



Outlook for the World Coffee Market

International Coffee Council

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Executive Director a.i.**

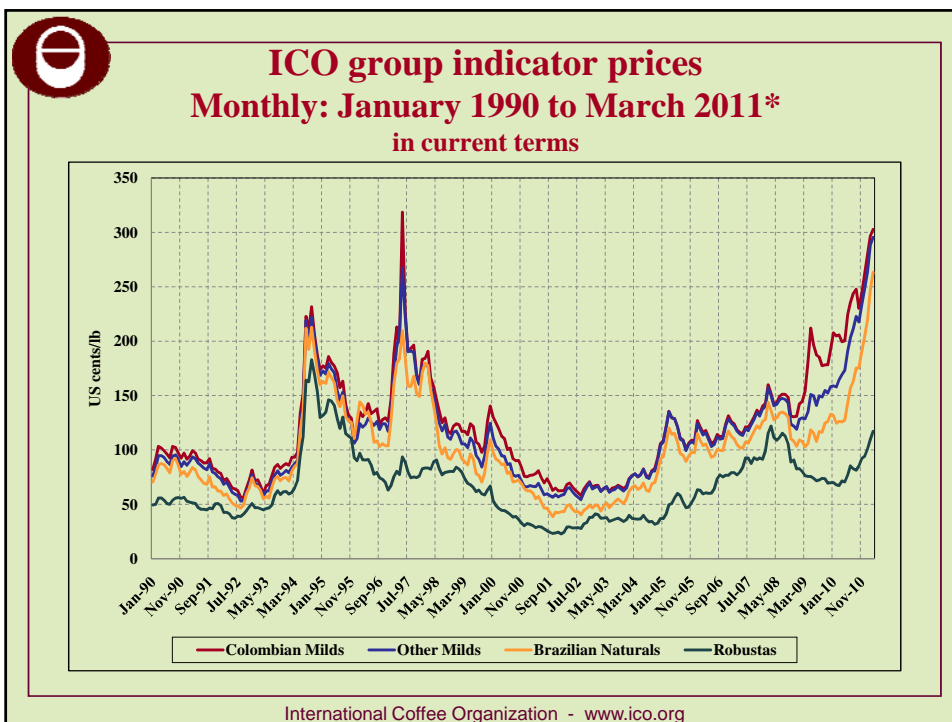
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ICO composite indicator price Monthly averages: January 1990 to March 2011* in current terms



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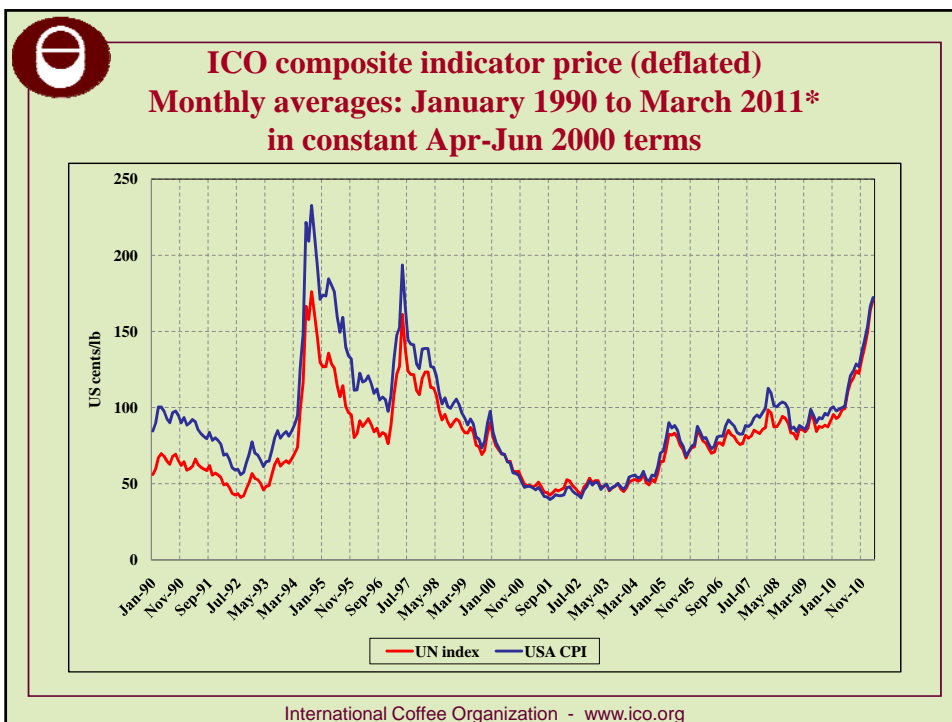


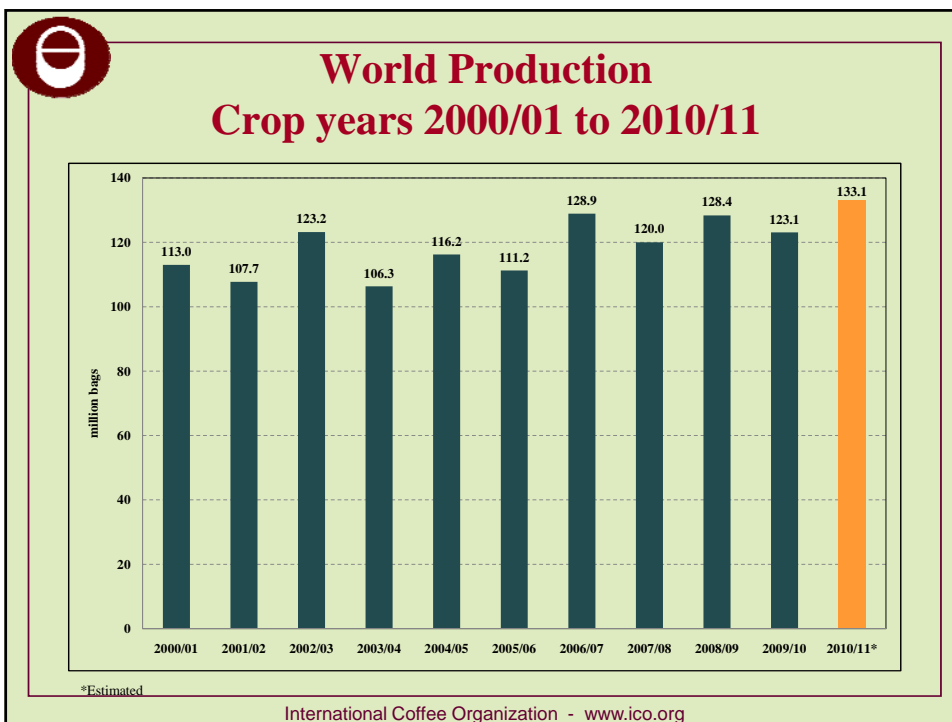
ICO composite and group indicator prices
historical comparison
 US cents per pound

	March 2011*	Last monthly average when price was higher		Highest monthly average ever recorded	
ICO Composite Price	225.33	243.06	June 1977	314.96	April 1977
Colombian Milds	301.91	318.50	May 1997	320.78	April 1977
Other Milds	294.48	317.68	April 1977	317.68	April 1977
Brazilian Naturals	262.70	280.24	May 1986	369.00	April 1977
Robustas	117.46	121.92	March 2008	312.24	April 1977

* Average from 1 to 24 March 2011

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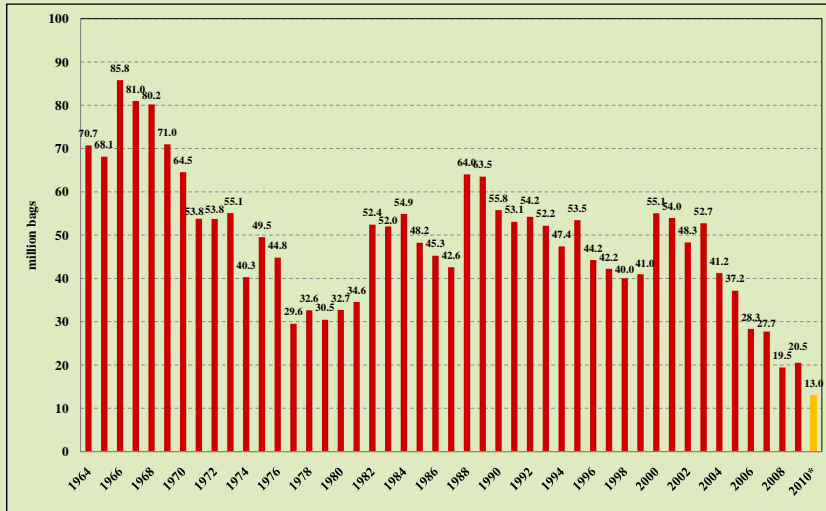
Production: 10 leading producers
(Volume in 000 bags - % of world production)

	2009/10	2010/11	% change
Brazil	39 470	48 095	21.9%
Vietnam	18 200	18 500	1.6%
Colombia	8 098	9 200	13.6%
Indonesia	11 380	8 500	-25.3%
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%

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Opening stocks in exporting countries Crop years 1964 to 2010

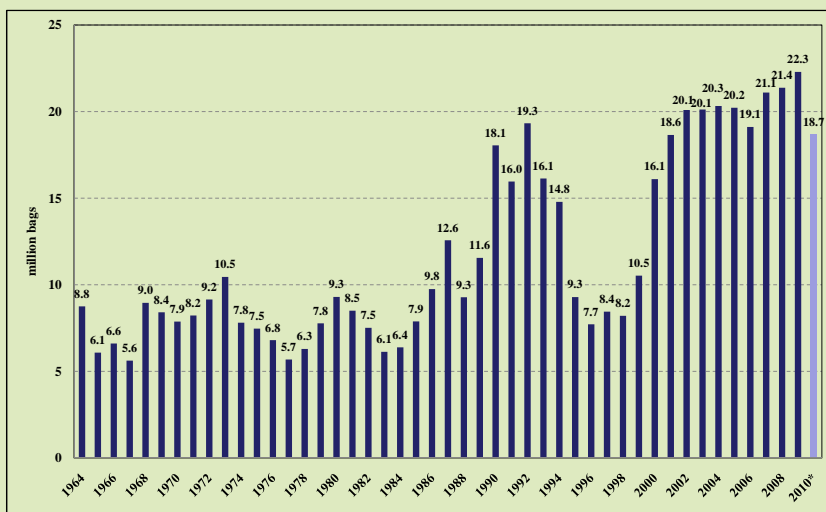


*Preliminary

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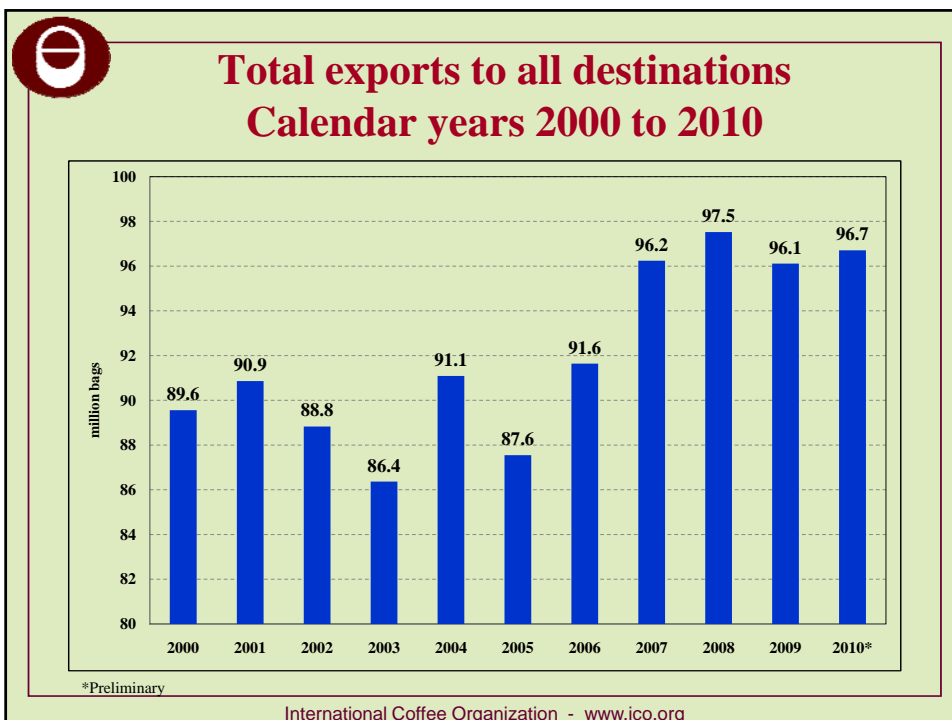


Inventories in importing countries Calendar years 1964 to 2010



*Preliminary

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**Exports by group and by type of coffee
October to January (000 bags)**

	2009/10	2010/11	% change
TOTAL	29 705	33 696	13.4
by group of coffee			
Colombian Milds	2 825	3 800	34.5
Other Milds	5 347	6 882	28.7
Brazilian Naturals	10 576	12 699	20.1
Robustas	10 957	10 315	-5.9
by type of coffee			
Arabicas	18 749	23 381	24.7
Robustas	10 957	10 315	-5.9

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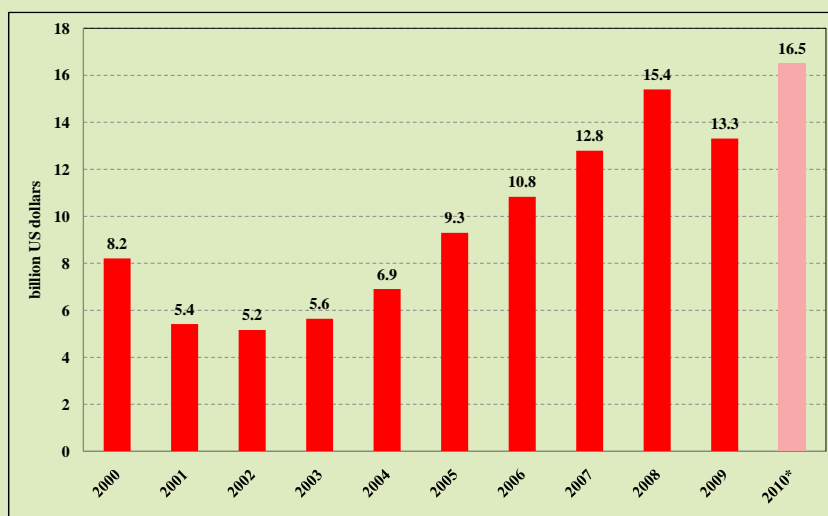
Exports by the top 10 exporting countries October to January (000 bags)

	2009/10	2010/11	% change
TOTAL	29 705	33 696	13.4
Brazil	10 458	12 810	22.5
Vietnam	5 106	4 875	-4.5
Colombia	2 480	3 412	37.6
Indonesia	2 901	1 745	-39.8
Peru	1 163	1 535	31.9
India	899	1 513	68.2
Ethiopia	439	948	116.0
Honduras	532	915	71.8
Uganda	968	908	-6.2
Guatemala	629	604	-4.0

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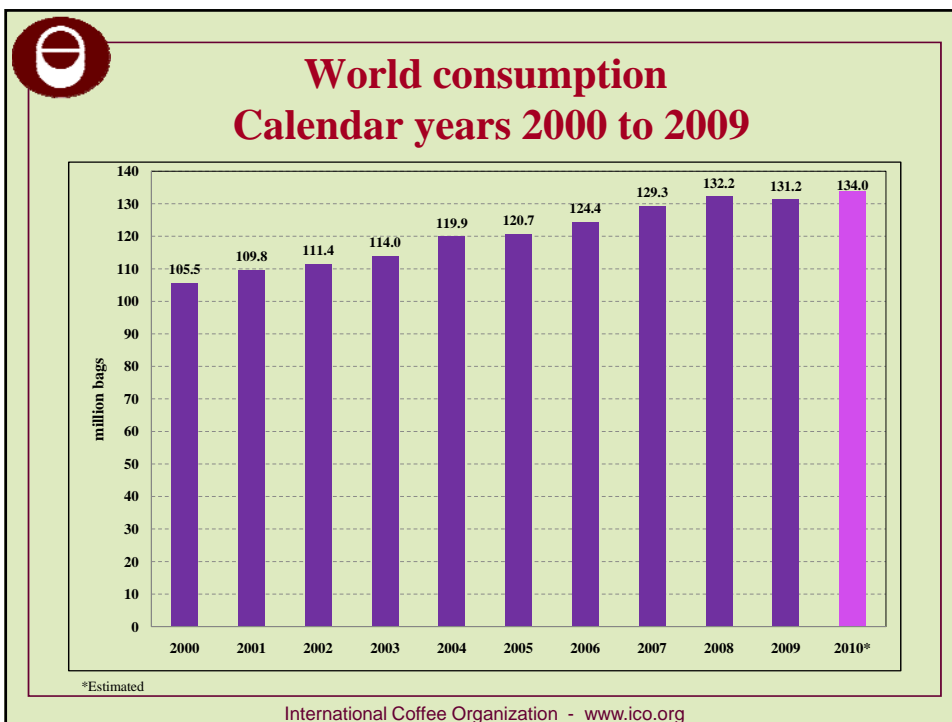


Value of coffee exports Calendar years 2000 to 2010



*Estimated

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**Estimated consumption:
10 leading markets by volume**

	2009	2010*	% change
	million bags		
World total	131.2	134.0	2.1
USA	21.4	21.8	1.6
Brazil	18.2	18.9	4.1
Germany	8.9	9.3	4.4
Japan	7.1	7.2	0.7
France	5.7	5.9	4.0
Italy	5.8	5.8	-0.4
Russian Federation	3.1	3.7	16.9
Canada	3.3	3.6	8.9
Spain	3.4	3.2	-3.6
United Kingdom	3.2	3.1	-3.3

*Estimated

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World coffee consumption Evolution 2000 – 2010

(in thousand bags)

	2000	2010*	Growth rate (%)
Traditional markets	63 367	70 837	+1.1
Producing countries	26 385	40 280	+4.3
Emerging markets	15 750	22 883	+3.8
World total	105 502	134 000	+2.4

*Estimated

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World Coffee Consumption: Traditional markets Evolution 2000 – 2010

(in thousand 60-kg bags)

	2000	2010*	Growth rate (%)
<i>European Union</i>	38 024	40 069	0.5
Germany	8 770	9 292	0.6
France	5 402	5 902	0.9
Italy	5 149	5 781	1.2
Spain	2 991	3 231	0.8
United Kingdom	2 342	3 115	2.9
Japan	6 626	7 181	0.8
USA	18 746	21 784	1.5

*Estimated

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World coffee consumption: Producing countries

Evolution 2000 – 2010

(in thousand 60-kg bags)

	2000	2010*	Growth rate (%)
Total	26 385	40 283	+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	11 113	+3.9

*Estimated

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World coffee consumption: Emerging markets

Evolution 2000 – 2010*

(in thousand 60-kg bags)

	2000	2010*	Growth rate (%)
Total	15 750	22 883	+3.8
Russian Federation	1 863	3 661	+7.0
Algeria	1 779	1 850	+1.2
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

*Estimated

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