# Outlook for the World Coffee Market

## The 3rd Buon Ma Thuot Coffee Festival 2011

**12-15 March 2011**

**Buon Ma Thuot City – Daklak Province**

**Vietnam**

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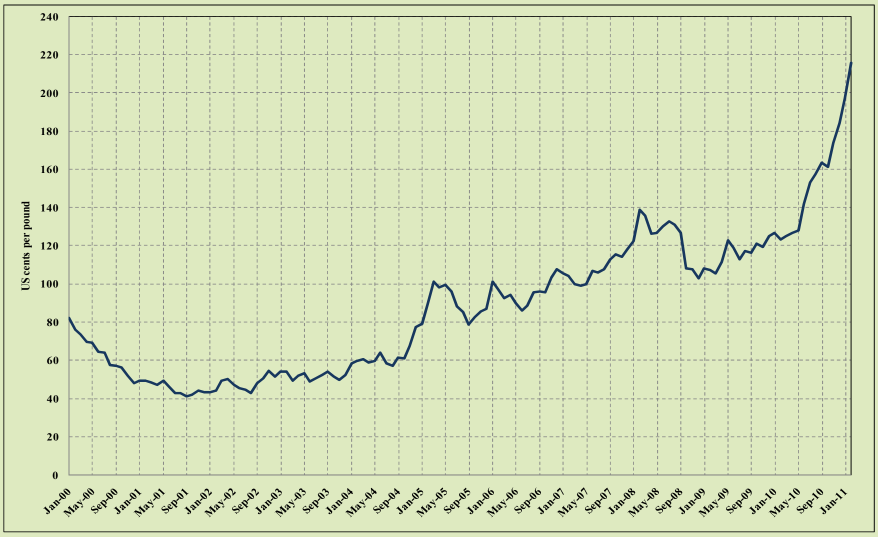
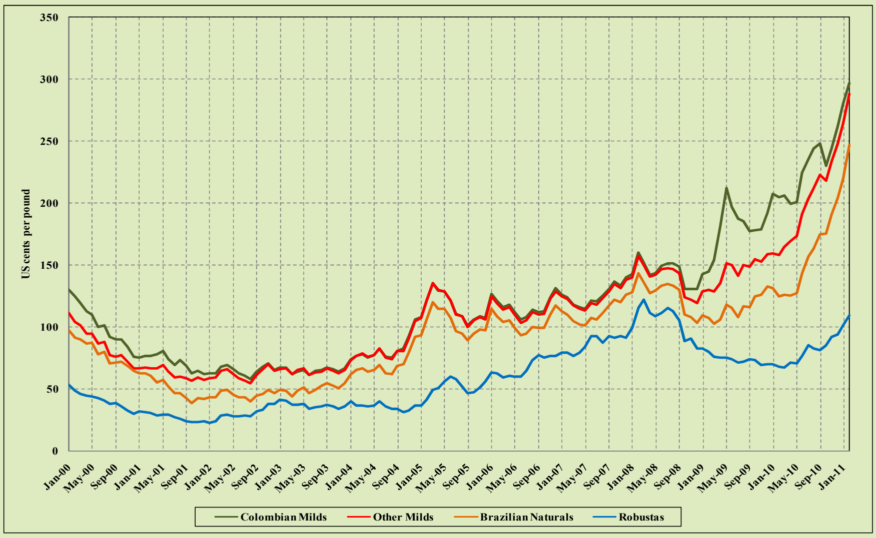
Executive Director a.i.



## ICO composite indicator price Monthly: January 2000 to February 2011



# ICO group indicator prices
# Monthly: January 2000 to February 2011

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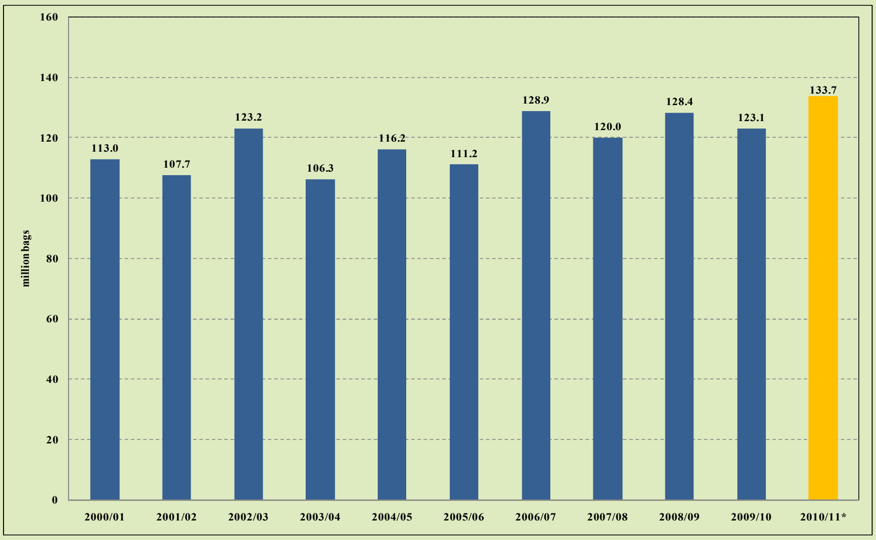
# World Production
# Crop years 2000/01 to 2010/11

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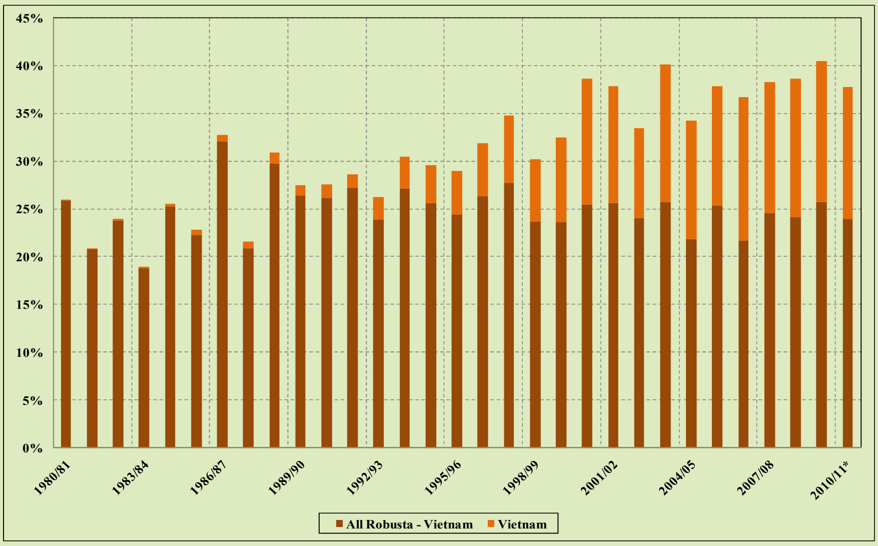
## Production: 10 leading producers (Volume in 000 bags - % of world production)

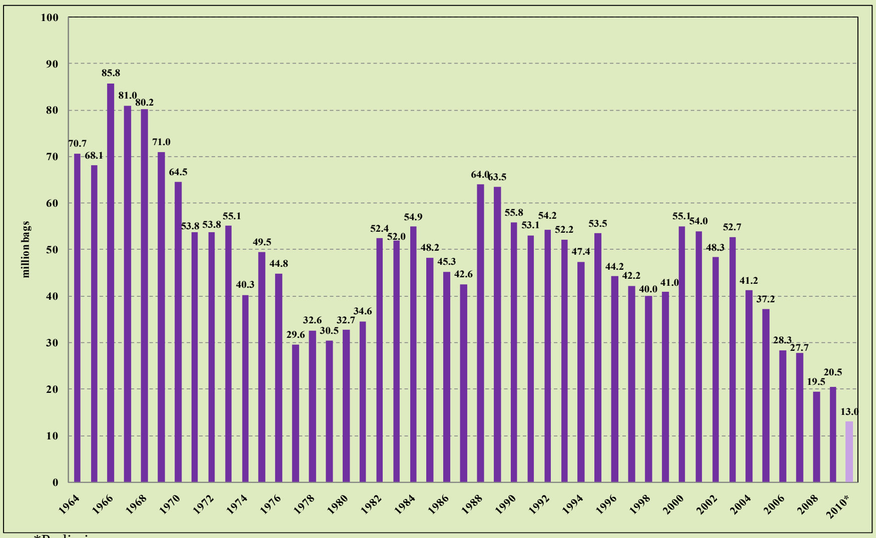
| | 2009/10 | 2010/11 | % change |
|---|---|---|---|
| Brazil | 39 470 | 48 095 | 21.9% |
| Vietnam | 18 200 | 18 433 | 1.3% |
| Indonesia | 11 380 | 9 500 | -16.5% |
| Colombia | 8 098 | 9 000 | 11.1% |
| Ethiopia | 6 931 | 7 450 | 7.5% |
| India | 4 823 | 4 733 | -1.8% |
| Mexico | 4 200 | 4 400 | 4.8% |
| Guatemala | 3 835 | 4 000 | 4.3% |
| Honduras | 3 575 | 3 830 | 7.1% |
| Uganda | 2 797 | 3 100 | 10.8% |



## Share in world production Crop year 1980/81 to 2010/11



# Opening stocks in exporting countries
# Crop years 1964 to 2010




*Preliminary

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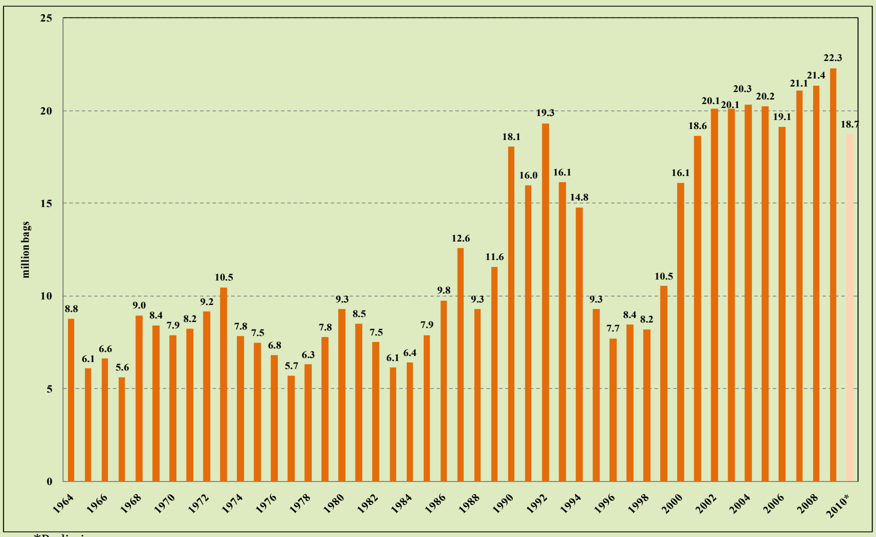
# Inventories in importing countries
# Calendar years 1964 to 2010




*Preliminary

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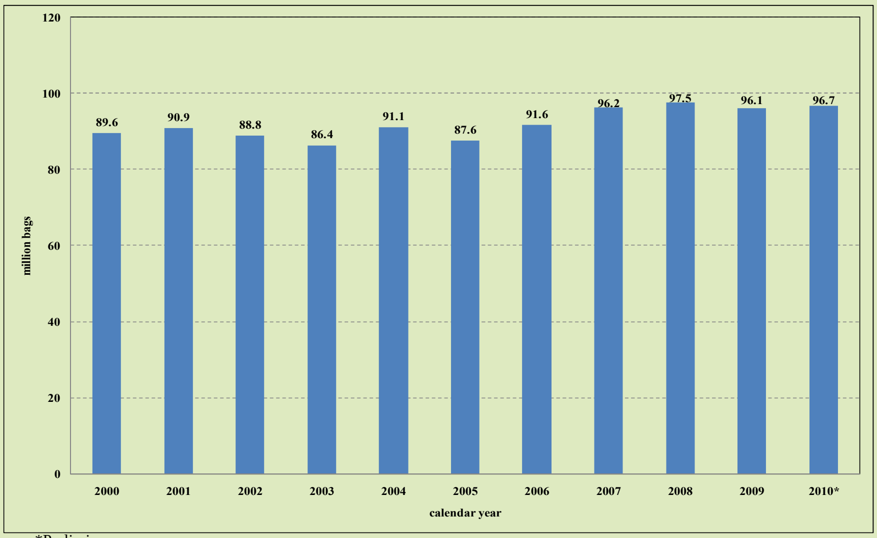
# Total exports to all destinations
# Calendar years 2000 to 2010

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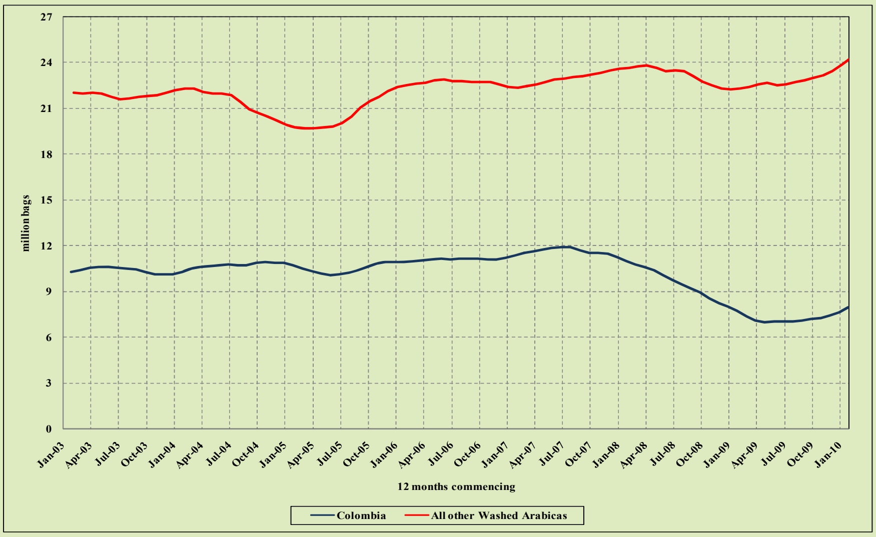
# Exports to all destinations – cumulative 12 months
# Washed Arabicas

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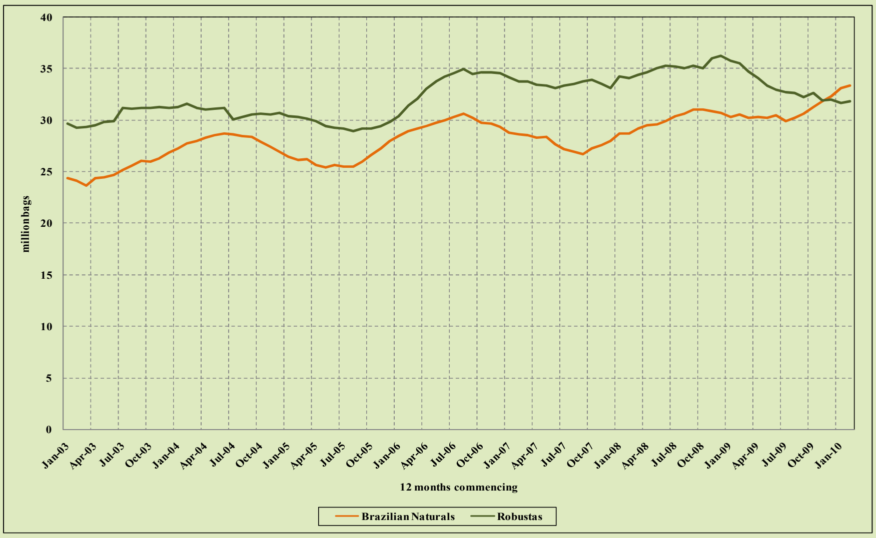
## Exports to all destinations – cumulative 12 months
## Brazilian Naturals and Robustas

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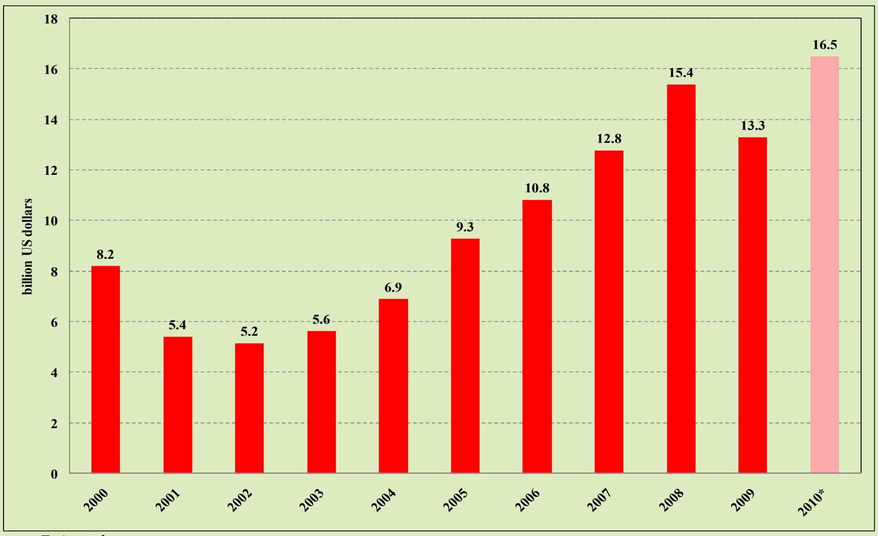
## Value of coffee exports
## Calendar years 2000 to 2010




*Estimated

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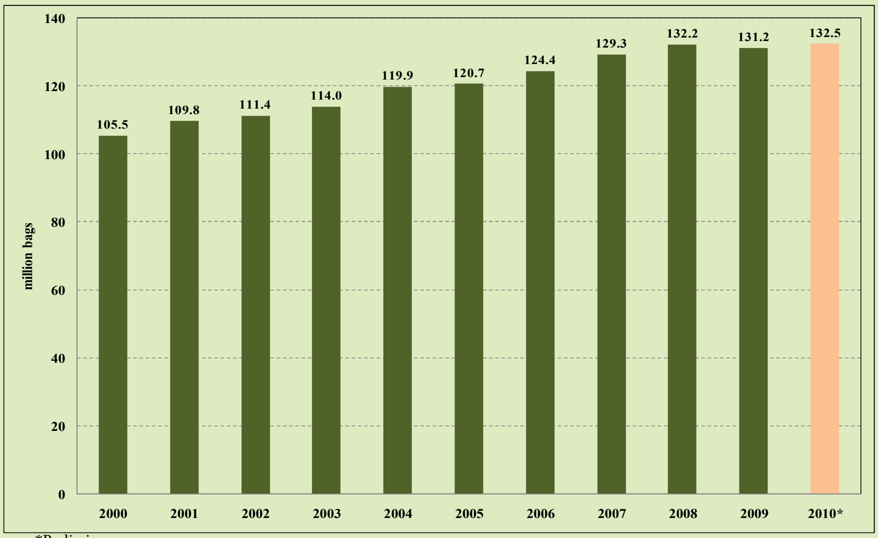
# World consumption
# Calendar years 2000 to 2009




*Preliminary



# Estimated consumption in 2010:
# 10 leading markets by volume

| (million bags) | |
|---|---|
| USA | 21.8 |
| Brazil | 18.9 |
| Germany | 9.3 |
| Japan | 7.3* |
| Italy | 6.0* |
| France | 5.9 |
| Spain | 3.4* |
| Indonesia | 3.3 |
| Russian Federation | 3.2* |
| United Kingdom | 3.1 |

*Preliminary

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## World coffee consumption
## Evolution 2000 – 2010

(in thousand bags)

| | 2000 | 2010* | Growth rate (%) |
|---|---|---|---|
| Traditional markets | 63 377 | 71 037 | 1.1 |
| Producing countries | 26 385 | 40 280 | 4.3 |
| Emerging markets | 8 761 | 13 022 | 4.0 |
| Other markets | 6 979 | 8 161 | 1.6 |
| World total | 105 502 | 132 500 | 2.3 |

*Preliminary



## World Coffee Consumption: Traditional markets
## Evolution 2000 – 2010

(in thousand 60-kg bags)

| | 2000 | 2010* | Growth rate (%) |
|---|---|---|---|
| *European Union* | *38 024* | *40 550* | *0.6* |
| Germany | 8 770 | 9 292 | 0.6 |
| Italy | 5 149 | 6 000 | 1.5 |
| France | 5 402 | 5 893 | 0.9 |
| Spain | 2 991 | 3 400 | 1.3 |
| United Kingdom | 2 342 | 3 115 | 2.9 |
| USA | 18 746 | 21 784 | 1.5 |
| Japan | 6 626 | 7 300 | 1.0 |

*Preliminary

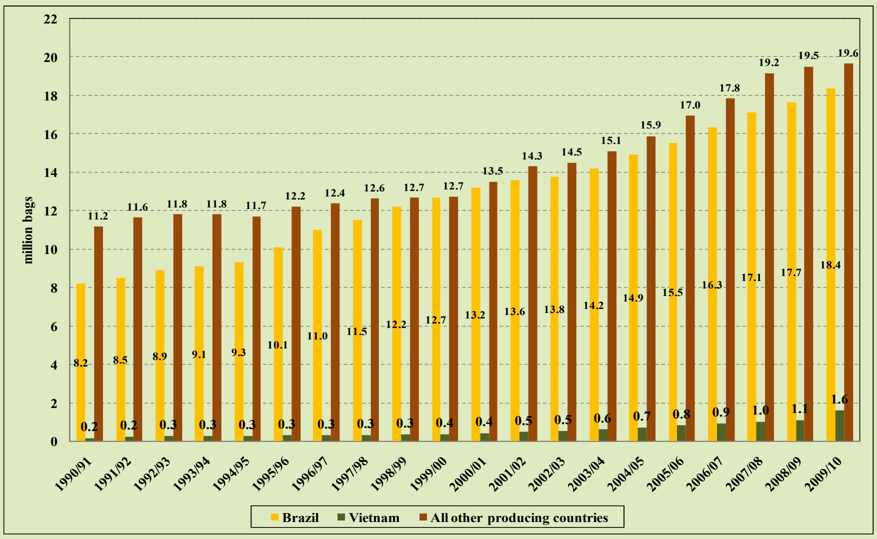
## World coffee consumption: Producing countries
## Evolution 2000 – 2010
(in thousand 60-kg bags)

| | 2000 | 2010* | Growth rate (%) |
|---|---|---|---|
| **Total** | 26 385 | 40 280 | 4.3 |
| **Brazil** | 13 075 | 18 945 | 3.8 |
| **Indonesia** | 1 664 | 3 333 | 7.2 |
| **Ethiopia** | 1 938 | 3 253 | 5.3 |
| **Mexico** | 1 189 | 2 239 | 6.5 |
| **India** | 938 | 1 400 | 4.1 |
| **Others** | 7 581 | 11 110 | 3.9 |

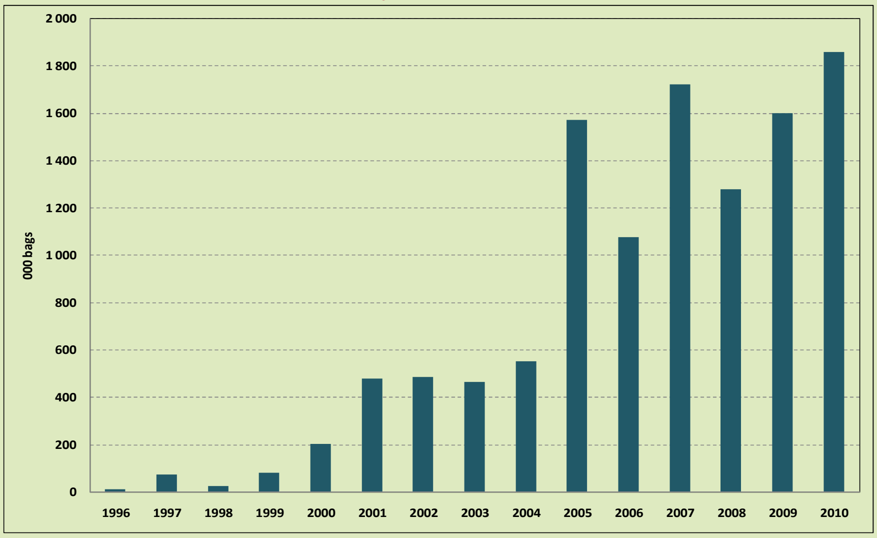
*Preliminary



## Domestic consumption in exporting countries
## Crop years 1990/91 to 2009/10



## Vietnam: exports to exporting countries
## Calendar years 1996 to 2010

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## World coffee consumption: Emerging markets
## Evolution 2000 – 2010*
(in thousand 60-kg bags)

| | 2000 | 2010* | Growth rate (%) |
|---|---|---|---|
| Total | 8 761 | 13 022 | 4.0 |
| Russian Federation | 1 863 | 3 661 | 7.0 |
| Algeria | 1 779 | 1 850 | 0.4 |
| Korea, Republic of | 1 246 | 1 666 | 3.0 |
| Ukraine | 179 | 1 485 | 23.6 |
| Australia | 832 | 1 370 | 5.1 |
| South Africa | 368 | 553 | 4.2 |
| China (Mainland- urban areas, Hong Kong and Macao) | 133 | 174 | 2.7 |

*Preliminary

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# Conclusions

1. Tight supplies situation in Arabicas will persist at least until end of 2011.
2. Supply of Robustas is sufficient to meet demand.
3. Stocks in producing countries will remain at very low levels.
4. Price levels of Arabica are attractive and will encourage better husbandry/rejuvenation of existing plantations



*Thank you*

**(Cảm ơn bạn)**

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