

Feng Chia University *Outstanding Academic Paper by Students*

Title : Taiwan coffee industry analysis

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Abstract

Base on its weather conditions and geographic location, Taiwan is a beautiful island within rich history, mixture cultures and well known staples. Especially Taiwan has many sweet fruit, good quality tea leaf, and rich aroma of coffee. In this article will more focus on Taiwan coffee industry.

The author of this paper has been in coffee industry for seven years with very professional experiences and owning a coffee shop in Taichung City, Taiwan for one year. Therefore, in this paper will be combine the academic and practical experiences to contribute to the coffee famers and agriculture scholars in Taiwan to explore the opportunities and obstacles in Taiwan coffee industry, further studies of Taiwan how to compete in the international arena and Development.



Keyword : Taiwan coffee, specialty coffee, coffee industry

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Chapter 1 Introduction

1. Introduction

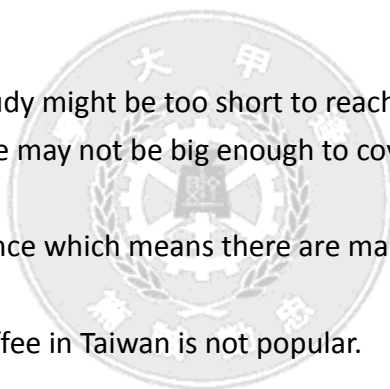
1.1 Research background and motivation

1.2 Research purpose

- A. To elucidate factors relating to current Taiwan coffee industry how to improve itself.
- B. To discuss the relationship between Taiwan coffee farmers and downstream sellers.
- C. To explore how factors such as coffee favors leading to affect behavior for Taiwan coffee taste.
- D. This study may help Taiwanese farmer to progress agriculture knowledge and skills, and help Taiwanese farmers to expand their selling channels for sell more coffee beans products.

1.3 Research obstacle

- A. Researching time of this study might be too short to reach the long term target.
- B. The research's sampling size may not be big enough to cover all Taiwanese coffee farmers.
- C. Coffee is undeveloped science which means there are many factors that affect the quality of Taiwan Coffee.
- D. The version of specialty Coffee in Taiwan is not popular.



Chapter 2 Literature Review

2.1 The history of Taiwan coffee

Taiwan is located on the Tropic of Cancer subtropical climate, in the geographical environment of Taiwan is full of mountains which means very suitable to grow coffee beans. The Japanese occupation era coffee plantations in the Ogasawara Islands, and then progressively to extend the scope to grow colonies Taiwan and Okinawa, Hengchun, Chiayi, to set up agricultural institutions to foster the introduction, the Arabica species best adapted to climate in Taiwan, it has gradually become an important feature coffee crops with local brands Taitung more coffee exported to Japan, Toyota village, also in eastern Taiwan was established in 1939 and Kimura coffee Ltd.,.

In 1941 Japan started the Pacific War, Taiwan Coffee industry getting depression, until Taiwan is recovery restoration, Pingtung, Taitung ,Nantou, Yunlin, Chiayi, Hualien, Tainan start to cultivation again.

in that industry time, Brazil, Colombia, India, Southeast Asia are the largest output countries, at the same time, Chiayi Agricultural Experiment branch continued efforts to crossbreeding; Kaohsiung Qishan cinchona and Fenglin pineapple field test site dedicated to coffee processing; Renai Township, Nantou County, medicinal woodland, National Chung Hsing University to take over the post-war renamed Hui Sun Forest, 1950 years later joined the coffee test research and promotion begin mass planting, and provide saplings free of charge, so 1954 was Nantou, Taiwan's largest scale cultivation of 11 hectares; and the most potential in eastern ramp, past Kimura, eastern Taiwan, Tian Jia also farms continue to produce a small amount, and trying to re-collect the test material revival; another short-term government since 1959 farm subsidy Yunlin economic experiment with planting, and the addition of Douliou coffee processing plants, from 1957 to 1973 to become Taiwan's Yunlin County, the largest area planted area, maintain more than a decade.

Taiwan coffee industry has no evidence of large-scale planting for many years, the reasons includes: Taiwan stop to cooperated with US, coffee beans excess production in the global market, and government stop to support the coffee industry, base on these irresistible reasons, Taiwan coffee has been stop progress for very long times, so in such hard situation, if Taiwan coffee want come back to the global market, it needs overcome many difficulties and years.

2.2 The variety of Taiwan's coffee trees

The variety of Taiwan's coffee trees is quite wide and rich, these variety includes Arabica coffee, Liberica coffee, Robusta coffee, Excelsa coffee and Arabusta coffee. The most common variety to see in Taiwan is Arabica, it is because of the coffee taste of Arabica beans are more aromatic favor and more smooth for drinking. On location part, most of them are farming in the Botanical parks.

2.3 Coffee cultivation in Taiwan

To grow up a coffee trees might be a complicate process for a famer, because coffee tree is a sensitive plant for the climate change 、 Sunlight 、 rainwater and soil, when a coffee bean fall on soil, it needs take few days to grow down the roots, when the top of the coffee beans will grow two leaves which means a whole new coffee tree is ready to cultivation. According to these cultivation steps we could understand to growing a coffee tree might be easy steps for a famer, but the question in this process is how to grow coffee beans with rich aroma favor inside? The growing factors for coffee trees are quite complicate, it is full of chemical factors in the process, so such humid and hot environment in Taiwan cause coffee famer need to take care of the cultivation details. In normally, in order to prevent the weather factor to affect the coffee trees, these coffee famers will put on a defense net to protect the coffee trees, and they also provide the water to these plants in regular time, some of them even are more focus on the temperatures, they said: if you provide the water during the high temperatures, it might affect the coffee favor, and they suggest the most suitable time to provide the water to coffee trees is around the morning time, and evening time.

2.4 The coffee Association in Taiwan.

Taiwan has many coffee associations to support coffee culture do support local coffee industry. Most of association are from spontaneous, the members in this kind of associations are having their own coffee brand, they promote themselves through this channel, for example: the most biggest coffee association in Taiwan- Taiwan Association of Specialty Coffee always promote the local coffee companies on their official website, also on this website provides the contact information to let the customers who have interested in their product could contact with them directly. These farmers not only have some supports from civil society, they also have the

support from government. Taiwan Agriculture Council sometimes hold some coffee teaching courses to let the farmers to understand some roast skills and how to brew a cup of coffee with rich favors.

Taiwan in 1992, in order to smallholder production characteristics, and promote marketing class system, coffee farmers through this system, the establishment of production and marketing of coffee-related classes, currently marketing group set up the basic conditions that must be 10 households, the total acreage to reach 10 hectares or more, before they can apply for the establishment of a marketing group.

As of June 2015, the Council of Agriculture registered cases related to the production and marketing of coffee has 38 classes, as shown in **Table I.**

Countries	Class Name	Class Members	Total Members
Hualien City	Shoufeng Township Class 1	13	70
	Ruisui Township Class 6	26	
	Fuli Township Class 3	31	
Taitung city	Taitung city Class 4	14	133
	Cheng Gong Class 1	31	
	Beinan Township Class 4	14	
	Beinan Township Class 5	11	
	Beinan Township Class 7	11	
	Taimali Township Class 4	8	
	Luye Township Class 16	14	
	Luye Township Class 17	15	
Changhua City	Changhua City Class 1	17	37
	She Tou Township Class 1	20	
Kaohsiung City	Da Shu Class 1	10	10
Nantou City	Zhushan Township Class 24	11	95
	Zhongliao Township Class 2	15	
	Zhongliao Township Class 3	15	
	Guoshing Township Class 2	12	
	Guoshing Township Class 3	13	

	Shui Li Township Class 3	29	
Taichung City	Dong Shi Class 1	11	11
Chiayi City	Jhongpu Township Class 7	11	40
	Meishan Township Class 15	19	
	Alishan Township Class 8	10	
Yunlin City	Gukeng Township Class 1	32	72
	Gukeng Township Class 6	40	
Tainan City	Dongshan Township Class 1	14	67
	Dongshan Township Class 2	11	
	Dongshan Township Class 3	11	
	Dongshan Township Class 4	11	
	Dongshan Township Class 5	10	
	Dongshan Township Class 6	10	
Pingtung City	Gaoshu Township Class 1	19	75
	Wanluan Township Class 1	16	
	Jhongpu Township Class 1	17	
	Jhongpu Township Class 1	11	
	Sandimen Township Class 1	12	

Table I. Council of Agriculture in Taiwan (2009 Agri-Food and the Department of Information)

2.5 The region of Taiwan coffee Industry

Coffee tree is a tropical plant, it is not suitable to grow in boreal regions. Thus the main factor affecting coffee cultivation is climate. Basically, if the area snows in winter, this area is not suitable to grow coffee. Coffee's pristine sites from Ethiopia plateau 1,500 meters, coffee is sciophyte plants, this area is very similarly like tea leaves, it needs more clouds to cover and should not be excessive sunlight. In principle, if this area is suitable to grow the tea leaves, it is also suitable for grow the coffee trees which is the reason why we could see the coffee trees is all around Taiwan.

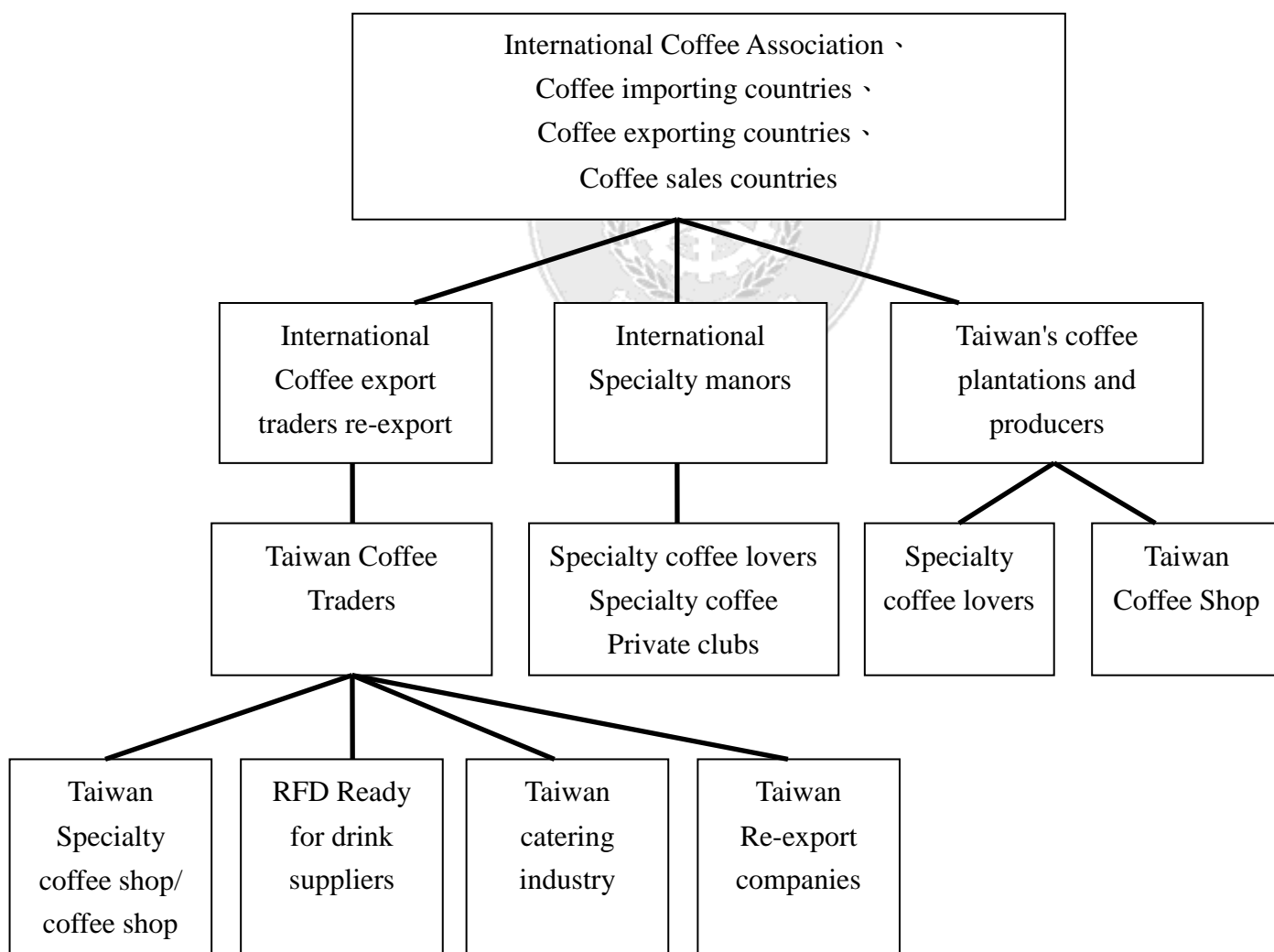
Most of Taiwan coffee manors are mixed with other crops, in the private agricultural land they mixed coffee trees with Arcas, and the rest of area provides to tourism and leisure park, because of farmers do not want to disclose relevant information, in the coffee-growing area of the number of compartments, this part's information in this study is quite difficult to obtain. Through seed supplier inquiry records, general civil estimated 200 cultivation

areas of around 1,500 hectares.

Here is the list for region of Taiwan coffee Industry recent years:

- A. Nantou Huishun
- B. Nantou Lugu
- C. Yunlin Guken
- D. Tainan Dongshan
- E. Hualian Wuhe
- F. Jiayi Alishan
- G. Pingdong Dawushan

2.6 The values chain of Taiwan coffee Industry



2.7 The obstacle of Taiwan coffee Industry

A. Annual production quantity is quite low, and per pack unit price is higher than foreign coffee beans.

Taiwan is a small country which means the annual production quantities might be lower than foreign coffee beans. In such a situation might be happen two things: first, because of the quantities is low, it is very difficult to prove the big quantities to the buyers. Secondly, In the case of supply and demand balance, if the production quantities are lower, that won't stable supply to buyers and the unit prices might be higher than foreign coffee beans. It is undeniable that these two impact factors will affect the buyer's purchase decision from Taiwan coffee beans.

B. Taiwan famers are quite lack of expertise and cause that Taiwan coffee flavor's is not as rich as foreign coffee beans.

By scientific proof to know the taste of coffee beans are consisting with thousands of molecules, if Taiwan famers are quite lack of expertise of coffee beans, and they use the wrong techniques to grow their coffee beans, such errors technology will directly affect the taste of coffee beans. More serious is this factor may affect the success rate of the coffee harvest, thereby affecting the coffee supply chain.

C. Taiwan coffee is insufficient to promote itself.

To let the entire coffee industry to enhance the quality and degree of competition in the international trade not only just by few people to support it. The trend of coffee in Taiwan just rise up in recent years, not too much master and famers are understand the situation, it might take few time and to gather more people to support the Taiwan coffee industry.

D. Taiwan coffee has false negative impression.

In 2007, Taiwan coffee had to dealing with a very difficult problem, some of the Taiwan coffee suppliers used the inferior quality coffee beans to mixed with the local Taiwan coffee beans, it was a shocking news for customers who are really interested the Taiwan coffee industry, and because of this mistakes let Taiwan coffee beans to pay a terrible price for many years, until now still have some of customers have suspected for the quality of Taiwan coffee beans, they are hesitant to spend money to support Taiwan coffee again.

E. Identification number of international award is less than foreign coffee beans.

To be a member of the specialty coffee manor, it needs to pass a lot of difficulties and selections. In this case, Taiwan coffee manor should improve them and to get more identification number of international award to prove its own quality, in order to open the international reputation.

F. Local sales channels are less and not wide enough.

The biggest problem for Taiwan coffee beans is they don't have much channels to sell their own coffee beans, most of coffee shop or potential buyers in Taiwan are prefer to purchase foreign coffee beans which is more famous and cheaper than Taiwan coffee beans. To solve this problem, these manors need to establish their own brand and combine with sightseeing to promote themselves.

2.8 The opportunities of Taiwan coffee Industry

Coffee is a labor-intensive crop. Basically, it is quite high production costs which are unable to compete the prices competition with import coffee wholesaler, in such complicate environment, how to change the situation? The key to be success is emphasizing the quality and freshness, only these two key words will attract more customers to buy it. Most of import coffee's shipment is by shipping; in such high humidity transport can easily cause fungal infection to breed, it might makes any kind of toxins inside of the coffee beans, for example germanium yeast toxins often exists in imported coffee beans, it will affect human health. On the other hand, if customer uses the right method to keep local coffee beans stay in fresh, the coffee beans will not happen toxins easily. In addition to the advantages of local production of origin, Taiwan farmers production technology has been respected every customer, more than that, Taiwan famers has many experiences in cultivation tea leaves and understand how to management the fruit trees, Taiwan tea leaves has been own a lot of international awards and got many international certification of quality, if Taiwan famers could improve and more control the quality of the fruit quality through the fruit management, to enhance the sweet favor of the coffee beans and processing techniques to create new flavors, we could expect in near future can be seen as a general characteristic of Taiwan coffee.

Chapter 3 Research Methodology

3.1 Sampling

The author of this study will participate a Taiwan farmer's class which is full of famous master of Taiwan coffee who will teach the farmers how to grow coffee trees, roast the coffee beans, introduces the coffee beans from different countries and how to cook a cup of coffee with rich aroma in Nantou city- Guoshing Township. During this class, the author will prepare a questionnaire and directly to have an interview with local farmers, to explore more details about Taiwan coffee industry. In order to this is the first time to have an interview with local farmers, so the questionnaire in this study will be the outline-style to answer the question by yes or no.

3.2 Research Location

Location: Nantou city- Guoshing Township

Date: November 26 – December 6 2014

Guests: Local coffee farmers and some famous masters of coffee

2014 達人開講
11/26 ~ 12/6
~咖啡講座課程表~

喝咖啡如品紅酒·產地才是關鍵
國姓咖啡全國第一產地認證

講師	日期	時間	主題
張廖巧玉 老師 2013 WBC 世界咖啡師錦標賽 新加坡咖啡師公會副會長	11/26 11/27	09:00~12:00 13:30~17:30	味嗅覺開發與鑑賞
陳政陽 老師 精研各國後製十餘年	12/02 12/03	09:00~12:00 13:30~17:30	後製實務 與現場操作
魏汝瑛 老師 2014 WBC 世界咖啡師錦標賽 第五名 Café Lulu 自家烘焙咖啡館 負責人	12/05 星期五	09:00~12:00 13:30~17:30	咖啡沖煮實作進階
陳志煌 老師 2014 WBC 世界咖啡師錦標賽 冠軍 2013 年全國咖啡師錦標賽 冠軍	12/06 星期六	09:00~12:00 13:30~17:30	國際咖啡世界 名廠名豆大解析
咖啡輔導師 韓懷宗 老師 協助輔導	11/26 12/06		

主辦單位: 行政院農業委員會、南投縣政府
主辦單位: 南投縣休閒農業策略聯盟
執行單位: 國姓鄉公所、檳榔休閒農業區
地點: 百勝村咖啡莊園

The poster of 2014 Taiwan farmer's class

3.3 Tools for Collecting Data

The author will prepare an outline-style questionnaire directly to have an interview with local farmers during the November 26 –

December 6 2014 Taiwan coffee farmers' class.

3.4 Data Collection Method

Total questionnaire: 55

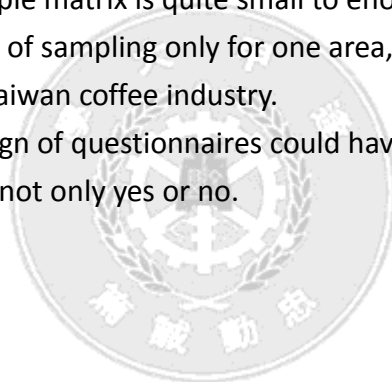
Interview time/ a farmer: 15 ~ 20 minutes

3.5 Data Analysis Method

Design an outline-style questionnaire to answer the question by yes or no, after collect the data will analysis by shown on a pie chart to reveal the result of this study.

3.6 Problems and Obstacles

- A. The time of collect information is quite short.
- B. The sample matrix is quite small to enough to prove details.
- C. The area of sampling only for one area, it is not enough to proves Taiwan coffee industry.
- D. The Design of questionnaires could have more selection or choices, not only yes or no.



3.7 The design of the questionnaires.

受訪人名稱:		受訪日期:		問卷編號:	
題號	題目	Yes	No	附註	
1	是否為第一次參加類似這樣的咖啡推廣活動				
2	對於咖啡相關知識有興趣嗎				
3	工作類型是否與咖啡有相關				
4	工作類型是否為上游廠商				
5	是否有自家耕種咖啡				
6	是否部分耕種為有機栽種咖啡				
7	之前是否有請專家給予咖啡種植上的指教或意見				
8	是否有自家烘培咖啡				
9	之前是否有請專家給予咖啡烘培上的指教或意見				
10	收採方式大部分採用水洗或是日曬(或有其他方式嗎?)				
11	是否有自行包裝? 或是代工包裝?				
12	大部分是 B to B 嗎?				
13	有配合販賣的咖啡店嗎?				
14	有加入咖啡協會嗎?				
15	有自創品牌嗎?				
16	有參與台灣咖啡展嗎?				
17	有拿過相關咖啡國際證照嗎?				
18	有自費請國外的專家進行技術的指導嗎? 包括栽種、烘培或是考照				
19	下次會再繼續參加類似相關的活動嗎?				
20	下次願意接受更深入的採訪嗎?				

Chapter 4 Empirical Analysis

受訪人名稱:		受訪日期:		問卷編號:	
題號	題目	Yes	No	附註	
1	是否為第一次參加類似這樣的咖啡推廣活動	34	21		
2	對於咖啡相關知識有興趣嗎	55	0		
3	工作類型是否與咖啡有相關	55	0		
4	工作類型是否為上游廠商	45	10		
5	是否有自家耕種咖啡	40	15		
6	是否部分耕種為有機栽種咖啡	25	30		
7	之前是否有請專家給予咖啡種植上的指教或意見	42	13		
8	是否有自家烘培咖啡	55	0		
9	之前是否有請專家給予咖啡烘培上的指教或意見	55	0		
10	收採方式大部分採用水洗或是日曬(或有其他方式嗎?)	水洗 55	日曬 35		
11	是否有自行包裝? 或是代工包裝?	34	21		
12	大部分是 B to B 嗎?	26	29		
13	有配合販賣的咖啡店嗎?	13	42		
14	有加入咖啡協會嗎?	14	41		
15	有自創品牌嗎?	55	0		
16	有參與台灣咖啡展嗎?	7	48		
17	有拿過相關咖啡國際證照嗎?	0	55		
18	有自費請國外的專家進行技術的指導嗎? 包括栽種、烘培或是考照	0	55		
19	下次會再繼續參加類似相關的活動嗎?	55	0		
20	下次願意接受更深入的採訪嗎?				

Chapter 5 Conclusion

The result of this data analysis is quite good, but still needs to dig out deeper questions about Taiwan coffee industry. The good side of this paper is most of farmers would like to cooperate with the author more in the future, they believe they could get more information and knowledge from academia, but the bad news for this research is most of the farmers don't get any international certificate of coffee, the reason is all these international certificates most of times are in English, it is might be a challenge for Taiwanese farmers to get it, basically, they don't understand any English.

Secondly, in this questionnaire, we can noticed that all these Taiwan farmers, they all have their own brand to sell their coffee, because they think the customers in Taiwan are quite trust the brand image. They think to create their own brand might be a good way for their customer to memorize them more easily. On the other hand, we can see there are only few farmers used their own brand to join the exhibition, the reason might be many explanations: the fee of to join the exhibition might be too high for them, they don't know how to get these information, or they think to join the exhibition is not useful for their business. In this point, we can write and discuss with these farmers more.

Conclusion, based on this briefly questionnaire, we can see Taiwan coffee farmers need more help than what we thought before, but we still hope this study not just only talk the strategy on paper, it should help them in practical ways. To changes the whole industry could not happened in one day, the author of this study should put more effort and times to understand the current situation of Taiwan coffee industry.

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