



INTERNATIONAL COFFEE ORGANIZATION
ORGANIZACIÓN INTERNACIONAL DEL CAFÉ
ORGANIZAÇÃO INTERNACIONAL DO CAFÉ
ORGANISATION INTERNATIONALE DU CAFÉ

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**Draft terms of reference for a Seminar on
trends in new coffee consuming markets**

1. The Executive Director presents his compliments and attaches a document containing draft terms of reference for a Seminar on trends in new coffee consuming markets, as provided for in the Programme of Activities for 2012/13 (document ICC-109-12). The Seminar will take place at the ICO headquarters in London during the 110th Council Session from 4 to 8 March 2013, and is scheduled for the afternoon of Tuesday 5 March 2013.
2. Members are invited to send comments on the draft terms of reference and suggestions for speakers to the Executive Director no later than **30 November 2012**, following which appropriate speakers will be identified and contacted.

DRAFT TERMS OF REFERENCE FOR A SEMINAR ON TRENDS IN NEW COFFEE CONSUMING MARKETS

Introduction

1. In September 2012, the Council agreed that the seminar topic for 2012/13 should be trends in new coffee consuming markets, noting that this was the fastest growing geographical segment of the world coffee market and merited further investigation.
2. The Council further decided that terms of reference should be developed for the seminar by a working group with the assistance of the Secretariat. The working group would include Brazil, Colombia, the European Union, Guatemala, India, Indonesia, Mexico, Uganda and the United States of America and would be open to all Members.

Objective

3. The objective of the Seminar is to provide information to Members on trends in new coffee consuming markets. The Seminar will identify relevant issues in this field, and will also attempt to formulate any relevant recommendations, especially with regard to the recently-approved Plan for Promotion and Market Development.

Proposed structure

4. The Seminar will cover issues related to trends in new coffee consuming markets, including but not limited to:
 - evaluation of key trends in emerging coffee consuming markets in Eastern and Central Europe, Asia, Africa and Oceania, with special attention to Russia, Ukraine, Algeria, Korea and China;
 - evaluation of key trends in domestic markets of coffee producing countries, especially in Latin America, Asia and Africa;
 - key drivers of coffee consumption in new markets, including disposable income, population, urbanization and cultural influences;
 - most important sources of coffee supply for emerging markets and impact on the global supply-demand balance in the future;
 - trends in forms of coffee consumption, such as soluble versus roasted, '3-in-1' preparations, ready-to-drink coffee, etc.; and
 - trends in location of consumption (in-home versus out-of-home; chains versus independent stores, etc.).

Suggested speakers

5. It is proposed that organizations from the following categories could be approached to provide speakers:

- coffee associations;
- representatives of the private sector;
- governmental and non-governmental organizations; and
- research institutions/universities/consultants with relevant expertise.

Participants

6. The event would be open to ICO Members and observers, private sector representatives and other interested parties.