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AN ANALYSIS OF BRAZILIAN COMPETITIVENESS IN THE GLOBAL COFFEE MARKET (2012–2022)

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This paper investigates the international competitiveness of the Brazilian coffee sector from 2012 to 2022, disaggregated by product categories: non-roasted non-decaffeinated coffee, non-roasted decaffeinated coffee, roasted non-decaffeinated coffee, and roasted decaffeinated coffee. The main objective is to evaluate Brazil's competitive performance across these segments and to identify structural constraints that limit its insertion in higher value-added markets within the global coffee system.

The methodological approach relies on classical and complementary indicators of international competitiveness, including market share, sectoral coverage ratio, Balassa's specialization coefficient, Revealed Comparative Advantage (RCA), and the symmetric revealed comparative advantage index (RCA-S). Trade data were obtained from the UN Comtrade database, while production and consumption data were sourced from the United States Department of

Agriculture (USDA), following the Harmonized System classification. The combined use of these indicators enables a comprehensive assessment of Brazil’s relative position in the global coffee market and allows for comparisons across different product categories and degrees of processing.

The results indicate that Brazil displays strong and persistent comparative advantages in green coffee exports, both decaffeinated and non-decaffeinated, confirming its leadership in global supply throughout the analyzed period. Conversely, the country exhibits low or negative competitiveness in roasted coffee segments, which are associated with higher levels of processing and greater value added. These segments are largely dominated by European countries that import green coffee, conduct downstream processing, and re-export differentiated coffee products to international markets.

The study concludes that Brazil’s export structure remains concentrated in low value-added products, which limits income generation along the coffee value chain and constrains broader development opportunities. Strengthening domestic processing capacity, fostering technological upgrading, promoting industrial diversification, and implementing targeted industrial and trade policies are essential strategies to enhance Brazil’s competitiveness in higher value segments of the global coffee market.

Palavras-chave: brazilian competitiveness; coffee; market share; sectoral coverage; symmetric revealed comparative advantage (rca-s).