



Major Trends in the World Coffee Market

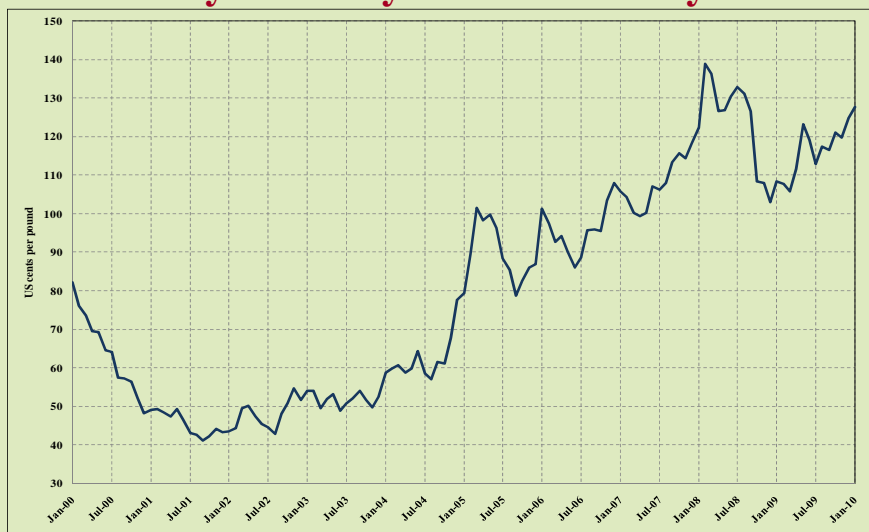
2nd Moscow International Coffee Forum
Moscow, Russia
8 February 2010

Néstor Osorio
Executive Director

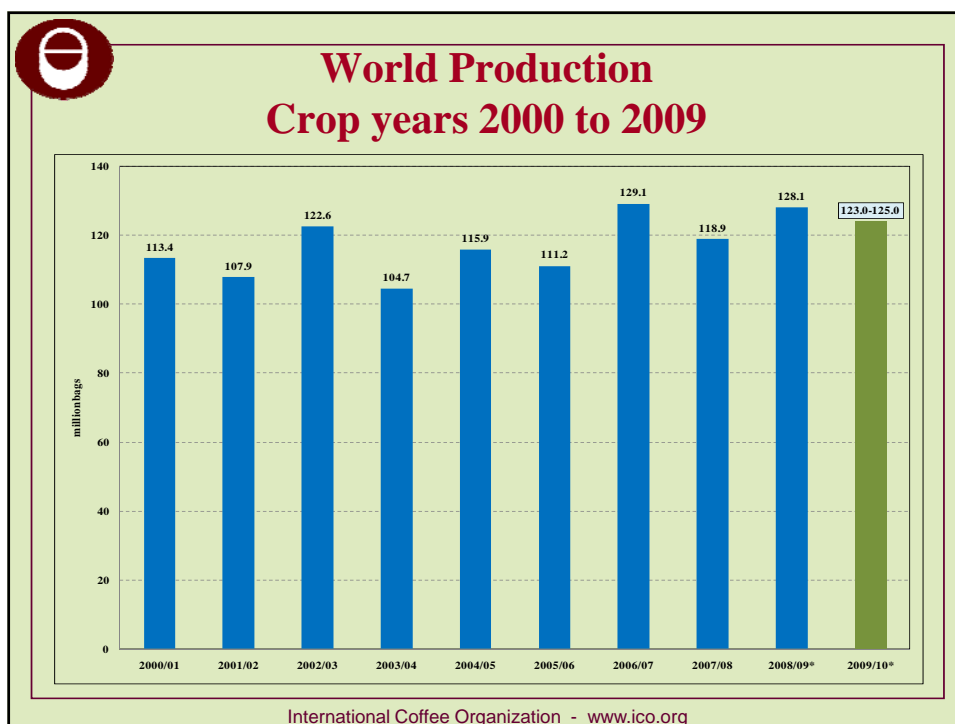
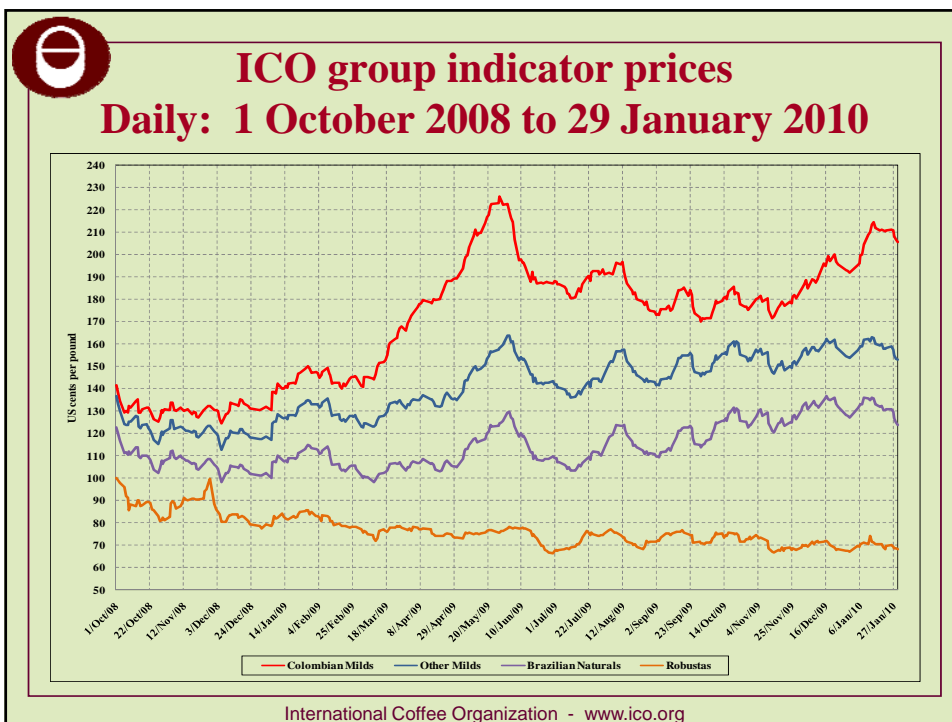
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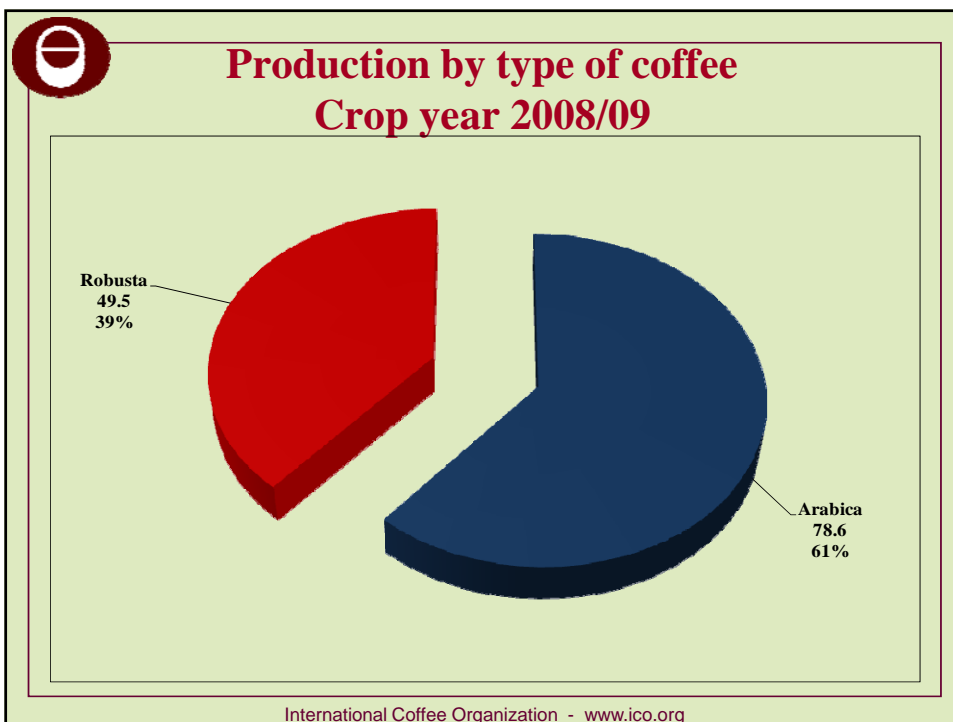
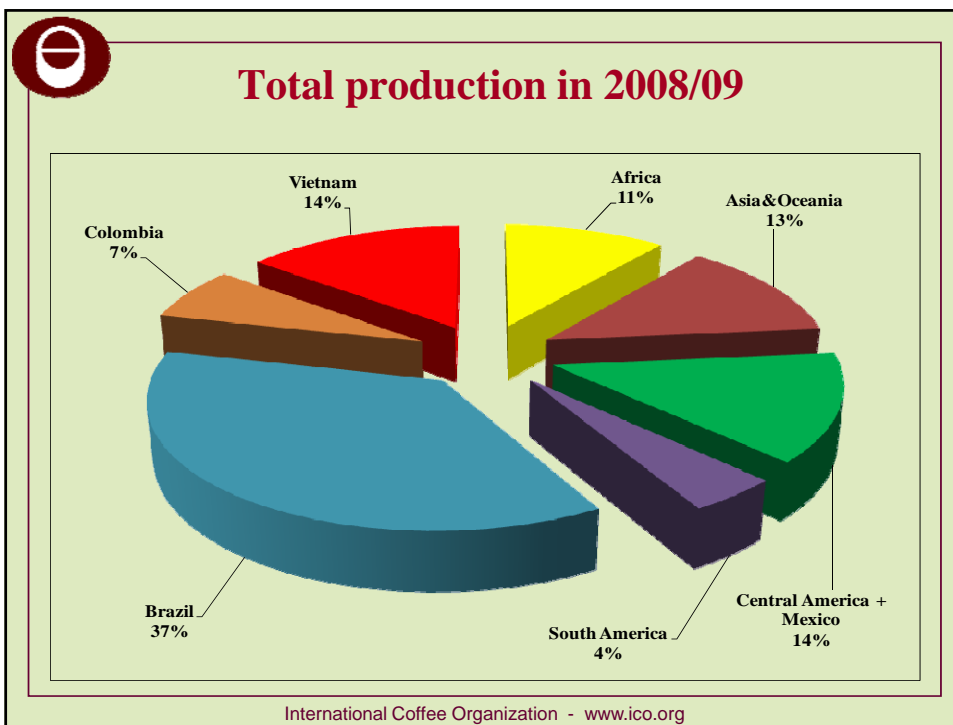


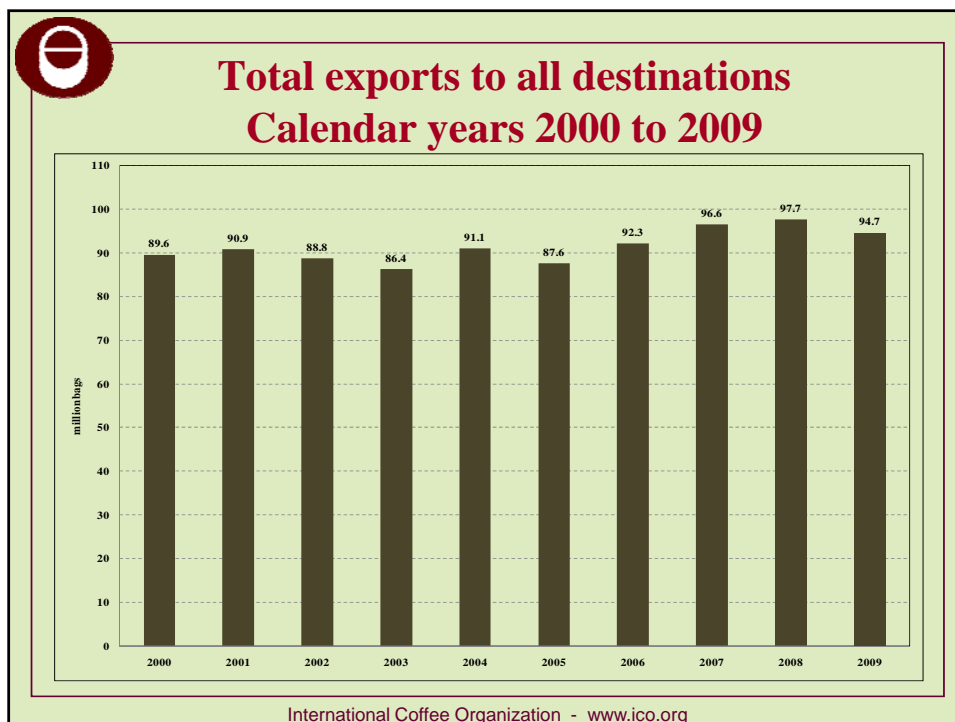
ICO composite indicator price Monthly: January 2000 to January 2010

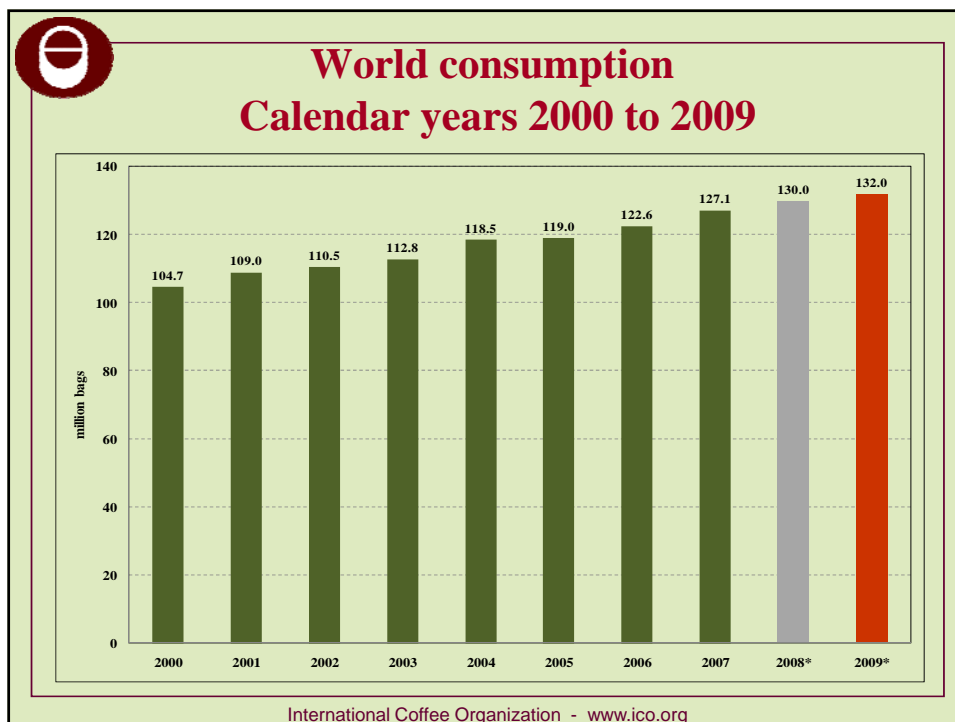
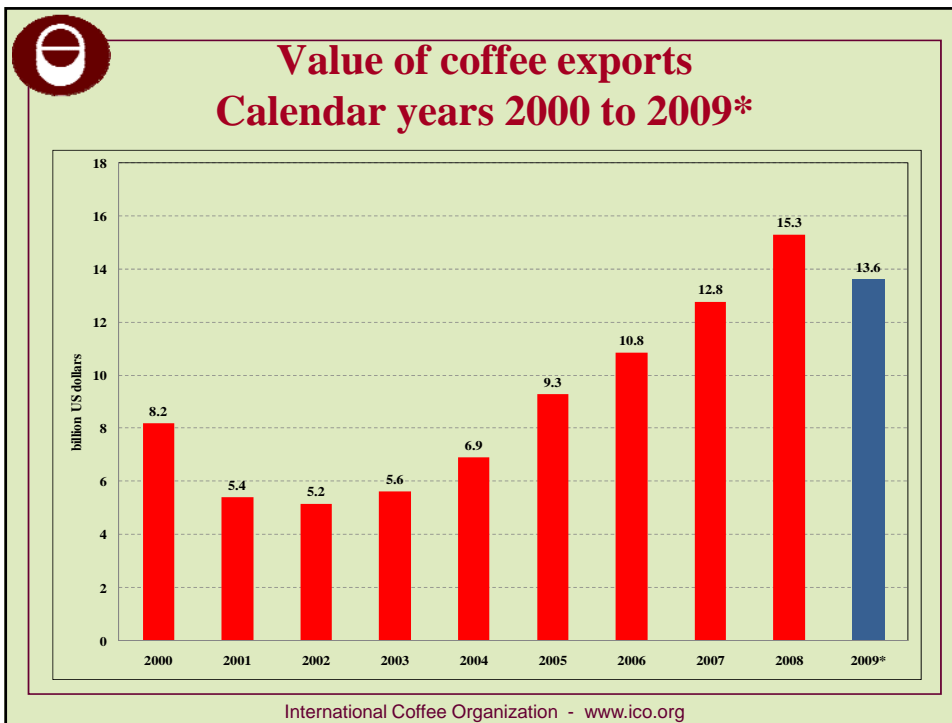


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Estimated consumption in 2008: 10 leading markets by volume

(in million 60-kg bags)	
USA	21.7
Brazil	17.9
Germany	9.6
Japan	7.1
Italy	5.9
France	5.1
Russian Federation	3.7
Spain	3.5
Indonesia	3.3
United Kingdom	3.1

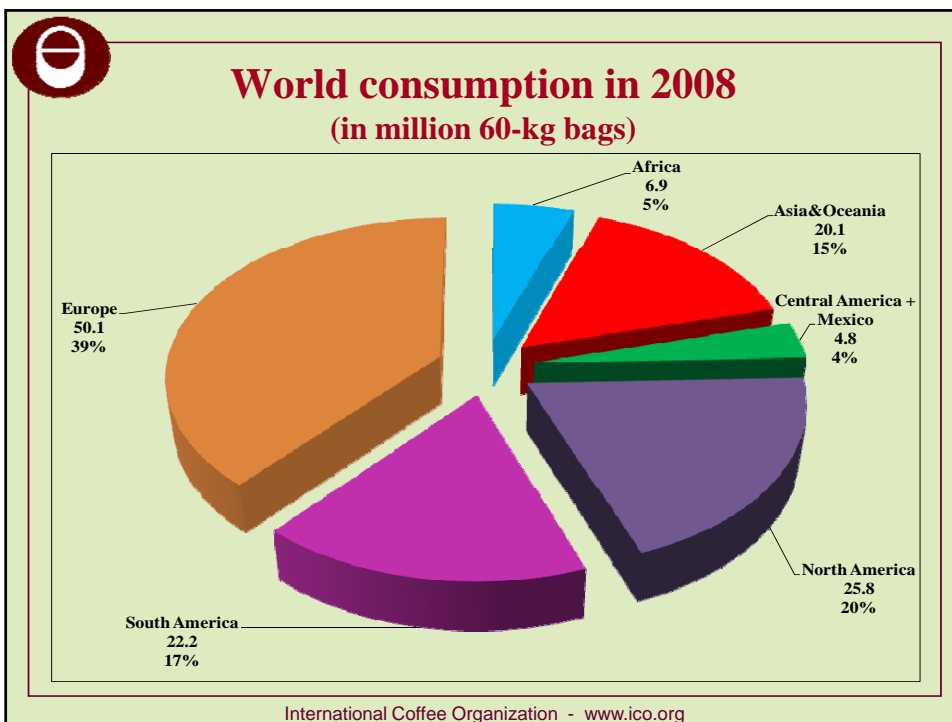
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Consumption per capita: top 10 leading markets by volume

(in kg (green equivalent) per year)	
Finland	12.6
Switzerland	9.1
Norway	9.0
Sweden	8.3
Iceland	8.3
Denmark	7.7
Germany	7.0
Estonia	6.9
Austria	6.5
Bosnia & Herzegovina	6.2

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World coffee consumption
Evolution 2000 – 2008
(in thousand 60-kg bags)

	2000	2008*	Annual growth (%)
Traditional markets	63 377	68 584	0.88
Producing countries	25 604	35 855	3.81
Emerging markets	15 744	25 565	5.53
WORLD TOTAL	104 725	130 004	2.43

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World Coffee Consumption: Traditional markets Evolution 2000 – 2008 (in thousand 60-kg bags)

	2000	2008*	Annual growth
Total	63 377	68 584	0.88
European Community	38 005	39 867	0.53
<i>Germany</i>	8 770	9 554	0.96
<i>Italy</i>	5 149	5 937	1.60
<i>France</i>	5 402	5 154	-0.52
<i>Spain</i>	2 991	3 485	1.71
<i>United Kingdom</i>	2 342	3 067	3.04
USA	18 746	21 652	1.61
Japan	6 626	7 065	0.72

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World coffee consumption: Producing countries Evolution 2000 – 2008 (in thousand 60-kg bags)

	2000	2008*	Annual growth (%)
Total	25 604	35 855	3.81
Brazil	13 075	17 526	3.31
Indonesia	1 664	3 333	8.03
Mexico	1 189	2 200	7.08
Ethiopia	1 642	1 833	1.23
India	938	1 518	5.50
Others	7 098	9 444	3.22

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World coffee consumption: Emerging markets Evolution 2000 – 2008

(in thousand 60-kg bags)

	2000	2008*	Annual growth (%)
Emerging markets	15 744	25 565	5.53
Russian Federation	1 863	3 716	7.97
Algeria	1 779	2 118	1.96
Ukraine	179	1 733	28.71
Korea, Republic of	1 246	1 665	3.28
Australia	832	1 145	3.61
China*	859	940	1.01
Others	8 986	14 248	5.26

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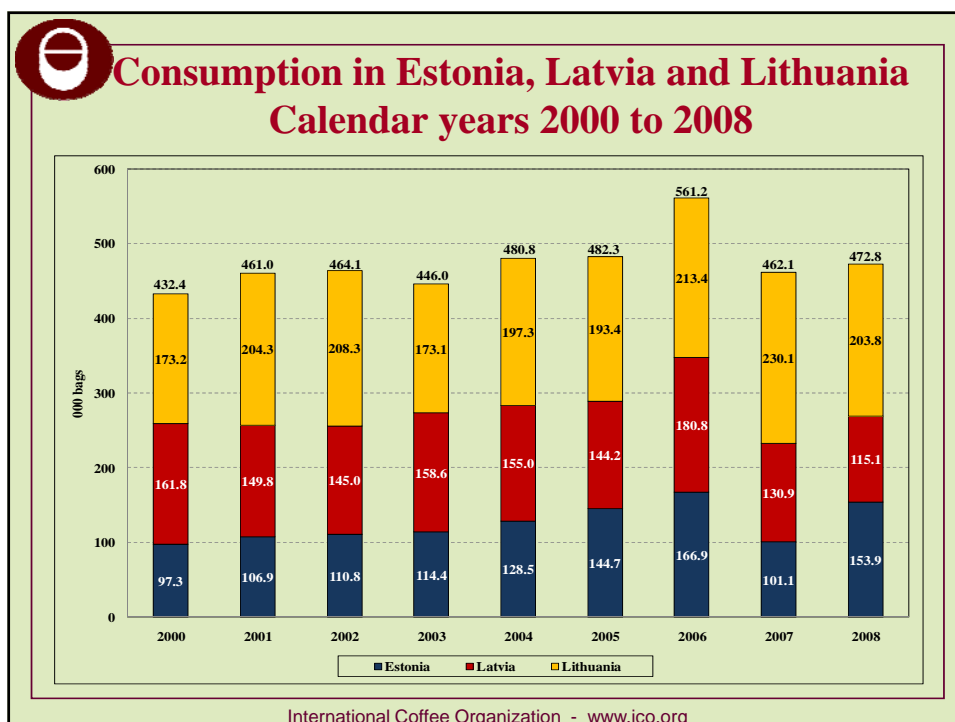


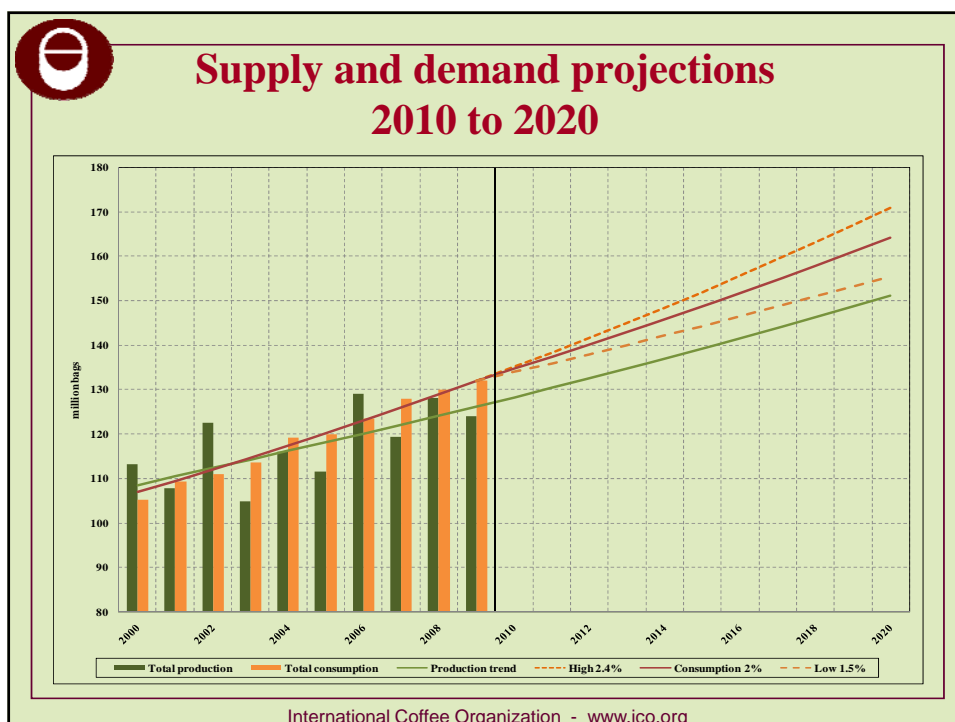
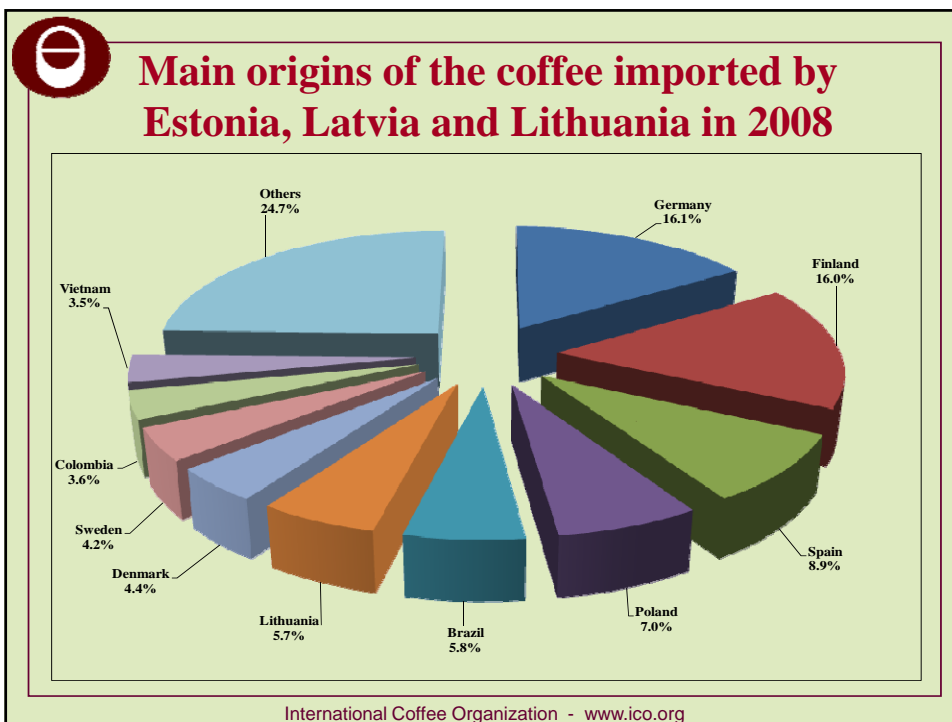
Consumption in the Russian Federation Calendar years 2000 to 2008



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World Coffee Conference Guatemala, 26-28 February 2010

2010 WORLD COFFEE
Conference
Guatemala



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



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Thank you

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