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Study

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**Study on coffee consumption in
ICO non-member countries**

Background

The purpose of this study is to examine the past performance and prospects of consumption in non-member countries for which statistical data are available from various sources. In particular, it will assess the extent to which such consumption could contribute to an increase in world consumption.

Action

The Council is requested to note this document.

STUDY ON COFFEE CONSUMPTION IN ICO NON-MEMBER COUNTRIES

Introduction

1. Coffee is a widely consumed beverage both in ICO Member countries and in non-member countries. Consumption in ICO Member countries, including both importing and exporting Members, reached 103.5 million bags in 2007, representing almost 83% of world consumption. In 2007, consumption in non-member countries is preliminarily estimated at 21.6 million bags (Table 1), equivalent to the remaining 17%.

2. The Organization's methodology to calculate consumption in importing non-members is by deducting re-exports from total imports, i.e., resulting in net imports. In the case of exporting non-members, the volume of internal consumption is used. The sources of the statistics used in this document include National Statistical Offices, the World Trade Atlas and the Food and Agriculture Organization of the United Nations (FAO), among others. The tables in this study cover the period 2000 to 2006, the latest dates for which figures are available for a representative range of countries. Information for 2007 is provided in selected cases.

Table 1: World coffee consumption in ICO Member and non-member countries

Year	World	% change	Members	% change	Non-members	% change
2000	104.57		90.13		14.43	
2001	108.87	4.12	92.99	3.17	15.88	10.00
2002	110.41	1.42	93.46	0.51	16.95	6.74
2003	112.92	2.27	96.23	2.96	16.69	-1.55
2004	118.42	4.87	99.75	3.66	18.67	11.89
2005	118.34	-0.07	99.21	-0.54	19.13	2.44
2006	121.54	2.70	101.70	2.51	19.83	3.70
2007*	125.06	2.90	103.46	1.73	21.60	8.93
Average 2000-2007	115.02	2.59	97.12	1.99	17.90	5.93
Share in consumption			84.4%		15.6%	

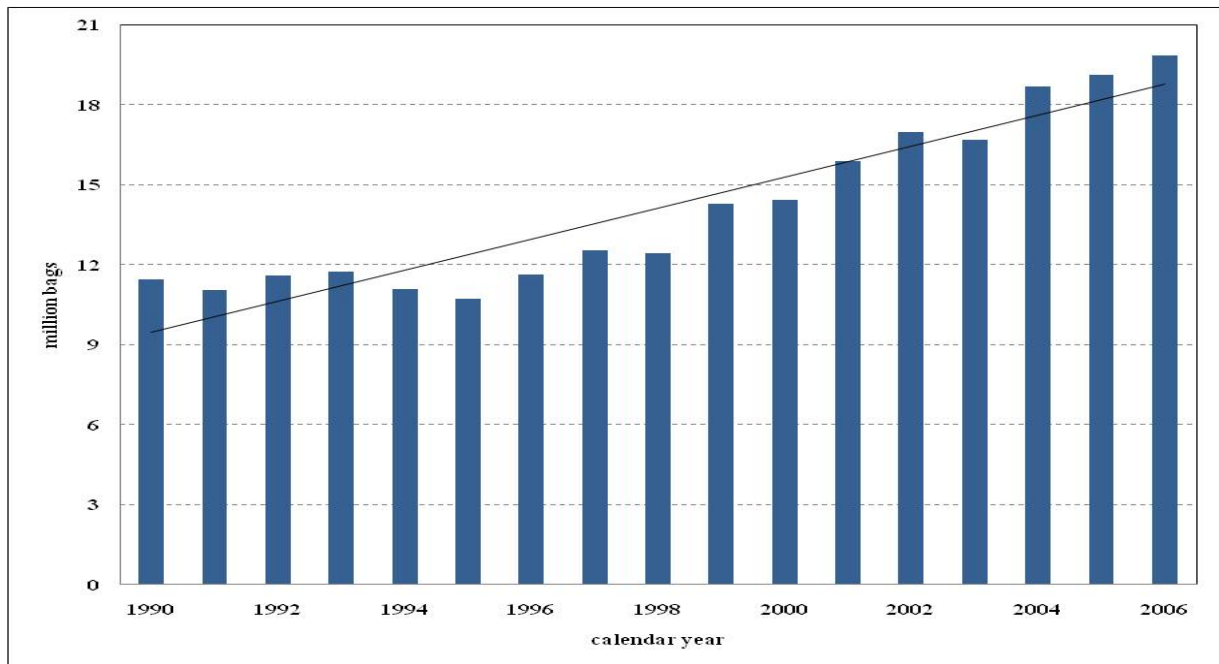
In million 60-kg bags

*Preliminary

I. Consumption in non-member countries

3. ICO non-members account for 46% of the world's population, or around 3 billion people. Although available statistics do not cover all non-member countries, estimated average annual consumption in these countries is more than 17.9 million bags in the period 2000 to 2007. In 2007, consumption in non-members is preliminarily estimated to have reached 21.6 million bags. The growth rate of consumption in non-member countries from 2000 to 2007 is 5.9%, compared to 2% in Member countries. Graph 1 shows consumption from 1990 to 2006 and the trend in consumption in the period.

**Graph 1: Consumption in ICO non-member countries and trend-line
Calendar years 1990 to 2006**



4. The main non-member consuming countries are the Russian Federation, Canada, Algeria, the Republic of Korea, Australia, the Gulf States¹, Serbia, Ukraine and Argentina, in which annual consumption averaged more than 500,000 bags from 2000 to 2006 (Table 2). Other non-member countries with significant levels of average annual consumption (between 200,000 to 450,000 bags) include Morocco, Turkey, South Africa, Israel and Taiwan.

¹ Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and United Arab Emirates.

**Table 2: Consumption in selected non-member countries
Calendar years 2000 to 2006 and period average**

Non-member	January - December							Average 2000-2006
	2000	2001	2002	2003	2004	2005	2006	
Russian Federation	1 863	2 983	3 446	3 582	3 086	3 212	3 263	3 062
Canada	2 377	2 535	2 302	2 146	2 747	2 794	3 098	2 571
Algeria	1 779	1 454	1 852	1 752	2 159	1 892	1 836	1 818
Korea Republic of	1 246	1 258	1 306	1 305	1 401	1 394	1 437	1 335
Australia	832	765	976	873	864	1 039	992	906
Gulf States	718	746	767	815	940	1 068	1 051	872
Serbia	644	671	731	756	851	651	608	702
Ukraine	179	228	440	647	739	1 025	968	604
Argentina	623	636	522	627	581	590	570	593
Morocco	503	490	505	415	401	388	437	449
Turkey	291	299	408	482	402	464	421	395
South Africa Republic of	368	301	338	374	402	436	484	386
Israel	287	367	366	414	427	401	430	385
Taiwan	376	417	446	459	340	320	290	378
Croatia	327	337	355	375	370	374	386	361
Syrian Arab Republic	221	641	450	225	341	402	240	360
Lebanon	273	421	319	307	407	323	325	339
Bosnia-Herzegovina	63	112	179	393	388	359	399	271
Sudan	129	178	224	119	390	398	403	263
New Zealand	186	190	200	219	233	238	256	218
Tunisia	174	233	230	121	263	190	200	202
Chile	218	214	170	194	205	192	207	200

In thousand bags

5. A summary of consumption of ICO non-members by geographic area is presented in Table 3 below. For the period 2000 to 2006, Europe recorded the highest consumption levels with an average of 5.3 million bags, followed by Asia and Oceania with 4.9 million bags. More detailed information can be found in Annex I.

**Table 3: Consumption in ICO non-member countries by geographic area
Calendar years 2000 to 2006 and period average**

Importing non-member	January-December							Average 2000-2006
	2000	2001	2002	2003	2004	2005	2006	
Europe	3 249	4 576	5 415	6 076	5 771	6 034	6 115	5 319
Asia and Oceania	4 314	4 626	4 655	4 084	5 020	5 502	5 855	4 865
Africa	3 265	2 965	3 539	3 220	3 991	3 646	3 679	3 472
North America	2 377	2 535	2 302	2 146	2 747	2 794	3 098	2 571
Latin America and the Caribbean	1 230	1 177	1 038	1 160	1 142	1 150	1 088	1 141
Total	14 435	15 878	16 949	16 686	18 670	19 126	19 834	17 368

In thousand bags

II. Europe

6. With the accession of 10 Eastern European countries to the European Union in 2004, European non-member countries now account for slightly more than 31% of total consumption by non-members, averaging 5.3 million bags a year. The population of these European non-member countries is 230 million inhabitants, representing around 7.8% of the total population of importing non-member countries. With an annual growth rate of 11%, this region is a driving force in the increase of world consumption. The main European non-member importing countries are the Russian Federation, Ukraine, and the countries formerly comprising Yugoslavia (Table 4).

**Table 4: Consumption in non-member countries in Europe
Calendar years 2000 to 2006
Period average, percentage share in all non-members and world,
and growth rate over the 6-year period**

Importing non-member	January-December (000 bags)							Percentage			
	2000	2001	2002	2003	2004	2005	2006	Average 2000-2006	Share in all non-members	Share in world consumption	Consumption growth rate from 2000-2006
Europe	3 249	4 576	5 415	6 076	5 771	6 034	6 115	5 319	31.23	4.68	11.12
Russian Federation	1 863	2 983	3 446	3 582	3 086	3 212	3 263	3 062	17.98	2.70	9.79
Ukraine	179	228	440	647	739	1 025	968	604	3.54	0.53	32.52
Serbia	644	671	731	756	851	651	608	702	4.12	0.62	-0.96
Croatia	327	337	355	375	370	374	386	361	2.12	0.32	2.80
Bosnia-Herzegovina	63	112	179	393	388	359	399	271	1.59	0.24	36.05
Others	173	246	264	323	336	413	490	321	1.88	0.28	18.97

Russian Federation

7. The Russian Federation is not only the biggest consumer in the group under consideration but also the biggest consumer among non-member importing countries as a whole. In 2007, preliminary data indicate a consumption of 4.1 million bags. For the period 2000 to 2006, average annual consumption is around 3.1 million bags, representing a per capita consumption of 1.3 kg for a population of 145 million. Per capita GDP is US\$9,000, with 16% of the population living below the poverty line. Prospects for increased consumption are linked to increases in disposable income, particularly in the case of young people who comprise the largest share of the population. Tea drinking is entrenched in older age groups, while young people aged between 25 and 35 years are frequent coffee drinkers. Russian Federation coffee imports, mainly in the form of soluble, come mostly from Brazil, Germany, India and Vietnam (Annex II). Significant investments have been made in coffee processing facilities in recent years. As these enter into operation, imports of soluble coffee are likely to decline while those of green coffee increase.

Ukraine

8. With annual consumption of just over one million bags in 2007, Ukraine is the second most important non-member consuming country in Europe, after the Russian Federation. The population is estimated at 46.3 million and per capita GDP is US\$3,000. Ukraine is the most important economy of the former Soviet bloc after the Russian Federation, even though slightly over 37% of the population lives below the poverty line. Per capita consumption in 2006 reached 1.25 kg. Soluble coffee and coffee-based mixes, imported mainly from Brazil and the European Union (Annex II), account for more than 70% of Ukraine's coffee consumption. Green coffee represents only a small share of imports.

Serbia

9. The new State of Serbia created after the secession of Montenegro has a population of around 10 million and coffee consumption averages 700,000 bags. Per capita GDP was estimated at US\$7,700 in 2008. Less than 7% of the population lives below the poverty line. Per capita consumption is around 4.2 kg, a relatively high level compared to many Member countries of the European Union. Imports are mainly of green coffee from Brazil, India, Uganda and Vietnam (Annex II).

Croatia

10. Croatia, with a population of 4.5 million inhabitants and per capita GDP of US\$11,000, is the richest of the new states created from the former Yugoslavia. Average annual consumption totals 361,000 bags, representing an average annual per capita consumption of 4.8 kg. Croatia's coffee imports come mainly from Brazil, India and Vietnam (Annex II).

Bosnia-Herzegovina

11. Bosnia-Herzegovina, which has a population of 3.9 million, consumed an average of 385,000 bags in the last four years, representing an average per capita consumption of 5.9 kg in this period. Per capita GDP is US\$3,700, with 25% of the population living below the poverty line. Imports are almost all of Brazilian Naturals (Annex II).

III. Asia and Oceania

12. The Asia and Oceania area has the largest number of non-member countries. Their total population is around 2.2 billion, representing 35% of the world's total population and 76% of the total population in non-member countries. From 2000 to 2006, average consumption in the region was 4.9 million bags, representing 28% of consumption in all non-member countries and around 4.3% of total world consumption. The average rate of increase

of consumption in this region is 5.2% per annum. If this growth rate is maintained, total consumption would reach 6.8 million bags in 2009 and 7.2 million bags in 2010. The main consuming countries in the region are: Republic of Korea, Australia, the Gulf States, Turkey, Israel, Taiwan, Lebanon and China (Table 5).

**Table 5: Consumption in non-members in Asia and Oceania
Calendar years 2000 to 2006
Period average, percentage share in all non-members and world
and growth rate over the 6-year period**

Importing non-member	January-December (000 bags)							Percentage			Consumption growth rate from 2000-2006
	2000	2001	2002	2003	2004	2005	2006	Average 2000-2006	Share in all non-members	Share in world consumption	
Asia and Oceania	4 314	4 626	4 655	4 084	5 020	5 502	5 855	4 865	28.01	4.28	5.22
Korea, Republic of	1 246	1 258	1 306	1 305	1 401	1 394	1 437	1 335	7.69	1.18	2.41
Australia	832	765	976	873	864	1 039	992	906	5.22	0.80	2.97
Gulf States 1/	718	746	767	815	940	1 068	1 051	872	5.02	0.77	6.55
Turkey	291	299	408	482	402	464	421	395	2.28	0.35	6.37
Israel	287	367	366	414	427	401	430	385	2.21	0.34	6.93
Taiwan	376	417	446	459	340	320	290	378	2.18	0.33	-4.24
Lebanon	273	421	319	307	407	323	325	339	1.95	0.30	2.96
China	133	84	102	76	113	199	179	127	0.73	0.11	5.11
Malaysia	-244	-489	-508	-731	-841	-174	239	-393			
Singapore	-466	-588	-777	-1 070	-506	-1 067	-874	-764			
Others	868	1 344	1 251	1 152	1 472	1 533	1 364	1 284	7.39	1.13	11.13

1/ Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the UAE.

Republic of Korea

13. Coffee consumption in Korea averages 1.3 million bags a year, accounting for 7.7% of the total consumption in non-member countries. Korea's population is around 48 million and GDP per capita is estimated at US\$20,100 in 2007. Korea has a fast growing economy and is one of the world's industrial emerging powers. Coffee consumption is, however, still not very widespread, since annual per capita consumption is around 1.8 kg and tea is still the main hot beverage consumed. Nonetheless, consumption has increased significantly over the last two decades. Moreover, around 50% of the population is in the under-30s age group and this offers a promising prospect for coffee consumption since young people tend to assimilate Western lifestyles, particularly in relation to eating habits, by moving away from the tea-drinking tradition in favour of coffee. Since 2000, consumption has grown at an average annual rate of 2.4%. Imports originate mainly from Brazil, Colombia, Honduras, Indonesia and Vietnam (Annex II).

Australia

14. Coffee consumption in Australia is estimated at just over one million bags in 2007. The total population is 20.7 million inhabitants and per capita GDP was estimated at US\$43,865 in 2007. Average annual per capita consumption is nearly 2.7 kg, a relatively low level for a developed country. There are promising prospects for a substantial increase in consumption since the annual growth rate was 3% in the period 2000 to 2006. In the home, coffee is predominantly consumed in soluble form, but coffee shop chains are making increasing inroads into the market. The main sources of imports are Brazil, Papua New Guinea and Vietnam (Annex II).

Gulf States

15. The Arab states of the Persian Gulf could become an important area for coffee consumption as a result of the development of their economies and tourism in recent years. The Gulf States comprise Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the seven countries that form the United Arab Emirates, where Abu Dhabi and Dubai are the most relevant in terms of coffee consumption. These States have a combined population of more than 36 million and their annual coffee consumption averages more than 872,000 bags, representing a per capita consumption of 1.4 kg a year. Per capita GDP is very high, particularly in Qatar (US\$75,000), Kuwait (US\$44,000), the United Arab Emirates (US\$55,000), Bahrain (US\$34,700) and Saudi Arabia (US\$20,700). Coffee consumption is increasing at an annual rate of 6.6%, making it possible to envisage a total consumption of 1.4 million bags by 2010. The main countries of origin for imports by the Gulf States are Ethiopia and India (Annex II).

Turkey

16. Turkey is one of the countries where coffee consumption has grown rapidly over the last few years. Average annual consumption is around 400,000 bags. The country's population is estimated at just below 75 million and per capita GDP is US\$8,800. Although the per capita consumption level is still low (0.35 kg), there is considerable potential for increasing demand. Coffee imports come mainly from Brazil (Annex II). It should be noted that Turkey is in the process of completing the requirements for membership of the new International Coffee Agreement.

Israel

17. Consumption in Israel averaged 385,000 bags for a population of 6.6 million, representing a per capita consumption of 3.6 kg. This consumption level is higher than the figure for some ICO importing Members, including the United Kingdom and Japan. Per capita GDP was estimated at US\$23,350 in 2008, but almost 22% of the population lives

below the poverty line. The annual rate of growth of coffee consumption in Israel is 6.9%. Imports come mainly from Brazil, Colombia, the European Union, India, USA and Vietnam (Annex II).

Taiwan

18. With a population of around 24 million and an estimated GDP of US\$16,274, Taiwan is one of Southeast Asia's leading emerging economies. Taiwan's coffee consumption averages around 378,000 bags and annual per capita consumption of 0.95 kg is still insignificant for a newly industrialized economy. The main origins for Taiwan's imports are: Brazil, China, Indonesia, Singapore and Vietnam (Annex II).

Lebanon

19. Lebanon, with a population of around 4 million, has an average annual coffee consumption level of 339,000 bags, representing a per capita consumption of 5.1 kg. The annual rate of growth of consumption is just under 3%. GDP per capita was estimated at US\$6,000 in 2007. Lebanon's coffee imports come mainly from Brazil (Annex II).

China

20. With a population estimated at 1.3 billion, China has great potential as a coffee consumer. Per capita GDP is estimated at US\$5,300, with 8% of the population living below the poverty line. China is a major economic power and the country's coffee consumption could have a considerable impact on world demand. Estimates of Chinese consumption are hampered by a lack of reliable statistics, including on coffee production in the province of Yunnan. Available trade data indicate a consumption level averaging 127,000 bags, which grows at a rapid pace. However, other credible sources which take into account national coffee production, estimate considerably higher figures surpassing 800,000 bags in 2008. The urban population, estimated at around 370 million people, is a potential target for an increase in coffee consumption. In urban areas average annual per capita consumption is around 760 grams. China's main coffee suppliers are Brazil, Colombia, Indonesia, USA and Vietnam (Annex II).

Malaysia and Singapore

21. The calculation of coffee consumption in Malaysia and Singapore presents significant methodological challenges. As shown in Table 5, available foreign trade statistics indicate that both countries are net exporters of coffee, implying that no coffee is consumed locally. This appears to be counterintuitive, given that Singapore does not produce any coffee

and production estimates for Malaysia lack consistency. Evidence from other sources suggests the existence of significant inflows of coffee that are not recorded in official data. Unofficial estimates for consumption in Singapore are around 200,000 bags/year.

IV. Africa

22. African non-member countries consume an average of almost 3.5 million bags a year, representing 20% of total consumption of non-members and 3.1% of world consumption. From 2000 to 2006 consumption in these countries grew at an average annual rate of 2%. If this growth rate is maintained, consumption in African non-member countries could surpass 4 million bags in 2010. The region's major consuming countries are: Algeria, Morocco, South Africa, Sudan, Tunisia and Egypt (Table 6).

**Table 6: Consumption in non-members in Africa
Calendar years 2000 to 2006
Period average, percentage share in all non-members and world,
and growth rate over the 6-year period**

Importing non-member	January-December (000 bags)							Percentage			
	2000	2001	2002	2003	2004	2005	2006	Average 2000-2006	Share in all non-members	Share in world consumption	Consumption growth rate from 2000-2006
Africa	3 265	2 965	3 539	3 220	3 991	3 646	3 679	3 472	20.39	3.06	2.01
Algeria	1 779	1 454	1 852	1 752	2 159	1 892	1 836	1 818	10.67	1.60	0.53
Morocco	503	490	505	415	401	388	437	449	2.63	0.40	-2.31
South Africa	368	301	338	374	402	436	484	386	2.27	0.34	4.67
Sudan	129	178	224	119	390	398	403	263	1.54	0.23	21.00
Tunisia	174	233	230	121	263	190	200	202	1.18	0.18	2.36
Egypt	95	79	111	105	117	125	108	106	0.62	0.09	2.13
Others	217	229	278	334	259	216	209	249	1.46	0.22	-0.61

Algeria

23. Algeria, with an estimated population of 34 million in 2007, has a per capita GDP estimated at just under US\$4,000 in 2007. The country's average annual consumption is 1.8 million bags, representing around 10.5% of the total consumption of non-member countries. Although the present level of annual per capita consumption (3.4 kg) is relatively high for a developing country, Algeria has potential to significantly increase consumption in light of its installed roasting capacity of around 4 million bags of green coffee. However, consumption grew at an average annual rate of only 0.5% between 2000 and 2006. The domestic market is considerably influenced by informal sales channels for which statistical data are not always available. Green coffee accounts for the bulk of Algeria's coffee imports and the main suppliers are Côte d'Ivoire, Indonesia and Vietnam (Annex II).

24. Despite the drop in coffee prices since September 2008, it should be noted that the growth of consumption in Algeria may be affected by earlier price increases. The cost of importing one tonne of green coffee, including freight and taxes, rose from US\$1,481 in March 2007 to US\$2,720 in March 2008, an increase of almost 100%. Moreover, 25% of the population still lives below the poverty line and coffee is considered a luxury item.

Morocco

25. Morocco has a population of 31.2 million and a per capita GDP estimated at US\$2,400 in 2007. Nearly 15% of the population lives below the poverty line. Average annual coffee consumption is around 450,000 bags, representing a per capita consumption of 0.9 kg. The level of consumption in the country represents 2.6% of total consumption in non-member countries but developments since 2000 indicate that there is little prospect of any significant increase given that the growth rate, calculated on the basis of available statistics, seems to be negative. Morocco imports green coffee mainly from Côte d'Ivoire, Guinea, Indonesia and Vietnam (Annex II).

South Africa

26. South Africa, which has over 48 million inhabitants, ranks third among African non-member countries. Average annual consumption is more than 386,000 bags, with a relatively low per capita consumption of around 0.5 kg. There is still potential for substantial growth in demand as the living standards of the population rise, since the current annual growth rate of consumption is 4.7%. However, 50% of the population still lives below the poverty line. Per capita GDP was estimated at US\$5,800 in 2007. The main origins of imports in 2007 are Vietnam and Indonesia (Annex II).

Sudan

27. Despite the lack of complete data, consumption in Sudan seems to be growing at a fast rate. Annual consumption rose from 129,000 bags in 2000 to more than 400,000 bags in 2006. Average annual consumption for the period 2000 to 2006 is 263,000 bags. The population is estimated at more than 38 million, with 40% living below the poverty line. Per capita consumption is around 400 grams. According to estimates for 2008, per capita GDP is US\$1,200.

Tunisia

28. Tunisia, with a population of 10.3 million, is the fifth biggest consuming market among African non-member countries. Average coffee consumption is 202,000 bags and

annual per capita consumption is 1.1 kg. The country's per capita GDP was estimated at US\$3,400 in 2007, with only 7.4% of the population living below the poverty line. Tunisian imports are mainly from Brazil, Cameroon, Côte d'Ivoire and Uganda (Annex II).

Egypt

29. Among the remaining African non-member countries, Egypt is the most important potential market, with a population of more than 75 million inhabitants that grows at an annual rate of 1.76%. Consumption averages 106,000 bags, representing an annual per capita consumption of less than 120 grams, which is negligible. Per capita GDP was estimated at US\$ 1,760 in 2007.

V. North America

30. In North America, Canada, with a population of around 33 million, is the only non-member country. Coffee consumption is preliminarily estimated to have exceeded 3.5 million bags in 2007. For the period 2000 to 2006, average annual consumption is 2.6 million bags, representing a per capita consumption of around 4.8 kg. The annual growth rate for the period is 4.5%. The country's main suppliers are: Brazil, Colombia, Guatemala, Peru, USA and Vietnam (Annex II).

VI. Latin America and the Caribbean

31. Total consumption in non-member countries in this region is around 1.14 million bags, more than half of which is accounted for by Argentina (Table 7). From 2000 to 2006, consumption in the region fell from 1.23 million to 1.09 million bags, an annual rate of decrease of 2%. These countries have a population of 92.5 million, representing 3.1% of the population of non-members as a whole.

**Table 7: Consumption in non-member countries in Latin America and the Caribbean
Calendar years 2000 to 2006
Period average, percentage share in all non-members and world,
and growth rate over the 6-year period**

Importing non-member	January-December (000 bags)							Percentage			
	2000	2001	2002	2003	2004	2005	2006	Average 2000-2006	Share in all non-members	Share in world consumption	Consumption growth rate from 2000-2006
Latin America & Caribbean	1 230	1 177	1 038	1 160	1 142	1 150	1 088	1 141	6.70	1.00	-2.02
Argentina	623	636	522	627	581	590	570	593	3.48	0.52	-1.47
Chile	218	214	170	194	205	192	207	200	1.17	0.18	-0.86
Others	389	327	346	340	356	368	312	348	2.04	0.31	-3.63

Argentina

32. With a population of over 39 million and a per capita GDP of US\$6,600, Argentina has the region's second strongest economy after Brazil. Despite this, more than 23% of the population lives below the poverty line. Average annual coffee consumption is around 593,000 bags, representing a per capita consumption of 910 grams, a relatively low level. Imports come mainly from Brazil and Colombia (see Annex II).

Chile

33. The level of average annual coffee consumption in Chile is around 200,000 bags, for a population of 16.6 million inhabitants, representing a per capita consumption of 750 grams. Per capita GDP is estimated at just under US\$9,800, with 18% of the population living below the poverty line. Chile's coffee imports are mainly from Brazil, Peru and Vietnam (Annex II).

Conclusion

34. Consumption in non-member importing countries is an important variable in fundamental market factors. However, much of the relevant information is not readily available. Moreover, statistics can differ considerably according to the source used. As noted in the discussion of some individual countries, the sources used in this study probably underestimate the amount of coffee actually consumed and the true figure is probably higher. Subject to this qualification, available information indicates a consumption level of more than 21 million bags in 2007.

35. In contrast with traditional coffee drinking markets in industrialized countries, where consumption has reached maturity and the overall growth rates are low, non-member markets are characterized by a large and rapidly growing population with a low per capita consumption. The barriers to increased coffee consumption in these emerging markets are related mainly to cultural and economic factors, since per capita GDP is generally low and tea is the traditional hot beverage consumed in many of these countries. In addition, coffee is considered a luxury good in some countries and subject to high levels of taxation, a factor that may inhibit the growth of demand. As income rises and Western lifestyles are diffused among the population, consumption of coffee will become more prevalent and the vast potential of these markets is likely to be increasingly fulfilled.

Consumption in non-member countries by continent
Calendar years 2000 to 2006, period average, percentage share in all non-members and in world,
and growth rate over the 6-year period
(000 bags)

Importing non-member	January-December							Average 2000-2006	% share in all non- members	% share in world consumption	Consumption growth rate from 2000- 2006
	2000	2001	2002	2003	2004	2005	2006				
	(000 bags)										
Europe	3 249	4 576	5 415	6 076	5 771	6 034	6 115	5 319	30.63	4.68	11.12
Russian Federation	1 863	2 983	3 446	3 582	3 086	3 212	3 263	3 062	17.63	2.70	9.79
Serbia	644	671	731	756	851	651	608	702	4.04	0.62	-0.96
Ukraine	179	228	440	647	739	1 025	968	604	3.48	0.53	32.52
Croatia	327	337	355	375	370	374	386	361	2.08	0.32	2.80
Bosnia and Herzegovina	63	112	179	393	388	359	399	271	1.56	0.24	36.05
Others	173	246	264	323	336	413	490	321	1.85	0.28	18.97
Asia & Oceania	4 314	4 626	4 655	4 084	5 020	5 502	5 855	4 865	28.01	4.28	5.22
Korea, Republic of	1 246	1 258	1 306	1 305	1 401	1 394	1 437	1 335	7.69	1.18	2.41
Australia	832	765	976	873	864	1 039	992	906	5.22	0.80	2.97
Gulf states 1/	718	746	767	815	940	1 068	1 051	872	5.02	0.77	6.55
Turkey	291	299	408	482	402	464	421	395	2.28	0.35	6.37
Israel	287	367	366	414	427	401	430	385	2.21	0.34	6.93
Taiwan	376	417	446	459	340	320	290	378	2.18	0.33	-4.24
Lebanon	273	421	319	307	407	323	325	339	1.95	0.30	2.96
China	133	84	102	76	113	199	179	127	0.73	0.11	5.11
Malaysia	-244	-489	-508	-731	-841	-174	239	-393			
Singapore	-466	-588	-777	-1 070	-506	-1 067	-874	-764			
Others	868	1 344	1 251	1 152	1 472	1 533	1 364	1 284	7.39	1.13	11.13
Africa	3 265	2 965	3 539	3 220	3 991	3 646	3 679	3 472	19.99	3.06	2.01
Algeria	1 779	1 454	1 852	1 752	2 159	1 892	1 836	1 818	10.47	1.60	0.53
Morocco	503	490	505	415	401	388	437	449	2.58	0.40	-2.31
South Africa, Republic of	368	301	338	374	402	436	484	386	2.22	0.34	4.67
Sudan	129	178	224	119	390	398	403	263	1.51	0.23	21.00
Tunisia	174	233	230	121	263	190	200	202	1.16	0.18	2.36
Egypt	95	79	111	105	117	125	108	106	0.61	0.09	2.13
Others	217	229	278	334	259	216	209	249	1.43	0.22	-0.61
North America	2 377	2 535	2 302	2 146	2 747	2 794	3 098	2 571	14.81	2.26	4.51
Canada	2 377	2 535	2 302	2 146	2 747	2 794	3 098	2 571	14.81	2.26	4.51
Latin America & Caribbean	1 230	1 177	1 038	1 160	1 142	1 150	1 088	1 141	6.57	1.00	-2.02
Argentina	623	636	522	627	581	590	570	593	3.41	0.52	-1.47
Chile	218	214	170	194	205	192	207	200	1.15	0.18	-0.86
Others	389	327	346	340	356	368	312	348	2.01	0.31	-3.63
Total	14 435	15 878	16 949	16 686	18 670	19 126	19 834	17 368	100.00	15.29	5.44

1/ Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the UAE

Imports of selected non-members by origin
Calendar year 2007

60-kg bags	Column Labels																							Grand Total	
Origin	Algeria	Argentina	Australia	Bosnia & Herzegovina	Canada	Chile	China	Croatia	Egypt	Gulf States	Israel	Korea, Rep. of	Lebanon	Malaysia	Morocco	Russia Federation	Serbia	Singapore	South Africa	Sudan	Taiwan	Tunisia	Turkey	Ukraine	Grand Total
Australia	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	6 625	0	0	8 161	0	0	0	14 786
Austria	0	0	0	5 084	0	0	0	7 748	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	22 016	34 848
Bolivia	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	7 501	0	0	0	0	0	0	0	0	7 501
Brazil	70 931	570 215	103 344	179 991	451 956	140 307	24 563	191 587	14 469	69 302	5 978	193 362	282 716	49 306	7 230	437 225	499 381	121 827	24 985	0	30 430	79 562	198 317	158 407	3 905 392
Cameroon	45 989	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	19 442	0	0	65 431
Canada	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	9 215	0	0	0	0	0	0	0	0	9 215
Chile	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	8 517	0	0	0	0	0	0	0	13 131	21 648
China	0	0	0	0	0	0	0	0	0	13 571	0	13 693	0	9 161	0	0	0	6 647	0	0	34 049	0	0	0	77 121
Colombia	0	14 181	32 727	0	645 376	15 893	16 155	12 729	0	0	8 917	140 760	0	0	11 119	64 587	0	0	8 564	0	13 535	0	0	9 496	994 038
Congo, Rep. of	0	0	0	0	0	0	0	0	0	0	0	0	0	0	22 707	0	0	0	0	0	0	0	0	0	22 707
Costa Rica	0	0	13 535	0	74 524	0	0	0	0	0	0	12 100	0	0	0	0	0	0	8 300	0	0	0	0	0	108 459
Côte d'Ivoire	1 206 580	0	0	0	0	0	0	6 583	0	0	5 048	0	0	0	64 908	19 108	0	0	0	0	0	37 425	0	0	1 339 652
Croatia	0	0	0	8 070	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	8 070
Czech Republic	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	17 583	17 583
Ecuador	0	0	0	0	0	21 127	0	0	0	0	0	0	0	0	0	49 360	0	0	0	0	0	0	9 429	0	79 916
Egypt	0	0	0	0	0	0	0	0	0	0	0	19 466	0	6 668	0	0	0	0	0	0	0	0	0	0	26 134
El Salvador	0	0	0	0	68 838	0	0	0	0	0	0	9 094	0	0	0	0	0	0	0	0	0	0	0	0	77 931
Ethiopia	0	0	12 582	0	22 381	0	0	0	0	277 713	5 630	6 374	0	0	0	10 139	0	0	0	0	6 411	0	0	0	341 231
Finland	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	21 544	0	0	0	0	0	0	0	0	21 544
France	13 452	0	15 552	0	0	0	0	0	0	0	0	0	0	0	0	106 493	0	0	0	0	0	0	0	9 739	145 237
Germany	0	0	37 421	0	10 698	0	5 771	10 642	5 061	11 624	0	10 565	0	6 331	0	585 305	0	7 126	11 113	0	0	0	20 689	84 854	807 199
Guatemala	0	0	0	0	278 219	0	0	5 480	0	0	0	0	0	0	0	0	0	0	11 688	0	0	0	0	0	295 387
Guinea	18 858	0	0	0	0	0	0	0	0	0	0	0	0	0	131 394	0	0	0	0	0	0	0	0	0	150 252
Honduras	0	0	23 487	0	41 072	0	0	0	0	0	0	128 112	0	0	0	9 769	0	0	0	0	0	0	0	0	202 440
India	58 058	0	39 684	11 661	23 701	0	0	64 845	10 822	105 644	12 555	9 883	0	19 154	0	821 119	93 671	32 230	0	6 330	17 367	0	0	65 190	1 391 913
Indonesia	195 850	0	28 659	0	52 398	0	44 444	0	50 207	15 984	0	152 067	0	247 381	119 365	55 203	0	204 793	164 718	0	77 161	8 094	0	9 586	1 425 909
Israel	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	6 284	0	0	0	0	0	0	0	0	6 284
Italy	0	0	47 265	11 023	28 253	0	0	26 670	0	0	0	0	0	0	0	29 281	10 456	0	6 465	0	0	0	0	6 567	165 981
Japan	0	0	38 814	0	0	0	6 960	0	0	0	0	5 792	0	0	0	0	0	0	0	0	8 114	0	0	0	59 681
Kenya	0	0	0	0	24 446	0	0	0	0	27 570	0	0	0	0	0	0	0	0	0	0	0	6 275	0	0	58 291
Korea, Republic of	0	0	0	0	0	0	5 680	0	0	0	0	0	0	0	0	41 147	0	0	0	0	49 521	0	16 467	0	112 814
Lao, People's Dem. Rep. of	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	7 153	0	0	0	0	0	0	7 153
Madagascar	6 862	0	0	0	0	0	0	0	0	0	0	0	0	0	11 563	0	0	0	0	0	0	0	0	0	18 426
Malaysia	0	0	0	0	0	0	6 399	0	0	14 945	0	0	8 578	0	0	36 024	0	501 356	0	0	18 951	0	0	0	586 254
Mexico	0	4 384	0	0	83 291	0	0	0	0	0	0	31 972	0	0	0	34 407	0	0	0	0	0	0	0	0	154 053
Morocco	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	10 695	0	0	0	0	0	19 273	0	0	29 969

Imports of selected non-members by origin
Calendar year 2007

60-kg bags	Column Labels																							Grand Total	
Origin	Algeria	Argentina	Australia	Bosnia & Herzegovina	Canada	Chile	China	Croatia	Egypt	Gulf States	Israel	Korea, Rep. of	Lebanon	Malaysia	Morocco	Russia Federation	Serbia	Singapore	South Africa	Sudan	Taiwan	Tunisia	Turkey	Ukraine	Grand Total
Netherlands	0	0	46 221	0	11 914	0	0	0	0	0	0	0	0	5 548	0	94 492	0	5 099	6 569	0	0	0	10 314	0	180 157
Nicaragua	0	0	0	0	49 188	0	0	0	0	0	0	0	0	0	0	7 598	0	0	0	0	0	0	0	0	56 785
Others	22 508	6 238	120 549	23 534	42 302	19 918	35 399	30 861	26 975	90 506	39 317	20 148	30 464	32 580	31 287	62 829	35 374	42 607	40 418	7 257	34 624	16 311	28 333	35 104	875 443
Panama	0	0	0	0	8 899	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	8 899
Papua New Guinea	0	0	154 723	0	0	0	0	0	0	0	0	7 934	0	5 358	0	0	0	0	5 363	0	0	0	0	0	173 378
Paraguay	0	2 019	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2 019
Peru	0	0	0	0	125 964	22 093	0	0	0	0	0	62 090	0	0	0	0	0	0	0	0	0	0	0	0	210 146
Poland	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	75 242	0	0	0	0	0	0	0	58 306	133 548
Russian Federation	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	26 972	26 972
Sierra Leone	0	0	0	0	0	0	0	0	0	0	0	0	0	0	5 619	0	0	0	0	0	0	0	0	0	5 619
Singapore	0	0	0	0	0	0	9 613	0	0	0	0	0	0	43 022	0	102 481	0	0	0	0	32 163	0	0	14 015	201 295
Slovenia	0	0	0	30 364	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	30 364
Spain	0	0	0	0	0	0	0	0	0	73 157	6 462	11 232	11 663	0	0	33 492	0	0	14 323	0	0	0	58 864	0	209 193
Switzerland	0	0	0	0	7 148	0	0	0	0	12 314	10 583	0	0	0	0	41 658	0	0	0	0	0	0	25 355	6 008	103 067
Taiwan	0	0	0	0	0	0	6 444	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	6 444
Tanzania	8 820	0	0	0	0	0	0	0	0	0	0	0	0	0	10 401	18 487	0	0	0	0	0	0	0	0	37 708
Thailand	0	0	0	0	0	0	0	0	0	0	0	37 827	0	21 676	0	9 583	0	27 347	0	0	21 155	0	18 014	0	135 601
Togo	0	0	0	0	0	0	0	0	0	0	0	0	0	0	21 802	0	0	0	0	0	0	0	0	0	21 802
Uganda	27 048	0	0	0	7 339	0	0	0	0	0	0	0	0	0	46 388	12 293	51 904	0	0	61 537	0	11 262	0	0	217 771
United Kingdom	0	0	11 152	0	0	0	0	0	0	13 292	7 132	0	0	0	0	132 679	0	0	0	0	0	0	14 910	13 624	192 790
Unspecified	0	0	0	6 953	0	0	0	0	0	120 975	271 817	0	0	0	0	8 854	0	0	0	187 907	0	0	0	43 768	640 275
USA	0	0	0	0	1 138 389	0	28 180	0	0	24 168	17 516	30 913	0	12 172	0	49 640	0	34 797	0	0	17 604	0	0	0	1 353 379
Vietnam	142 938	2 169	290 239	0	187 222	38 956	172 624	20 578	0	20 874	34 454	535 496	0	169 212	72 900	136 623	18 193	113 329	108 156	0	29 958	6 340	0	16 602	2 116 863
Yemen	0	0	0	0	0	0	0	0	0	42 764	0	0	0	0	0	0	0	0	0	0	0	0	0	0	42 764
Zambia	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	7 355	0	0	0	0	0	7 355
Zimbabwe	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	10 904	0	0	0	0	0	10 904
Grand Total	1 817 894	599 207	1 015 954	276 678	3 383 517	258 294	362 233	377 725	107 534	934 403	425 409	1 438 880	333 421	627 568	556 684	3 148 875	708 981	1 110 934	428 920	263 032	399 206	203 983	400 693	610 967	19 790 991
% share in imports by selectd countries	9.19	3.03	5.13	1.40	17.10	1.31	1.83	1.91	0.54	4.72	2.15	7.27	1.68	3.17	2.81	15.91	3.58	5.61	2.17	1.33	2.02	1.03	2.02	3.09	