



# Outlook for the World Coffee Market

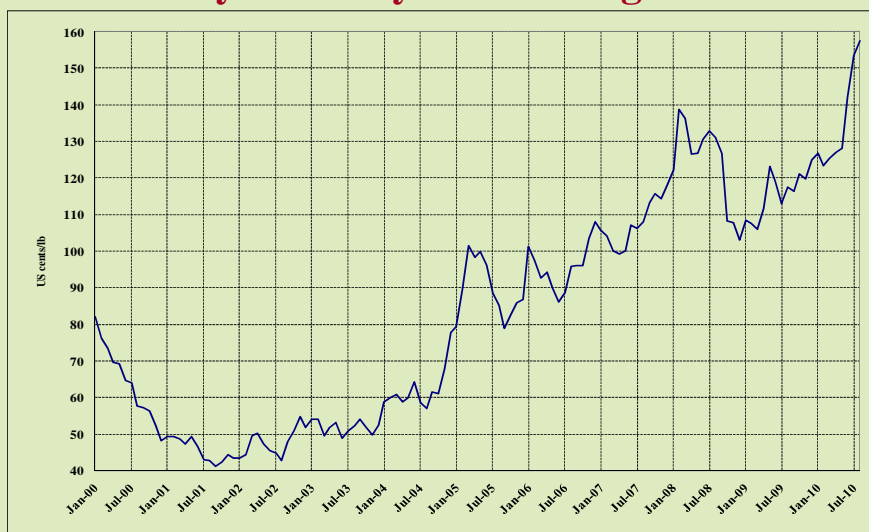
**105<sup>th</sup> Session**  
**International Coffee Council**  
**London**  
**21-23 September 2010**

**Néstor Osorio**  
**Executive Director**

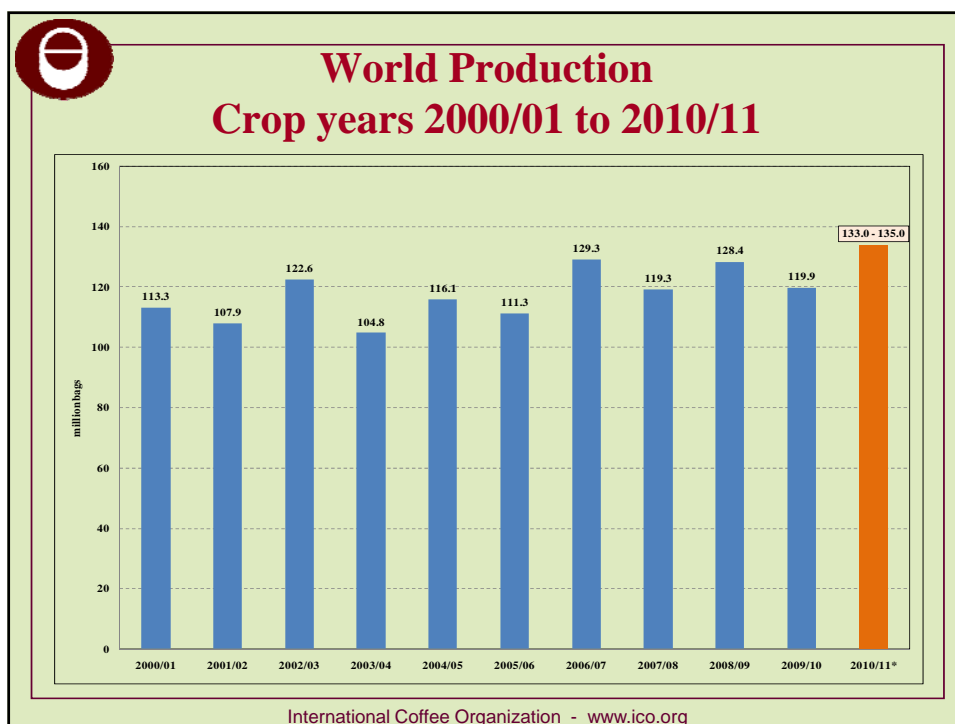
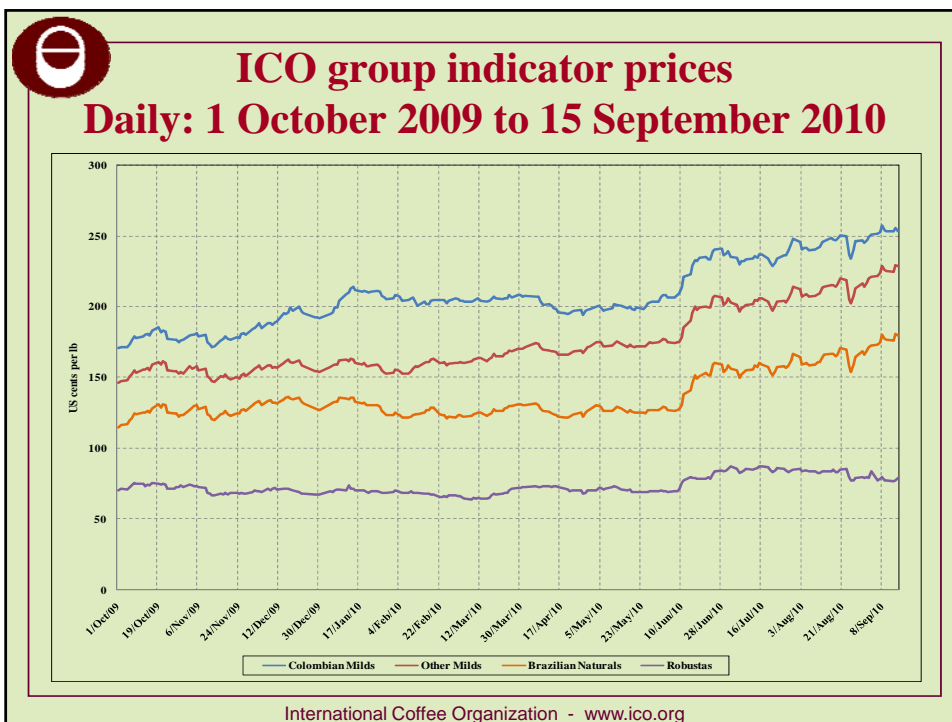
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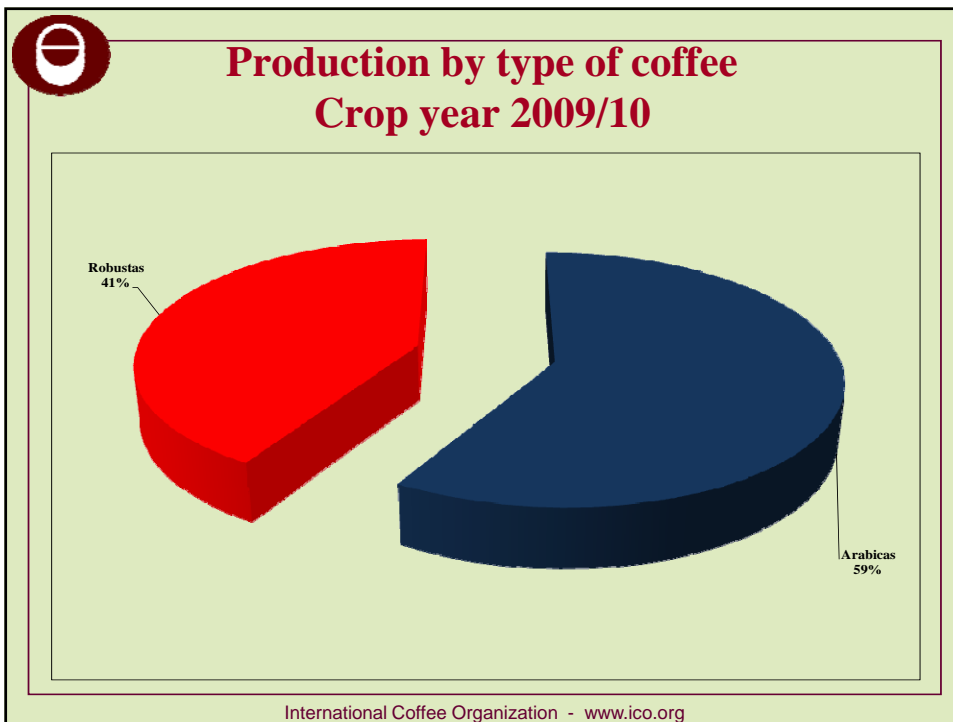
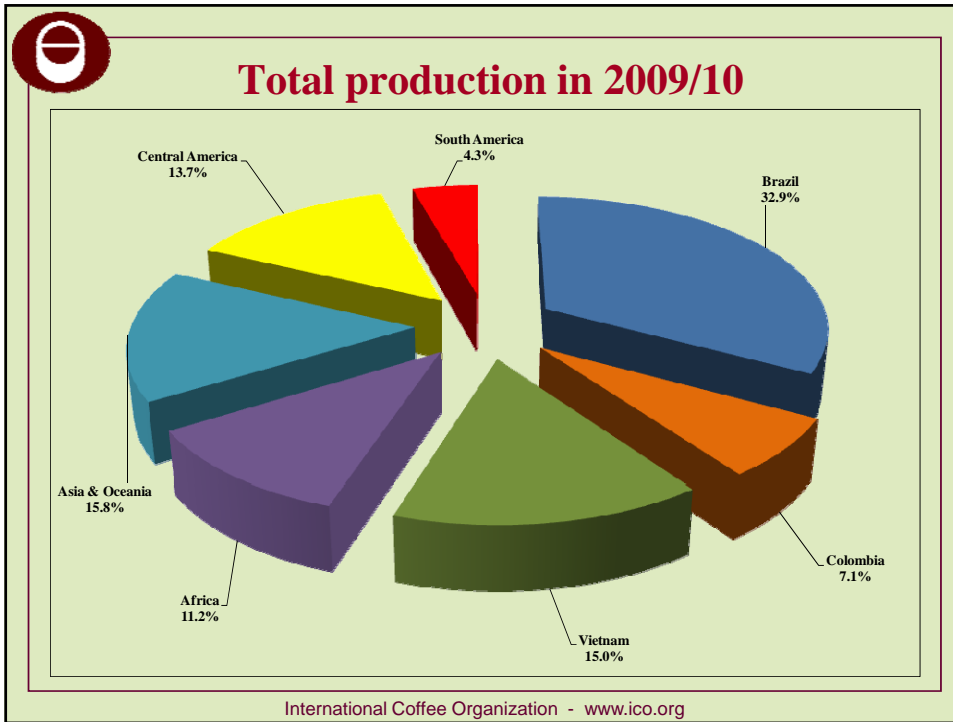


## ICO composite indicator price Monthly: January 2000 to August 2010



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### Production: 10 leading producers 2009/10 (Volume in 000 bags - % of world production)

	2009/10	2010/11	% change
<b>Brazil</b>	<b>39 470</b>	<b>47 200</b>	<b>19.6%</b>
<b>Vietnam</b>	<b>18 000</b>	<b>18 725</b>	<b>4.0%</b>
<b>Indonesia</b>	<b>11 380</b>	<b>10 750</b>	<b>-5.5%</b>
<b>Colombia</b>	<b>8 500</b>	<b>9 000</b>	<b>5.9%</b>
<b>India</b>	<b>4 827</b>	<b>5 133</b>	<b>6.3%</b>
<b>Mexico</b>	<b>4 200</b>	<b>4 600</b>	<b>9.5%</b>
<b>Ethiopia</b>	<b>4 500</b>	<b>4 200</b>	<b>-6.7%</b>
<b>Guatemala</b>	<b>3 500</b>	<b>4 010</b>	<b>14.6%</b>
<b>Honduras</b>	<b>3 527</b>	<b>3 800</b>	<b>7.7%</b>
<b>Uganda</b>	<b>3 000</b>	<b>3 200</b>	<b>6.7%</b>

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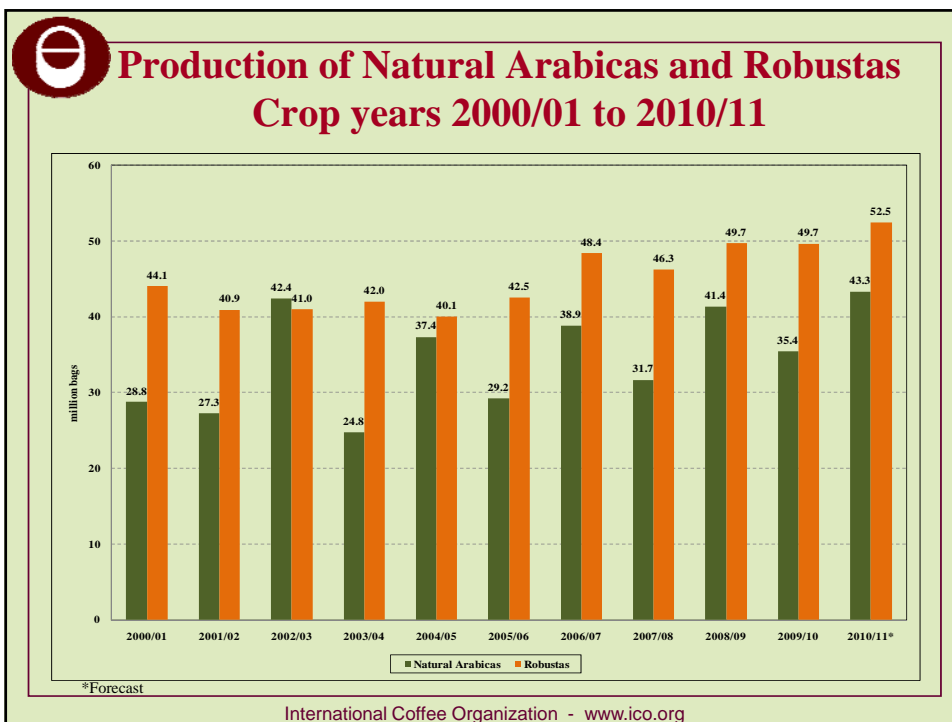


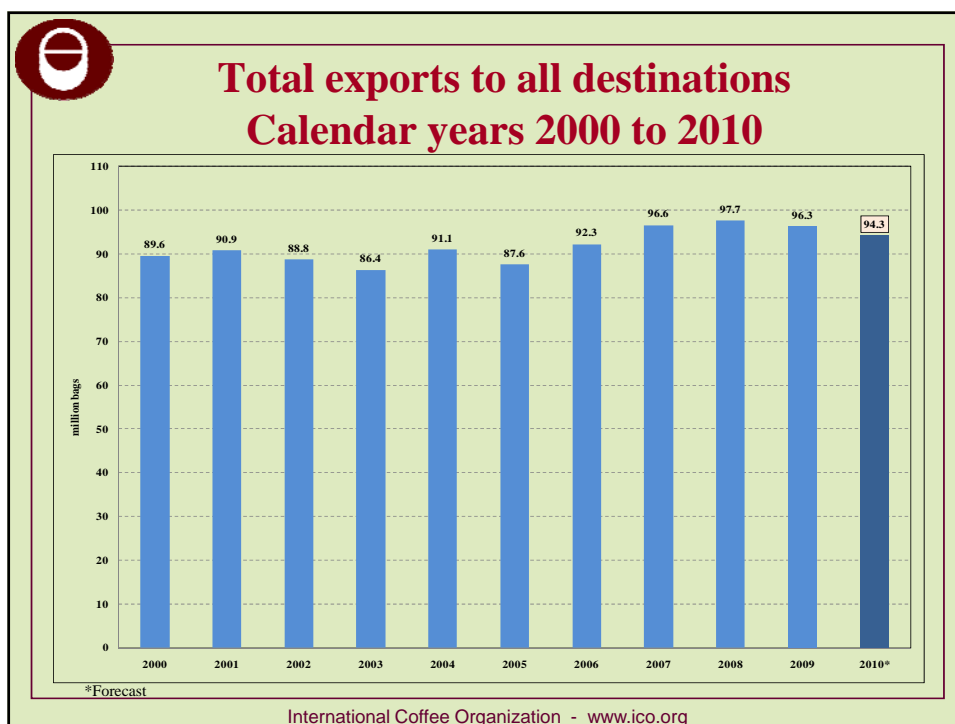
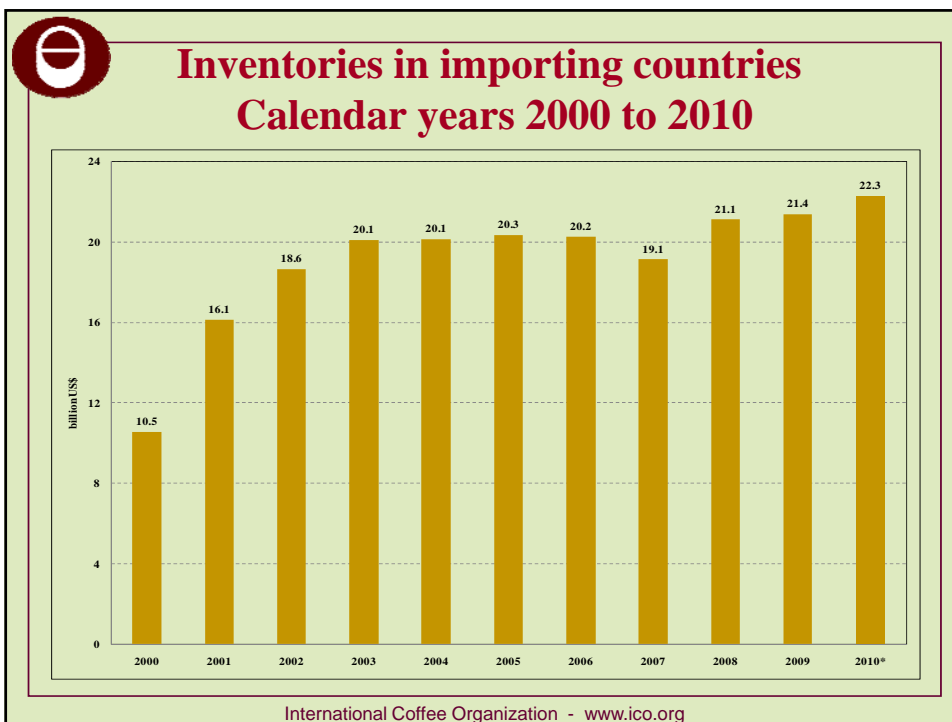
### Production of Washed Arabicas Crop years 2000/01 to 2010/11

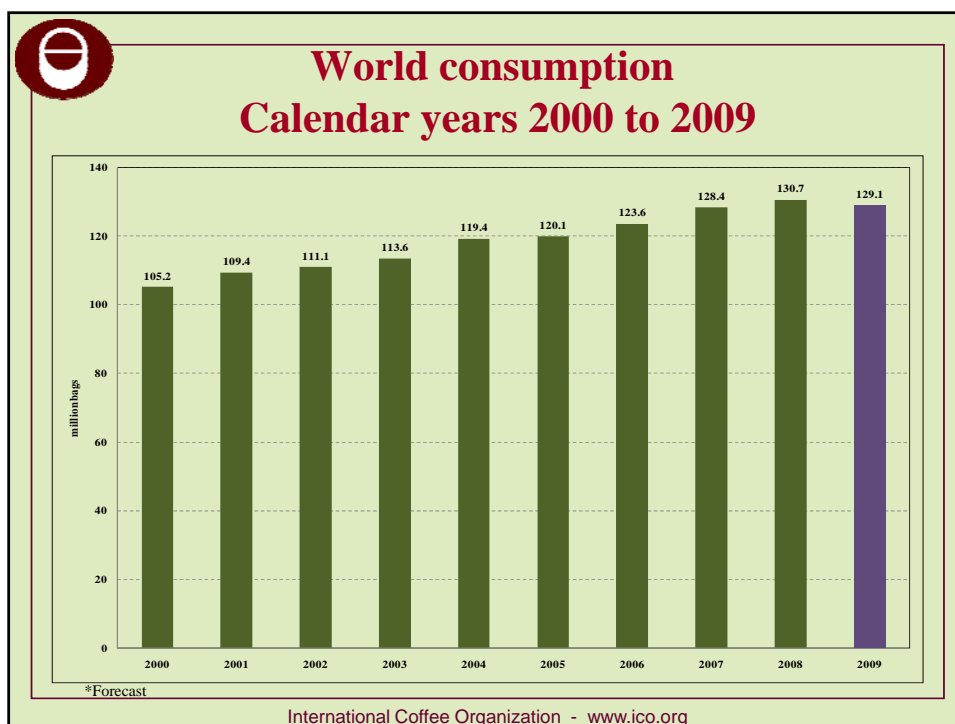
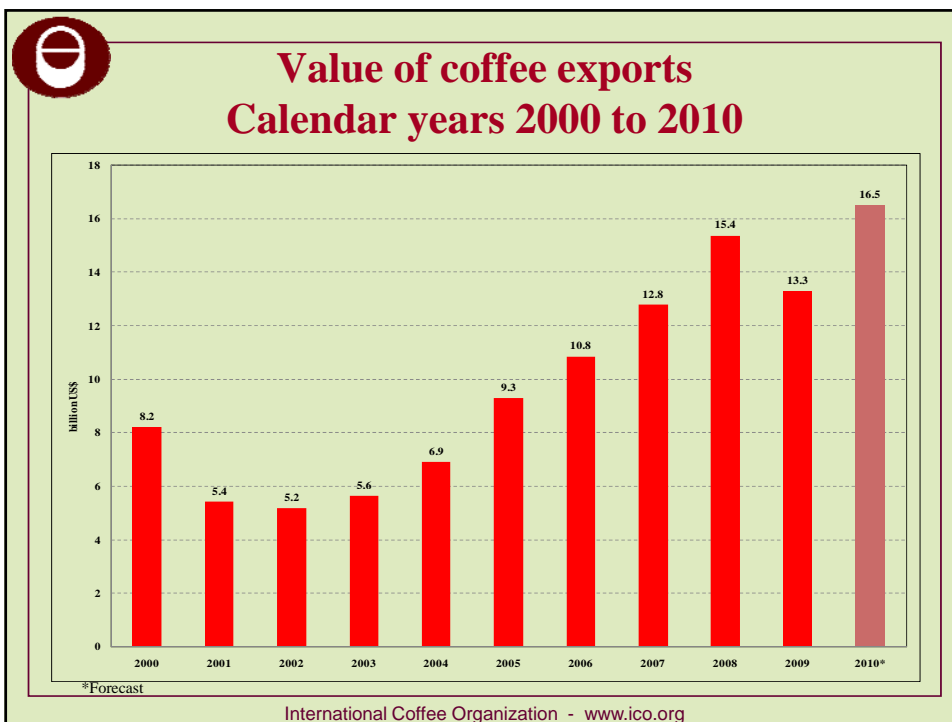


\*Forecast

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### **Estimated consumption in 2009: 10 leading markets by volume**

<b>(million bags)</b>	
<b>USA</b>	<b>21.4</b>
<b>Brazil</b>	<b>21.0</b>
<b>Germany</b>	<b>8.9</b>
<b>Japan</b>	<b>7.1</b>
<b>Italy</b>	<b>5.8</b>
<b>France</b>	<b>5.6</b>
<b>Spain</b>	<b>3.4</b>
<b>Canada</b>	<b>3.3</b>
<b>United Kingdom</b>	<b>3.2</b>
<b>Russian Federation</b>	<b>3.1</b>

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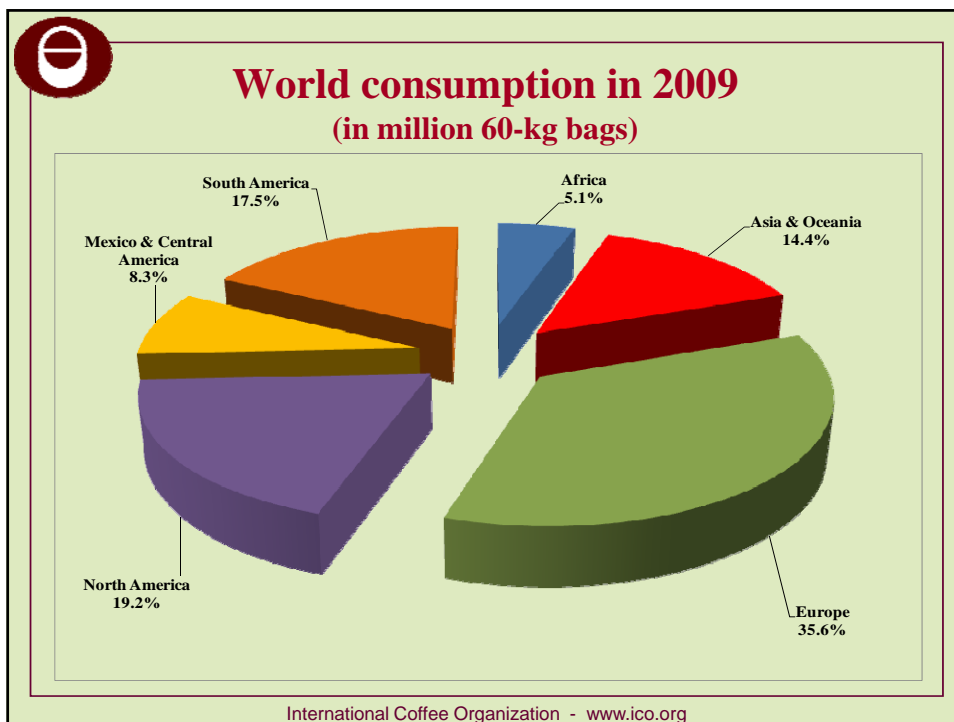


### **Annual consumption per capita: top 10 leading markets by volume**

<b>(kg of GBE)</b>	
<b>Finland</b>	<b>11.9</b>
<b>Norway</b>	<b>8.9</b>
<b>Iceland</b>	<b>8.9</b>
<b>Denmark</b>	<b>7.9</b>
<b>Switzerland</b>	<b>7.7</b>
<b>Sweden</b>	<b>7.3</b>
<b>Germany</b>	<b>6.5</b>
<b>Austria</b>	<b>6.4</b>
<b>Canada</b>	<b>5.9</b>
<b>Slovenia</b>	<b>5.9</b>

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**World coffee consumption**  
**Evolution 2000 – 2009**  
(in thousand 60-kg bags)

	2000	2009*	Annual growth (%)
Traditional markets	63 377	68 873	0.8
Producing countries	25 604	37 705	4.0
Emerging markets	15 744	22 500	3.6
<b>WORLD TOTAL</b>	<b>104 725</b>	<b>129 078</b>	<b>2.1</b>

\*Forecast

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## World Coffee Consumption: Traditional markets

### Evolution 2000 – 2009

(in thousand 60-kg bags)

	2000	2009*	Annual growth (%)
<b>Total</b>	<b>63 377</b>	<b>68 873</b>	<b>0.8</b>
<b>European Union</b>	<b>38 024</b>	<b>38 626</b>	<b>0.2</b>
<i>Germany</i>	<i>8 770</i>	<i>8 897</i>	<i>0.1</i>
<i>Italy</i>	<i>5 149</i>	<i>5 835</i>	<i>1.3</i>
<i>France</i>	<i>5 402</i>	<i>5 568</i>	<i>0.3</i>
<i>Spain</i>	<i>2 991</i>	<i>3 352</i>	<i>1.2</i>
<i>United Kingdom</i>	<i>2 342</i>	<i>3 220</i>	<i>3.3</i>
<b>USA</b>	<b>18 746</b>	<b>20 436</b>	<b>0.9</b>
<b>Japan</b>	<b>6 626</b>	<b>7 130</b>	<b>0.7</b>

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## World coffee consumption: Producing countries

### Evolution 2000 – 2009

(in thousand 60-kg bags)

	2000	2009*	Annual growth (%)
<b>Total</b>	<b>25 604</b>	<b>37 705</b>	<b>4.0</b>
<b>Brazil</b>	<b>13 075</b>	<b>18 208</b>	<b>3.4</b>
<b>Indonesia</b>	<b>1 664</b>	<b>3 333</b>	<b>7.2</b>
<b>Mexico</b>	<b>1 189</b>	<b>2 200</b>	<b>6.4</b>
<b>Ethiopia</b>	<b>1 642</b>	<b>1 833</b>	<b>1.1</b>
<b>India</b>	<b>938</b>	<b>1 573</b>	<b>5.3</b>
<b>Others</b>	<b>7 096</b>	<b>10 558</b>	<b>4.1</b>

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## World coffee consumption: Emerging markets

### Evolution 2000 – 2009

(in thousand 60-kg bags)

	2000	2009*	Annual growth (%)
<b>Total</b>	<b>15 744</b>	<b>22 500</b>	<b>3.6</b>
<b>Russian Federation</b>	<b>1 863</b>	<b>3 131</b>	<b>5.3</b>
<b>Algeria</b>	<b>1 779</b>	<b>2 066</b>	<b>1.5</b>
<b>Korea, Rep. of</b>	<b>1 246</b>	<b>1 551</b>	<b>2.2</b>
<b>Ukraine</b>	<b>179</b>	<b>1 460</b>	<b>23.4</b>
<b>Australia</b>	<b>832</b>	<b>1 223</b>	<b>3.9</b>
<b>Turkey</b>	<b>291</b>	<b>521</b>	<b>6.0</b>
<b>Croatia</b>	<b>327</b>	<b>366</b>	<b>1.1</b>
<b>Tunisia</b>	<b>174</b>	<b>289</b>	<b>5.2</b>

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## World coffee consumption

### Comparison 2008 – 2009

(in thousand 60-kg bags)

	2008	2009*	Change (%)
<b>Traditional markets</b>	<b>70 364</b>	<b>68 873</b>	<b>-2.1</b>
<b>Producing countries</b>	<b>36 427</b>	<b>37 705</b>	<b>3.5</b>
<b>Emerging markets</b>	<b>23 591</b>	<b>22 500</b>	<b>-4.6</b>
<b>WORLD TOTAL</b>	<b>130 657</b>	<b>129 078</b>	<b>-1.2</b>

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## World Coffee Consumption: Traditional markets Comparison 2008 – 2009

(in thousand 60-kg bags)

	2008	2009*	Change (%)
<b>Total</b>	<b>70 364</b>	<b>68 873</b>	<b>-2.1</b>
<b>European Union</b>	<b>39 783</b>	<b>38 599</b>	<b>-3.0</b>
<i>Germany</i>	<i>9 355</i>	<i>8 897</i>	<i>-6.7</i>
<i>Italy</i>	<i>5 892</i>	<i>5 835</i>	<i>-1.0</i>
<i>France</i>	<i>5 152</i>	<i>5 568</i>	<i>8.1</i>
<i>Spain</i>	<i>3 485</i>	<i>3 352</i>	<i>-3.8</i>
<i>United Kingdom</i>	<i>3 067</i>	<i>3 220</i>	<i>5.0</i>
<b>USA</b>	<b>21 652</b>	<b>21 435</b>	<b>-1.0</b>
<b>Japan</b>	<b>7 065</b>	<b>7 130</b>	<b>0.9</b>

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## World coffee consumption: Producing countries Comparison 2008 – 2009

(in thousand 60-kg bags)

	2008	2009*	Change (%)
<b>Total</b>	<b>36 427</b>	<b>37 705</b>	<b>3.5</b>
<b>Brazil</b>	<b>17 526</b>	<b>18 208</b>	<b>3.9</b>
<b>Indonesia</b>	<b>3 208</b>	<b>3 333</b>	<b>3.9</b>
<b>Mexico</b>	<b>2 050</b>	<b>2 200</b>	<b>7.3</b>
<b>Ethiopia</b>	<b>1 833</b>	<b>1 833</b>	<b>0.0</b>
<b>India</b>	<b>1 518</b>	<b>1 573</b>	<b>3.6</b>
<b>Others</b>	<b>10 292</b>	<b>10 558</b>	<b>2.6</b>

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## World coffee consumption: Emerging markets Comparison 2008 – 2009

(in thousand 60-kg bags)

	2008	2009*	Change (%)
<b>Total</b>	<b>23 591</b>	<b>22 500</b>	<b>-4.6</b>
<b>Russian Federation</b>	<b>3 716</b>	<b>3 131</b>	<b>-15.7</b>
<b>Algeria</b>	<b>2 118</b>	<b>2 066</b>	<b>-2.4</b>
<b>Korea, Rep. of</b>	<b>1 665</b>	<b>1 551</b>	<b>-6.8</b>
<b>Ukraine</b>	<b>1 733</b>	<b>1 460</b>	<b>-15.7</b>
<b>Australia</b>	<b>1 145</b>	<b>1 223</b>	<b>6.8</b>
<b>Turkey</b>	<b>484</b>	<b>521</b>	<b>7.7</b>
<b>Croatia</b>	<b>377</b>	<b>366</b>	<b>-3.1</b>
<b>Tunisia</b>	<b>317</b>	<b>289</b>	<b>-9.1</b>

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*Thank you*

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