

Trend Analysis of Agricultural Cooperatives in Coffee Marketing: Case of Oromia Coffee Farmers' Cooperative Union, Oromia, Ethiopia

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Abstract	Article Information
<p>This study is intended to examine the status of Oromia Coffee Farmers' Cooperative Union (OCFCU) in coffee export marketing and to predict coffee export of the union in the intended years. Descriptive statistics was used for analyzing market share and trends of coffee market of the OCFCU. Linear regression (Least Square method) was used to predict the trend projection of coffee export by the union. The result indicates that OCFCU has taken part in coffee marketing value chain by providing extension services to improve coffee productivity and quality; collecting, processing and exporting coffee. In the years 2001 to 2015 OCFCU exported 56,603.19-ton coffee which was grown from 126 to 11,187.0 ton (mean 4,270.8 ton per annum). This accounts for 49.84% average growth rate of exported volume and obtain 3.479% market share from Ethiopia and 69.73% from part exported by Cooperative Unions. Based on the trend analysis of coffee export of OCFCU for the last 15 years, it was predicted for the coming ten years that the OCFCU will collect, process and export 157, 041.77 tons of coffee that was estimated to increase from 11,187.0 ton in 2015 to 18,213.94 ton in 2025. it is predicted to obtain total sale value of 11, 91 billion birr that is projected from 810.62 million in 2015 to 1.4 billion birr in 2025 with 3.75% average annual growth rate. From the result it is concluded that the union significantly taking part in coffee market value chain by collecting coffee from producers through member cooperatives in Oromia, processing, packing and exporting it. Furthermore, it is predicted that the coffee export volume and value of cooperative union will continue to grow by 2.6 and 2.4 folds respectively for the years 2016-2025 as a result millions of member small coffee farmers are continuing to be benefitted.</p>	<p>Article History: Received : 10-01-2016 Revised :16-03-2016 Accepted :23-03-2016</p> <p>Keywords: Coffee market, cooperative union, export marketing, coffee farmers, Value chain</p>
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INTRODUCTION

Coffee production is important to the Ethiopian economy with about 15 million people's livelihoods directly or indirectly based on coffee. Coffee is also a major Ethiopian export commodity Gray, *et al* (2013). Ethiopia is one of the ten largest world coffee producer and exporter (Kibre, 2015). It accounts for 45 to 50% of Ethiopia's total export earnings by private exporters and coffee farmers' cooperatives (Yeabsira, 2016). This shows that among agricultural products coffee has long been Ethiopia's flagship export commodity and remains an important source of foreign exchange in the country.

There are different actors taking part in coffee value chains. Such coffee marketing actors include

collectors, local traders, primary cooperatives, cooperative unions, exporters, importers, domestic wholesalers and retailers, service providers and consumers. Its supply chain is complex and small farmer's sale to local traders, local trader's sale to big coffee milers and exporters, after processing local trader sale to international exporters. Primary cooperatives purchase a lot of coffee and sale to the cooperative union and the union processes and sales it to exporters on behalf of the cooperatives (Alemayehu, 2014).

However, coffee is prominent product, limited access to the market information, low literacy level among the farmers, multiple channels of distribution,

price fluctuation, globalization and low bargaining power of coffee producer farmers are some of several challenges involved in marketing of agricultural, coffee by farmers (Vadivelu&Kiran, 2013). These some of the driving force that motivate farmers to get organize in cooperative.

Cooperative society is about peoples' organization to capture different opportunities in the economy where they can address their economic needs and aspirations. By the same token therefore, cooperatives can be formed in any sector of the economy of a country such as agriculture, minerals, industries and service sectors (Smith, 2006).Agricultural cooperatives such as coffee farmer cooperatives help farmers to solve a collective action problem to facilitate members access to natural resources such as land and water for irrigation development; information, knowledge and extension services for improving productivity and product quality; markets, farm input and output and training and other capacity building initiatives (Koopmans, 2006; Chambo, 2009).

According to Verakumera (2007), many social events are still taking place in urban and rural Ethiopia through collective endeavor through cooperatives. Tiegist (2008) and Bezabih (2012) note that in Ethiopia, overall cooperatives have become increasingly important to individual members, the community, the business sector and the national economy. More than 85 percent of the total inputs in rural areas are now distributed through cooperatives; and they are responsible for over 75 percent of coffee exports, the country's major foreign exchange earner.

In a similar manner, Coffee Farmers' Cooperative Unions have been providing very useful services to the coffee producers through the primary coffee farmers' cooperatives by means of providing extension services and input supply to improve coffee production, marketing facilities for guaranteeing coffee product quality and price. Then they engaged into coffee export marketing and ultimately provide better price for the produce, which contribute for improving the members' income. They also help coffee producers to take part in coffee market chain. The cooperatives have also saved the farmers from the exploitation of the merchants and middlemen (Federal Cooperative Agency, 2013).

These cooperatives encourage the farmers to cultivate organic coffee to meet the demand of

majority of coffee importers. Coffee farmers' cooperative union in Ethiopia in general sought ways to increase high-end sales of their members' coffee through fair trade and sales of organic coffee (Nakkira, 2013). Oromia Coffee Farmers' Cooperative Union (**OCFCU**) in particular is exporting high quality, organic and Fair-Trade coffee to different destinations countries in the world, earning premium prices for their members. These importers are paying a slightly higher price, \$1.3 more than market price for such organic coffee and specialty coffee. Such practice is called as Fair-Trade practice. The premium prices from fair trade used by the members and community development through the primary cooperatives. Hence the role of the coffee cooperatives in enhancing the income of the farmers is commendable one (Taddese, 2014). OCFCU is small coffee farmer owned cooperative union. OCFCU was established on June 1, 1999. OCFCU represents coffee farmers in Oromia national regional states and works exclusively in the region regarding coffee export cooperative. The initial members were 34 primary coffee farmer cooperatives encompasses individual members of 22,503 (male 21,342 and female 1,161) and capital of \$90,000. Currently, the cooperative members of the union have grown to 357 and its capital to USD \$15,500,000 and 332,393 individual members (affiliated to member cooperatives) and so many coffee farmers benefited from the union (OCFCU, 2015).

Statement of the problem

Ethiopian coffee mainly exported to 53 destination countries in the world its source 95 % from private companies and only 5 % is from coffee growing farmer cooperative union (Alemayehu, 2014). Coffee farmers' cooperatives play a notable role in the field of production, marketing and export of coffee (Nakkiran, 2013). Based on government decision coffee farmers' cooperatives bypass the auction, direct exports of differentiated coffee and the trend of exported coffee volume is strongly upward. The member producers are benefited from the coffee price obtained by the cooperative unions in addition to fair initial buying prices at farm gate (Petit, 2007) OCFCU has been organized exclusively to market coffee and provide service and supplies to improve coffee productivities and quality. It was entering into export market first with exporting

amounted to 72 metric tons and progressed to 5,498.22 ton in 2013. The value of exported coffee was grown from \$130,000 to \$40 million for the specified years (Taddese&Yalem, 2014).

According to study by Tamiru (2015), OCFCU's coffee export volume was progressed from year to year in which the highest and the lowest export volume were seen in 2009 and 2006 years respectively. The sale value in terms of birr earned from sale of coffee increases from 2006-2010 years. Ever working to increase farmers' incomes through coffee value chain, OCFCU and providing extension service program for its member farmers as well to improve coffee production and maintain product quality as a result the volume of coffee exported by the cooperative union is increased from time to time (Taddese, 2014)

All these statements are providing about the experience and role of OCFCU in the coffee market. None of them state the market share of OCFCU from total coffee exported from Ethiopia as well as from that part of coffee exported by coffee farmers' cooperatives. Nonetheless as per the knowledge of the researcher there is no research that was dealt with the future trends of coffee export volume and value by the OCFCU. Here there is knowledge gap about the export market share of the union and future expectation of volume export and revenue generate for benefiting member and contribute for socio-economic development of the country.

Therefore, this study was intended to answer the basic research question of what is the coffee export marketing performance of the cooperative union, what is the market share and how well it will perform in the future. In order to answer these research questions, the objective of the study was to analyze the significance of Oromia coffee farmer cooperative union in coffee export marketing and to predict the coffee that will be exported in the intended years.

MATERIALS AND METHODS

Research Data

The study used secondary data concerning coffee volume exported and revenue generated through obtaining foreign currency. Fifteen years data on exported coffee volume, sale value, revenue generated and patronage refund distributed for members were collected from OCFCU. Ten years consistent and available data on exported coffee volume of Ethiopia and that part by Coffee Farmers' Cooperative Unions were collected from Ministry of

Trade and Federal Cooperative Agency respectively. Qualitative primary data were collected from leaders of the cooperative union under study to support some results from secondary data.

Data collection methods

The main method used for collecting secondary data was thoroughly reviewing databases and annual institutional reports of OCFCU, Ministry of Trade and Federal Cooperative Agency for analyzing the coffee export market share and marketing trend of the cooperative union under study. Focus group discussion was used to collect primary data from OCFCU leaders.

Data analysis

Descriptive statistics was used for analyzing coffee market chain, coffee export market share and trends of OCFCU using collected data. Linear regression (Least square method) was used to predict the trend projection of volume of coffee intended to be exported, sale value (revenue), net capital growth and patronage refund distribution by the union for the coming ten years. The results were presented using table, percent and graphs. The prediction has made using the linear regression equation (Gujarati, 2005):

1. Equation for export volume prediction
 $Exp_c = \alpha_c + \beta_c t$ 1
2. Equation for export value prediction
 $Exp_v = \alpha_v + \beta_v t$ 2
3. Equation for Net surplus gain prediction
 $Nets = \alpha_s + \beta_s t$ 3
4. Equation for patronage refund prediction
 $PatronR = \alpha_p + \beta_p t$ 4

Where:

Exp_c forecasted coffee export volume (ton)

Exp_v value of coffee predicted to be exported

Nets forecasted net surplus (revenue obtained)

Patron R patronage refund predicted to be distributed to members a constant (intercept) for volume export/ sale value/surplus/patronage refund (constant from regression analysis) β predicting factors (slope) for volume export/sale value/net surplus/patronage refund (beta value from regression analysis)

t Time (in year)

RESULTS AND DISCUSSION

Coffee market chain and member benefited

Coffee market chain

Cooperatives take part in coffee value chain from production up to export marketing. According to the result from discussion made with the leader of OCFCU, the cooperative union providing extension services for producer members to improve coffee productivity and quality. The member primary cooperatives directly collect the coffee from

individual members, processing to some extent and supply to the OCFCU. The cooperative union process, pack, label and export the coffee to sell at price benefiting members. From the discussion, the coffee market value chain is illustrated as follow (Figure 1).

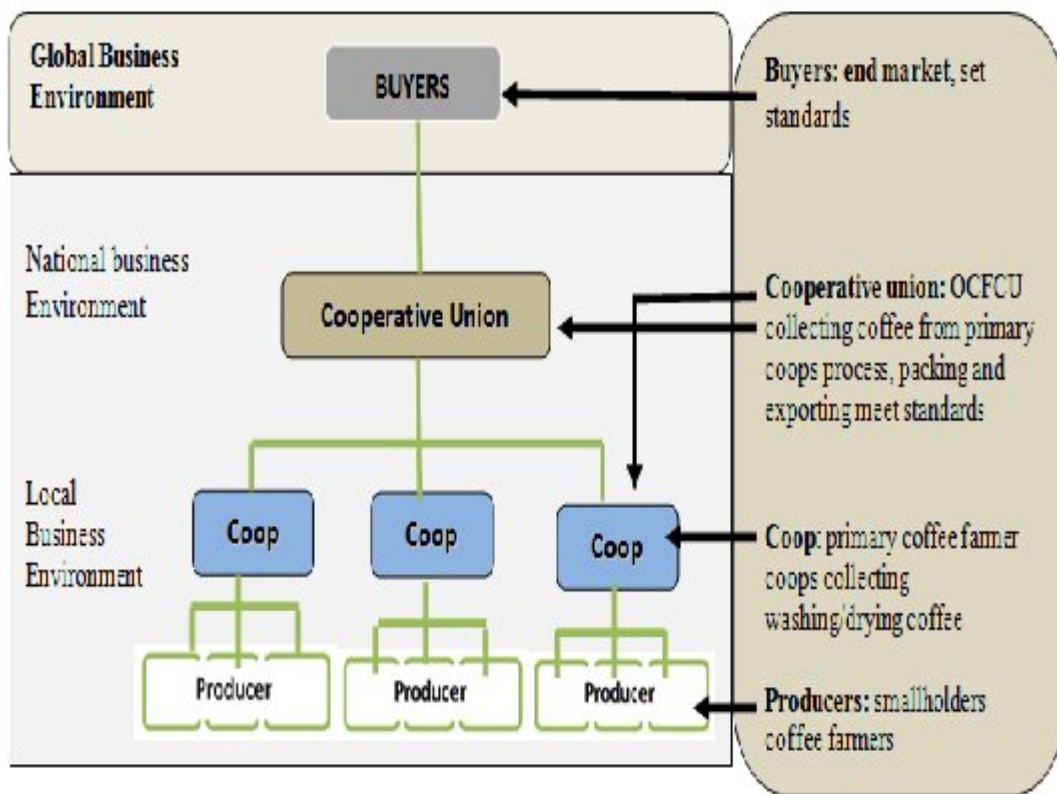
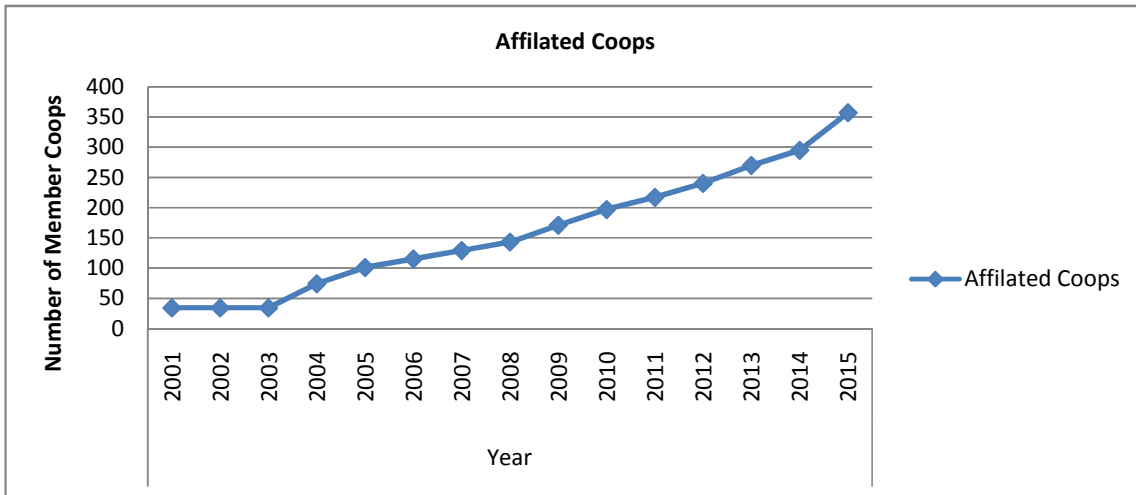


Figure 1: Coffee value chain by OCFCU

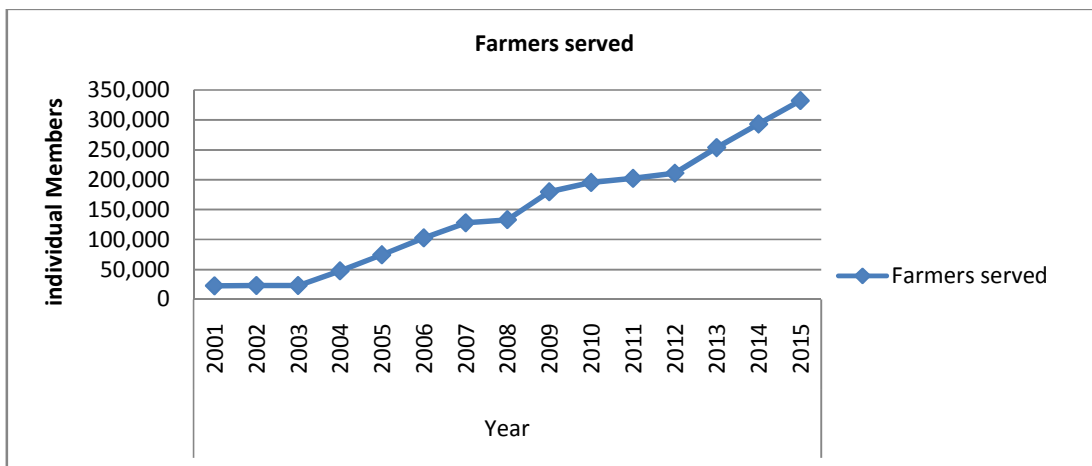
As it is depicted by the figure OCFCU actively participating in coffee value chain from the local to global coffee business environment. This is in a manner that member primary cooperatives are collecting coffee from smallholder coffee producers at local level and supply to OCFCU. OCFCU engaging in processing, packing, labeling the coffee and then exporting the coffee by obtaining competitive coffee price and fair trade for organic and specialty coffee.

Member benefited from coffee market

The affiliated cooperative and individual members of union are increasing from year to year. The number of member cooperatives grown from 34 to 357 and farmer members increased from 23,043 to 332,393 from 2001 to 2015. Mean member cooperative growth rate is 20.7 and farmer member growth rate is 23.5% (See Figure 1 and 2).



a. Affiliated primary Coffee farmers' Cooperative



b. Farmer members served by the cooperative union

Figure 2: farmers benefited from the union

The result indicates that the cooperative and individual members of the cooperative union is ever increasing. According to result from discussion with the leaders, this is due to OFCU. OCFCU is practicing open membership cooperative principle; improves the farmers' income by exporting their coffee directly to the international market and obtaining competitive price. Besides, the union provides financial, capacity building and social benefits. This shows that according to views of leaders of the union, if the average number of household of those beneficiaries is 5, about 1,270,260 people are directly benefited from the union engaging in international coffee market.

Coffee trade chain benefiting members

According to result from the discussion with the OCFCU leaders, the coffee marketing chain is including primary cooperatives collect coffee from the member farmers, add value and supply to OCFCU. OCFCU further add value by processing and grading the coffee and exporting to international market with fair trade with \$1.3 additional price per kilogram of coffee sold to benefiting members this is illustrated by figure 3 below.

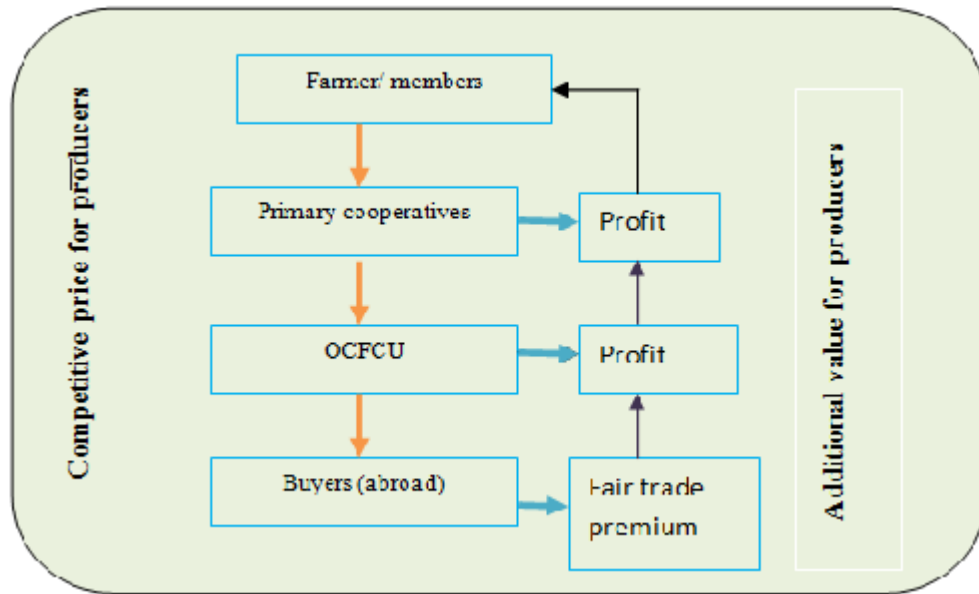


Figure 3: OCFCU coffee market chain benefiting member farmers

This coffee market chain indicates that whatever profit/ premium or additional value obtains by cooperative union at any level is cultivated back to producer member. This improves coffee producers' income from the exported coffee.

farmers' cooperative unions and OCFCU for the last 10 years (2006-2015). The mean coffee export volume market share of OCFCU from total coffee exported from Ethiopia is 3.47% and 69.73% from the amount exported by coffee farmer cooperative unions for the elapsed ten years.

Coffee export market share of OCFCU

The following Table 1 displays the total coffee exported from Ethiopia, the part exported by coffee

Table 1: OCFCU market share of coffee export market

Year	Exported coffee			Market share of OCFCU	
	Ethiopia	Total coop unions	OCFCU	From Ethiopia	From Coop Unions
2006	161,061.0	9,983.3	3,182.30	1.98	31.88
2007	147,725.0	6,967.67	3,248.20	2.20	46.62
2008	176,438.0	7,292.76	3,598.80	2.04	49.35
2009	170,741.0	6,234.42	5,329.30	3.12	85.48
2010	133,998.0	8,713.22	4,889.00	3.65	56.11
2011	172,271.0	12,785.46	6,600.00	3.83	51.62
2012	196,136.0	8,110.12	4,938.91	2.52	60.90
2013	169,392.0	6,514.0	5,498.22	3.25	84.41
2014	190,873.0	9,177.0	9000.00	4.72	98.07
2015	151,165.85	8,417.58	11,187.00	4.41	79.24
Total	334,356.7	84,195.5	64,061.93		18.01
Mean	166,980.09	8,419.55	5,747.17	3.47	69.73

Computed from data collected Ministry of trade (2015), Federal Coop Agency (2015) and OCFCU, (2015) reports

The result indicates that the proportion of coffee exported by OCFCU is low as compared to the total volume of coffee exported at the national level. However, it obtained the largest share from coffee farmers' cooperative unions exported coffee in

Ethiopia. OCFCU obtained the relatively higher share in 2014, which accounts for 4.72% and 98.07% and lowest share in 2006 that accounts for 1.98% and 31.88% from total exported from Ethiopia and by coffee farmers' cooperative unions respectively. This reveals that the union is

progresses in improving the volume of coffee export.

Trend analyses of exported coffee volume and value
Trend of exported coffee volume

One of the objectives for which OCFCU established is improving the farmer's income by exporting their coffee. Thus, union buys, processes

and internationally sales coffee supplied by smallholder producers through their cooperatives. It is observed that the volume of sale has grown from 126 ton in 2001 to 11,178 tons in 2015 with mean export volume of 4, 27.8 ton and mean growth rate of 49.84%. The total exported coffee in the last 15 years is 64,061.93 (see figure 4 and Table 2).

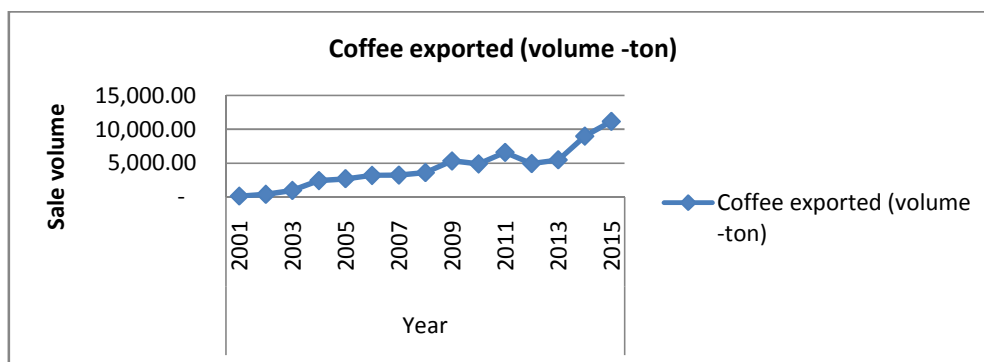


Figure 4: past trends of volumem of coffee sold

The result show that there is slight increase in volume of coffee exported from 2001 to 2009 however, the volume exported was grown downward in 2010 and 2012 but then after there is the tendency of increasing of volume of sale with average annual growth rate of 49.84%.

According to views forwarded during discussion made with the leaders of the OCFCU, the reasean

for the fluctuation in volume of sale was because of low productivity of coffee so as low supply by the coffee farmers. Yet not Whatever the case is there the union strives its effort to export the product for benefiting the producers and bargaining for higher price through supplying quality coffee (organic, speciality coffee etc).

Table 2: Business Growth rate of the cooperative union

Year	Growth rate in %					
	Affiliated coop	Farmers served	Sale volume	Sale value	Revenue	patronage refund
2001						
2002	-	2.4	197.62	238.12	654.40	480.98
2003	-	-	157.92	144.76	166.73	110.07
2004	117.6	103.1	151.40	141.05	20.64	11.62
2005	36.5	56.1	10.65	48.33	(22.11)	(36.59)
2006	13.9	37.6	18.28	28.92	25.56	9.48
2007	12.2	24.7	2.07	18.56	102.93	180.24
2008	10.9	3.9	10.79	32.77	68.11	68.18
2009	19.6	35.0	48.09	98.32	91.09	168.66
2010	15.2	8.6	(8.26)	9.33	36.66	(2.84)
2011	10.2	3.5	35.00	139.99	84.50	84.50
2012	10.6	4.4	(25.17)	(17.50)	(22.14)	(22.14)
2013	12.5	20.3	11.32	8.69	(6.62)	(9.90)
2014	9.3	15.4	63.69	15.69	29.05	33.74
2015	21.0	13.4	24.30	10.10	17.94	40.66
Mean	20.7	23.5	49.94	65.51	89.05	79.76

Computed from secondary data (Oromia Coffee Farmers Cooperation Union, 2015)

Trends of exported coffee value, revenue and patronage refund

As displayed in the following figure 5, the sale value of coffee increased from 2.27 million birr (2001) to 810.62 (mean 347.06) million birr (2015) with average annual growth rate of 65.51%. As a result, its net surplus (net income in conventional business model) is grown from 0.289 to 124.89 (mean 52.66) million birr with average annual

growth rate of 89.05%. Patronage refund (dividend) part which distributed back to farmers as addition benefit being the produces gain from cooperative also projected from 0.263 to 74.47 (mean 27.8) million birr with average annual growth rate of 79.76%.

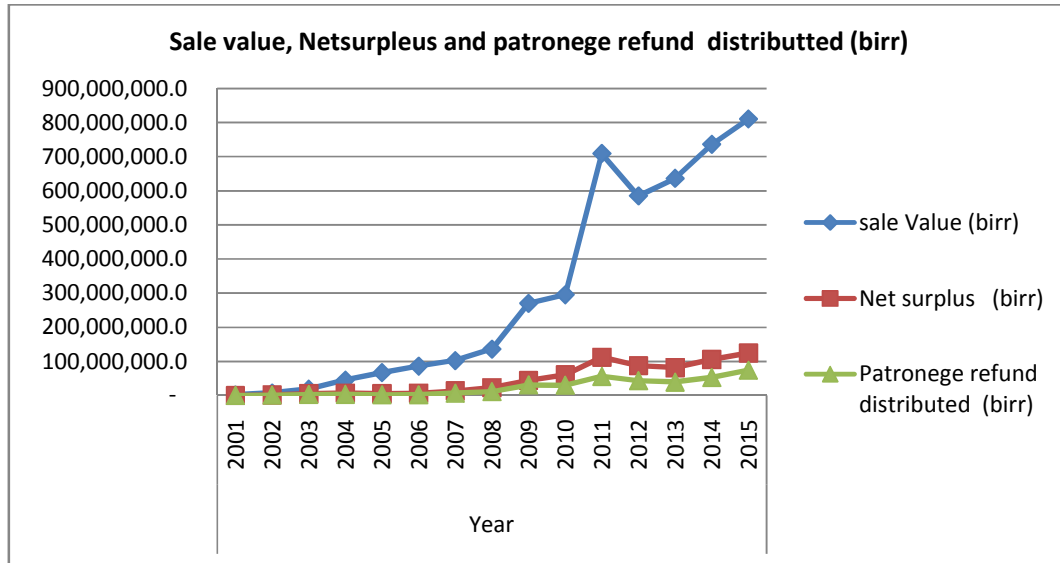


Figure 5: Exported coffee value, net surplus and patronage refund distributed by the union

As revealed by the figure, there is increasing sale value year after year so that the foreign currency generated by union is in progress. The value increased from 2001 to 2010 and flourish (sharp increase) 2010 to 2011. But it falls in 2012 yet decrease in sale value is not below the mean. However it tend to increase and then after. It is found that according to views of the leaders this decrease in sale value is because of decrease in vlume of sale in the specified year and international coffee price fluctuation.

Likewise there is increase in net surplus and patronage refund distributed and highly increases from 2007 to 2011 and tends to decrease in 2012. This is in line with the fluctuation observed from sale value. However, there is a tendency of slight increasing in net surplus and patronage refund since 2013.

Coffee export and sale value prediction export prediction

From the trends of exported coffee by OCFCU the volume of coffee that to be exported is predicted for the coming ten year by using least square statistical method (simple linear regression analysis) equation $Exp_c = \alpha_c + \beta_c \cdot t$ (equation 1) and α (constant) and β (predictor value) are taken from regression analysis.

Drawing constant (α value) and beta coefficient (β value) from regression analysis, the prediction equation for coffee export is exported coffee volume $= 4270.80 + 557.7t$. The analysis shows that the volume of coffee that predicted to export is projected from 11,187 ton in 2015 to 18,213.94 (mean 15,704.18) ton and mean projection rate is 3.7% per year (See Figure 5 and Appendix Table 2).

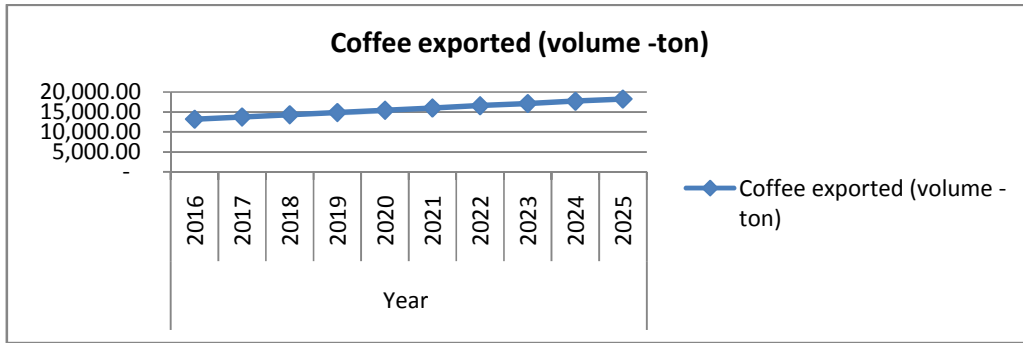


Figure 5: projection of coffee volume for exporting 2015-2024

The coffee export projection analysis reveals that the OCFCU expected to collect process and export 157,041.77-ton coffee by the coming ten years (2016-2025) with mean annual export expected to grow by 3.67 folds. As a result, the union will increase its coffee export market share and utilizing global coffee market for benefiting coffee farmers.

Sale value, net surplus and patronage refund prediction

From regression analysis regarding sale value, net surplus and patronage refund by OCFCU prediction equation 2, 3 and 4 respectively become
 Sale value of coffee is $Sale\ value = 300.78 + 43.46t$

Net surplus of the union is $Net\ surplus = 45.63 + 6.56t$ and

Patronage refund is $Member\ patron = 24.10 + 3.47t$

The trend perdition analysis reveals that there is projection sale value, net surplus and patronage distribution from 810.62 million birr to 11.19 billion birr (mean 1.19 billion birr); 124.89 million birr to 180.9 (mean 154.62) million birr and 74.47 million birr to 110.92 (mean 95.29) million birr respectively from 2015 to 2025.

The sale value, net surplus and patronage refund by the union projected by yearly average growth rate of 3.75%, 3.89% and 3.7% respectively for the next ten years (2016-2025). This is due to projection in volume sale provided that the inflation and global price of coffee are under normal trend.

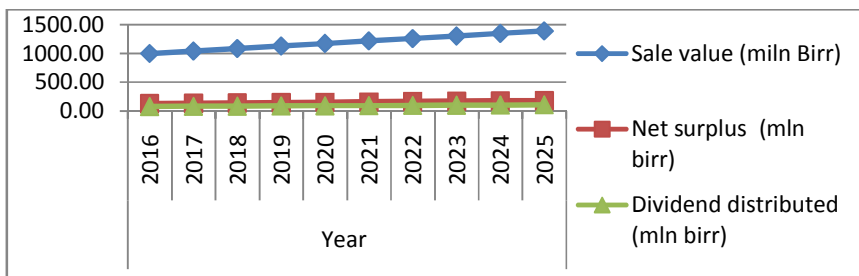


Figure 6: projection of sale value, surplus and patronage refund for 2015-2024

This shows that the projections are with 2.64, 2.26 and 2.64 folds for exported coffee value, revenue and patronage refund predicted to be distributed for farmers respectively. This indicates that the Oromia Coffee Farmers Cooperative union continues to generate high foreign currency through exporting coffee. Consequently, the union endures benefiting coffee farmers from their coffee by obtaining reliable price and patronage refund, additional payment for coffee producers in the coming ten years.

CONCLUSION AND RECOMMENDATIONS

From the result, it is concluded that OCFCU engaged in coffee value chain from production by providing extension services to improve coffee productivity and quality up to exporting by obtaining competitive price end buyers at international level so as benefiting member farmers.

The union collecting processing and exporting coffee with low market share at national coffee export market but major market share from part that

exported by coffee farmer cooperative unions from Ethiopia.

From the trend analysis it is concluded that the volume and value of coffee exported, the revenue generated and patronage refund distributed to members are increased from year to year. However, there is decrease observed in the year 2010 and 2012 for volume of coffee exported due to low production and global coffee price. This also reduces the revenue and patronage refund distributed in the specified years.

The regression analysis it is predicted that OCFCU export volume, value, revenue and patronage refund are predicted to be projected from 2015 current status in 2025 with the 3.67, 2.64, 2.26 and 2.64 folds respectively. The growth rates for all are in the decreasing rate because it is predicted that the coffee production will attain its potential during the prediction years.

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