



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

ED 2150/13

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**Seminar on trends in new coffee
consuming markets**

- Draft programme
- Final terms of reference

London, 5 March 2013 (14:30 – 18:15)

1. The Executive Director presents his compliments and has the pleasure of inviting Members, Private Sector Consultative Board (PSCB) associations and observers to attend the ICO Seminar on trends in new coffee consuming markets from 14:30 to 18:15 on Tuesday, 5 March 2013. The event will be chaired by Mr Andrea Illy of the European Union – Italy and will take place at the headquarters of the Organization at 22 Berners Street, London W1T 3DD, during the week of the 110th Session of the Council (information about these meetings is contained in document ED-2145/12). Simultaneous interpretation will be provided in English, French, Portuguese and Spanish.

2. 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. A preliminary draft programme and the final terms of reference are attached as Annex I and II, respectively. Both were developed in consultation with the working group established by the Council at its 109th Session in September 2012.

3. The event is free of charge and is open to ICO Members, representatives of PSCB associations and invited observers. For all other participants from interested institutions, there is a registration fee of £50 to help defray costs. The Executive Director wishes to recommend representation at the event by all ICO Member Governments, to ensure wide-ranging discussions on this important topic.

Registration

4. If you would like to attend, please complete and return the attached form to the ICO **by 18 February 2013**, either by email: deschamp@ico.org, or by fax: +44 (0) 20 7612 0630. Members who have already sent their credentials do not need to complete the attendance form.

DRAFT PROGRAMME
SEMINAR ON TRENDS IN NEW COFFEE CONSUMING MARKETS

Tuesday, 5 March 2013 (14:30 – 18:15)

- 13:00 – 14:30 **Registration**
- 14:30 – 14:35 **Welcome and opening remarks:** Executive Director, ICO – Mr Robério Oliveira Silva
- 14:35 – 14:40 **Introduction:** Chairperson Mr Andrea Illy, European Union – Italy
- 14:40 – 15:05 **Coffee 2013: Ready for take-off**
Mr J. Ross Colbert, Executive Director, Global Strategist – Beverages, Rabobank International (Food & Agribusiness Research & Advisory)
- 15:05 – 15:25 **Key trends in emerging consuming markets in Eastern Europe:**
Mr Ramaz Chanturiya, General Director, Rusteacoffee
- 15:25 – 15:45 **Key trends in producing countries: Colombia**
Mr Luis Fernando Samper, Chairman of the Board of Directors, Programme for the Promotion of Domestic Consumption in Colombia
- 15:45 – 16:05 **Key trends in emerging consuming markets in Asia: Korea**
Ms Lee Yunson, Vice President and green bean buyer, Terarosa
- 16:05 – 16:25 **Impact of new markets on world supply/demand balance:** Mr Rob Simmons, Head of Coffee and Cocoa Research, LMC International
- 16:25 – 16:45 **Instant changes still take time – Outlook for soluble coffee in new markets:**
Ms Judy Ganes-Chase, CEO, J. Ganes Consulting LLC
- 16:45 – 17:05 **Out-of-home consumption:**
Carlos Brando, Director, P&A International Marketing, Brazil
- 17:05 – 18:00 **Discussion**
- 18:00 – 18:15 **Concluding remarks by individual presenters/Summing up:** Chairperson

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;
- evaluation of key trends in domestic markets of coffee producing countries;
- key drivers of coffee consumption in new markets, including disposable income, population, urbanization and cultural influences;
- key barriers to increased coffee consumption (e.g. low per capita consumption, low quality, lack of coffee consuming culture and tariff and non-tariff barriers to imports of coffee);
- 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;
- private companies (e.g. coffee traders, roasters and retailers);
- governmental and non-governmental organizations; and
- research institutions/universities/consultants with relevant expertise.

Participants

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



INTERNATIONAL COFFEE ORGANIZATION

22 Berners Street
London W1T 3DD
United Kingdom

**SEMINAR ON TRENDS IN NEW COFFEE CONSUMING MARKETS
5 MARCH 2013 (14:30 – 18:15)**

ATTENDANCE FORM

I will/will not* attend the above event on 5 March 2013 (a separate form should be completed for each participant).

Name of ICO Member country/PSCB association/observer:

Name:

Position:

Organization/company:

Phone:

Fax:

Email:

The event is free of charge to ICO Members, representatives of the PSCB associations and invited observers. For all other participants, there is a registration fee of £50 payable in cash or by cheque.

To be completed by fee-paying participants only:

() I enclose a registration fee of £50 (N.B. cheques must be drawn on a UK bank payable to the International Coffee Organization)

** Please delete as appropriate*

Please return to:

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