Outlook for the World Coffee Market

International Coffee Council
4 – 8 March 2013
London, England

ICO composite indicator prices
Monthly averages: Jan-2000 to Feb-2013
(In current terms)
ICO composite indicator prices
Monthly averages: Jan-2000 to Feb-2013
(In current and constant terms)

ICO group indicator prices
Monthly averages: Jan-2000 to Feb-2013
(In current terms)
Arbitrage: New York* - London*
Monthly averages: Jan-2000 to Feb-2013
(In current terms)

*Average price for the 2nd and 3rd positions

International Coffee Organization

Exchange rate movements
(Index: Jan-2009=100)

International Coffee Organization
### Production: 10 leading producers
(In thousand bags)

<table>
<thead>
<tr>
<th></th>
<th>2011/12</th>
<th>2012/13*</th>
<th>% change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brazil</td>
<td>43 484</td>
<td>50 826</td>
<td>16.9%</td>
</tr>
<tr>
<td>Vietnam</td>
<td>24 058</td>
<td>22 000</td>
<td>-8.6%</td>
</tr>
<tr>
<td>Indonesia</td>
<td>8 620</td>
<td>11 250</td>
<td>30.5%</td>
</tr>
<tr>
<td>Colombia</td>
<td>7 653</td>
<td>8 500</td>
<td>11.1%</td>
</tr>
<tr>
<td>Ethiopia</td>
<td>6 798</td>
<td>8 100</td>
<td>19.1%</td>
</tr>
<tr>
<td>India</td>
<td>5 233</td>
<td>5 258</td>
<td>0.5%</td>
</tr>
<tr>
<td>Mexico</td>
<td>4 546</td>
<td>4 300</td>
<td>-5.4%</td>
</tr>
<tr>
<td>Honduras</td>
<td>5 903</td>
<td>4 900</td>
<td>-17.0%</td>
</tr>
<tr>
<td>Peru</td>
<td>5 581</td>
<td>4 750</td>
<td>-14.9%</td>
</tr>
<tr>
<td>Guatemala</td>
<td>3 840</td>
<td>3 100</td>
<td>-19.3%</td>
</tr>
</tbody>
</table>

*Estimated

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### Volume and value of total exports
Calendar years 2000 - 2012

![Graph showing volume and value of total exports from 2000 to 2012](image)
Certified stocks on the New York and London exchanges
March 2011 – February 2013

World coffee consumption
2002 – 2012*
(In million bags)

<table>
<thead>
<tr>
<th></th>
<th>2002</th>
<th>2012*</th>
<th>% change</th>
<th>Absolute change</th>
<th>Average annual growth rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>WORLD TOTAL</td>
<td>111.2</td>
<td>142.2</td>
<td>27.9%</td>
<td>31.0</td>
<td>2.5%</td>
</tr>
<tr>
<td>Exporting countries</td>
<td>28.4</td>
<td>43.4</td>
<td>52.7%</td>
<td>15.0</td>
<td>4.3%</td>
</tr>
<tr>
<td>Traditional markets</td>
<td>65.1</td>
<td>72.9</td>
<td>12.1%</td>
<td>7.9</td>
<td>1.1%</td>
</tr>
<tr>
<td>Emerging markets</td>
<td>17.7</td>
<td>25.8</td>
<td>46.0%</td>
<td>8.1</td>
<td>3.9%</td>
</tr>
</tbody>
</table>

* Provisional
### Retail prices: % change in Roast & Ground coffee
(In national currencies)

<table>
<thead>
<tr>
<th></th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Austria</td>
<td>0.9%</td>
<td>18.7%</td>
<td>9.3%</td>
</tr>
<tr>
<td>Belgium</td>
<td>3.3%</td>
<td>19.3%</td>
<td>3.9%</td>
</tr>
<tr>
<td>Denmark</td>
<td>8.0%</td>
<td>21.6%</td>
<td>4.9%</td>
</tr>
<tr>
<td>Finland</td>
<td>10.1%</td>
<td>38.6%</td>
<td>–3.1%</td>
</tr>
<tr>
<td>France</td>
<td>0.4%</td>
<td>8.9%</td>
<td>2.7%</td>
</tr>
<tr>
<td>Germany</td>
<td>5.2%</td>
<td>2.3%</td>
<td>0.6%</td>
</tr>
<tr>
<td>Italy</td>
<td>0.4%</td>
<td>10.7%</td>
<td>7.4%</td>
</tr>
<tr>
<td>Japan</td>
<td>–1.3%</td>
<td>4.5%</td>
<td>3.2%</td>
</tr>
<tr>
<td>Norway</td>
<td>7.7%</td>
<td>19.7%</td>
<td>–1.5%</td>
</tr>
<tr>
<td>Poland</td>
<td>1.3%</td>
<td>12.1%</td>
<td>10.5%</td>
</tr>
<tr>
<td>Portugal</td>
<td>–1.7%</td>
<td>3.5%</td>
<td>13.4%</td>
</tr>
<tr>
<td>Spain</td>
<td>–1.2%</td>
<td>7.6%</td>
<td>9.5%</td>
</tr>
<tr>
<td>Sweden</td>
<td>6.1%</td>
<td>26.4%</td>
<td>–2.3%</td>
</tr>
<tr>
<td>UK</td>
<td>2.3%</td>
<td>16.6%</td>
<td>4.6%</td>
</tr>
<tr>
<td>USA</td>
<td>6.5%</td>
<td>32.9%</td>
<td>9.3%</td>
</tr>
</tbody>
</table>

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### World consumption outlook
(1970 to 2020)

[Graph showing world consumption outlook from 1970 to 2020]