Outlook for the World Coffee Market

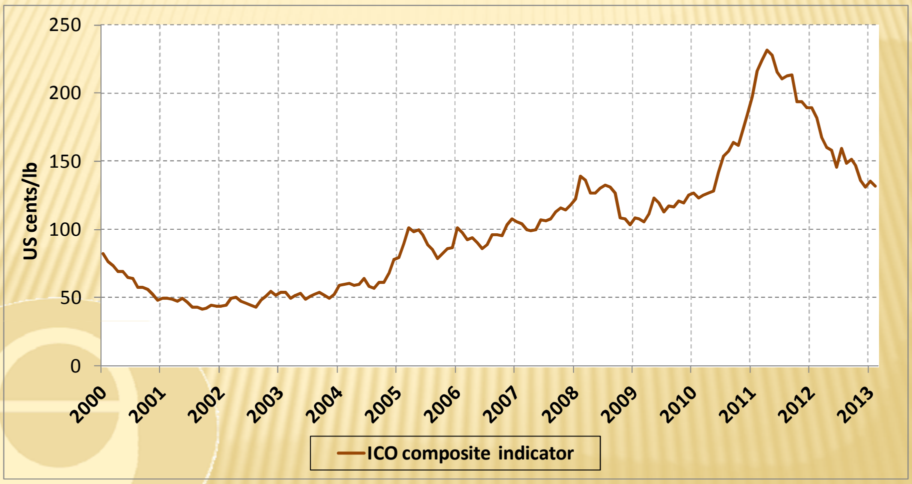
International Coffee Council

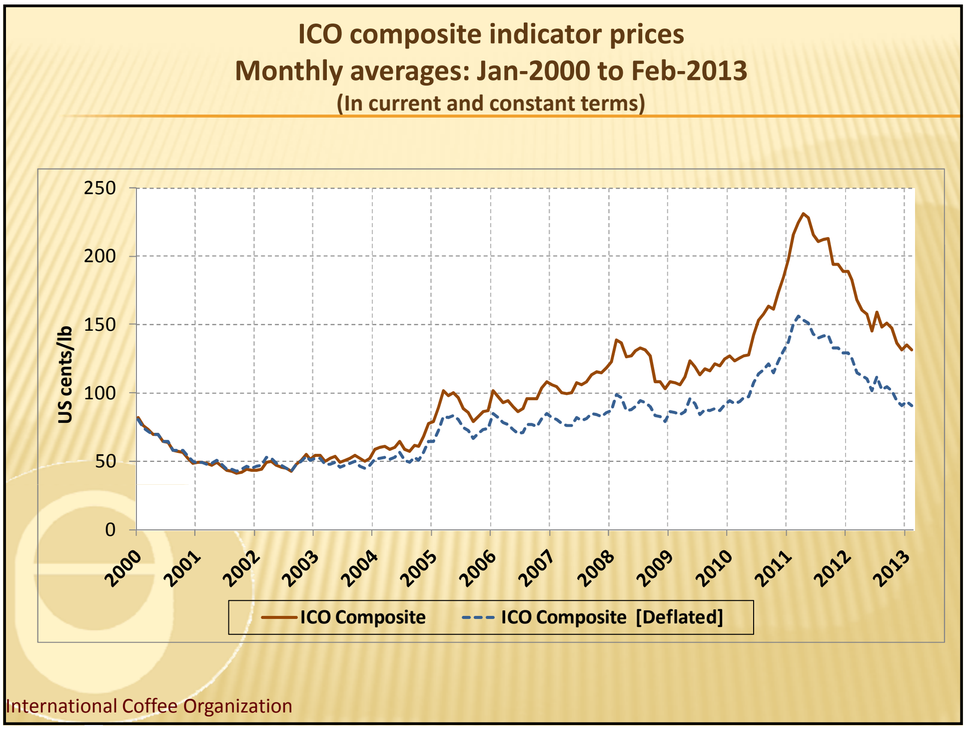
4 – 8 March 2013

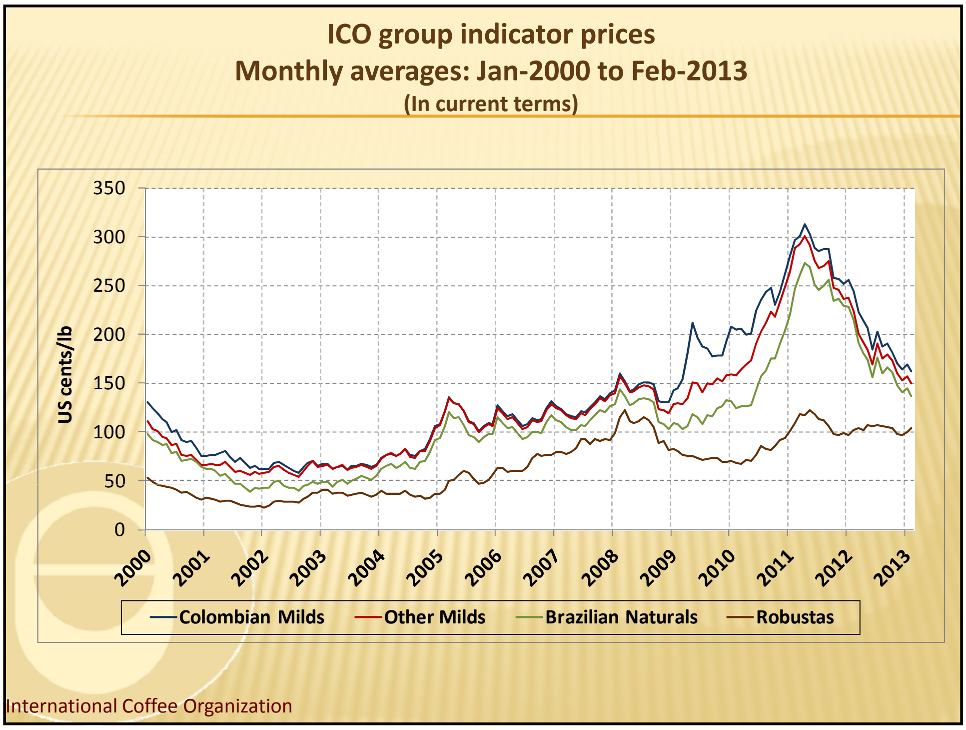
London, England

ICO composite indicator prices
Monthly averages: Jan-2000 to Feb-2013

(In current terms)




ICO composite indicator prices
Monthly averages: Jan-2000 to Feb-2013
(In current and constant terms)
US cents/lb
250
200
150
100
50
0
2000
2001
2002
2003
2004
2005
2006
2007
2008
2009
2010
2011
2012
2013
ICO Composite
ICO Composite [Deflated]
International Coffee Organization

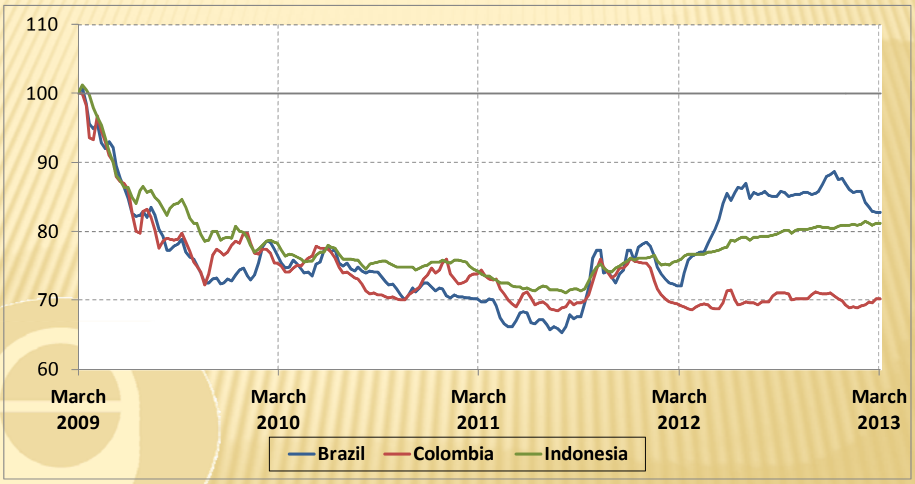

ICO group indicator prices
Monthly averages: Jan-2000 to Feb-2013
(In current terms)
US cents/lb
350
300
250
200
150
100
50
0
2000
2001
2002
2003
2004
2005
2006
2007
2008
2009
2010
2011
2012
2013
Colombian Milds
Other Milds
Brazilian Naturals
Robustas
International Coffee Organization

Arbitrage: New York* - London*
Monthly averages: Jan-2000 to Feb-2013
(In current terms)

*Average price for the 2nd and 3rd positions

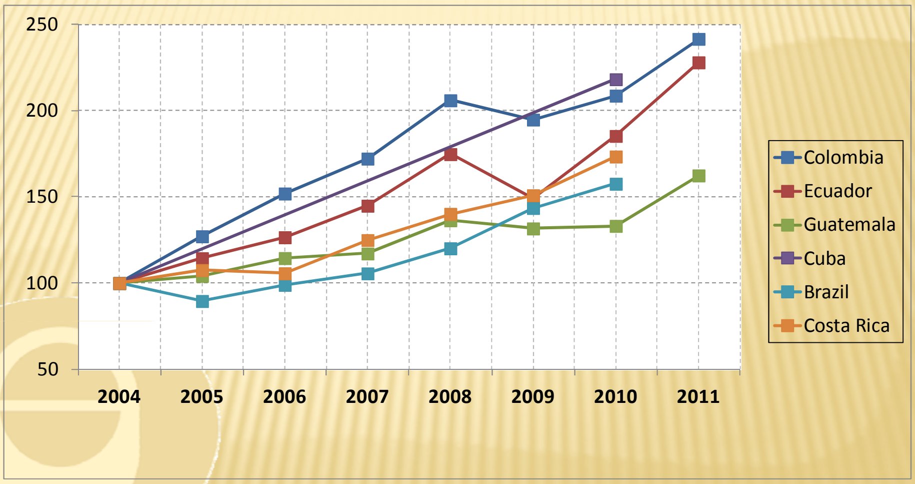
International Coffee Organization

Exchange rate movements
(Index: Jan-2009=100)



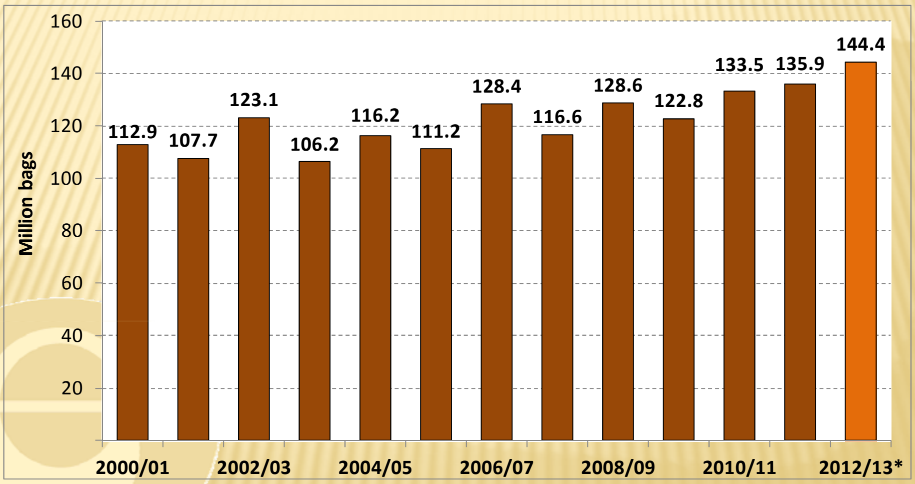
International Coffee Organization

Costs of production
(Index: 2004=100)



International Coffee Organization

World production
Crop years 2000/01 to 2012/13*



*Estimated

International Coffee Organization

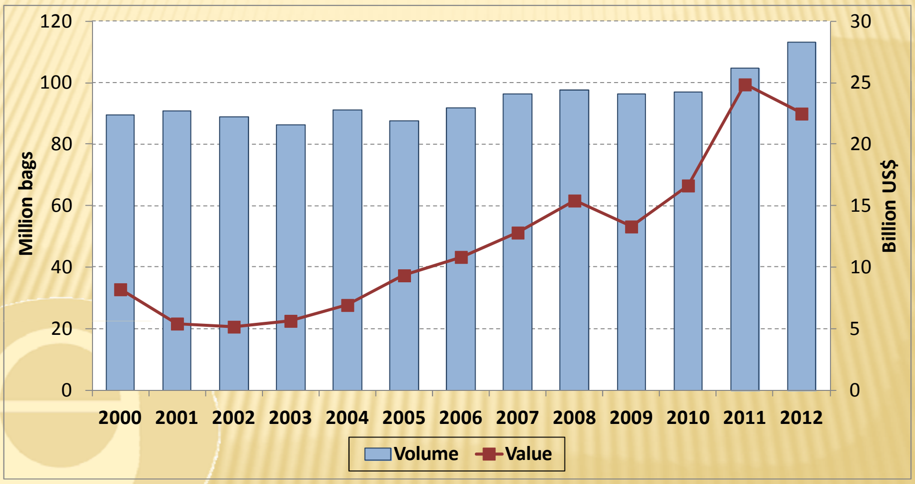
Production: 10 leading producers
(In thousand bags)

	2011/12	2012/13*	% change
Brazil	43 484	50 826	16.9%
Vietnam	24 058	22 000	-8.6%
Indonesia	8 620	11 250	30.5%
Colombia	7 653	8 500	11.1%
Ethiopia	6 798	8 100	19.1%
India	5 233	5 258	0.5%
Mexico	4 546	4 300	-5.4%
Honduras	5 903	4 900	-17.0%
Peru	5 581	4 750	-14.9%
Guatemala	3 840	3 100	-19.3%

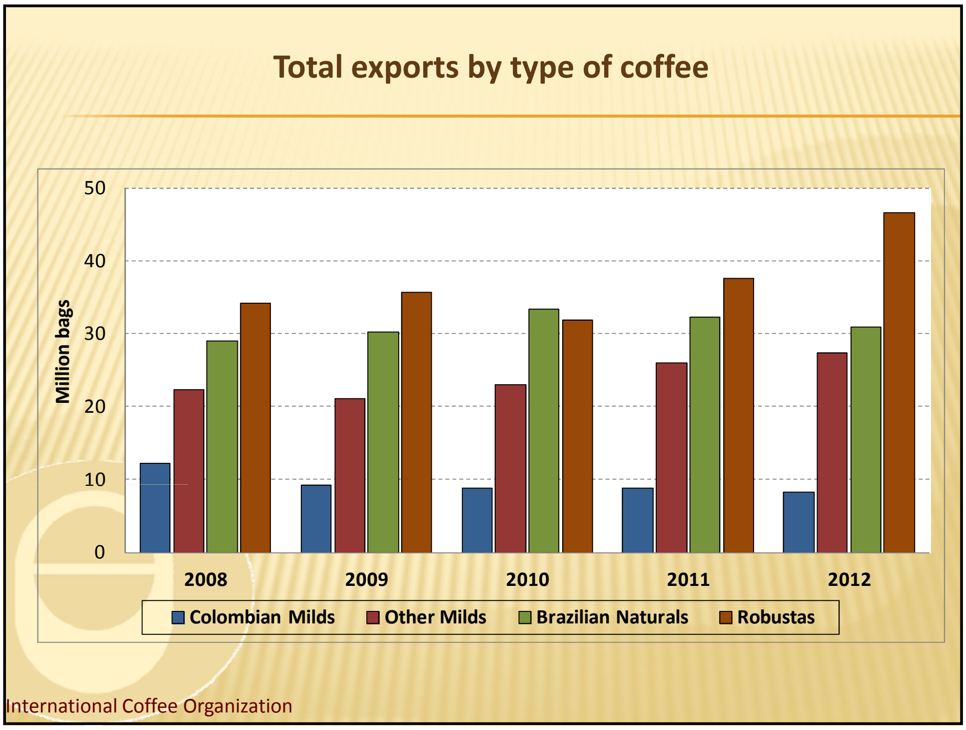
*Estimated

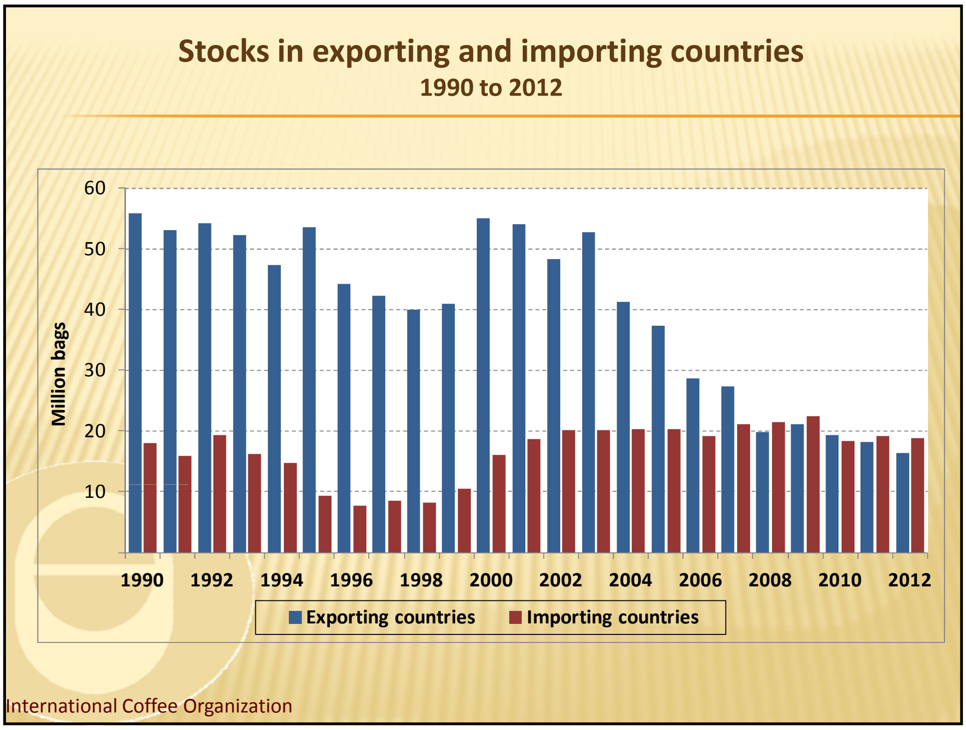
International Coffee Organization

Volume and value of total exports
Calendar years 2000 - 2012



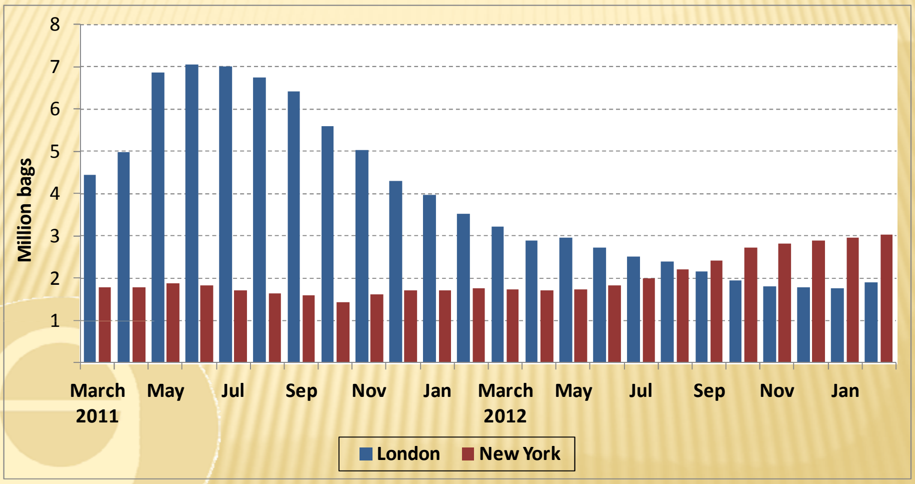
International Coffee Organization


Total exports by type of coffee
Million bags
50
40
30
20
10
0
2008
2009
2010
2011
2012
Colombian Milds
Other Milds
Brazilian Naturals
Robustas
International Coffee Organization


Stocks in exporting and importing countries
1990 to 2012
Million bags
60
50
40
30
20
10
1990
1992
1994
1996
1998
2000
2002
2004
2006
2008
2010
2012
Exporting countries
Importing countries
International Coffee Organization

Certified stocks on the New York and London exchanges

March 2011 – February 2013



International Coffee Organization

World coffee consumption 2002 – 2012*

(In million bags)

	2002	2012*	% change	Absolute change	Average annual growth rate
WORLD TOTAL	**111.2**	**142.2**	**27.9%**	**31.0**	**2.5%**
Exporting countries	28.4	43.4	52.7%	15.0	**4.3%**
Traditional markets	65.1	72.9	12.1%	7.9	**1.1%**
Emerging markets	17.7	25.8	46.0%	8.1	**3.9%**

* Provisional

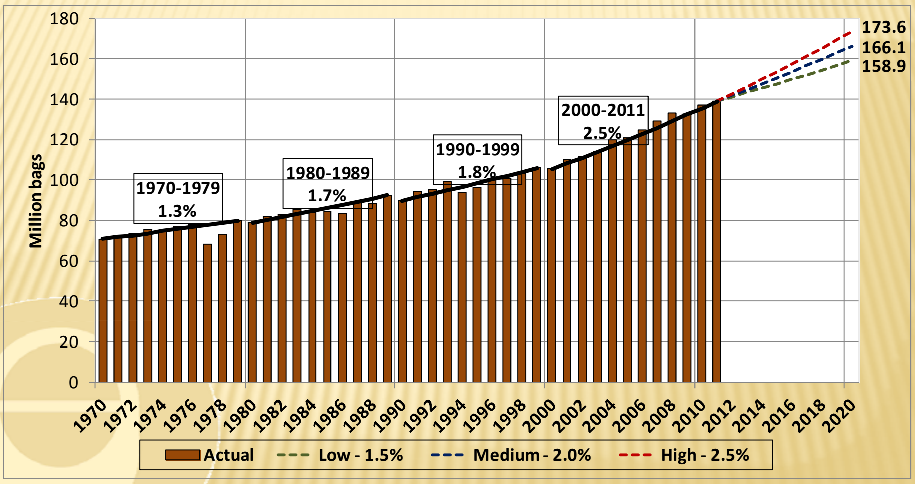
International Coffee Organization

Retail prices: % change in Roast & Ground coffee
(In national currencies)

	2010	2011	2012
Austria	0.9%	18.7%	9.3%
Belgium	3.3%	19.3%	3.9%
Denmark	8.0%	21.6%	4.9%
Finland	10.1%	38.6%	-3.1%
France	0.4%	8.9%	2.7%
Germany	5.2%	2.3%	0.6%
Italy	0.4%	10.7%	7.4%
Japan	-1.3%	4.5%	3.2%
Norway	7.7%	19.7%	-1.5%
Poland	1.3%	12.1%	10.5%
Portugal	-1.7%	3.5%	13.4%
Spain	-1.2%	7.6%	9.5%
Sweden	6.1%	26.4%	-2.3%
United Kingdom	2.3%	16.6%	4.6%
USA	6.5%	32.9%	9.3%

International Coffee Organization

World consumption outlook
(1970 to 2020)



International Coffee Organization