



Outlook for the World Coffee Market

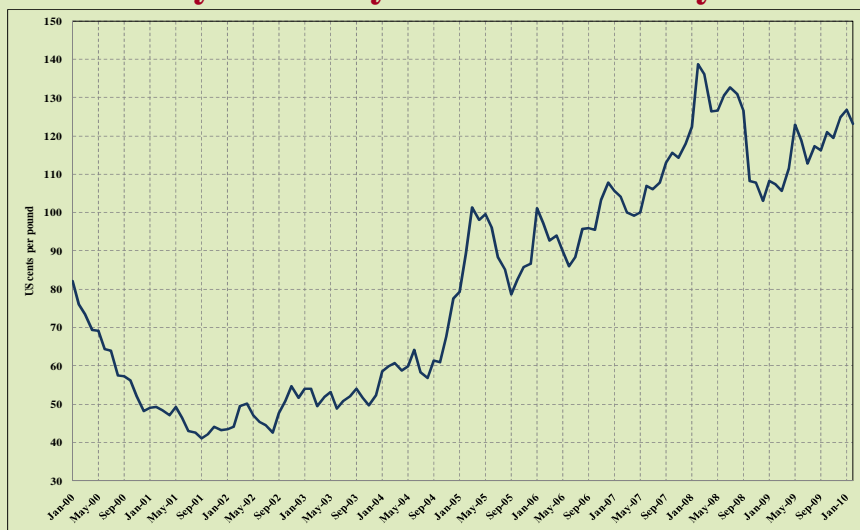
104th Session
International Coffee Council
Guatemala
1-4 March 2010

Néstor Osorio
Executive Director

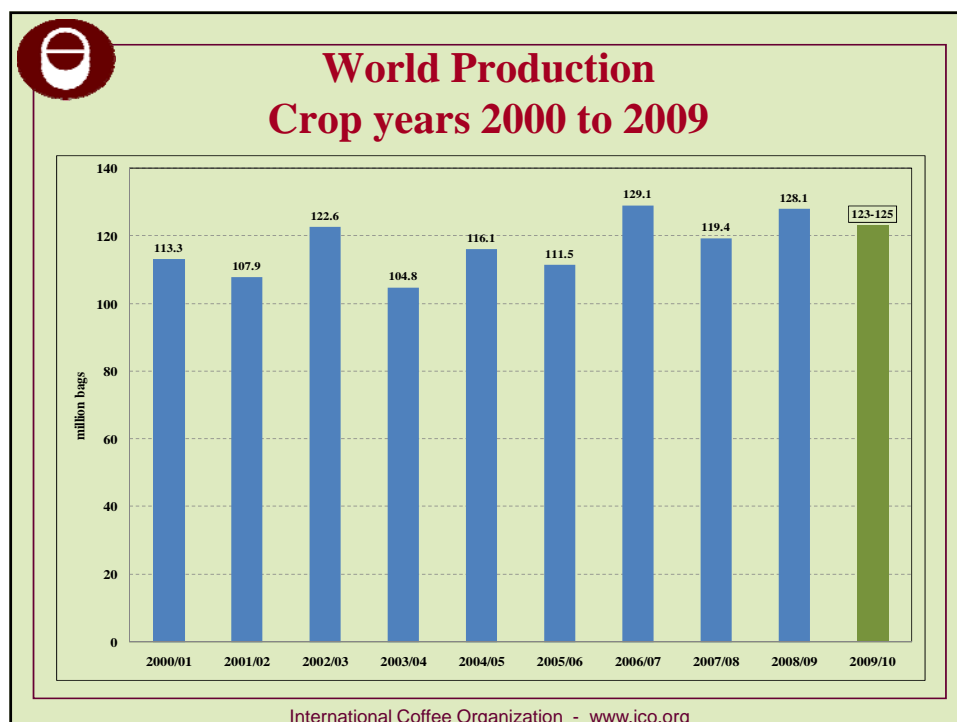
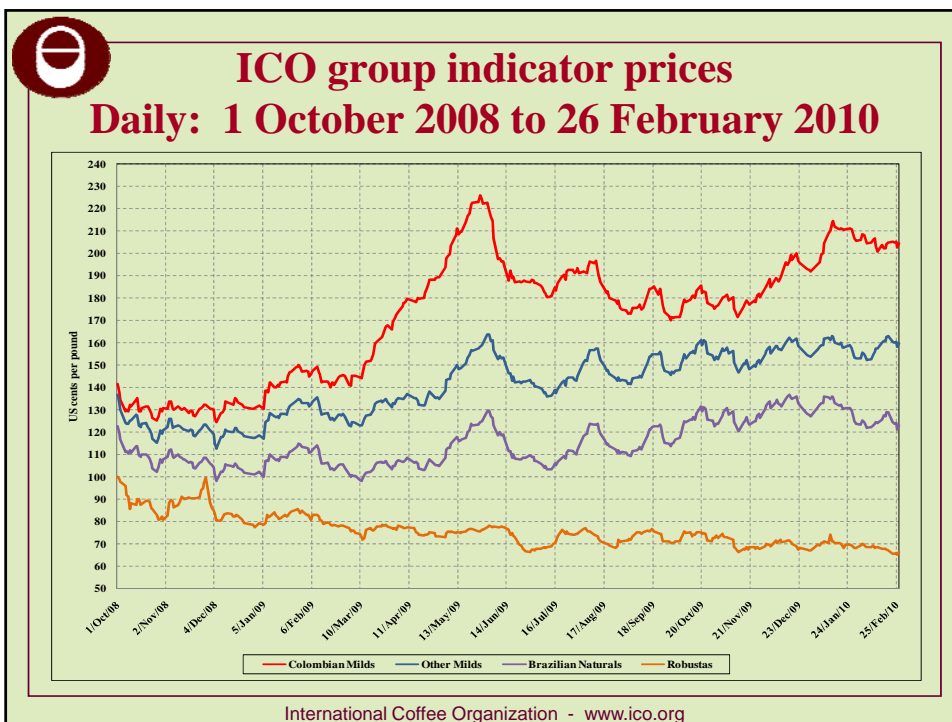
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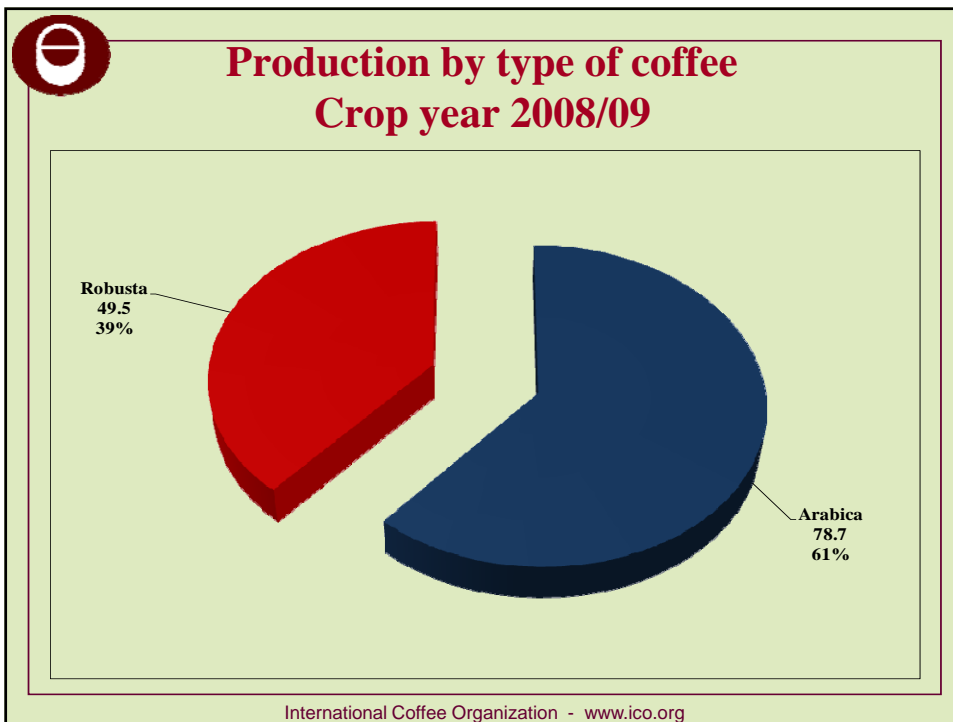
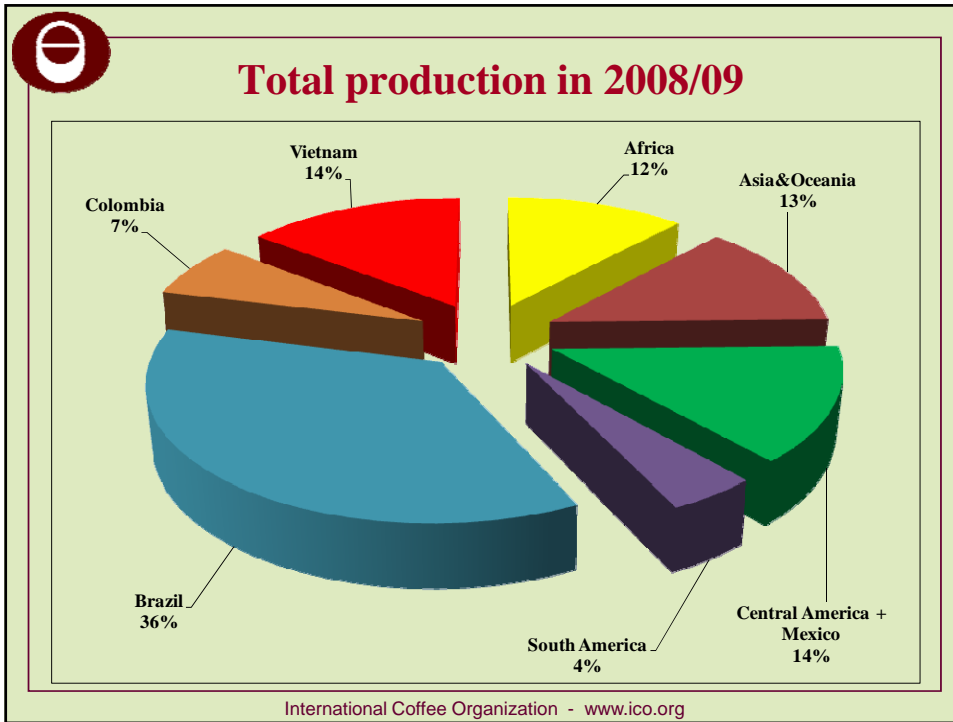


ICO composite indicator price Monthly: January 2000 to February 2010



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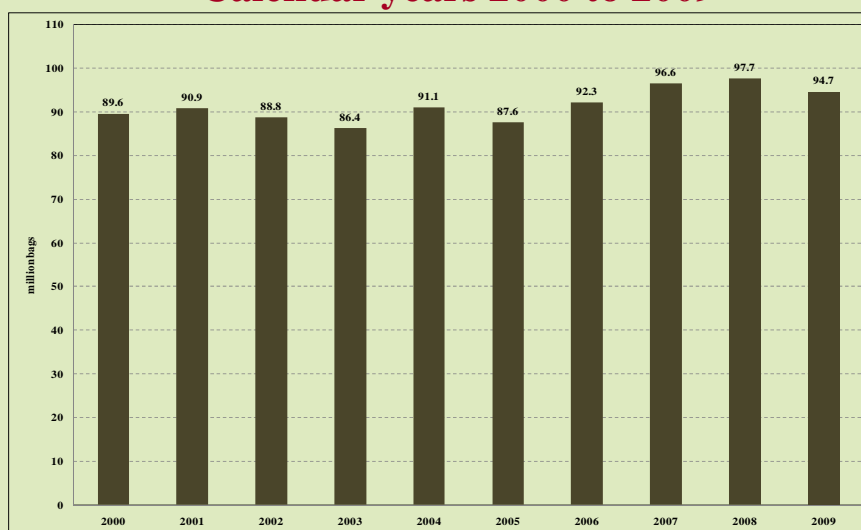
Production: 10 leading producers 2008/09 (Volume in 000 bags - % of world production)

Brazil	45 992	35.9
Vietnam	18 500	14.4
Indonesia	9 350	7.3
Colombia	8 644	6.7
Mexico	4 651	3.6
India	4 372	3.4
Ethiopia	4 350	3.4
Peru	3 872	3.0
Guatemala	3 785	3.0
Honduras	3 450	2.7

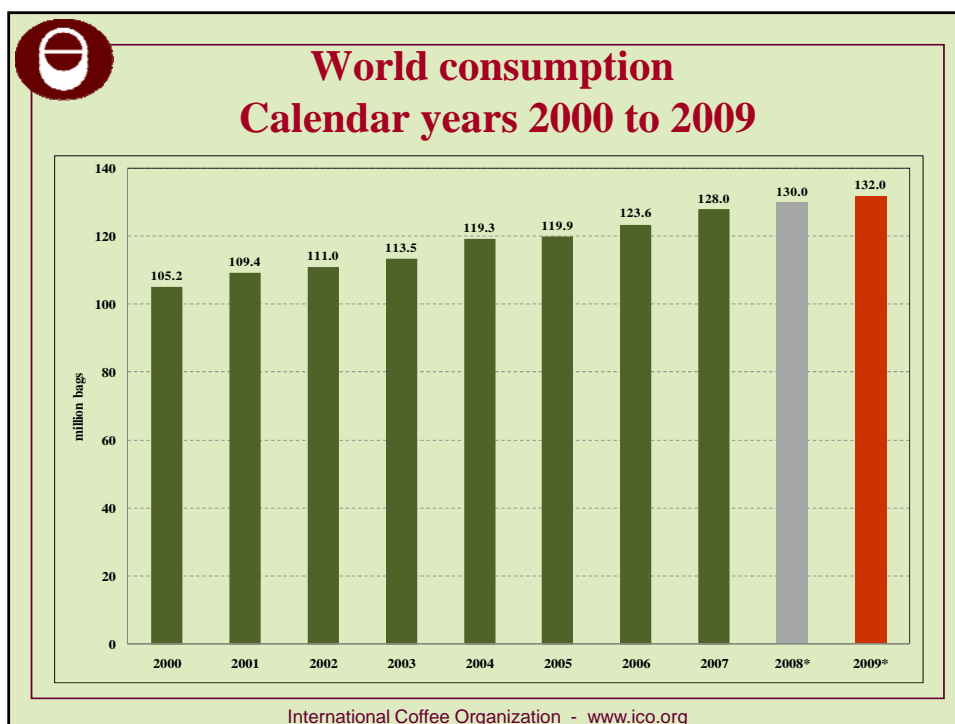
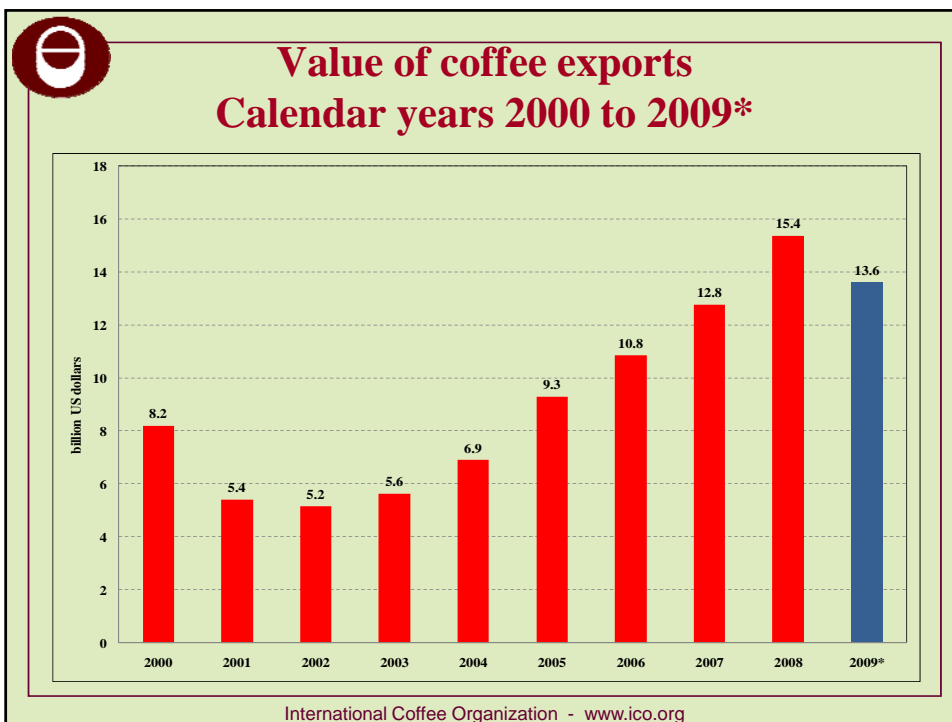
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Total exports to all destinations Calendar years 2000 to 2009



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Estimated consumption in 2008: 10 leading markets by volume

(million bags)	
USA	21.7
Brazil	17.5
Germany	9.5
Japan	7.1
Italy	5.9
France	5.2
Russian Federation	3.7
Spain	3.5
Indonesia	3.3
Canada	3.2

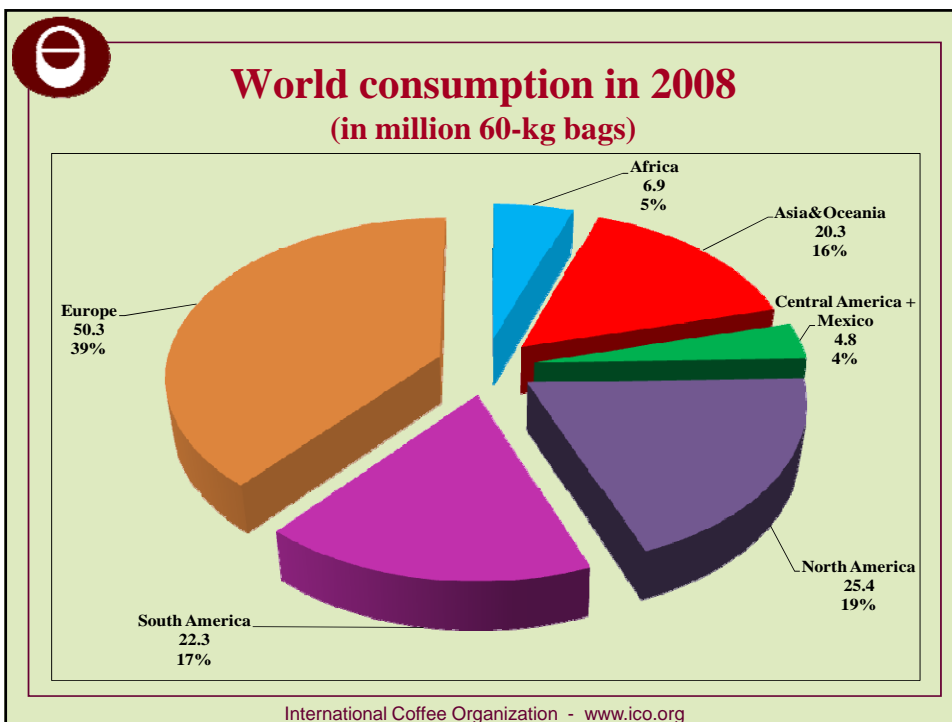
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Consumption per capita: top 10 leading markets by volume

(kilograms)	
Finland	12.6
Switzerland	9.1
Norway	9.0
Sweden	8.3
Iceland	8.3
Denmark	7.7
Germany	7.0
Estonia	6.9
Austria	6.5
Bosnia and Herzegovina	6.2

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World coffee consumption
Evolution 2000 – 2008
(in thousand 60-kg bags)

	2000	2008*	Growth rate (%)
Traditional markets	64 861	70 426	1.33
Producing countries	26 089	36 703	4.36
Emerging markets	17 638	22 875	2.93

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World Coffee Consumption: Traditional markets Evolution 2000 – 2008

(in thousand 60-kg bags)

	2000	2008*	Growth rate (%)
European Union	38 005	39 845	0.6
Germany	8 770	9 535	1.0
Italy	5 149	5 937	1.6
France	5 402	5 152	-0.6
Spain	2 991	3 485	1.7
United Kingdom	2 342	3 067	3.4
USA	18 746	21 652	1.6
Japan	6 626	7 065	0.7

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World coffee consumption: Producing countries Evolution 2000 – 2008

(in thousand 60-kg bags)

	2000	2008*	Growth rate (%)
Total	26 089	36 703	3.9
Brazil	13 075	17 526	3.3
Indonesia	1 664	3 333	8.0
Mexico	1 189	2 200	7.1
Ethiopia	1 642	1 833	1.2
Venezuela, Bol. Rep. of	1 148	1 600	3.8
India	938	1 518	5.5

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World coffee consumption: Emerging markets Evolution 2000 – 2008

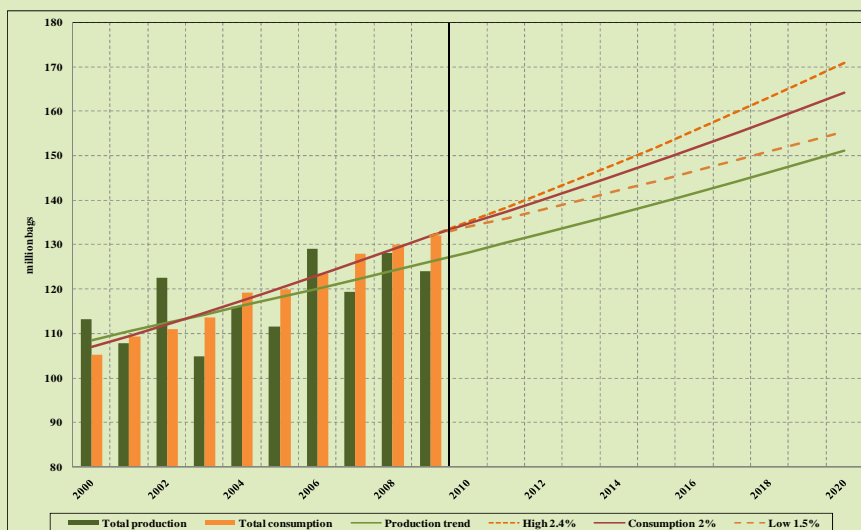
(in thousand 60-kg bags)

	2000	2008*	Growth rate (%)
Total	15 744	25 565	5.5
Russian Federation	1 863	3 716	8.0
Algeria	1 779	2 118	2.0
Ukraine	179	1 733	28.7
Korea, Republic of	1 246	1 665	3.3
Australia	832	1 145	3.6
Serbia	644	680	0.6
China (Mainland- urban areas, Hong Kong and Macao)*	36	496	33.8

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Supply and demand projections 2010 to 2020



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Thank you

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