quality evaluation, which can be impacted favorably by brand reputation. In nearly all cases, a cupper's assessment of blind coffee samples will increase when told that sample originates from an origin perceived as favorable (e.g. Ethiopia) or well-known producer; and

2. *provides the buyer with content that is necessary to articulate many complex factors in coffee production and explain value to consumers in a way that is approachable and easy to comprehend.*

In consumer sales, coffee retailers rely on technical information about the harvested lot and a story about the people, the place, the process and the culture produced the

coffee as evidence that demonstrates its uniqueness and their own proficiency. Consumers that remain unconvinced or are otherwise not motivated by claims of quality may purchase based on a human interest story behind a coffee, for exotic origin intrigue or for the belief that the purchase is doing good.

Myanmar's Message

Myanmar's message to the coffee industry is simple and authentic: a rustic gem of natural resources and ideal climate conditions for coffee production that is inhabited by organized and industrious people who have recently emerged from isolation. With its doors open to the world, Myanmar now is quickly implementing the latest of best practices and new technologies that will help to improve Myanmar's coffee quality, productivity and subsequent value.

Myanmar aspires to become the Panama of Asian coffee production

Myanmar aspires to become the Panama of Asian coffee production: small in volume but maintaining high quality standards. This message will be widely understood and admired among the coffee trade and can be effectively communicated with reports of quality improvement effort underway, photographic and video assets taken from the field and through independent cupping results, such as Q Coffee* qualitative numerical scores that are particularly well received in Asia.

In Western markets, emphasis can be placed on the work being done by USAID and its implementation partners to create economic value in one of the world's poorest countries and that Myanmar's coffee is a key export that improves lives.

In Japanese market communication, it can be noted that most of Myanmar's coffee production is located between 19 and 20°N latitude, which is very similar to Kona coffee from Hawaii, which is an extraordinarily popular origin in that country. Wet processed coffee from Myanmar shares similar physical and cupping characteristics to Kona (also similar to a mild Central American washed coffee) coffee, which can be an added benefit in that market.

In communication regarding quality and sensory characteristics, a reasonable and honest approach must be maintained: washed coffees presently produced in Myanmar are borderline specialty to subspecialty but improving and exhibit characteristics similar to Central American coffees (or Kona, as noted above). A range of qualities and flavors exist among the country's dry natural processed offerings, at best mid-grade specialty; however, it is also reasonable to emphasize that Myanmar is a new participant on the global stage for coffee production and that change and improvement is occurring rapidly.

* A Q Arabica or Q Robusta Coffee has been evaluated by independent Q Grader (professional cuppers) and certified by CQI as being specialty coffee in the Q Coffee System.

The story of the people of Myanmar is compelling in all regions of the world; their struggle to overcome adversity; the motivation and willingness to implement change is a strong message that resonates with audiences of all nationalities. Almost everyone will root for an underdog.

Market Entry Points

As a new and unknown origin of coffee production, potential exists for Myanmar in practically every consuming region of the world to increase trade and in the case of China specifically, the value of trade. This is both an opportunity and also a dilemma, as careful selection of which markets to pursue (and in what order) is necessary to maximize returns for all segments of Myanmar's coffee industry now and for years to come during its anticipated growth and maturation as a specialty coffee producer. [In order to promote the interests of the Myanmar coffee sector consistently in select markets and to achieve the best return on investment, cooperation among the entire industry segment to operate as a single firm is paramount.](#)

The combined regional entry points below form a portfolio of markets that balance risk versus reward for Myanmar's larger volume subspecialty producers and those capable of producing small quantities of high quality coffee.

Japan

LONG TERM INVESTMENT FOR INCREASED VALUE OF BOTH HIGH AND LOW QUALITY COFFEE

Opportunity:

Japan offers a broad and vibrant market in Asia that can support coffees of all qualities from Myanmar in substantial volumes. The Japanese market is established, reliable and shows signs of steady future growth.

Challenge:

The Japanese coffee import market is controlled by a small number of well-established large trading companies, including Wataru, Mitsubishi, ECOM, OLAM and others that take a conservative buying approach to trading and may not be easily swayed by short term opportunities from an unknown emerging coffee market. Myanmar must establish credibility and a reputation among Japanese buyers for quality.

Strategy:

Japan is a long-term investment that will pay dividends over time. Additional Japan-specific coffee market research is recommended, leading to the identification of early adopter importing partners and a development of a marketing campaign uniquely designed for Japan. Emphasis may be placed on Myanmar coffee's flavor profile and latitudinal similarity to Kona, Hawaii, which is a consumer origin brand of near mythical proportion in Japan and also its potential to achieve quality status approaching the "Panama of Asia," in coming years.

South Korea

QUICK RETURN ON INVESTMENT FOR INCREASED VALUE OF LOW QUALITY COFFEE

Opportunity:

Korea is a young and rapidly developing market for green coffee imports that is growing at double-digit percentage rates annually but has yet to develop a unique national coffee identity. The majority of coffees consumed in Korea today are low quality Robusta and commodity Arabica prepared as soluble coffee but specialty coffee consumption is growing at a dramatic pace, largely prepared as espresso and served in milk beverages.

The Korean coffee market has developed to a level where national coffee shop chains saturate urban street corners. Retailers are seeking new opportunities for differentiation as competition among national brands and foreign imports like Starbucks reaches new heights. Korea's burgeoning independent café and craft roasting scene remains small but with good future potential for growth as consumption matures. Coffees from Myanmar are well suited to current demand in Korea and potential exists for long-term trade as both markets mature.

Challenge:

Korea is presently a market drawn to value with a very small number of buyers for high priced quality-differentiated specialty coffees. Some high value purchasing occurs each year, which is generally limited to high visibility competitive auctions, such as Cup of Excellence™ events and others with acquired lots destined for re-export to neighboring Asian countries or as trophies for promotional purposes.

Strategy:

Identify partners in-country for immediate low-value trade of subspecialty Myanmar coffee based on value with the future speculation that a greater market for differentiated specialty coffee trade will mature in coming years.

United States of America

LARGE AND INFLUENTIAL MARKET TO PROMOTE MYANMAR'S GLOBAL BRAND IMAGE

Opportunity:

The U.S.A. is the world's largest single coffee consuming country and offers potential for large volumes of trade in all quality levels and processing methods. More so, it is the epicenter of the world's specialty coffee movement, which influences Asian and to a lesser extent, European coffee interests. Trade media originating in the United States is often distributed or syndicated to Asian and some European markets in local languages, increasing its distribution.

American specialty coffee consumers are motivated by philanthropic interests more so than Asian or European counterparts, meaning American specialty roasters pay for extrinsic value in coffees connected to environmental or social programs.

Challenge:

The United States is a large and decentralized market with distinct East and West Coast trading partners and a wide ideological distance between commodity and specialty coffee buyers that can be costly to pursue simultaneously. Despite the wide breadth of origins available in the U.S.A., traditional and specialty green coffee importers operate on slim trading margins and remain relatively conservative, purchase only those coffees with immediate demand from commercial buyers.

Strategy:

As the hub of the world's specialty coffee activity, the U.S.A. is an ideal market to identify and launch a highly visibility specialty coffee development pilot project. An early adopter (or adopters) may be identified in the U.S.A. to participate as a founding partner or sponsor of specialty coffee development activity benefitting Myanmar's producers and yielding high quality coffee.

Producers participating in the project will benefit from higher premiums paid for good quality results and the commercial partner receives recognition for philanthropic support of this new farming origin in addition to a rare and good quality coffee. Myanmar receives exposure as producer of good quality specialty coffee selected by an influential specialty coffee company.

Trade media will be informed and ideally involved throughout the process from partner engagement to launch of roasted coffee product to disseminate a favorable image of Myanmar throughout the industry.

Australia / New Zealand

QUICK RETURN ON INVESTMENT FOR INCREASED VALUE OF A SMALL VOLUME OF HIGH QUALITY COFFEE

Opportunity:

Australasia is a high value market for green coffee that offers opportunities for quality-differentiated specialty coffee and is geographically isolated from origins offering similar flavor profiles. Nearly all coffee consumption in both countries is espresso, which is an ideal method of extraction for dry natural processed coffees.

Although firmly rooted in coffee consumption traditions borrowed from Italian and Greek immigrants and influenced by American soldiers during World War II, Australian coffee culture is rebellious, innovative and willing to consider new ideas. This curiosity makes its coffee buyers approachable by new and potentially unproven origins.

Challenge:

Although per-capita consumption and the value of coffees purchased by Australasian buyers are high, so is the cost of promotion in this region relative to the size of its population (23 million in Australia, 4.5 million in New Zealand). This region offers the potential of high-value trade for certain well-performing producer groups to supplement Myanmar's earnings but is not capable of supporting an entire industry of coffee producers by itself.

Strategy:

Australasia is poised as an early adopter of coffee from Myanmar, particularly those representing the upper quality tier. Select coffee buyers from Australia and/or New Zealand may be involved in pilot commercial programs with small but consistent brand marketing promotion in the region.

Market Development Activities

The core activities outlined herein are available to promote Myanmar's coffee production interests. To reach the goal of establishing an authentic and desirable image as a coffee origin across a diverse multinational audience of potential buyers with distinct needs, preferences and cultural biases, each activity must carefully its corresponding market.

The timing and location of activities have been selected to project a consistent message year-round among key markets while making efficient use of limited available resources. Consistency and repetition of brand messaging is critical to ensure optimal acceptance and a long-term natural shift in buyer behavior favoring Myanmar as a preferred origin.

Although most activities outlined herein are divided by regional market, be aware that there is crossover of influence among coffee professionals between geographic boundaries. U.S.-based events and trade publications specifically have a significant global footprint and are likely to attract broad international audiences. Variations in approach and messaging are recommended in some regions to accommodate for local culture preferences.

Quality Programs

Work already underway or proposed by CQI and its partners in Myanmar are the backbone of successful trade marketing campaigns in specialty coffee. Specialty coffee buyers are extremely sophisticated and not easily swayed; in fact, this audience tends to be averse to pure marketing campaigns that lack verifiable facts. Work in the areas of traceability and quality advancement bolsters Myanmar's image as a credible specialty coffee producing origin and will raise value.

These programs should be promoted as a central theme in messaging distributed the coffee industry all available platforms (tradeshows events, lectures, press releases, social media, editorials, etc.) as well as include the direct involvement by industry representatives wherever possible. For example, enlisting industry coffee cuppers (Q Graders) to participate in a cupping panel gives these potential buyers a connection to the coffee work ongoing in Myanmar.

Commercial Pilot Programs

Pilot trade programs conducted with early commitment and ideally, investment from commercial buyers to purchase coffees meeting specific conditions provide an immediate financial return on development activities and create a sustainable market linkage with producing communities. Selection of the potential buyer and producer (or producer community) is critical in this process, as is setting realistic expectations for all parties involved.

In a pilot program, one or more commercial buyers are given access, sometimes exclusive access and/or marketing rights to specific lots or trade brand of coffee resulting from development efforts in exchange for the advance commitment to purchase coffee at a specified premium price. These premiums are sometimes contingent on meeting certain quality goals, delivery dates or with the expectation

that some portion of the premium will fund quality, social or environmental programs benefitting the producer.

Industry Events (Trade Fairs, Conferences)

Trade expositions, conferences and industry meetings are an important element of coffee origin trade marketing campaigns, as they allow Myanmar's representatives in-person access to coffee professionals from around the world or from one region in one convenient place.

Personal interaction is critical to develop trust and long-term business relationships between sellers and buyers in the specialty coffee industry.

Exhibiting at a trade show to meet new buyers on the trade floor is not the primary goal of participation at a specialty coffee exposition but rather, to use these events at a platform to communicate the origin's brand message, create relationships and conduct in-person meetings or cupping sessions with select industry buyers. Additional promotional opportunities exist at many of these events to participate as lecturers or panelists, which provides a larger audience for communication of the substantiating work underway.

Special Events

Special events, such as origin trips, consumer-market road shows and barista competitions all engage a potential and develop meaningful connection between buyers and sellers.

Origin Trips

In an origin tour, coffee buyers visit the source of production for approximately 5-10 days each harvest season to gain a high-level understanding of the culture of a place, its people and to develop direct lines of communication with coffee suppliers.

For the coffee producing origin, this is a way to build better relationships with its buyers or potential buyers and promote its interests abroad with minimal travel required.

Origin trips may be organized by individual producers or producer associations but are most effective when coordinated in partnership with a consumer association, such as the Specialty Coffee Association of America (SCAA) or Speciality Coffee Association Europe (SCAE), which offers organized annual travel programs to its membership.

The cost of international travel is generally paid by the visitor with in-country costs paid by the sponsoring producer organization. International travel for key participants (high value buyers, industry influencers or media) can be supported in part or in full by the sponsoring entity to ensure that selected coffee buyers and markets are represented.

Cupping Roadshows

Organized cupping roadshows bring the experience of tasting a variety of coffees from Myanmar directly to buyers in their home markets and sometimes their own office. Although trade events offer a similar opportunity for engagement, show attendees often have busy schedules with a number of obligations with visiting clients and suppliers over a short period of time. A series of private cupping events organized by one origin in key regions of consuming country for professional buyers at times can be a low cost way to reach new and existing customers.

Industry Competitions

Barista, brewing and roasting competitions held in a coffee producing origin make news throughout the industry. When connected to a known national or international competition, such as the World Barista Championship, competitors from producing countries receive worldwide attention in industry trade press. The same is true for the coffee used in these competitions, so promoting exceptional lots of Myanmar coffee for use by experienced competitors from nations other than Myanmar is recommended as a low-cost method of sponsorship that can yield exceptional industry publicity.

Trade Media

Print and electronic trade media outlets are influential in the specialty coffee industry and important when developing an origin brand reputation. Information about the coffee industry is obscure and not widely reported by consumer media; those working in coffee are geographically dispersed, meaning that industry-specific media plays a leading role in educating readers about latest the latest events, activities and information of the trade.

Press Releases

Press releases offer a low cost and effective method of gaining industry exposure for newsworthy announcements and accomplishments. When drafted in a way that states facts free of marketing language these announcements may be reprinted by trade industry media outlets in print or electronic formats and can lead to follow-up interviews and editorial coverage.

Feature Articles

Editorial features are prominent 3-5 page articles of 1,000 to 2,000 words plus attractive photography that makeup the bulk of reader content offered by a trade publication and are generally accepted by the reader as true and unbiased, making them particularly valuable promotional tools.

These articles are either commissioned by the publication from writers or, as in our case, promoted (or pitched) as short 1-2 paragraph abstracts to editors for consideration.

Past performance of the author, relevance / interest in the topic and cost of the content offered (if any) are often used to determine suitability of an article and

when *or if* it may appear. Current or future advertisers are generally preferred as editorial subjects in trade media, though editors publicly deny this practice.

Since many factors determine the success rate of article acceptance and multiple publications may need to be pitched before an article is approved, it is difficult to plan exactly where and when an article may appear. The same article, however, may be reissued or repurposed in multiple regional markets to maximize exposure.

Internet / Social Media

Social media offers a low cost way of reaching a global audience instantly and with greater depth than print media. Messages, photos and videos from farmers and traders within Myanmar can help to tell the story of the origin and establish awareness among the industry.

Advertising

Although business transactions rarely occur directly as the result of traditional paid print advertising, it still serves a useful purpose:

- 1) to raise awareness
- 2) reinforce branding
- 3) pattern usage of a product or service by example; and
- 4) build and maintain a business relationship with a publication in order to enhance acceptance of editorial content, such as press releases and feature articles.

Sponsorships

An origin can gain publicity and build a positive industry association by sponsoring visible quality-focused coffee events and activities. Sponsorships may be regional, national or international supporting competitions, such as the World Brewers Cup championship held each year or focused on a meeting of coffee professionals like the U.S. Roasters Guild Retreat.

Cupping Events / Competition

Cupping competitions run by independent and credible authorities, similar to the one conducted in Yangon in May 2015, are an effective way of rewarding coffee farmers for their accomplishments in coffee quality and also act as a way of making lesser known origins more accessible to buyers – particularly smaller specialty buyers willing to pay high premiums for quality.

Promotional activities for the event should be conducted both before and during judging, as well as following an awards ceremony in a press announcement to trade media.

Calendar of Activities

The following calendar outlines recommended activities benefitting the Myanmar coffee origin brand and trade value for the remainder of 2015 and complete 2016 seasons. Note that in most cases these individual activities are connected, with components of one leading to another. For example, content and assets obtained in the Mya Zai Di Commercial Pilot Program may become editorial content for trade press coverage and are expected to be a focus on messaging and promotion at future events, such as the 2016 SCAA Event in Atlanta. Metrics for evaluation and goals for the success of each activity will be developed prior to implementation and reported following its conclusion.

Dates	Market	Activity	Description
Q3 2015 – Q2 2016	U.S.A. / Australia	Mya Zai Di Commercial Pilot Program	Buyers will be solicited and selected to participate in a commercial pilot program where coffees of extraordinary quality are developed in the Mya Zai Di community through Winrock / CQI's existing efforts. CQI will introduce and facilitate the transaction and visit(s) to origin for the buyer(s) and promote the project and its success within the coffee industry. Planning may commence immediately with ongoing support expected throughout the transaction and promotion in Q2 2016.
Q4 2015	U.S.A. / World	Myanmar Trade Press Editorial	Editorial content related to recent coffee industry developments in Myanmar and future plans will be developed and submitted to leading coffee industry trade publications and written upon acceptance. The marketing message of this piece will emphasize the natural state of Myanmar, entry into the world and its potential for quality improvement in a straightforward and authentic manner.
Q3 2015 – Q4 2015	Japan	Japan Market Development	As a highly specialized market that requires slow but steady progress for acceptance among key buyers, CQI will conduct Japan-specific market research and begin to develop trade contacts on behalf of Myanmar with in-person travel corresponding to the 2015 Specialty Coffee Association of Japan (SCAJ) event in Tokyo, Sep. 30 – Oct. 2, 2015. A marketing report with specific recommendations and contacts will follow within 30 days after. Exhibition space is not recommended in 2015.

Dates	Market	Activity	Description
Q4 2015	Korea	Korean Market Entry / Seoul Café Show 2015	<p>CQI will participate at the Seoul Café Show Nov. 12-15 on behalf of the Myanmar Coffee Association and accompany / introduce representatives from MCA to key industry contacts in the Korean coffee market. Exhibition space is not recommended in 2015; however, CQI will leverage existing relationships with show and Korean industry representatives to gain favorable coverage of Myanmar's</p>

			efforts and will organize a cupping of available coffees for buyers at the event.
Q4 2015 – Q1 2016	World	Myanmar Marketing Materials	Trade marketing materials, including an industry-facing website and brochures will be developed in English (optional Japanese, Korean, Mandarin) to be used in trade promotion in 2016.
Q4 2015 – Q1 2016	World	Myanmar Origin Tour	CQI will organize an origin tour of Myanmar’s coffee production areas and the Mya Zia Di community for

			6-10 vetted buyers, including the commercial trade pilot participant(s) and possibly in cooperation with a major coffee trade association or coffee roaster group and trade media. Planning for the event will begin in late 2015 with the trip expected to last 5-7 days in Q1 2016, during the late harvest season.
Q4 2015 - Q2 2016	U.S.A.	SCAA Event Atlanta 2016	The Myanmar Coffee Association will participate in the 2016 Specialty Coffee Association Event in Atlanta,

			Georgia USA, April 14-17 2016. The SCAA Event is the world's largest coffee trade exposition, drawing more than 12,000 professional attendees in 2015. Planning will begin in 2015 for MCA's exhibition at the event and numerous connected marketing and promotion activities, including but not limited to trade media activity and a cupping of coffees at the event.
Q2 2016 - Q3 2016	Australia	Australia / NZ Cupping Roadshow	A one week to 10-day cupping roadshow tour of coffees in

			<p>Australia / New Zealand representing Myanmar's range of production will be taken to key markets of Melbourne, Sydney and Brisbane, possibly Auckland and potentially in combination with one of that region's annual events: Melbourne International Coffee Show (Dates TBD), New Zealand Specialty Coffee Show (Dates TBD), Sydney Coffee Experience (Aug / Sep 2016) or Café Culture Golden Bean (Sep / Oct 2016). This</p>
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			<p>event is expected to gain publicity for its uniqueness and also present Myanmar to the first time to a number of qualified coffee buyers in the region. Opportunities for trade press leading to and resulting from the event will be pursued and generate additional publicity.</p>
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Dates	Market	Activity	Description
Q2 2016 – Q3 2016	Japan	SCAJ Event 2016	MCA will participate at the 2016 SCAJ Event in Tokyo as an exhibitor to promote the interests of the Myanmar coffee industry and to conduct trade with regional coffee buyers. The annual SCAJ show is the largest each year serving the Japanese market and primary meeting place of Japanese buyers outside of the SCAA Event in the U.S.A.
Q2 2016 – Q4 2016	Korea	Seoul Café Show 2016	With over 100,000 attendees each year, the Seoul Café Show is the largest coffee event in Korea and one of the largest food and beverage shows anywhere worldwide. MCA will

			participate at the 2016 Seoul Café Show as an exhibitor and conduct trade with coffee buyers with regional coffee buyers.
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Budget

Mya Zai Di Commercial Pilot Program

Engage, manage partner, promotion (Consultant)20 days @ \$600 = \$12,000
Oversee production and delivery (CQI staff)30 days @ \$500 = \$15,000
Travel *No Travel*

Pilot Commercial Program Total \$27,000

Myanmar Trade Press Editorial

Draft construct, pitch concept (Consultant) 5 days @ \$600 = \$3,000
Draft / edit article (Consultant) 5 days @ \$600 = \$3,000
Travel *No Travel*

Myanmar Editorial Press Total..... \$6,000

Japan Market Development

Pre-trip market research and planning (Consultant) 5 days @ \$600 = \$3,000
Travel Days (Consultant) 7 days @ \$600 = \$4,200
Strategy and report (Consultant) 10 days @ \$600 = \$6,000
Travel (Consultant) \$5,000

Japan Market Development Total..... \$18,200

Korean Market Entry / Seoul Café Show 2015

Pre-trip planning and preparation (Consultant) 5 days @ \$600 = \$3,000
Travel Days (Consultant) 6 days @ \$600 = \$3,600
Travel (Consultant) \$4,000

Korean Market Entry / Seoul Café Show Total..... \$10,600

Myanmar Marketing Materials

Content development (Consultant) 15 days @ \$600 = \$9,000
Print / show material design English (Subcontract) \$1,500
Website design and production (Subcontract) \$2,500
Website hosting (annual)..... \$300
Printing + freight (Subcontract) \$1,000
Tradeshaw and event backdrops (Subcontract) \$5,000
Travel *No Travel*

Myanmar Marketing Materials (English)..... \$19,300

Myanmar Origin Tour

Organize, promote and participate (Consultant)	15 days @ \$600 = \$9,000
Management and in-country logistics (CQI).....	30 days @ \$500 = \$15,000
Travel (Consultant)	\$4,500
Travel (CQI)	\$4,500
Travel (Participant travel support, in-country costs)	\$10,000

Myanmar Origin Tour Total..... \$43,000

SCAA Event Atlanta 2016

Plan, promote & participate (Consultant)	15 days @ \$600 = \$9,000
Management and logistics (CQI staff)	10 days @ \$500 = \$5,000
Exhibit space, advertisement, exhibitor costs and freight.....	\$7,500
Travel (Consultant)	\$3,500
Travel (CQI)	\$2,500

SCAA Event Atlanta 2016 Total..... \$27,500

Australia / NZ Cupping Roadshow

Organize, promotion, conduct event (Consultant)	20 days @ \$600 = \$12,000
Logistics, support (CQI staff)	10 days @ \$500 = \$5,000
Supplies, location costs	\$2,000
Travel (Consultant)	\$8,000

Total Australia / NZ Cupping Roadshow \$27,000

SCAJ Event 2016

Planning, promotion and participation (Consultant) ...	15 days @ \$600 = \$9,000
Logistics, event management and support (CQI staff) .	15 days @ \$500 = \$7,500
Exhibition fees (includes freight)	\$5,000
Travel (Consultant)	\$4,000
Travel (CQI staff)	\$4,000

Total SCAJ Event 2016..... \$29,500

Seoul Café Show 2016

Planning, promotion and participation (Consultant) ... 15 days @ \$600 = \$9,000	
Logistics, event management and support (CQI staff) . 15 days @ \$500 = \$7,500	
Exhibition fees (includes freight)	\$5,000
Travel (Consultant)	\$4,000
Travel (CQI staff)	\$4,000
Total Seoul Café Show 2016	\$29,500

¹ U.S. DEPARTMENT OF AGRICULTURE, U.S. FOREIGN AGRICULTURE SERVICE, GAIN REPORT, COFFEE: WORLD MARKETS AND TRADE (JUNE 2015).

² INTERNATIONAL COFFEE ORGANIZATION, REPORT ICC-112-4, COFFEE CONSUMPTION IN EAST AND SOUTH EAST ASIA: 1990-2012 (2014).

³ U.S. DEPARTMENT OF AGRICULTURE, U.S. FOREIGN AGRICULTURE SERVICE, GAIN REPORT, BLOSSOMING COFFEE CULTURE CREATES OPPORTUNITIES FOR US EXPORTERS (2014).

⁴ INTERNATIONAL COFFEE ORGANIZATION, REPORT ICC-111-8, COFFEE IN CHINA (2013).

⁵ INTERNATIONAL COFFEE ORGANIZATION, EXPORTS OF ALL FORMS OF COFFEE BY EXPORTING COUNTRIES TO ALL DESTINATIONS, OCTOBER 2014, [[HTTP://WWW.ICO.ORG/PRICES/M1.HTM](http://www.ico.org/prices/m1.htm)] (ACCESSED JANUARY 2015).

⁶ *Id.*

⁷ INTERNATIONAL COFFEE ORGANIZATION, ED 2157/13, REPORT ON THE OUTBREAK OF COFFEE LEAF RUST IN CENTRAL AMERICA, (2013).

⁸ THE NATIONAL COFFEE ASSOCIATION OF U.S.A. INC., NATIONAL DRINKING TRENDS SURVEY (2014), "NCA DRINKING TRENDS"

⁹ ICO "CONSUMPTION IN EAST AND SOUTH EAST ASIA" *supra* note 2.

¹⁰ *Id.*

¹¹ *Id.*

¹² JAPANESE CUSTOMS AND TARIFF BUREAU

[[HTTP://WWW.CUSTOMS.GO.JP/ENGLISH/TARIFF/2015_4/DATA/E_09.HTM](http://www.customs.go.jp/english/tariff/2015_4/data/e_09.htm)] (ACCESSED JULY 2015)

¹³ "JAPANESE RTD MARKET 2014," SUNTORY GLOBAL INNOVATION CENTER LTD, JAPAN

¹⁴ U.S. DEPARTMENT OF AGRICULTURE, U.S. FOREIGN AGRICULTURE SERVICE, GAIN REPORT, KOREA – REPUBLIC OF, COFFEE MARKET BRIEF UPDATE (2013).

¹⁵ *Id.*

¹⁶ *Id.*

¹⁷ ASIAN DEVELOPMENT BANK, ASIAN DEVELOPMENT OUTLOOK 2015

[[HTTP://WWW.ADB.ORG/COUNTRIES/PHILIPPINES/ECONOMY](http://www.adb.org/countries/philippines/economy)] (ACCESSED JULY 2015)

¹⁸ U.S. DEPARTMENT OF AGRICULTURE, U.S. FOREIGN AGRICULTURE SERVICE, GAIN REPORT, PHILIPPINES COFFEE SITUATION AND OUTLOOK (2011).

¹⁹ U.S. DEPARTMENT OF AGRICULTURE, U.S. FOREIGN AGRICULTURE SERVICE, GAIN REPORT, PHILIPPINES DAIRY PRODUCTS ANNUAL (2014).

²⁰ INTERNATIONAL COFFEE ORGANIZATION, REPORT ICC-111-8, COFFEE IN CHINA (2013).

²¹ *Id.*

²² SPECIALTY COFFEE ASSOCIATION OF AMERICA, THE SPECIALTY COFFEE CHRONICLE, "FIELD NOTES FROM PU'ER, CHINA: COFFEE PRODUCTION IN THE LAND OF TEA" (JUNE 2013).

²³ ICO "CONSUMPTION IN EAST AND SOUTH EAST ASIA" *supra* note 2.

²⁴ IBISWORLD, INDUSTRY REPORT C1199, "TEA, COFFEE AND OTHER FOOD MANUFACTURING IN AUSTRALIA" (MAY 2015).

²⁵ THE COFFEE EXPORTER'S GUIDE. REP. THIRD ED. GENEVA, SWITZERLAND: INTERNATIONAL TRADE CENTRE, 2012. PRINT.