



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

E

MONTHLY COFFEE MARKET REPORT

November 2011

During November prices of Brazilian Naturals increased while those of the other three groups of coffee fell slightly. Overall, coffee prices remained stable, with the monthly average of the ICO composite indicator price at 193.66 in November compared to 193.90 US cents/lb in October. The average of the ICO composite indicator price for the first 11 months of 2011 is 212.33 US cents/lb, the highest level in 34 years. Price volatility also decreased considerably during November.

In terms of market fundamentals, on the basis of the statistical data available, production in crop year 2011/12 is estimated at around 128.6 million bags compared to 133.1 million bags in crop year 2010/11. Adverse weather conditions have affected production in several exporting countries. With world consumption estimated at 135 million bags in calendar year 2010, the supply/demand balance continues to be tight. A brief analysis of world consumption during the last 40 years is included in this report.

Exports by all exporting countries during October 2011 totalled 7.1 million bags, bringing the cumulative total for exports during the first 10 months of the calendar year (January to October 2011) to 86.2 million bags compared to 79.9 million bags for the same period in 2010, an increase of 7.9%.

In November 2011 the Executive Director of the Organization, Mr Robério Silva, attended the 50th Anniversary of the InterAfrican Coffee Organisation (IACO) held in Nairobi, Kenya. In his address to the 25 member countries of IACO, he focused on the situation of the world coffee market, the challenges facing the sector and the need for continued international cooperation to ensure a sustainable coffee economy.

**Graph 1: Daily composite indicator prices
1 November 2010 to 9 December 2011**



Price movements

The monthly average of the **ICO composite indicator price** fell by just 0.1% from 193.90 in October to 193.66 US cents/lb in November (Table 1). Graphs 1 and 2 show ICO daily composite indicator prices and group indicator prices since 1 November 2010 respectively. Except in the case of Brazilian Naturals, all coffee groups recorded slight falls in price compared to their levels in October. Volatility indexes were lower for all four groups of coffee. More specifically, prices of **Colombian**

Milds, Other Milds and **Robustas** fell by 0.3%, 1.1% and 0.9% respectively compared to their levels in October. The fall in prices of Other Milds was more marked than in the case of the other coffee groups. Prices of Brazilian Naturals increased by 1.1% from 234.28 in October to 236.75 US cents/lb in November. The relatively firm prices of Brazilian Naturals led to their differentials with the other Arabica groups narrowing slightly (Table 2 and Graph 3).

**Graph 2: Group indicator prices
1 November 2010 to 9 December 2011**

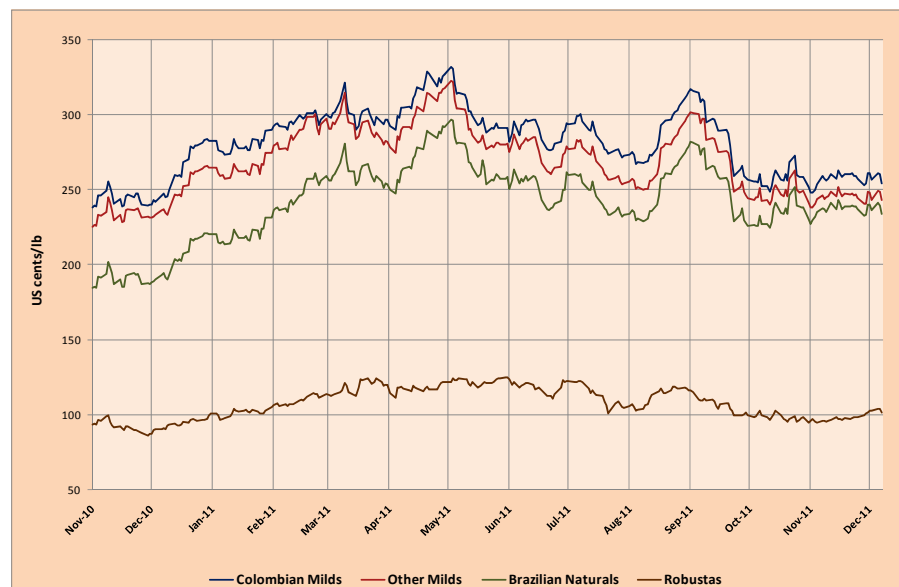


Table 1: ICO indicator prices and futures prices (US cents/lb)

	ICO Composite	Colombian Milds	Other Milds	Brazilian Naturals	Robustas	New York*	London*
Monthly averages							
2010							
November	173.90	244.02	233.48	190.62	92.04	206.92	86.40
December	184.26	261.97	248.17	204.25	94.09	221.51	88.70
2011							
January	197.35	279.88	263.77	219.77	101.09	238.05	96.02
February	216.03	296.44	287.89	247.00	109.35	261.41	104.53
March	224.33	300.68	292.07	260.98	118.13	274.10	111.36
April	231.24	312.95	300.12	273.40	117.37	285.58	111.34
May	227.97	302.17	291.09	268.66	121.98	277.72	116.76
June	215.58	287.95	274.98	250.59	117.95	262.52	110.51
July	210.36	285.21	268.02	245.69	112.73	255.90	103.36
August	212.19	286.97	270.44	249.83	112.07	260.39	102.71
September	213.04	287.54	274.88	255.64	106.06	261.39	96.10
October	193.90	257.66	247.82	234.28	98.10	236.74	88.64
November	193.66	256.99	245.09	236.75	97.24	235.25	85.78
Annual averages							
2000	64.24	102.60	87.07	79.86	41.41	94.58	40.11
2001	45.59	72.05	62.28	50.70	27.54	58.86	23.92
2002	47.74	64.90	61.52	45.23	30.01	57.02	25.88
2003	51.90	65.33	64.20	50.31	36.95	65.24	34.11
2004	62.15	81.44	80.47	68.97	35.99	79.53	32.85
2005	89.36	115.73	114.86	102.29	50.55	111.38	46.80
2006	95.75	116.80	114.40	103.92	67.55	112.30	59.77
2007	107.68	125.57	123.55	111.79	86.60	121.83	78.56
2008	124.25	144.32	139.78	126.59	105.28	136.46	97.17
2009	115.67	177.43	143.84	115.33	74.58	128.40	67.69
2010	147.24	225.46	195.96	153.68	78.74	165.20	71.98
% change between Nov-11 and Oct-11							
	-0.1	-0.3	-1.1	1.1	-0.9	-0.6	-3.2
% change between Nov-11 and Nov-10							
	11.4	5.3	5.0	24.2	5.7	13.7	-0.7
% change between Nov-11 and 2010 average							
	31.5	14.0	25.1	54.1	23.5	42.4	19.2
Volatility (%)							
Nov-10	8.3	7.3	8.6	9.8	9.1	9.4	11.1
Dec-10	5.7	6.5	5.9	7.3	5.2	4.0	8.1
Jan-11	6.7	6.2	6.7	8.0	7.0	7.3	7.6
Feb-11	5.2	4.6	6.3	5.8	4.9	4.6	6.0
Mar-11	8.9	8.6	8.8	9.7	10.3	9.8	8.3
Apr-11	6.6	6.6	6.6	6.5	8.8	7.7	7.2
May-11	6.3	5.6	6.4	8.5	5.7	7.1	4.8
Jun-11	7.8	7.3	7.8	9.6	9.6	9.2	11.2
Jul-11	5.8	5.4	5.5	5.8	9.9	6.3	10.3
Aug-11	5.7	5.3	6.0	6.5	7.2	6.8	7.5
Sep-11	7.7	8.0	8.2	9.0	8.2	9.2	9.0
Oct-11	10.6	10.4	10.9	11.4	10.0	12.4	11.2
Nov-11	4.7	5.7	6.0	6.1	4.9	7.5	4.9
Variation between Nov-11 and Oct-11							
	-5.8	-4.7	-4.8	-5.4	-5.1	-4.9	-6.3

* Average of the 2nd and 3rd positions

Table 2: Price differentials (US cents/lb)

	Colombian Milds Other Milds	Colombian Milds Brazilian Naturals	Colombian Milds Robustas	Colombian Milds New York*	Other Milds Brazilian Naturals	Other Milds Robustas	Brazilian Naturals Robustas	New York* London*
Nov-10	13.80	57.72	167.88	40.46	43.92	154.08	110.16	132.81
Dec-10	16.11	60.11	178.79	41.83	44.00	162.68	118.68	142.03
Jan-11	8.55	49.44	187.09	35.03	40.89	178.54	137.65	156.88
Feb-11	8.61	39.70	182.55	26.58	31.09	173.94	142.85	162.74
Mar-11	12.83	39.55	195.58	27.37	26.72	182.75	156.03	174.24
Apr-11	11.08	33.51	180.19	24.45	22.43	169.11	146.68	160.96
May-11	12.97	37.36	170.00	25.44	24.39	157.03	132.63	152.00
Jun-11	17.19	39.52	172.48	29.30	22.33	155.29	132.96	152.55
Jul-11	16.53	37.14	174.90	26.58	20.61	158.37	137.77	157.68
Aug-11	12.66	31.90	181.48	26.14	19.24	168.82	149.58	165.29
Sep-11	12.66	31.90	181.48	26.14	19.24	168.82	149.58	165.29
Oct-11	9.83	23.37	159.55	20.91	13.54	149.72	136.18	148.10
Nov-11	11.91	20.25	159.75	21.74	8.34	147.85	139.50	149.47
Absolute change between Nov-11 and Oct-11								
	2.08	-3.12	0.20	0.83	-5.20	-1.87	3.33	1.36
% change between Nov-11 and Oct-11								
	21.1	-13.4	0.1	4.0	-38.4	-1.3	2.4	0.9

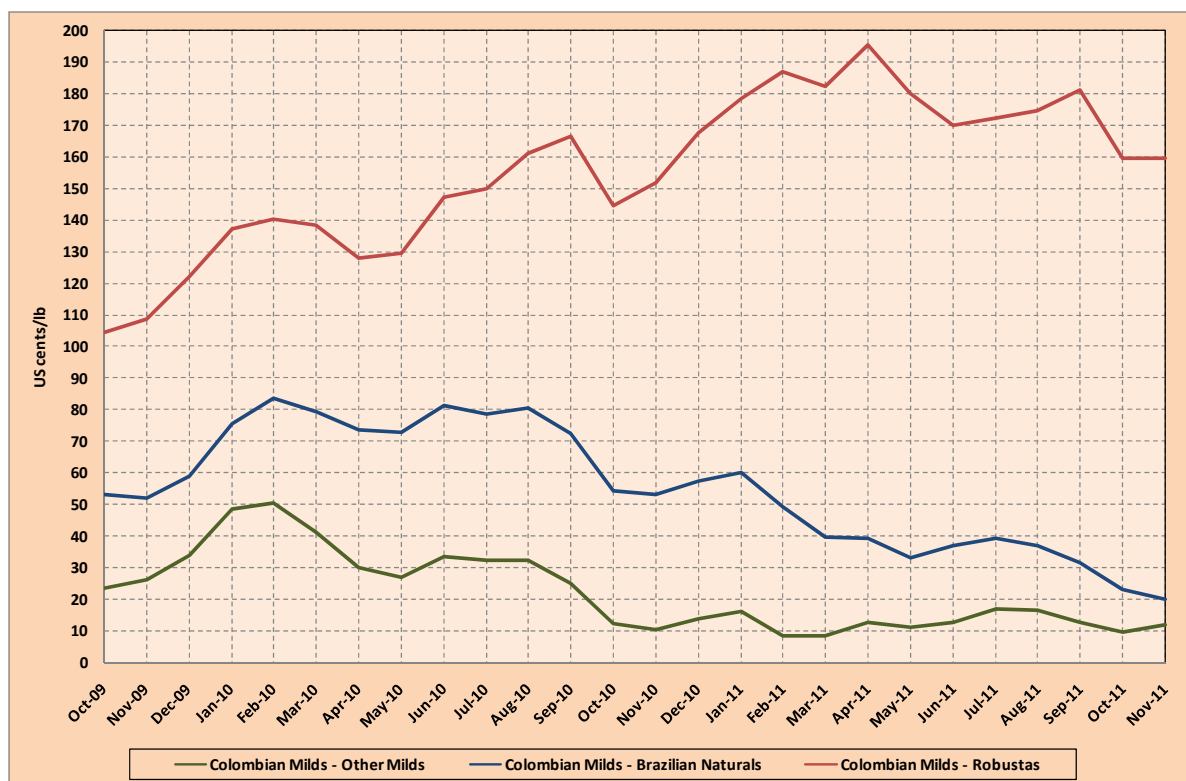
*Average of the 2nd and 3rd positionsGraph 3: Differentials between prices of Colombian Milds and the other three coffee groups
October 2009 to November 2011

Table 3: Production in selected exporting countries

Crop year commencing	2008	2009	2010	2011	% change 2010-2011
TOTAL	128 293	122 936	133 145	128 560	-3.4
Africa	15 950	15 830	13 590	16 258	19.6
Cameroon	750	750	600	700	16.6
Côte d'Ivoire	2 397	1 795	999	1 600	60.2
Ethiopia	4 949	6 931	5 000	6 350	27.0
Kenya	541	630	617	750	21.6
Tanzania	1 186	709	800	750	-6.2
Uganda	3 197	2 797	3 290	3 500	6.4
Others	2 931	2 220	2 284	2 608	14.2
<i>Arabicas</i>	<i>7 894</i>	<i>9 147</i>	<i>7 591</i>	<i>9 106</i>	<i>20.0</i>
<i>Robustas</i>	<i>8 056</i>	<i>6 684</i>	<i>5 998</i>	<i>7 152</i>	<i>19.2</i>
Asia & Oceania	34 727	37 207	37 510	35 798	-4.6
India	3 950	4 764	6 586	5 500	-16.5
Indonesia	9 612	11 380	9 129	8 750	-4.2
Papua New Guinea	1 028	1 038	867	1 000	15.3
Thailand	376	470	579	850	46.9
Vietnam	18 500	18 200	19 467	18 500	-5.0
Others	1 261	1 356	882	1 198	35.9
<i>Arabicas</i>	<i>4 389</i>	<i>5 071</i>	<i>5 696</i>	<i>5 867</i>	<i>3.0</i>
<i>Robustas</i>	<i>30 338</i>	<i>32 136</i>	<i>31 814</i>	<i>29 931</i>	<i>-5.9</i>
Mexico & Central America	17 307	16 854	19 242	18 358	-4.6
Costa Rica	1 320	1 450	1 585	1 640	3.5
El Salvador	1 450	1 065	1 859	1 450	-22.0
Guatemala	3 785	3 835	3 950	3 600	-8.9
Honduras	3 450	3 575	4 326	4 300	-0.6
Mexico	4 651	4 200	4 850	4 500	-7.2
Nicaragua	1 442	1 831	1 804	1 800	-0.2
Others	1 209	899	868	1 068	23.1
<i>Arabicas</i>	<i>17 165</i>	<i>16 721</i>	<i>19 038</i>	<i>18 147</i>	<i>-4.7</i>
<i>Robustas</i>	<i>142</i>	<i>133</i>	<i>203</i>	<i>211</i>	<i>3.7</i>
South America	60 309	53 044	62 803	58 146	-7.4
Brazil	45 992	39 470	48 095	43 154	-10.3
Colombia	8 664	8 098	8 523	8 500	-0.3
Ecuador	691	813	854	875	2.5
Peru	3 872	3 286	3 976	4 447	11.8
Others	1 090	1 377	1 355	1 170	-13.6
<i>Arabicas</i>	<i>49 391</i>	<i>41 988</i>	<i>50 841</i>	<i>46 497</i>	<i>-8.5</i>
<i>Robustas</i>	<i>10 918</i>	<i>11 056</i>	<i>11 962</i>	<i>11 649</i>	<i>-2.6</i>
TOTAL	128 293	122 936	133 145	128 560	-3.4
Colombian Milds	9 964	9 181	9 652	9 730	0.8
Other Milds	27 052	26 582	29 651	29 274	-1.3
Brazilian Naturals	41 822	37 164	43 864	40 613	-7.4
Robustas	49 455	50 010	49 978	48 943	-2.1
<i>Arabicas</i>	<i>78 838</i>	<i>72 926</i>	<i>83 167</i>	<i>79 617</i>	<i>-4.3</i>
<i>Robustas</i>	<i>49 455</i>	<i>50 010</i>	<i>49 978</i>	<i>48 943</i>	<i>-2.1</i>
TOTAL	100.0	100.0	100.0	100.0	
Colombian Milds	7.8	7.5	7.2	7.6	
Other Milds	21.1	21.6	22.3	22.8	
Brazilian Naturals	32.6	30.2	32.9	31.6	
Robustas	38.5	40.7	37.5	38.1	
<i>Arabicas</i>	<i>61.5</i>	<i>59.3</i>	<i>62.5</i>	<i>61.9</i>	
<i>Robustas</i>	<i>38.5</i>	<i>40.7</i>	<i>37.5</i>	<i>38.1</i>	

In thousand bags

Market fundamentals

On the basis of the latest information received from Member countries, **total production** in crop year 2011/12 has now been revised to around 128.6 million bags compared to 133.1 million bags in 2010/11, a fall of 3.4% (Table 3). Bad weather continues to have a negative impact on production in some areas by causing a rise in coffee pests and diseases. Colombia will not be in a position to confirm a recovery in its production levels, averaging 8.4 million bags over the last four years.

In **Africa**, there is likely to be a significant recovery in production, which is expected to go up from 13.6 million bags in 2010/11 to 16.3 million bags in 2011/12, representing an increase of 19.6%, the highest production level since crop year 2000/01.

In **Asia**, production may fall by 4.6% from 37.5 million bags in 2010/11 to 35.8 million bags in 2011/12, mainly on account of decreased production attributable to adverse weather conditions in Indonesia and India. Estimates by the Vietnamese authorities indicate a drop in production of around 5%.

In **Mexico & Central America**, production is also expected to fall by 4.6% from 19.2 million bags in 2010/11 to 18.4 million bags in 2011/12.

In **South America**, with the fall in Brazilian production, and notwithstanding increased production in Peru, total production should be down by around 7.4%.

Production of **Arabicas** and **Robustas** in crop year 2011/12 will be 79.6 and 48.9 million bags respectively.

Exports during October totalled 7.1 million bags, bringing the total volume of exports in the first ten months of calendar year 2011 to 86.2 million bags, an increase of 7.9% compared to 79.9 million bags for the same period in the previous calendar year (Table 4).

**Table 4: Total exports of all forms of coffee
(January to October 2010 and 2011)**

	2010	2011	% change
TOTAL	79 894	86 194	7.9
Colombian Milds	6 646	6 999	5.3
Other Milds	20 016	21 601	7.9
Brazilian Naturals	26 515	25 896	-2.3
Robustas	26 716	31 697	18.6
Arabicas	53 177	54 497	2.5
Robustas	26 716	31 697	18.6
Angola	3	6	82.1
Benin	0	0	
Bolivia	60	51	-15.6
Brazil	26 427	27 357	3.5
Burundi	211	214	1.2
Cameroon	721	450	-37.6
Central African Republic	87	79	-9.2
Colombia	5 890	6 103	3.6
Congo, Dem. Rep. of	143	116	-18.7
Congo, Rep. of	0	0	
Costa Rica	1 083	1 101	1.7
Côte d'Ivoire	1 685	686	-59.3
Cuba	5	7	28.4
Dominican Republic	32	80	148.3
Ecuador	986	1 232	24.9
El Salvador	870	1 714	97.1
Ethiopia	2 819	2 433	-13.7
Gabon	1	1	-1.1
Ghana	24	27	11.3
Guatemala	3 197	3 413	6.8
Guinea	369	294	-20.3
Haiti	9	7	-13.7
Honduras	2 993	3 510	17.3
India	3 953	5 311	34.3
Indonesia	4 564	5 132	12.4
Jamaica	14	15	4.7
Kenya	436	524	20.1
Liberia	2	2	18.4
Madagascar	59	76	28.6
Malawi	5	15	223.0
Mexico	2 265	2 561	13.1
Nicaragua	1 573	1 383	-12.0
Nigeria	2	2	-27.2
Panama	61	46	-24.5
Papua New Guinea	779	950	22.0
Paraguay	0	0	
Peru	2 959	2 621	-11.4
Philippines	5	9	70.4
Rwanda	229	167	-27.0
Sierra Leone	54	20	-62.9
Tanzania	428	611	42.9
Thailand	281	204	-27.4
Timor-Leste	48	42	-11.4
Togo	192	153	-20.2
Uganda	2 152	2 673	24.2
Venezuela	18	4	-76.8
Vietnam	11 904	14 475	21.6
Yemen	17	17	-3.9
Zambia	14	21	46.4
Zimbabwe	6	10	70.1
Other exporting countries 1/	260	269	3.3

In thousand bags

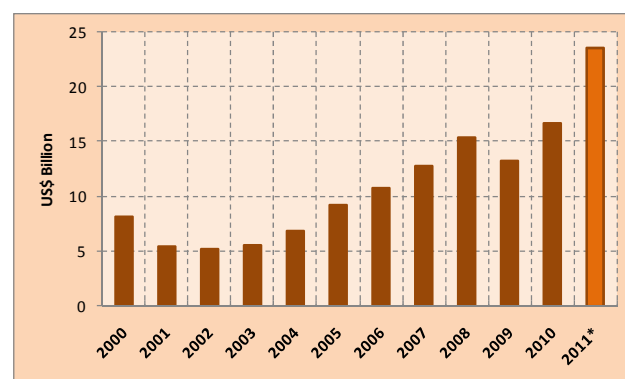
1/ Equatorial Guinea, Guyana, Lao (PDR), Nepal, Sri Lanka and Trinidad and Tobago

The value of total exports in calendar year 2011 is currently forecast at US\$23.5 billion for a total volume of 102.4 million bags compared to US\$16.7 billion for a volume of 96.8 million bags in 2010 (Table 5 & Graph 4).

**Table 5: Volume and value of total exports
(Calendar years 2009 to 2011)**

	2009	2010	2011*	% change 2010-2011
Volume (million bags)	96.2	96.8	102.4	5.8
Value (US\$ billion)	13.3	16.7	23.5	40.7

* Forecast

**Graph 4: Value of total exports
(Calendar years 2000 to 2011)**

* Forecast

World consumption during the last three calendar years (2008 to 2010) is shown in Table 6. Consumption in calendar year 2010 is around 135 million bags compared to 131.8 million bags in 2009, an increase of 2.4%. Domestic consumption in exporting countries is around 41.3 million bags in 2010, representing an increase of 4.2% in relation to 39.7 million bags in 2009. Consumption in importing countries is in the region of 93.7 million bags compared to 92.1 million bags in 2009, an increase of 1.7%.

**Table 6: World consumption
(Calendar years 2008 to 2010)**

	2008	2009	2009-2010		
			2010	Difference % change	
WORLD TOTAL	132 911	131 823	135 040	3 217	2.4
Exporting countries	38 119	39 675	41 331	1 656	4.2
Brazil	17 526	18 208	18 945	738	4.1
Indonesia	3 333	3 333	3 333	0	0
Ethiopia	2 933	3 089	3 253	165	5.3
Mexico	2 200	2 200	2 239	39	1.8
Philippines	1 390	1 770	1 973	203	11
India	1 518	1 605	1 725	120	7.5
Venezuela	1 599	1 649	1 650	1	0.0
Vietnam	1 021	1 208	1 583	375	31
Colombia	1 400	1 400	1 400	0	0
Others	5 199	5 214	5 231	17	0.3
Importing countries	94 792	92 148	93 709	1 561	1.7
European Union	40 230	39 652	40 794	1 142	2.9
Germany	9 535	8 897	9 292	395	4.4
Italy	5 892	5 806	5 781	-25	-0.4
France	5 152	5 677	5 711	35	0.6
Spain	3 485	3 352	3 232	-120	-3.6
United Kingdom	3 067	3 220	3 134	-86	-2.7
Poland	1 681	2 001	2 156	155	7.7
Netherlands	1 324	898	1 347	449	50.0
Sweden	1 272	1 133	1 221	89	7.8
Finland	1 115	1 058	1 080	22	2.1
Others	7 707	7 610	7 839	229	3.0
Japan	7 065	7 130	7 192	62	0.9
Norway	715	715	746	30	4.3
Switzerland	1 149	966	1 012	46	4.8
Tunisia	317	289	301	13	4.4
Turkey	484	521	610	89	17.0
USA	21 652	21 436	21 783	347	1.6
Other importing countries	23 179	21 439	21 270	-169	-0.8
Russian Federation	3 716	3 131	3 661	530	16.9
Canada	3 210	3 292	3 586	294	8.9
Algeria	2 118	2 066	2 021	-45	-2.2
Korea, Rep. Of	1 665	1 551	1 666	115	7.4
Ukraine	1 733	1 460	1 485	25	1.7
Australia	1 145	1 223	1 370	148	12.1

In thousand bags

Analysis of world consumption from 1970 to 2010

World consumption has almost doubled over the last forty years from 70.7 million bags in 1970 to 135 million bags in 2010, an increase of 91% (Annex I).

Annex II shows the change in consumption between 1970 and 2010 and average annual growth rates in the last four decades. During the last decade, world consumption grew at an average annual rate of 2.5%. Domestic consumption in exporting countries recorded the steepest increase (4.6%) from 26.4 million bags in 2000 to 41.3 million bags in 2010. The growing demand in exporting countries during the last decade could continue to support an increase in world consumption over the next few years. With an average annual growth rate of 3.9% in the last decade, emerging markets are also a significant source of increase in world consumption.

As for traditional markets in North America, Western Europe and Japan, the average annual growth rate for the period 2000 to 2010 was 1.1%, an increase in consumption equivalent to 7.4 million bags from 63.6 million to 71 million bags. More specifically, in traditional markets the highest average annual growth rates in the last decade were recorded in Canada (4.2%), United Kingdom (3%), United States (1.5%) and Italy (1.2%). During the last four decades (1970 to 2010) the average annual growth rate of world consumption was 1.6%. If world consumption continues to grow at the same rate it could exceed 158 million bags by 2020.

Annex III shows average per capita consumption over the last four decades, which has been consistently high in Finland, at 11.9kg per person.

In conclusion, it should be noted that market fundamentals continue to favour firm prices with current prices at their highest levels since 1977. Vibrant world consumption means that the supply/demand balance will continue to be tight and prices will remain firm. A brief analysis of world consumption over the last forty years confirms its buoyancy, particularly during the last ten years. Nevertheless, credit restrictions and the lack of liquidity caused by the world financial and economic crisis, combined with higher production costs, could lead to a reduction in supplies. This in turn could also lead to a slackening in the current growth rate of consumption.

WORLD CONSUMPTION (CALENDAR YEARS 1970 TO 2010)

	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989
WORLD TOTAL	70 718	72 344	73 671	75 781	75 254	76 901	78 041	68 400	73 378	79 785	79 027	82 205	83 132	85 622	83 755	84 428	83 565	89 273	88 199	92 320
Exporting countries	17 484	17 929	17 654	17 486	17 274	17 051	17 237	17 797	17 792	17 964	18 945	19 248	19 854	19 591	18 846	19 311	19 376	19 372	19 268	19 836
Brazil	8 809	8 631	8 071	7 675	7 354	6 914	6 695	6 942	6 709	6 600	7 368	7 756	7 800	7 575	7 125	7 000	7 000	7 000	7 750	8 150
Indonesia	1 118	1 257	1 304	1 291	1 323	1 160	1 121	1 146	1 142	1 153	1 177	1 202	1 208	1 240	1 338	1 167	1 150	1 167	1 186	1 211
Ethiopia	1 194	1 428	1 471	1 515	1 563	1 625	1 742	1 858	1 796	1 654	1 575	1 604	1 617	1 612	1 608	1 699	1 932	1 917	1 167	1 175
Mexico	1 463	1 513	1 563	1 575	1 563	1 738	1 625	1 400	1 400	1 400	1 425	1 525	1 625	1 650	1 558	1 773	1 825	1 600	1 625	1 675
India	563	633	636	649	642	614	648	812	852	826	896	894	1 037	846	704	822	729	1 180	878	967
Other exp coun	4 336	4 469	4 611	4 780	4 831	5 000	5 407	5 639	5 893	6 332	6 504	6 267	6 567	6 669	6 514	6 850	6 740	6 508	6 663	6 658
Importing Countries	53 235	54 415	56 017	58 296	57 979	59 850	60 804	50 604	55 586	61 821	60 082	62 957	63 279	66 030	64 909	65 118	64 189	69 902	68 931	72 484
Traditional Markets	47 941	48 882	50 337	51 924	51 190	52 636	53 870	43 963	48 414	53 971	52 084	54 011	55 415	56 656	55 771	55 848	56 408	59 631	59 689	59 802
USA	21 267	20 716	21 898	21 791	20 767	19 993	20 874	15 672	17 925	19 014	17 414	17 200	18 283	17 923	18 397	18 379	17 572	18 197	17 889	18 556
Germany	5 541	6 628	5 867	6 363	6 118	6 438	6 829	7 042	6 635	7 678	7 759	8 044	8 541	8 902	8 274	7 742	8 706	9 673	10 177	9 380
Japan	1 224	1 326	1 431	1 531	2 397	2 334	2 341	2 361	2 171	3 166	3 357	3 245	3 587	3 749	3 878	4 153	4 298	4 755	4 910	4 940
France	3 988	4 304	4 181	4 419	4 590	4 974	4 823	4 436	4 955	5 158	5 274	5 466	5 357	5 423	4 948	5 051	5 068	5 394	5 396	5 289
Italy	2 739	2 951	2 947	3 326	3 385	3 356	3 548	3 076	3 231	3 786	3 679	3 747	4 075	4 113	3 709	4 656	4 189	4 299	4 219	4 307
Canada	1 461	1 496	1 520	1 539	1 513	1 737	1 637	1 346	1 674	1 749	1 771	1 977	1 763	1 739	1 828	1 841	1 786	1 800	1 814	1 822
Spain	1 151	1 111	1 224	1 328	1 559	1 615	1 600	1 122	1 573	1 745	1 428	1 732	1 748	2 031	1 868	1 761	2 224	2 106	2 343	2 592
United Kingdom	1 847	1 975	1 891	2 508	1 841	2 016	1 930	1 621	1 740	2 457	2 022	2 392	2 286	2 266	2 367	2 307	2 282	2 355	2 331	2 177
Others	8 723	8 374	9 379	9 121	9 020	10 174	10 288	7 286	8 509	9 217	9 381	10 209	9 776	10 510	10 503	9 956	10 283	11 053	10 610	10 738
Emerging Markets	5 293	5 533	5 680	6 371	6 789	7 214	6 934	6 641	7 172	7 849	7 998	8 946	7 863	9 375	9 138	9 270	7 782	10 270	9 242	12 683

In thousand bags

	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
WORLD TOTAL	89 810	94 510	95 295	99 302	93 792	96 010	99 951	100 539	103 018	105 853	105 500	109 812	111 382	113 925	120 012	120 801	124 627	129 348	132 911	131 823	135 040
Exporting countries	19 418	19 909	20 761	21 131	21 228	22 030	23 310	24 160	24 981	25 540	26 383	27 800	28 453	29 392	30 906	32 623	34 427	36 373	38 119	39 675	41 331
Brazil	8 200	8 425	8 800	9 050	9 250	9 900	10 775	11 375	12 025	12 575	13 075	13 493	13 710	14 088	14 760	15 392	16 133	16 927	17 526	18 208	18 945
Indonesia	1 236	1 271	1 309	1 349	1 390	1 432	1 475	1 521	1 567	1 614	1 664	1 919	1 834	1 820	1 958	2 375	2 750	3 208	3 333	3 333	3 333
Ethiopia	1 200	1 216	1 281	1 349	1 421	1 496	1 576	1 659	1 747	1 840	1 938	2 041	2 149	2 264	2 384	2 511	2 644	2 785	2 933	3 089	3 253
Mexico	1 544	1 331	1 225	1 243	1 058	1 060	1 193	1 227	1 178	1 119	1 189	1 354	1 500	1 500	1 500	1 556	1 794	2 050	2 200	2 200	2 239
India	726	906	917	896	833	833	833	833	833	854	938	1 017	1 084	1 142	1 188	1 272	1 357	1 438	1 518	1 605	1 725
Other exp coun	6 513	6 760	7 229	7 245	7 276	7 309	7 458	7 546	7 631	7 539	7 581	7 978	8 176	8 580	9 116	9 517	9 749	9 967	10 609	11 241	11 837
Importing Countries	70 392	74 601	74 534	78 171	72 564	73 980	76 640	76 380	78 037	80 313	79 117	82 011	82 929	84 533	89 106	88 178	90 200	92 974	94 792	92 148	93 709
Traditional Markets	59 057	64 668	62 161	65 368	60 403	61 512	63 349	62 045	63 340	64 942	63 589	64 709	64 196	66 220	69 147	67 614	69 440	70 220	70 029	69 220	70 973
USA	18 298	18 661	18 290	19 217	17 326	17 363	18 059	17 795	18 604	19 359	18 746	19 554	19 125	20 193	20 973	20 998	20 667	21 033	21 652	21 436	21 783
Germany	7 279	12 377	9 570	11 325	8 214	11 231	10 594	9 670	9 976	9 748	8 770	9 059	8 498	9 499	10 445	8 665	9 151	8 627	9 535	8 897	9 292
Japan	5 060	5 809	5 132	5 740	5 973	6 116	5 838	5 968	6 052	6 273	6 626	6 936	6 875	6 770	7 117	7 128	7 268	7 282	7 065	7 130	7 192
France	5 205	5 557	5 614	5 507	5 111	5 313	5 512	5 487	5 351	5 578	5 402	5 253	5 526	5 394	4 929	4 787	5 278	5 628	5 152	5 677	5 711
Italy	4 832	4 254	4 132	4 888	4 774	4 644	4 776	4 913	4 936	4 919	5 149	5 243	5 182	5 507	5 469	5 552	5 593	5 821	5 892	5 806	5 781
Canada	1 974	2 068	1 916	2 117	2 407	2 109	2 291	2 229	2 317	2 303	2 377	2 535	2 302	2 146	2 747	2 794	3 066	3 245	3 210	3 292	3 586
Spain	2 714	2 651	3 045	2 728	2 774	2 732	2 901	2 977	2 996	3 324	2 991	2 795	2 833	2 740	2 705	3 007	3 017	3 198	3 485	3 352	3 232
United Kingdom	2 348	2 342	2 516	2 534	2 640	2 200	2 406	2 441	2 588	2 276	2 342	2 215	2 261	2 236	2 458	2 680	3 059	2 824	3 067	3 220	3 134
Others	11 347	10 949	11 945	11 314	11 184	9 804	10 972	10 565	10 520	11 162	11 186	11 120	11 595	11 736	12 304	12 003	12 341	12 563	10 970	10 410	11 260
Emerging Markets	11 336	9 933	12 373	12 803	12 162	12 468	13 291	14 335	14 697	15 371	15 528	17 303	18 733	18 313	19 959	20 564	20 760	22 754	24 764	22 928	22 736

In thousand bags

**AVERAGE ANNUAL GROWTH RATES AND PERCENTAGE CHANGE IN CONSUMPTION
(CALENDAR YEARS 1970 TO 2010)**

	% change 1970-2010	Average Annual Growth Rates				
		1970-2010	1970-79	1980-89	1990-99	2000-10
WORLD TOTAL	91.0	1.6%	1.3%	1.7%	1.8%	2.5%
Exporting countries	136.4	2.2%	0.3%	0.5%	3.1%	4.6%
Brazil	115.1	1.9%	-3.2%	1.1%	4.9%	3.8%
Indonesia	198.1	2.8%	0.3%	0.3%	3.0%	7.2%
Ethiopia	172.4	2.5%	3.7%	-3.2%	4.9%	5.3%
Mexico	53.0	1.1%	-0.5%	1.8%	-3.5%	6.5%
India	206.3	2.8%	4.3%	0.8%	1.8%	6.3%
Other exp coun	173.0	2.5%	4.3%	0.3%	1.6%	4.6%
Importing Countries	76.0	1.4%	1.7%	2.1%	1.5%	1.7%
Traditional Markets	48.0	1.0%	1.3%	1.5%	1.1%	1.1%
USA	2.4	0.1%	-1.2%	0.7%	0.6%	1.5%
Germany	67.7	1.3%	3.7%	2.1%	3.3%	0.6%
Japan	487.6	4.5%	11.1%	4.4%	2.4%	0.8%
France	43.2	0.9%	2.9%	0.0%	0.8%	0.6%
Italy	111.1	1.9%	3.7%	1.8%	0.2%	1.2%
Canada	145.4	2.3%	2.0%	0.3%	1.7%	4.2%
Spain	180.9	2.6%	4.7%	6.8%	2.3%	0.8%
United Kingdom	69.7	1.3%	3.2%	0.8%	-0.3%	3.0%
Others	29.1	0.6%	0.6%	1.5%	-0.2%	0.1%
Emerging Markets	329.5	3.7%	4.5%	5.3%	3.4%	3.9%

**PER CAPITA CONSUMPTION
(CALENDAR YEARS 1970 TO 2010)**

	1970-1979	1980-1989	1990-1999	2000-2010	1970-2010
Exporting countries					
Brazil	4.3	3.3	3.7	5.0	4.8
Indonesia	0.6	0.5	0.4	0.7	0.5
Ethiopia	2.9	2.4	1.6	2.0	2.0
Mexico	1.6	1.3	0.8	1.0	0.9
Venezuela, B.R.	3.4	2.8	2.5	3.2	3.1
Vietnam	0.0	0.1	0.2	0.6	0.5
India	0.1	0.1	0.1	0.1	0.1
Colombia	3.6	3.5	2.4	2.0	2.0
Philippines	0.3	0.6	0.7	0.8	0.7
Importing countries					
European Union					
Germany	4.9	6.7	7.4	6.7	7.6
France	5.2	5.7	5.6	5.3	4.9
Italy	3.5	4.3	4.9	5.7	5.6
Spain	2.3	3.1	4.4	4.2	3.8
United Kingdom	2.1	2.4	2.5	2.7	2.5
Poland	0.9	0.9	2.3	3.2	3.6
Netherlands	7.7	8.9	9.2	6.3	7.3
Sweden	12.8	11.6	9.9	8.1	8.2
Finland	12.3	12.6	11.6	11.8	11.9
Japan	1.0	2.0	2.8	3.3	3.4
Norway	9.7	10.3	10.0	9.2	9.2
Switzerland	6.0	6.7	7.7	7.5	5.9
Tunisia	0.6	0.6	0.9	1.4	1.6
Turkey	0.2	0.1	0.2	0.4	0.3
USA	5.6	4.5	4.1	4.1	4.2
Other importing countries					
Russian Federation	0.0	0.0	0.5	1.4	1.3
Canada	4.1	4.2	4.5	5.3	5.2
Algeria	1.8	3.4	2.8	3.5	4.0
Korea, Rep. Of	0.1	0.5	1.3	1.8	1.8
Ukraine	0.0	0.0	0.1	1.2	0.9
Australia	1.8	2.4	2.5	3.0	2.6

In kilogrammes