



Demand and Consumption Trends in the European Region

World Coffee Outlook

Antwerp

12-14 September 2011

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Summary

1. Imports
2. Re-exports
3. Inventories
4. Consumption

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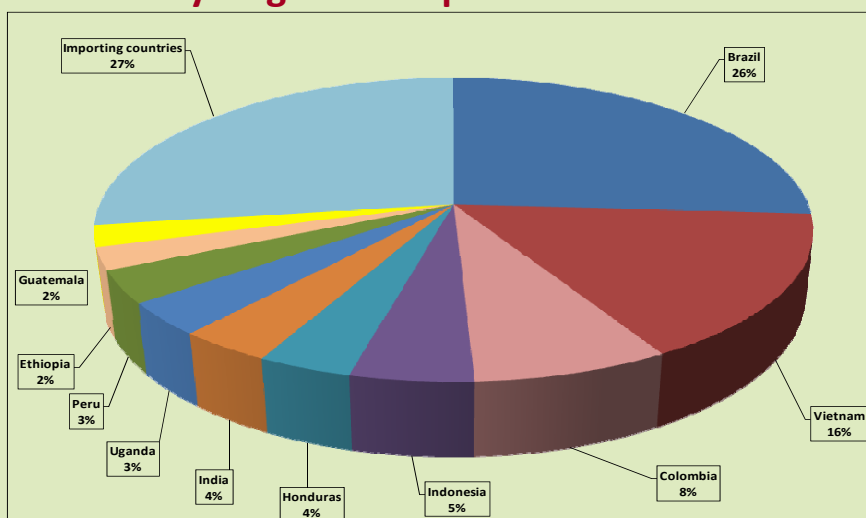
Average volume of imports of coffee into the EU+2

Origin	Average imports (000 bags)		Annual growth rate 1990-2010
	1990-99	2000-10	
Exporting countries	42 884	48 815	0.9%
Importing countries	7 280	14 837	7.4%
Total	50 167	63 652	2.1%
By form			
Green	86.4%	78.5%	
Roasted	6.7%	11.9%	
Soluble	6.9%	9.6%	
main origins			
Brazil	8 744	14 277	3.2%
Vietnam	1 940	8 599	15.5%
Colombia	7 316	4 168	-6.7%
Indonesia	2 535	2 608	-0.1%
Honduras	1 073	1 991	6.2%
India	1 288	1 975	6.5%
Uganda	2 403	1 936	-0.2%
Peru	650	1 901	10.6%
Ethiopia	747	1 302	5.8%
Guatemala	1 481	1 249	0.5%

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EU+2: Share of imports by origin in the period 2000-10



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Estimated share of imports of coffee into EU+2 by group and by type of coffee

	Period average			
	1970-79	1980-89	1990-99	2000-10
by group of coffee				
Colombian Milds	19.2%	23.9%	20.6%	10.1%
Other Milds	20.4%	20.4%	23.4%	21.4%
Brazilian Naturals	30.2%	28.9%	22.8%	32.6%
Robustas	30.1%	26.9%	33.2%	35.9%
	100.0%	100.0%	100.0%	100.0%
by type of coffee				
Arabica	69.9%	73.1%	66.8%	64.1%
Robusta	30.1%	26.9%	33.2%	35.9%
	100.0%	100.0%	100.0%	100.0%

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GERMANY ESTIMATED COMPOSITION OF BLEND

Composition of blend by group of coffee	Share in total				
	1975-79	1980-89	1990-99	2000-08	1975-2008
Colombian Milds	36.1%	37.5%	32.0%	13.5%	28.0%
Other Milds	39.8%	33.0%	32.5%	28.5%	32.1%
Brazilian Naturals	14.1%	18.0%	18.8%	35.9%	23.5%
Robustas	10.1%	11.5%	16.7%	22.2%	16.4%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

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ITALY

ESTIMATED COMPOSITION OF BLEND

Composition of blend by group of coffee	Share in total				
	1975-79	1980-89	1990-99	2000-08	1975-2008
Colombian Milds	6.9%	6.5%	6.8%	5.4%	6.2%
Other Milds	11.3%	11.3%	14.3%	13.4%	13.0%
Brazilian Naturals	38.7%	35.2%	31.4%	33.6%	33.8%
Robustas	43.1%	47.0%	47.5%	47.6%	47.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

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FRANCE

ESTIMATED COMPOSITION OF BLEND

Composition of blend by group of coffee	Share in total				
	1975-79	1980-89	1990-99	2000-08	1975-2008
Colombian Milds	5.0%	5.7%	11.0%	6.7%	7.4%
Other Milds	9.7%	10.7%	17.4%	17.0%	13.9%
Brazilian Naturals	15.4%	23.0%	16.6%	30.9%	21.6%
Robustas	69.9%	60.5%	55.0%	45.3%	57.2%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

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EU+2: Average volume of re-exports of coffee

Destination	Average total re-exports (000 bags)		Annual growth rate 1990-2010
	1990-99	2000-10	
Importing countries	10 211	22 015	6.9%
Exporting countries	18	54	12.2%
Total	10 229	22 068	6.9%
Share in total by form			
Green	33.0%	32.5%	
Roasted	40.3%	39.1%	
Soluble	26.6%	28.4%	

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EU+2: Average volume and annual growth rate of re-exports of coffee by origin

	(000 bags)		Annual growth rate
	1990-99	2000-10	
Germany	3 542	8 277	6.5%
Belgium	1 455	3 351	9.1%
Italy	707	1 780	9.7%
Spain	434	1 371	10.1%
Netherlands	671	1 210	3.8%
France	1 085	1 082	0.8%
United Kingdom	586	873	4.6%
Switzerland	209	669	10.9%
Austria	427	666	0.6%
Poland	181	660	12.8%

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EU+2: Average volume and annual growth rate of re-exports of coffee by destination

	(000 bags)		Annual growth rate
	1990-99	2000-10	
France	1 665	2 930	5.2%
Netherlands	900	2 150	9.1%
Germany	734	1 881	6.7%
USA	1 104	1 612	1.8%
Poland	350	1 390	10.4%
Austria	474	1 286	7.6%
United Kingdom	793	1 092	3.2%
Spain	338	783	7.0%
Russian Federation	232	762	21.5%
Belgium	719	723	1.0%
Italy	152	673	4.6%

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HS codes for green and roasted coffee applied by most importing countries

ICO Statistical Rules (HS codes with 8 digits)	
090.111.00	Coffee not roasted not decaffeinated
090.112.00	Coffee not roasted decaffeinated
090.121.00	Coffee roasted not decaffeinated
090.122.00	Coffee roasted decaffeinated

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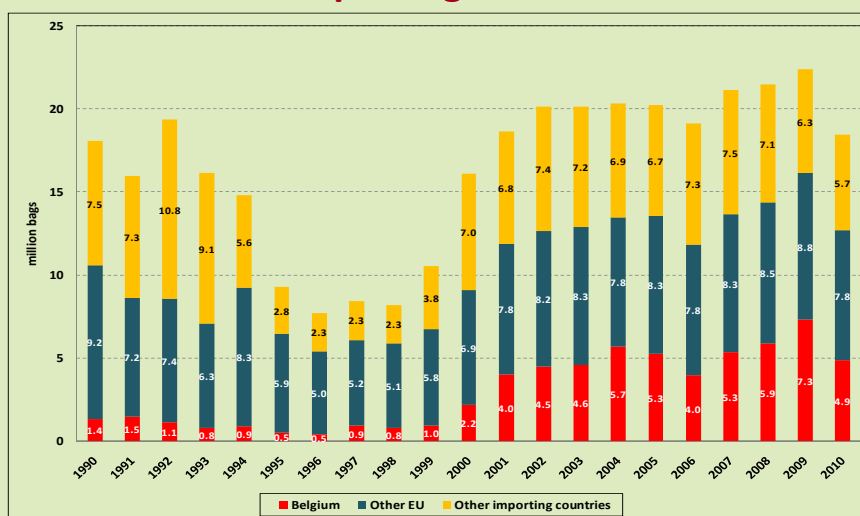
HS codes for green and roasted coffee established by the US Trade Commission

HS CODE	DESCRIPTION
0901.11.00	COFFEE NOT ROASTED NOT DECAFFEINATED
0901.11.00-15	CERTIFIED ORGANIC COFFEE ARABICA
0901.11.00-25	COFFEE ARABICA OTHER
0901.11.00-45	CERTIFIED ORGANIC COFFEE OTHER (Robusta)
0901.11.00-55	COFFEE OTHER (Robusta)
0901.12.00	COFFEE NOT ROASTED DECAFFEINATED
0901.12.00-15	CERTIFIED ORGANIC COFFEE
0901.12.00-25	COFFEE OTHER
0901.21.00	COFFEE ROASTED NOT DECAFFEINATED
0901.21.00-35	CERTIFIED ORGANIC COFFEE (in retail containers < 2kg)
0901.21.00-45	OTHER COFFEE (in retail containers < 2kg)
0901.21.00-55	CERTIFIED ORGANIC COFFEE
0901.21.00-65	OTHER COFFEE
0901.22.00	COFFEE ROASTED DECAFFEINATED
0901.22.00-35	CERTIFIED ORGANIC COFFEE (in retail containers < 2kg)
0901.22.00-45	OTHER COFFEE(in retail containers < 2kg)
0901.22.00-60	OTHER COFFEE

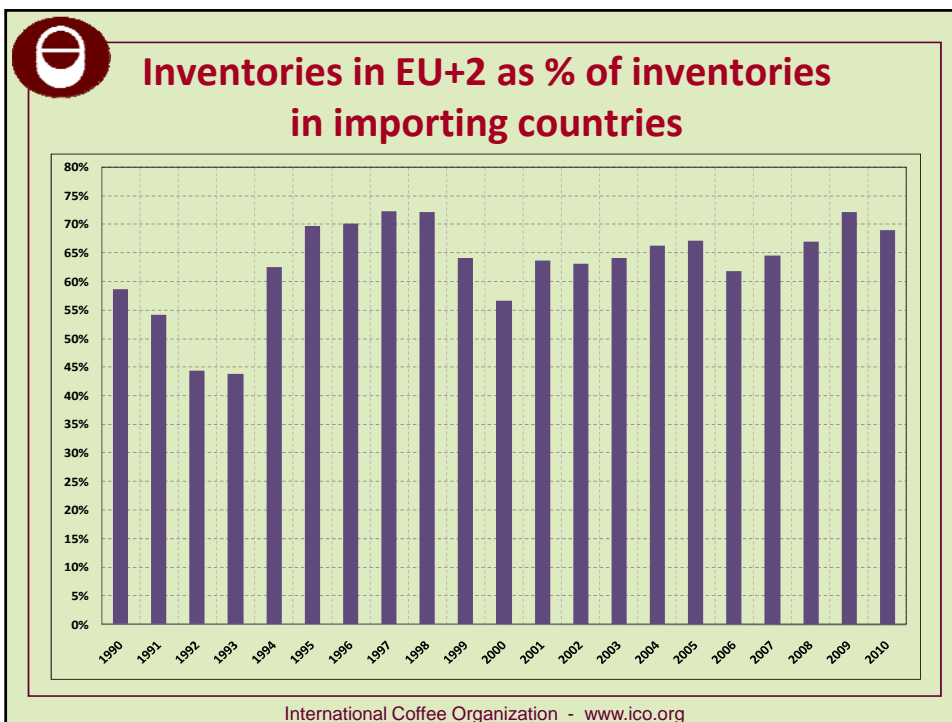
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Volume of inventories in importing countries



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World coffee consumption Evolution 2000 – 2010
(in thousand bags)

	2000	2010*	Change (2010)-(2000)		Period growth rate (%)
			Volume	%	
Traditional markets	63 367	70 837	7 470	26.2	1.1
Producing countries	26 385	40 280	13 895	48.8	4.3
Emerging markets	15 750	22 883	7 133	25.0	3.8
World total	105 502	134 000	28 498		2.4

*Estimated

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World Coffee Consumption: Traditional markets Evolution 2000 – 2010

(in thousand 60-kg bags)

	2000	2010*	Growth rate (%)
European Union + 2	39 508	42 779	+0.8
Germany	8 770	9 292	+0.6
France	5 402	5 930	+0.9
Italy	5 149	5 781	+1.2
Spain	2 991	3 232	+0.8
United Kingdom	2 342	3 134	+3.0
Japan	6 626	7 192	+0.8
USA	18 746	21 783	+1.5

*Estimated

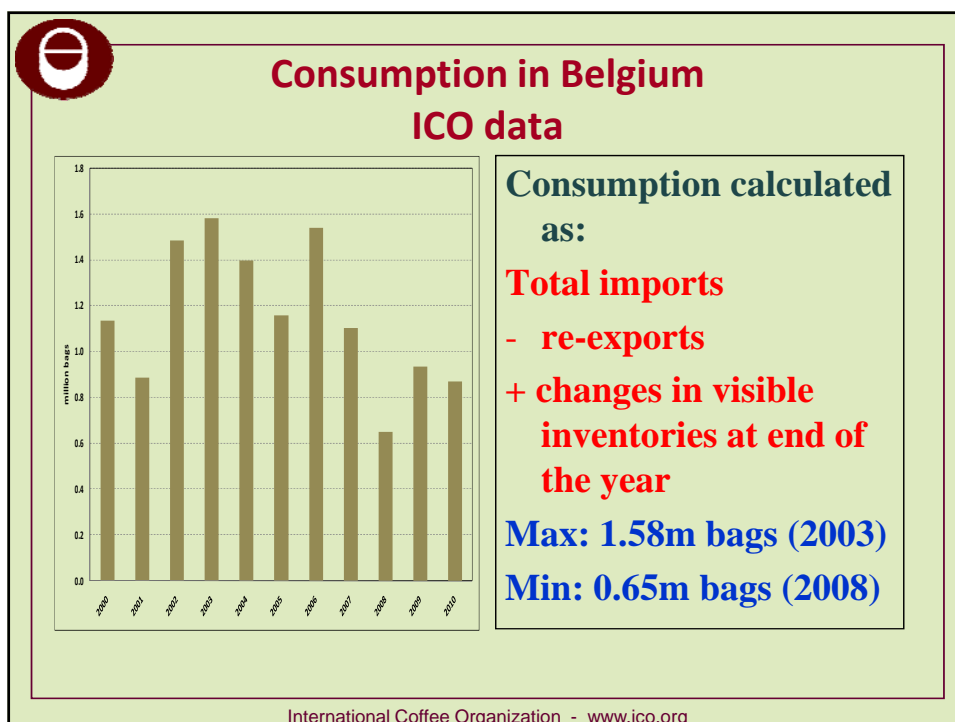
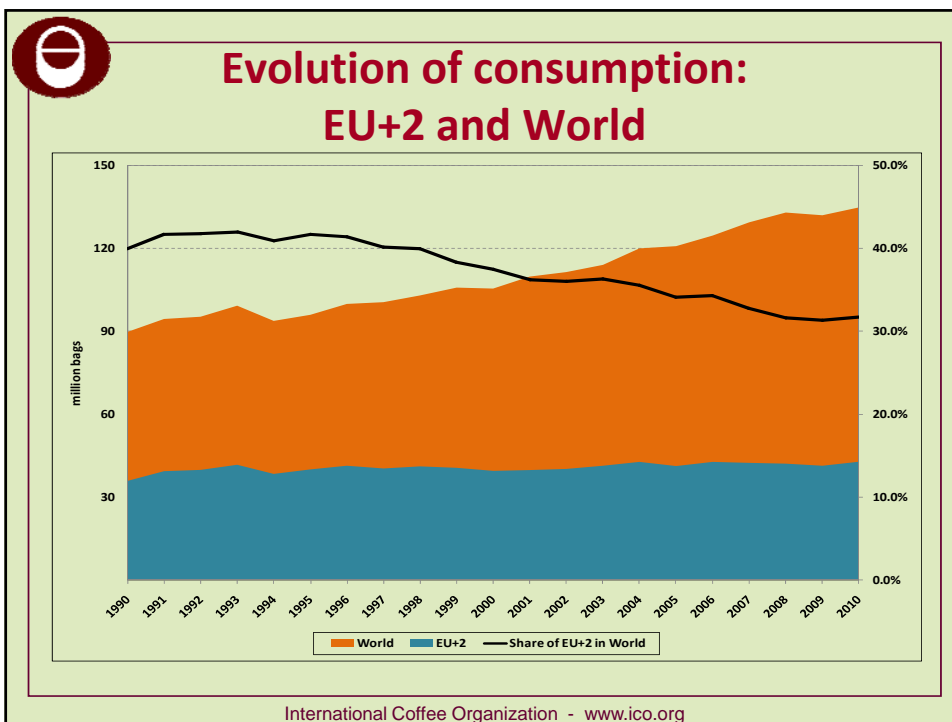
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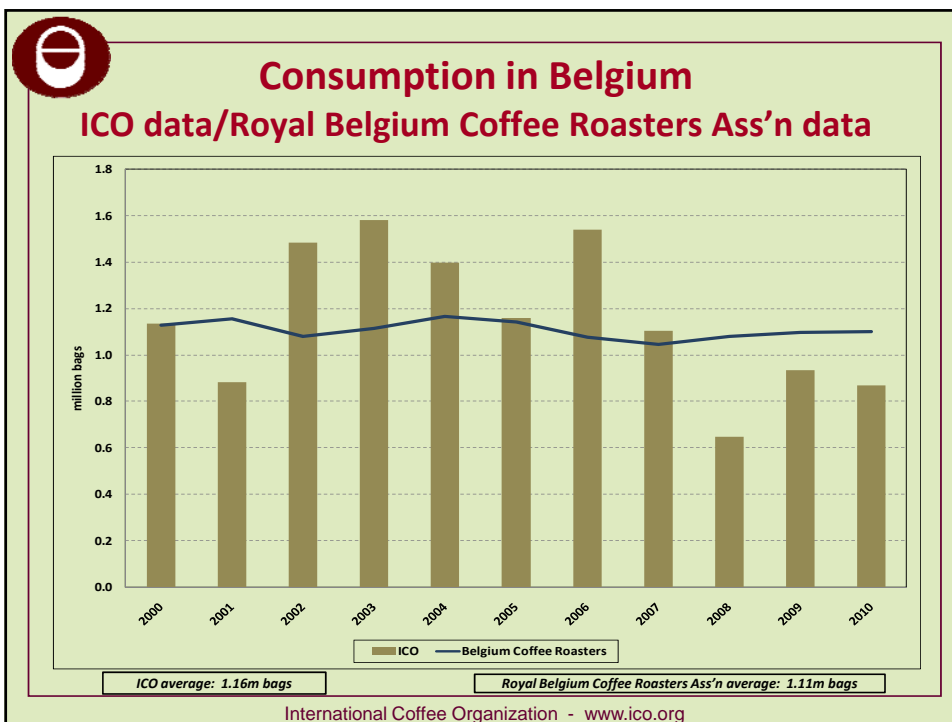


Total consumption: growth rates in Europe

	2000	2010	Annual growth rate
EU+2	39 508	42 779	0.8%
Germany	8 770	9 292	0.6%
France	5 402	5 930	0.9%
Italy	5 149	5 781	1.2%
Spain	2 991	3 232	0.8%
United Kingdom	2 342	3 134	3.0%
Poland	2 046	2 156	0.5%
Netherlands	1 860	1 347	-3.2%
Sweden	1 173	1 221	0.4%
Switzerland	827	1 012	2.0%
Norway	657	746	1.3%

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Per capita consumption (kg) in selected importing countries

Country	Average 2006-2010 (kg)
Belgium	5.78
Denmark	8.46
Finland	12.12
France	5.35
Germany	6.64
Greece	5.19
Italy	5.82
Netherlands	5.81
Norway	9.23
Poland	2.93
Spain	4.39
Sweden	8.07
Switzerland	8.03
United Kingdom	3.00
Japan	3.39
USA	4.10

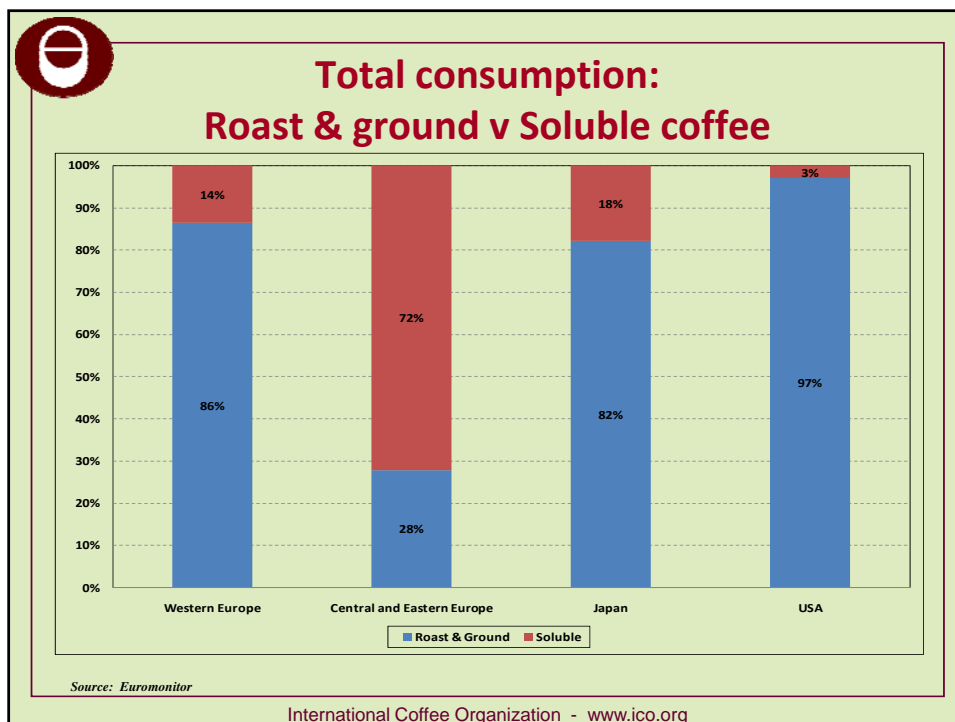
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 **Retail price of roasted coffee**
€ /kg

Country	Dec-09	Dec-10	Jun-11	Change from Dec-09 to Jun-11
Belgium	8.67	9.02	10.62	22.5%
Denmark	8.75	9.52	11.38	30.1%
Finland	5.86	7.09	9.00	53.5%
France	6.35	6.07	6.56	3.3%
Germany	7.95	8.22	7.96	0.2%
Italy	12.80	12.24	12.77	-0.2%
Norway	6.82	7.48	9.40	37.8%
Spain	6.85	6.59	6.96	1.6%
Sweden	6.08	7.64	9.02	48.4%
United Kingdom 1/	26.65	27.92	30.01	12.6%
Japan	9.89	9.95	10.20	3.2%
USA	5.82	6.90	8.00	37.3%

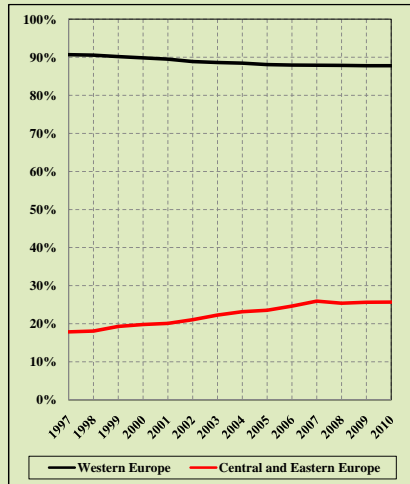
1/ Soluble coffee

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Total consumption: Roast & ground v Soluble coffee - Trends



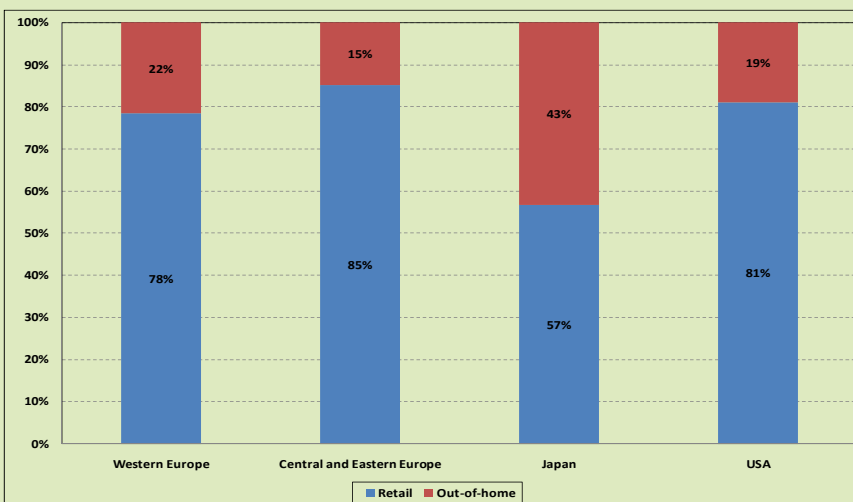
- › Western Europe consumes much more roast & ground coffee than Central & Eastern, but moving in different directions.
- › Consumption of roast & ground coffee in Western Europe has lost ground slightly to soluble (although it has still increased in absolute terms)
- › In Central and Eastern Europe, consumption of roast & ground coffee has increased from 17.9% of total consumption by volume in 1997 to 25.7% in 2010

Source: Euromonitor

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Total consumption: Retail v Out-of-home

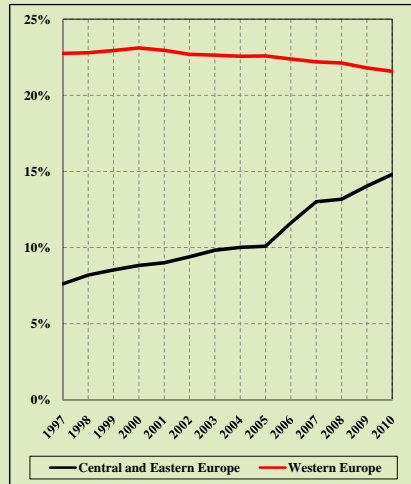


Source: Euromonitor

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Total consumption: Retail v Out-of-home - Trends



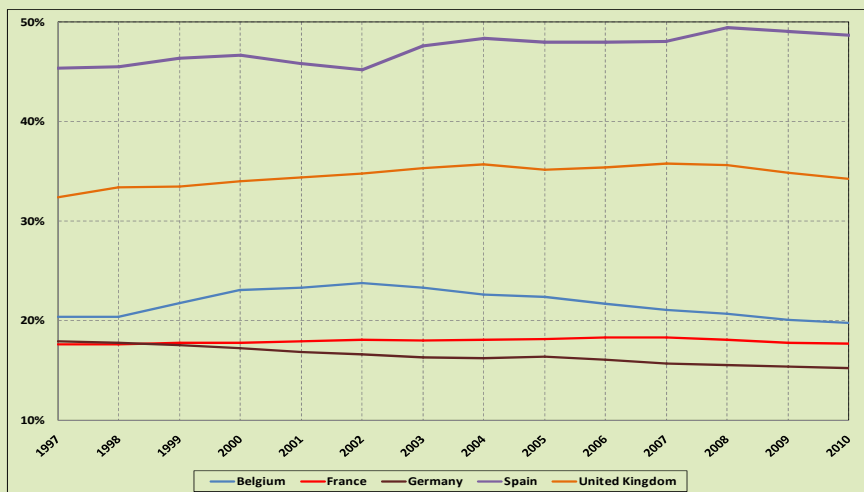
- ▶ Out-of-home consumption averages 21.6% of the total in Western Europe in 2010, but has fallen slightly from 23.1% in 2000
- ▶ Whereas in Central and Eastern Europe the average is 14.8% in 2010, following strong increases mostly driven by Turkey and Russia

Source: Euromonitor

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Retail v Out-of-home consumption: Trends in selected countries



Source: Euromonitor

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Other key trends

- Fast growth in monodoses (pods and capsules)
- Growth in certified/sustainable coffees
- Premium/gourmet segment expanding
- Discounters also expanding

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*Thank you
Merci beaucoup
Heel erg bedankt*

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