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Coffee industry in Malaysia: An overview and potential

(Industri kopi di Malaysia: Kaji selidik umum dan potensi)

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Abstract

Coffee, also known by its scientific name Coffea spp. from the Rubiaceae family and the genus *Coffea*. There are numerous coffee varieties, but the three most widely grown and commercialised are Arabica, Robusta and Liberica. Malaysia's coffee industry appears to be growing, despite the fact that the country's coffee production is declining and unable to meet demand. This rise in demand is due to population growth and current changes in lifestyle. The decrease in coffee-growing areas in Malaysia has resulted in a limited supply of local green coffee. However, current trend shows an increase in local demand, particularly for pre-mixed coffee, which makes coffee as one of the important commodities and has the potential to be developed. Therefore, the aim of this study is to examine the overview and potential of the Malaysian coffee industry. Secondary data was gathered from several sources and analysed using descriptive analysis, trend analysis dan Revealed Comparative Advantage (RCA). Due to limited local coffee resources and prices, the country depends on imported green coffee beans, particularly Robusta and Arabica varieties from Indonesia, Vietnam, Columbia and Brazil. The trend of importing green coffee and exporting coffee products is increasing yearly. Although the world market price of green coffee beans fluctuates, the price is still cheaper than local green coffee, especially the Robusta variety. The results of the RCA analysis show that Malaysia is competitive with some other countries, especially in coffee extract products. This is an opportunity for industrial players to explore foreign markets and expand the coffee industry especially in value added product. Therefore, planning and systematic action plans can be improved and developed to be on par with other countries.

Introduction

Coffee or its scientific name Coffea spp. is from the Rubiaceae family and the genus *Coffea* (Ghawas and Rubiah 1991) native to tropical regions of the African continent especially Ethiopia. There are many varieties of coffee but the three most widely grown and commercialised types are Arabica, Robusta and Liberica. According to Ghawas and Rubiah (1991) coffee belong to perennial crops and can live more than 25 years and grow at a height of 6 – 15 m. The history of coffee cultivation in Malaysia began in 1779 when the Arabica variety originating from the Tropics of the African Continent was brought in and introduced. However, the growth of Arabica coffee is less encouraging as it requires moderately cold temperatures between 15 °C to 22 °C as well as humid-cold conditions. Technically, Arabica coffee is suitable to

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be grown only at upland areas between 1000 – 2000 m above sea level. However, the limited area of highlands in Malaysia makes the area for coffee cultivation limited. A string of that, in 1875, the Liberica variety was first introduced by Leonard Wray. Liberica coffee is suitable to be grown at high temperatures and hot and dry conditions with the optimum temperature is at 18 °C – 28 °C. Currently, most coffee plantations are cultivated as a single crop or using intercropping system in the West Coast areas of Peninsular Malaysia, Sabah and Sarawak. However, both of these varieties were found to be susceptible to leaf rust disease (Hemileia vastatrix). To overcome this problem, in 1900, Robusta coffee which is more susceptible to disease was introduced and it spread all over the world including Malaysia. The introduction of Robusta coffee into the country has resulted in a rapid expansion of the Malaysian coffee industry. In 1980, the British operated about 10 coffee estates around Kuala Lumpur. However, in 1897, the market price of coffee suffered a fall and leaf rust disease as well as the attack of the clear wing moth (Cephanodes hylas L.) had been the cause of the decline of the local coffee industry. This decline was exacerbated when the rubber plantation industry flourished in the early 1900s. As a result, estate coffee crops became increasingly scarce and less in demand. Although this coffee crop increased again after 1950, this crop was cultivated mainly by smallholders. (Ghawas and Rubiah 1991).

The coffee industry in Malaysia is seen to be growing even though the country's coffee production is declining and unable to meet the demand. This increase in demand is due to the increase in total population and current changes in lifestyle. Previously, Malaysians preferred drinking tea over coffee. Recently, the scenario started to change as more Malaysian enjoyed drinking coffee as their main beverage (Ramanthan and Ali 2021). On the production side, the limited local green coffee is a result of the reduction in coffee growing areas in Malaysia. Farmers are seen to be less interested in coffee and more inclined to other industrial crops such as oil palm and rubber (Amna 2016). In addition, it is also influenced by unstable price factors, unfavorable returns, complicated coffee collection and the processing method itself, making the coffee enterprise run on a small scale. Therefore, the country has to import green coffee beans to meet local demand, especially for the coffee product processing industry. In 2019, the total import of green coffee beans is 136,250 mt and the total export of coffee products is 133,782 mt. The growth of coffee imports is seen to be greater than the value of exports indicating that the country's dependence on the supply of green coffee from foreign countries is high.

The fact is that the coffee plant an important commodity and has the potential to be developed. This is because the demand for value-added coffee products especially pre-mixed coffee is big in the local and global markets (Mohd Zaffrie et al. 2016). Furthermore, local cafes are expanding, and more people are consuming coffee and it is becoming a regular drink among Gen Z (Rahim et al. 2019). This indirectly encourages the development of the coffee processing industry including small and medium enterprises (SMEs) in the production of coffee products, especially pre-mixed coffee. This increase provides employment and income opportunities for Malaysians. It is expected that the demand for coffee products will continue to increase in the local and global markets. According to forecast data from Statista (2021), expected coffee consumption in Malaysia increased from 635,000 bags in 2020 to 800,000 bags in (Ramanathan and Ali 2021). As such, it is an opportunity that local entrepreneurs should take to venture and expand their business internationally. Thus, a study on the potential and an overview of coffee industry in Malaysia was conducted.

Methodology

This study involved the collection of data from secondary sources. Secondary data such as production, hectarage, total imports, total exports and prices were obtained from reports, books, journals and websites. The fundamental characteristics of the data in this study were described using descriptive statistics. It provides brief summaries of the sample and values such as mean, maximum, minimum and standard deviations.

Data was also analysed using the trend analysis and Revealed Comparative Advantage (RCA) methods. The term comparative advantage refers to a country's propensity to export commodities that it can produce relatively well compared to the rest of the world. In other words, if a country can produce a good at a lower relative cost than other countries, that country should use more of its limited resources to produce that goods through trade. That country can obtain other goods at a lower price (opportunity cost) through trade in exchange for the goods in which it has a comparative advantage. RCA is a technique used to make comparisons by calculating the relative advantages or disadvantages of a country in a particular commodity or service shown in the form of an index. Balassa (1977) developed the Revealed Comparative Advantage concept to identify the relative trade performance of individual countries for a specific country. In the literature, the Balassa Index (Balassa 1965) is widely used to calculate the RCA for countries with sectorial specialisation. The concept of RCA refers to individual countries' relative trade performance in specific commodities (Batra and Khan 2005). The RCA index is measured by:

$$RCA = \ln (X_{iM} / X_M) / (X_{iW} / X_W)$$

Wheres,

X_{iM} = Malaysia's exports of produce *i* to the World

X_M = Malaysia's total agricultural exports to the World

X_{iW} = Rival country's exports of produce *i* to the World

X_W = Rival country's total agricultural exports to the World

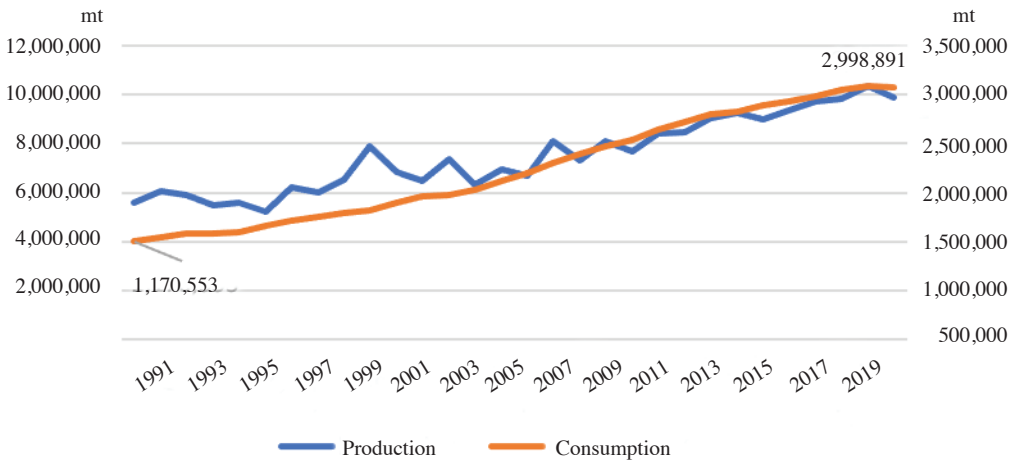
Positive RCA values indicate that Malaysia has a comparative advantage in exporting goods to competing countries in global agricultural and selected export markets, while negative values indicate the opposite. A higher positive value indicates greater competitiveness, while a higher negative value indicates less competitiveness. Trade data from the UN Comtrade database covering the period 2010 – 2019 were gathered using the Harmonised System (HS) of classification at six digit levels (disaggregated).

Findings and discussion

Global coffee production

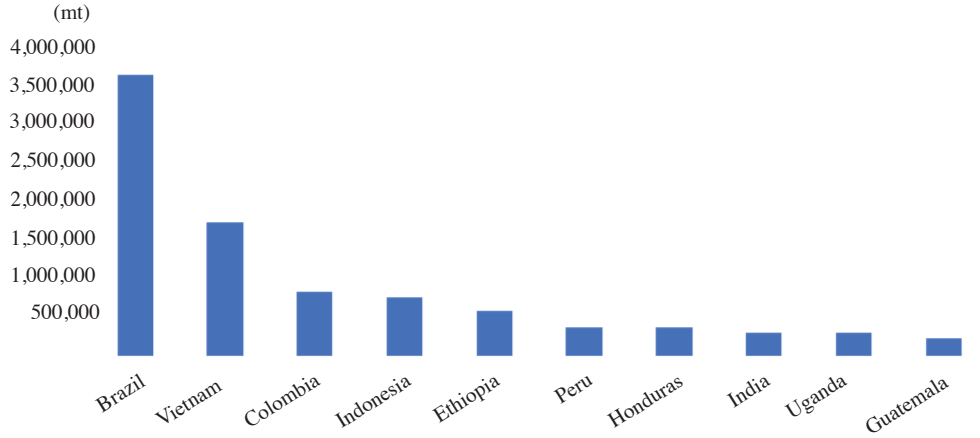
Global coffee production has experienced an increasing trend every year starting from 5.6 million mt in 1991 to 10 million mt in 2020 (*Figure 1*). This almost one-fold increase is due to global demand increasing annually from 1.17 million mt in 1991 to 3.0 million mt in 2020. The increase in world production and demand for coffee shows that the world's coffee industry is growing at such an advanced rate.

Brazil is the world's leading producer of coffee with a production of 3.7 million mt followed by Vietnam 1.76 million mt and Columbia 0.83 million mt in 2020 (*Figure 2*). Indirectly, Brazil has contributed to the percentage of world coffee production by 34%, followed by Vietnam 16%, Columbia 8%, Ethiopia 5%, Peru, Honduras, India and Uganda 3% respectively, Guatemala 2% and other countries accounted for 15% (*Figure 3*). Typically, the country that is the primary producer of a commodity also becomes the primary exporter of that commodity



Source: International Coffee Organisation (ICO) 2022

Figure 1. World coffee production and consumption



Source: FAOSTAT 2022

Figure 2. Top coffee producing countries 2020

where Brazil is the world's leading coffee exporter, accounting for up to 31% of the global market. This was also followed by Vietnam, Columbia, Honduras and other coffee producing countries in the world. Although Germany is not listed as the world's leading coffee producer, it is in sixth place as the world's coffee exporter. It shows that Germany is capable of being the world's leading coffee exporter and is indirectly comparable to the leading producing countries

Coffee varieties

The main coffee varieties are Arabica and Robusta which contributes 99% of world's total production. While Liberica is a minority variety, it is little known and only accounts for less than 1% of global coffee production. Therefore, data and information related to total production, exports, imports and markets are limited and not recorded. *Figure 4* refers to the world coffee bean production consisting of Arabica, Robusta, and several other varieties such as Columbian Milds, Brazillian Naturals and Other Milds, yet there is no information

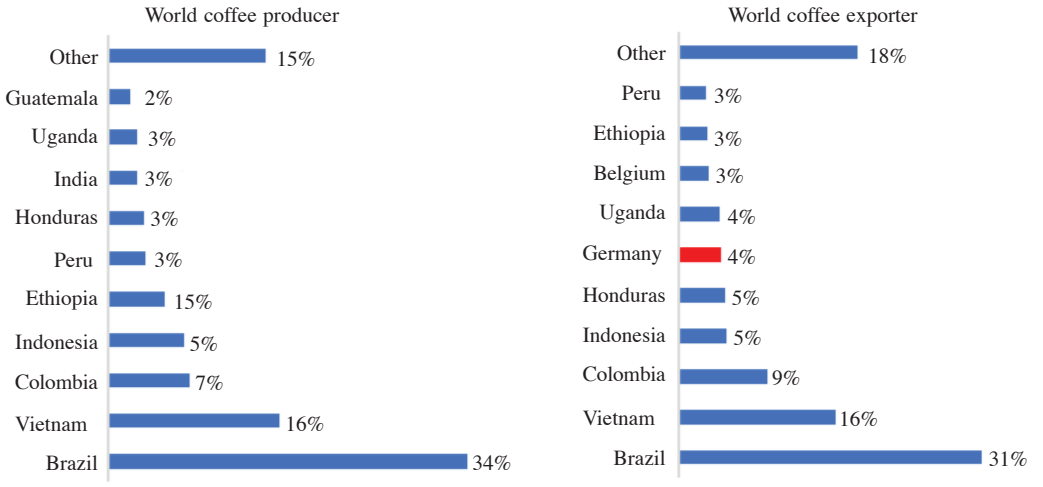
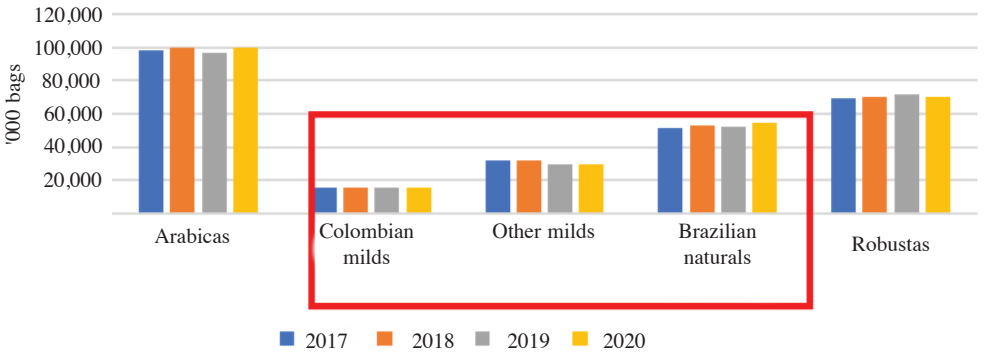


Figure 3. World coffee producer and exporter



Source: International Coffee Organisation 2021
*1 bag = 60kg

Figure 4. Global coffee production by varieties 2021

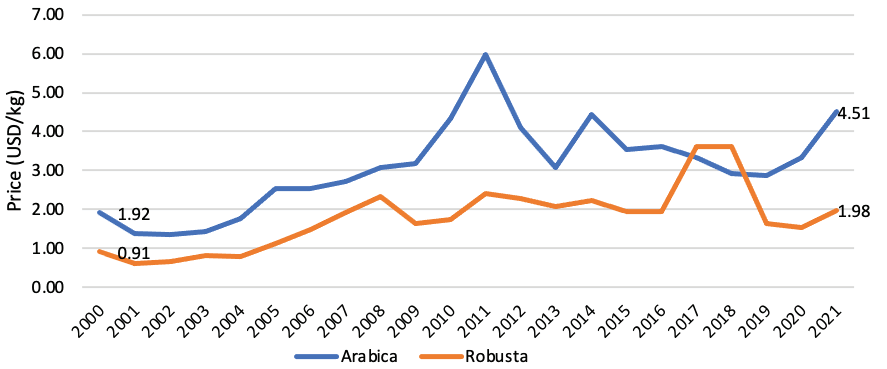
related to Liberica. The data showed that Arabica variety is the most production accounted almost 100 million bags followed by Robusta around 70 million bags.

Global coffee price

World coffee price details for Arabica and Robusta varieties is shown in *Figure 5*. Arabica price is higher than Robusta and the price trend is increasing yearly. In 2000, the price of Arabica was at $1.92/kg (RM8.08/kg) and reached up to $5.98/kg (RM25.18/kg) in 2011 and most recently (2021) the price experienced a slight decrease of $4.51/kg (RM19.00/kg). On the other hand, in 2000 the price of Robusta coffee was around $0.91/kg (RM3.83/kg) and increased to $3.61/kg (RM15.20) and most recently in 2021 the price was around $1.98/kg (RM8.34/kg). On average the price of Arabica is 72% higher than Robusta.

Coffee industry in Malaysia

Malaysia is ranked 47th in world coffee production with a total production of 4,241 mt contributed 0.04% from total world production in 2020 (*Table 1*). The planted area and total coffee production in Malaysia experienced a relatively drastic decline from 2008 to 2019 (*Figure 6*).



Source: Index Mundi 2020

Figure 5. World cofee price 2000 – 2019

Table 1. Malaysia's position in world coffee production

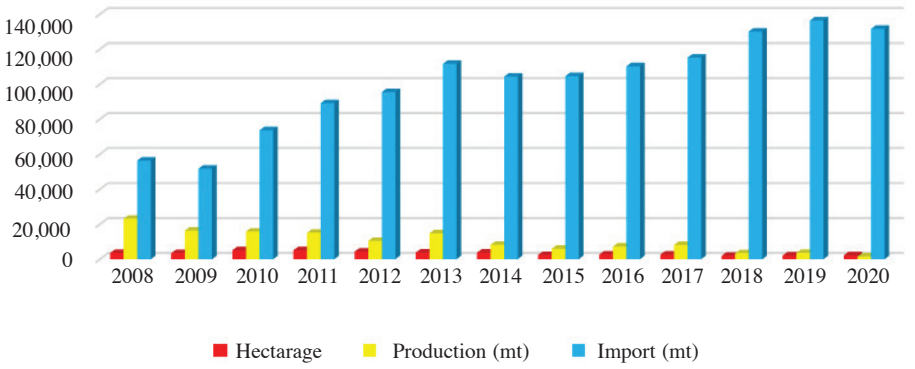
No	Country	Production (mt)	Percentage (%)
1	Brazil	3,700,231	34%
2	Vietnam	1,763,476	16%
3	Colombia	833,400	8%
4	Indonesia	773,409	7%
5	Ethiopia	584,790	5%
6	Peru	376,725	3%
7	Honduras	364,552	3%
8	India	298,000	3%
9	Uganda	290,668	3%
10	Guatemala	225,000	2%
47	Malaysia	4,241	0.04%
Total		10,802,153	

Source: FAOSTAT 2022

In 2008, the planted area recorded was 3,538 ha but decreased to 2,114 ha in 2019 which is about 40% decrease. This has caused the total local coffee production to be severely affected with a decrease of 85%. Total coffee production in 2008 was around 23,061 tonnes falling to 3,559 tonnes only. Although local coffee production has experienced a relatively drastic decline, however, the coffee industry in Malaysia today is seen to be growing well where the total import of coffee beans has increased relatively high which is about 142% in 12 years. This is in line with the increase in per capita consumption which also more than doubled from 1.3 kg in 2013 to 3.0 kg in 2019.

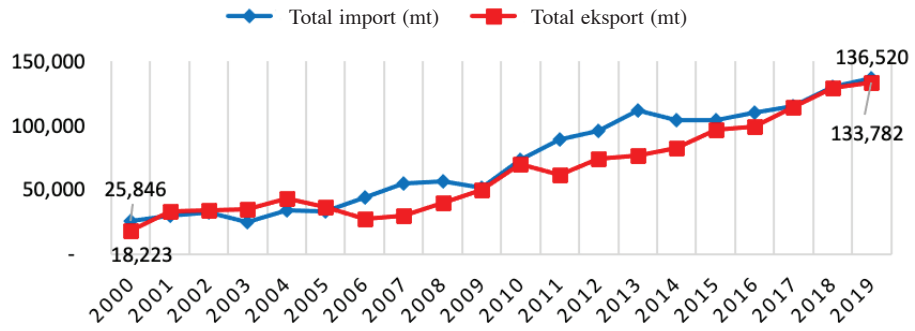
Malaysia's total coffee imports and exports experienced an increasing parallel trend from 2000 to 2019 (*Figure 7*). Total imports more than quadrupled from 25,846 tonnes in 2000 to 136,520 tonnes in 2019. While total exports have increased more than sixfold from 2000 to 2019. Although local coffee production is only 3%, we have the potential to re-export the coffee product. The limited production of green coffee has caused the country to import more than 80% of green coffee and the rest in the form of coffee extract and roasted for domestic and export (*Figure 8*). This green coffee is then processed into extract coffee which contributes to 87% of the country's exports.

Malaysia exports coffee, especially coffee extract, to several major countries such as China, Singapore, Thailand, USA, Philippines, UAE and Korea (*Table 2*). A total of 5,627 tonnes of coffee extract worth nearly US$8.2 million were exported to China, accounting for 29.6% of the country's total exports, followed by Singapore with 2,479 tonnes worth US$5.5 million Thailand with US$3.3 million, USA US$1.8 million and Philippines US$1.4 million. This shows that the country's coffee industry has an ever-increasing development potential for the future.



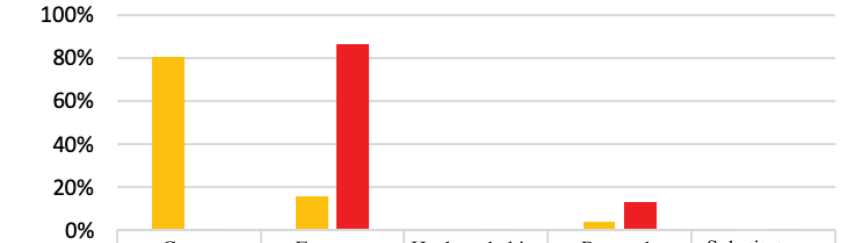
Source: Statistik Pertanian 2022

Figure 6. Planted area, production and total coffee imports in Malaysia (2008 – 2020)



Source: FAOSTAT 2021

Figure 7. Total imports and exports coffee in Malaysia



	Green	Extract	Husk and skin	Roasted	Substitutes
Import	80.59%	15.52%	0.15%	3.67%	0.07%
Export	0.66%	86.46%	0.02%	12.85%	0.00%

Source: FAOSTAT 2021

Figure 8. Percentage of imports and exports coffee in Malaysia by type 2019

Coffee variety in Malaysia

On average, coffee cultivation in Malaysia includes several main varieties, namely Liberica (87%), Robusta (10%) and other varieties (3%). *Table 3* shows the list of coffee varieties and growing regions in Malaysia. Liberica coffee is generally abundant and suitable for cultivation in southern Peninsular Malaysia, particularly Johor and some areas in Sabah and Sarawak. Among the Liberica varieties grown are Polyhybrid, MKL 2, MKL 3, MKL 4, MKL 5, MKL 6 and MKL 7. Robusta coffee is grown in the northern part of the peninsular, particularly in Kedah and Sabah with Polyhybrid, MKR 2, MKR 3, MKR 4 and MKR 5 varieties. While Arabica is only grown in a few areas in Sabah because it requires high and cool areas, the most popular varieties are Catimor and Typica.

Table 2. Malaysia export destinatiom

Country	Quantity (kg)	Value (US$)	%
1. China	5,627,616	8,158,930	29.6%
2. Singapore	2,478,704	5,490,287	13.0%
3. Thailand	2,043,204	3,299,139	10.8%
4. Usa	1,962,624	1,776,381	10.3%
5. Filipina	1,022,183	1,396,626	5.4%
6. UAE	783,325	824,865	4.1%
7. Korea	668,699	1,083,324	3.5%

Source: FAOSTAT 2021

Coffee import

Every year, the country imports 97% of coffee beans to meet domestic needs with just 3% of domestic production. *Table 4* shows the percentage of coffee imports by variety. Malaysia imports 55% Robusta coffee beans, 35% Arabica and 10% other varieties including Liberica and Excelsa varieties. Green coffee is widely imported from the world's major coffee-producing countries, including Vietnam (37.7%), Indonesia (32.1%), Colombia (9.2%), Brazil (7.6%) and others (13.1%), including China, Guatemala and India. (*Table 5*).

Local coffee prices

Coffee farmers have two options for selling the harvest in the form of cherry coffee or coffee beans. There is a significant price difference between these two types of coffee. The price of cherry coffee is much cheaper than coffee beans. The price of cherry coffee is much cheaper than coffee beans. *Figure 9* and *Figure 10* show the price differences of cherry coffee and coffee beans for the Liberica and Robusta varieties. In general, the price of cherry coffee is more expensive for Liberica, which ranges from RM0.47/kg to RM1.67/kg, compared to the price for Robusta, which ranges from RM0.35/kg to RM1.40/kg.

Table 3. Varieties and areas of coffee cultivation in Malaysia

Liberica (South Peninsular Malaysia, Sarawak and Sabah)	Robusta (North of Peninsular Malaysia and Sabah)	*Arabica*/ others (Some areas in Sabah)
Polyhybrid	Polyhybrid	Catimor
MKL 2	MKR 2	Typica
MKL 3	MKR 3	
MKL 4	MKR 4	
MKL 5	MKR 5	
MKL 6		
MKL 7		

Table 4. The percentage of coffee imports by variety

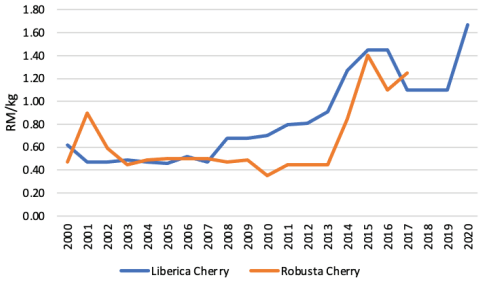
No	Variety	Import (%)
1	Liberica	10%
2	Robusta	35%
3	Arabica	55%

Source: Department of Agriculture (DOA) 2020

Table 5. The percentage of coffee imports by Country

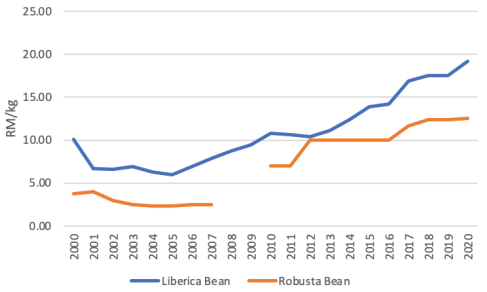
No	Country	Import (%)
1	Indonesia	32%
2	Vietnam	38%
3	Columbia	9%
4	Brazil	8%
5	Others (China, Guatamala, India and etc)	13%

Source: International Coffee Organisation 2021



Source: Department of Agriculture (DOA) 2020

Figure 9. The price of cherry coffee 2000 – 2020



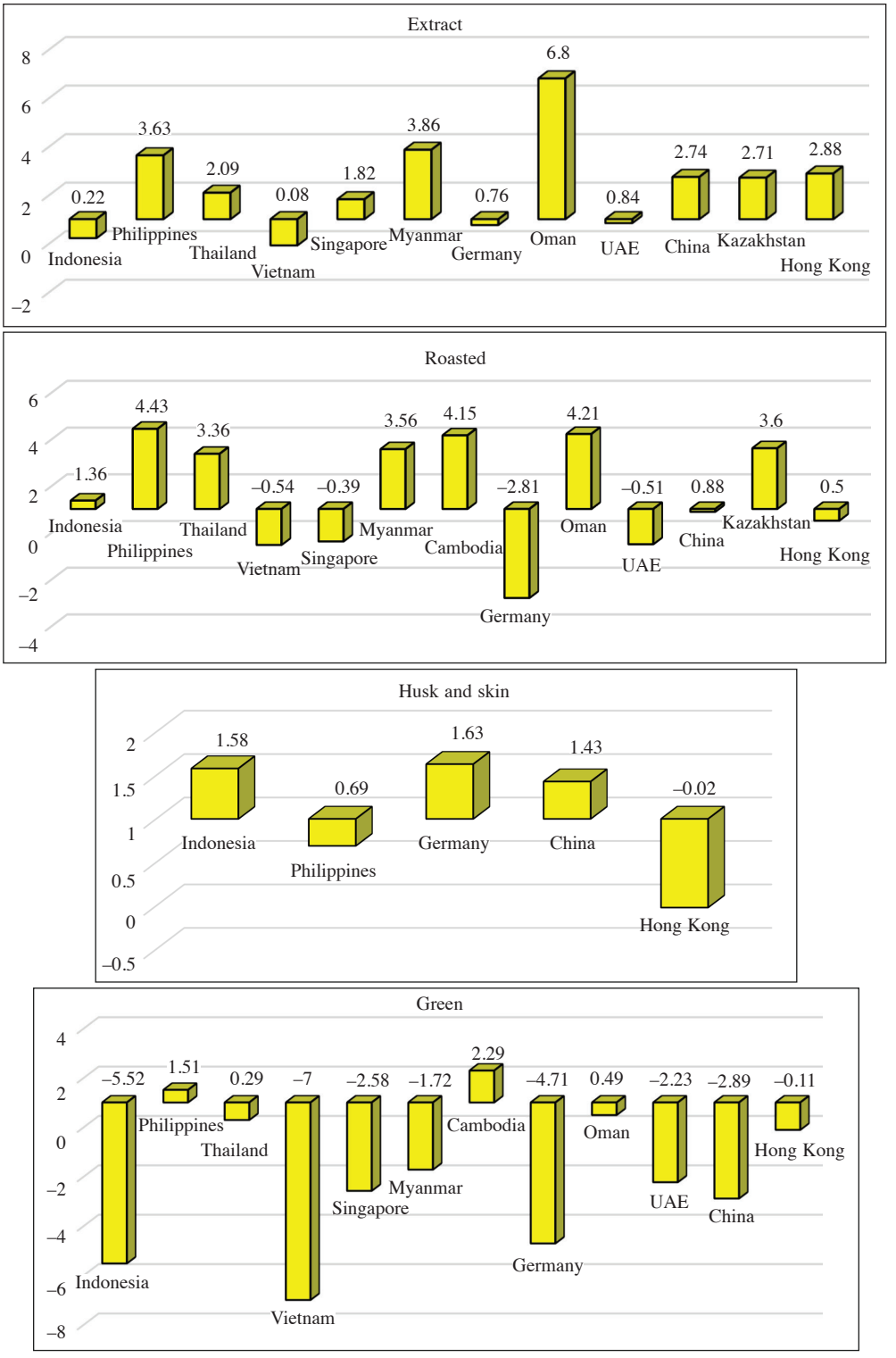
Source: Department of Agriculture (DOA) 2020

Figure 10. Price of coffee bean, 2000 – 2020

Likewise, the price of coffee beans for Liberica is RM6.00/kg and can reach up to RM19.15/kg compared to Robusta, with the minimum price at RM2.35/kg and the highest at only RM12.50/kg. The price difference of almost 53% means that Liberica coffee has a distinct position over Robusta. Therefore, in order to get a higher return, farmers are advised to sell their coffee in the form of coffee beans instead of cherry coffee.

Revealed Comparative Analysis (RCA)

Revealed Comparative Analysis or commonly known as RCA is a technique used to make comparisons by calculating the relative advantages or disadvantages of a country in a particular commodity or service shown in the form of an index. RCA analysis was conducted on four types of coffee products (coffee extract, green coffee, coffee husk and skin, as well as roasted coffee). The results of the analysis showed that Malaysia is able to compete with several countries such as the Philippines, Thailand, Singapore, Oman, Myanmar, China, Kazakhstan and Hong Kong, but not competitive with Vietnam for the coffee extract (*Figure 11*). As for roasted coffee, Malaysia is most able to compete with Philippines, followed by Oman, Cambodia, Myanmar, Kazakhstan, Thailand, Indonesia, China, and Hongkong. However Malaysia are totally not competitive with Germany, Vietnam, Singapore and UAE in roasted coffee. In term of husk and skin products, Indonesia, Philippines, Germany and China are competitive for Malaysia but not for Hong Kong. Lastly for the green coffee product, Malaysia only can compete with Philippines, Thailand, Cambodia and Oman, others not competitive. This analysis shows that Malaysia has potential and is competitive with others countries, especially in coffee extract and roasted products. Therefore, the country must seize this opportunity by improving the quality of value-added products manufactured in the future.



Source: FAOSTAT 2021

Figure 11. Revealed Comparative Advantage (RCA)

Conclusion

Global coffee production is increasing every year, driven by increasing global coffee demand, which nearly doubled from 1990 to 2020. This has resulted in the country's coffee industry booming in line with the increase in per capita consumption although the planted area and the production of domestic green coffee beans are declining every year. Although the price of local coffee is more expensive than the price of imported coffee, farmers are less interested in growing it. The country's dependence on imported green coffee beans especially Robusta and Arabica varieties from Indonesia, Vietnam, Columbia and Brazil is due to limited local coffee resources and prices. The trend of importing green coffee and exporting coffee products is increasing year by year. Although the world market price of green coffee beans fluctuates, the price is still cheaper than the price of local green coffee, especially the Robusta variety. The results of the RCA analysis show that Malaysia is competitive with some other countries, especially in coffee extract products. This is an opportunity for industrial players to explore foreign markets and expand industry and indirectly improve the country's economy by improving the quality of value-added products manufactured in the future. Coffee is a highly valued industry that can be expanded to improve agri-food security in Malaysia indirectly increase farmers' socio-economy status. However, in order to grow and successfully become sustainable, the industry needs government support and intervention. Therefore, in this industry, planning and systematic action plans can be improved and developed to be on par with other countries.

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Abstrak

Kopi dikenali dengan nama saintifiknya *Coffea* spp. ialah tumbuhan dalam keluarga Rubiaceae dan genus *Coffea*. Terdapat banyak jenis kopi, tetapi tiga yang paling banyak ditanam dan dikomersialkan ialah Arabica, Robusta dan Liberica. Industri kopi Malaysia semakin berkembang, walaupun pengeluaran kopi negara semakin berkurangan dan tidak dapat memenuhi permintaan. Peningkatan permintaan ini adalah disebabkan oleh pertambahan penduduk dan perubahan gaya hidup semasa. Bekalan kopi hijau tempatan yang terhad ini disebabkan oleh pengurangan kawasan penanaman kopi di Malaysia. Hakikatnya tanaman kopi merupakan salah satu komoditi penting dan berpotensi untuk dibangunkan dengan lebih meluas. Hal ini disebabkan oleh permintaan yang tinggi untuk produk kopi nilai tambah, khususnya kopi pracampuran di pasaran tempatan dan global. Oleh itu, kajian ini adalah untuk mengkaji gambaran keseluruhan dan potensi industri kopi Malaysia. Data sekunder dikumpul daripada beberapa sumber dan telah dianalisis menggunakan analisis deskriptif, analisis trend dan *Revealed Comparative Advantage* (RCA). Disebabkan sumber dan harga kopi tempatan yang terhad, negara bergantung kepada biji kopi hijau yang diimport, terutamanya jenis Robusta dan Arabica dari Indonesia, Vietnam, Columbia dan Brazil. Trend import kopi hijau dan eksport produk kopi semakin meningkat dari tahun ke tahun. Walaupun harga pasaran biji kopi hijau dunia tidak menentu, namun harga kopi import lebih murah berbanding dengan harga kopi hijau tempatan terutamanya varieti Robusta. Hasil analisis RCA menunjukkan Malaysia berdaya saing dengan beberapa negara lain terutama dalam produk ekstrak kopi. Hal ini memberi peluang kepada pemain industri untuk meneroka pasaran luar dan mengembangkan industri kopi terutama dalam produk nilai tambah. Oleh itu, perancangan dan pelan tindakan yang sistematik boleh ditambah baik dan dibangunkan agar setanding dengan negara lain.