



Organización Internacional del Café
Organização Internacional do Café
Organisation Internationale du Café

ICC 93-5

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International Coffee Council
Ninety-third Session
18 – 20 May 2005
London, England

Overview of the coffee market

Background

This document contains an overview of recent developments in the world coffee market, including an analysis of production and consumption in the main exporting and importing countries. It also provides data on price movements since 1999, and analyses possible short-term scenarios.

Action

The Council is requested to take note of this report.



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Corrigendum

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In paragraph 26, on line 3, please replace the sentence “Brazil’s consumption world consumption.” with the following:

“Brazil’s consumption increased by 3.64% from 13.75 million bags in 2003/04 to 14.25 million in 2004/05; this represents about half the total consumption of exporting countries and 12.57% of world consumption.”

Introduction

1. Since the last quarter of 2004 coffee prices have recorded a considerable rise, with the ICO composite indicator price moving between 94.90 and 107.36 US cents/lb during the month of March 2005, compared to a 58.79 and 62.88 cents range in March 2004. Such levels had not been recorded since the last quarter of 1998. This price rise faltered somewhat towards the end of March 2005, before recovering from mid-April onwards. Prices, therefore, remain firm and confirm that the crisis, created by weak price levels for exporting countries for over four years, is at an end. While the four coffee groups have enjoyed a price rise, the differential between Other Milds and Robustas has grown and reached an average of 85.52 US cents/lb in April 2005, compared to 39.07 cents in April 2004 and 27.27 cents in April 2003. The price increase of the last quarter of 2004 and early 2005 also confirms the important role of fundamentals in determining movements in coffee prices. It is worth noting that the weakness of the United States dollar continues to negatively affect real income of coffee producers.

2. The latest OECD report points to a general firming of economic growth in its Member countries, despite turbulence on the oil market. The total volume of domestic demand for the OECD countries is predicted to increase by 2.9% in 2005, and by 1.9% in the Euro zone, 3.3% in the United States and 2.1% in Japan. This economic growth in the main coffee importing countries contrasts with the rise in poverty in exporting countries, which have been suffering for too long from a fall in the value of their coffee exports.

I. Market prices

Composite indicator price

3. Table 1 contains the monthly ICO indicator prices and prices on the New York and London futures markets between 1999 and 2005, as well as the differential between Other Milds and Robustas. The average of the ICO composite indicator price for the first four months of 2005 is 92.10 US cents/lb, compared to 62.15 cents for the whole of 2004, 51.91 cents in 2003, 47.74 cents in 2002 and 45.60 cents in 2001. Graph 1 shows movements in the monthly average of the ICO composite price from January 1999 to April 2005. Graph 2 shows daily movements in the ICO composite indicator price since 5 January 2005. The composite indicator price passed the 107.36 US cents/lb mark on 11 March, before undergoing corrections and hovering around an average of 100 US cents/lb. Since that date, prices have fallen back but remain firm, since they are supported by movements in market fundamentals.

Colombian Milds

4. The indicator price for Colombian Milds recorded an average for the month of March 2005 of 135.54 US cents/lb, before falling back to 129.51 US cents/lb in April 2005. This price level is well above the averages recorded in the last five years. Graph 3 shows changes in the monthly average since January 1999, movements in prices for the Arabicas of the group Brazilian Naturals as well as the differential between the latter and Colombian Milds.

Other Milds

5. During the first four months of 2005, the average of Other Milds was 123.14 US cents/lb, compared to 80.47 cents for the whole of 2004 and 64.20 cents in 2003. The monthly average, which was 135.03 US cents/lb in March 2005, fell to 129.53 cents in April, but the trend remains firm. Graph 4 shows movements in the monthly average from January 1999 to April 2005. Graph 4 also shows changes in the indicator prices for Robustas and the differential between Other Milds and Robustas.

Brazilian Naturals

6. The price of Brazilian Naturals has also followed an upward path, since it reached an average of 120.12 US cents/lb in March 2005, although there was then a correction which brought it to 114.48 cents in April 2005. The average for the first four months of 2005 is 108.59 US cents/lb, compared to 68.97 cents for the whole of 2004. Graph 3 shows monthly averages since January 1999. The differential with Colombian Milds was 15.03 US cents/lb in April 2005, compared to 11.52 cents in April 2004.

Robustas

7. Prices of Robustas recovered late compared to the other coffee groups. Despite the widening of the differential with Other Milds (Graph 4), the indicator price for Robustas recorded a monthly average of 50.75 US cents/lb in April 2005, compared to 36.37 cents in April 2004, an increase of 39.54%. Graph 4 shows monthly movements since January 1999. The differential with Other Milds rose from 39.07 US cents/lb in April 2004 to 78.78 cents in April 2005.

New York and London futures markets

8. Graph 5 presents daily movements in the average of 2nd and 3rd positions on the New York and London futures markets. Prices on the futures markets have undergone the same upward movements as the ICO indicator prices. The New York market, which is sensitive to the situation of Arabicas, rose from 73.51 US cents/lb in April 2004 to 124.84 US cents in

April 2005, which is a rise of 69.83%. The London market, which reflects the supply situation for Robustas, rose from 33.57 US cents/lb in April 2004 to 47.36 cents in April 2005, an increase of 41.08%.

Retail Prices

9. Table 2 shows average retail prices for roasted coffee in selected importing countries in current value for calendar years 2001 to 2004. Available information indicates a rise in retail prices in all countries. The highest increases were recorded in Belgium (+49.20%), Switzerland (+10.95%), Denmark (+10.86%), Norway (+10.26%), Italy (+9.95%), Finland (+9.68%), Luxembourg (+9.57%), Slovakia (+9.28%) and the United Kingdom (+9.15%)

Prices paid to coffee growers in selected exporting countries

10. Information on prices paid to coffee growers in exporting countries in 2005 is not yet complete. However, Table 3 shows average prices paid to growers in selected exporting countries from 2001 to 2004.

II. Supply

11. Global availability (production + stocks) is estimated at 150.92 million bags in 2004, compared to 145.33 million bags in 2003, which represents a decline of 3.85%. The estimate for the year 2005 is around 135 million bags.

World production

12. Preliminary estimates based on data from Member countries indicate that total production for crop year 2005/06 is 106 million bags, a decline of 6.51% compared to production in 2004/05, which totalled 113.38 million bags (Table 4).

Production in Africa

13. Despite a rise during crop year 2004/05, African production has not yet really begun to take off since, with the exception of Ethiopia, the main producers in the area are facing difficulties. Production in crop year 2004/05 totalled 15.24 million bags, compared to 13.67 million in 2003/04. If climatic conditions remain favourable in Ethiopia, the level of African production for crop year 2005/06 will closely match that of 2004/05. In fact, **Ethiopia**, which produces unwashed Arabicas (only 10% are washed), has become Africa's largest producer with a coffee industry which withstood the crisis of low world prices. Domestic consumption was an important factor in this success. Favourable climatic

conditions fostered an increase in production in crop year 2004/05 of approximately 29%, which took it from 3.87 million in 2003/04 to 5 million. The potential exists for a rise in production since the country has a large 450,000-hectare area planted to coffee, and strong domestic demand.

14. **Uganda** is now Africa's second largest producer. Its production in crop year 2004/05 totalled 2.75 million bags, which is slightly up on that of 2003/04, which was 2.5 million bags. Uganda's coffee industry has been badly hit by the low price crisis and the disease tracheomyces, which causes a deterioration in the coffee tree. A project to combat this disease, funded by the Common Fund for Commodities, is underway in the countries affected, but the abandonment of many plantations during the crisis has proved an obstacle to the swift eradication of the epidemic. **Côte d'Ivoire**, which was long Africa's main producer, now occupies third place. Production, which had reached 6.32 million bags during crop year 1999/2000, has gradually come down to a level of 1.47 million bags in 2004/05. This fall in production has been exacerbated by political and military troubles which hampered crop years 2002/03, 2003/04 and 2004/05. Even if the political and military situation goes back to normal a return to former production levels will take time.

15. Production in **Cameroon** was approximately 1.1 million bags in 2004/05, a rise of 22.22% compared to 2003/04 levels. Cameroon's production, which includes both Robustas (90% of local production) and Arabicas (10%), fell following the liberalisation of its marketing system in the early 1990s. However, a gradual upturn has commenced, although it is being held back by the long period of crisis in world price levels since the end of 1998. **Kenya**, which only produces Arabicas, is the fifth largest producer in Africa. It produced 917,000 bags in crop year 2004/05. Production has not yet managed to return to levels of previous years. Low prices paid to growers, who are, moreover, heavily indebted, are preventing them from meeting their maintenance charges or costs of agricultural inputs. Unless growers have access to adequate finance, production levels will remain at below the 1 million bag mark. **Tanzania**, Africa's sixth largest producer, which basically produces Arabica coffee, recorded a total production of 750,000 bags in 2004/05. A very similar level of production is expected for crop year 2005/06.

Production in Central and North America

16. In the region of **Central and North America**, production fell by 7.76% from 17.10 million bags in 2003/04 to 15.77 million in 2004/05. Production declined in almost all countries in the region, with the exception of Costa Rica. In **Mexico**, production in crop year 2004/05 reached 3.86 million bags, compared to 4.55 million in 2003/04, a decline of 15.01% basically due to the abandonment of plantations by agricultural workers. We should recall that Mexico produces Arabicas (97% of total production) and a small proportion of Robustas, destined in the main for local industry. Coffee is grown over a total area of approximately

800,000 hectares, and the industry employs over 700,000 families throughout the country, of which 282,000 are growers and 300,000 permanent or temporary workers. The agro-industry sector linked to coffee employs some 100,000 additional workers.

17. **Guatemala's** production fell by 4.43%, from 3.61 million bags in 2003/04 to 3.45 million in 2004/05. Production in the country had, however, passed the 4 million bag mark in 2002/03. Despite this decline, Guatemala is still the largest producer in Central America. The second largest producer in the region, **Honduras**, produced 2.75 million bags in 2004/05, a decline of 7.35% in comparison to the level in 2003/04 of 2.96 million bags. Despite quite high production costs in **Costa Rica**, production there rose slightly in 2004/05 to 1.92 million bags from 1.8 million in 2003/04. Nevertheless, these levels are still low compared to those recorded at the end of the 1990s. There are signs that production will quite closely match that of 2004/05 owing to high production costs and indebtedness of growers. Production is also weak in **El Salvador** where a level of 1.43 million bags was recorded in 2004/05, which is quite similar to that of 2003/04. Many farms have also been abandoned in this country. Production has slumped in **Nicaragua** (-34.52%). Production for crop year 2004/05 totalled 920,000 bags compared to 1.40 million bags in 2003/04.

Production in South America

18. Driven by **Brazil**, production rose by 24.51% in South America from 44.19 million bags in 2003/04 to 55.03 million in 2004/05. Production in Brazil rose by 34.17% in crop year 2004/05 to 38.66 million bags compared to 28.82 million in 2003/04. Production in crop year 2005/06, which has already commenced, is estimated at 32.46 million bags. Production of Arabicas is going to decline by 25.33% from 31.11 million bags in 2004/05 to 23.26 million in 2005/06. On the other hand, Robustas will increase by 21.69% from 7.56 million bags in 2004/05 to 9.2 million in 2005/06. Production in **Colombia** went from 11.09 million bags in 2003/04 to 11.5 million in 2004/05, a slight rise of 3.63%. In crop year 2005/06, production could reach the same level as in 2004/05. **Ecuador's** production fell by 2.22% in 2004/05 taking it to 750,000 bags, compared to 767,000 bags in 2003/04. Production in **Peru** surged and is set to continue to rise in coming years. Production in crop year 2004/05 totalled 3.07 million bags, compared to 2.53 million in 2003/04.

Production in Asia/Oceania

19. Production in the region **Asia/Oceania** fell by 3.06% in 2004/05, totalling 27.33 million bags, compared to 28.20 million in 2003/04. **Vietnam** produced 14 million bags in 2004/05, a decline of 5.60% compared to 2003/04 levels, of 14.83 million bags. Climatic conditions in the main production areas do not seem to favour a continuation of this level of production in crop year 2005/06 in the largest Robusta-producing country. In **Indonesia**, production in crop year 2004/05 fell by 11.05% compared to crop year 2003/04,

which is the largest reduction among producing countries in the region. There are limited prospects for an increase in production during crop year 2005/06. The coffee-growing area is 1.1 million hectares in size and coffee production is taking place in 900,000 hectares of these. It is worth noting that Robustas represent 90% of the country's production and Arabicas 10%.

20. **India** has seen its production increase by approximately 9.11% from 4.45 million bags in 2003/04 to 4.85 million in 2004/05. India's production is made up of 60% Robustas and 40% Arabicas. It is worth noting that production of Arabicas in India is threatened by the white stem borer disease, in which larvae make galleries in the trunks of coffee trees, thereby reducing their production potential. **Papua New Guinea's** production is relatively stable at 1.2 million bags in 2004/05 compared to 1.14 million bags in 2003/04. **Thailand's** production recorded a rise from 846,000 bags in 2003/04 to 1.05 million in 2004/05. A coffee growing development programme is underway in this country, which could become an important regional producer in the medium-term.

21. Table 5 contains supply data for the four coffee groups for crop years 1999/2000 to 2004/05 and Table 6 gives a breakdown by coffee group of supplies of exporting Member countries. Production of **Arabicas** totalled 74.92 million bags in 2004/05, a rise of 10.85% compared to the level in 2003/04 of 67.58 million bags. Arabicas made up 66.07% of world production in 2004/05, compared to 65.50% in 2003/04. Production of **Colombian Milds** rose by 2.23% in 2004/05 from 12.25 million in 2003/04 to 12.88 million. However, their share of world production fell from 11.87% in 2003/04 to 11.36% in 2004/05.

22. Production of **Other Milds** fell by 1.61% in 2004/05 from 26.44 million bags in 2003/04 to 26.01 million. This group makes up 22.94% of world coffee production in 2004/05 compared to 25.63% in the previous crop year. The volume of production of the group **Brazilian Naturals** rose by 23.75% from 28.88 million bags in 2003/04 to 36.01 million in 2004/05. This group makes up 31.76% of world production in 2004/05, a rise compared to 28% in 2003/04. Production of **Robustas** rose by 8.08% during coffee year 2004/05 from 35.59 million bags in 2003/04 compared to 38.47 million in 2004/05. However, poor climatic conditions in Vietnam and difficulties faced by certain Robusta-producing countries, particularly Côte d'Ivoire and Uganda, could lead to a fall in production in crop year 2005/06. Robustas made up 33.93% of world production in 2004/05, compared to 34.50% in 2003/04.

Stocks in exporting countries

23. Opening stocks in exporting countries for crop year 2004/05 totalled 17.43 million bags, a reduction of 21.10% compared to crop year 2003/04 (see Table 5). Stocks of Other Milds rose by 8.38%. Stocks of all other coffee groups fell at the beginning of crop year 2004/05.

Stocks in importing countries

24. Table 7 shows movements in stocks of green coffee in importing countries, including free ports, from 2000 to 2004. Recently stocks in importing countries have recovered when world prices were too weak. Stocks, which stood at 10.6 million bags at the end of December 1999, are estimated at 21.5 million bags at the end of December 2004. At the end of March 2005, certified stocks on the New York futures market (NYBOT) stood at 4.50 million bags, and those on the London futures market at 3.80 million bags.

25. Graph 6 shows exports for calendar years 1999 to 2004. Exports for 2004 totalled 89.62 million bags, compared to 85.87 million for 2003. During the same period, exports of Robustas and Brazilian Naturals have risen by 4.26% and 12.23% respectively. Exports of Colombian Milds have fallen by 2.96%, while those of Other Milds are relatively stable (-0.26%). The value of total exports rose by 26.77% during 2004 to an estimated US\$7.05 billion, compared to 5.56 billion in 2003 (Table 9).

III. Demand

Domestic consumption

26. Domestic consumption in exporting countries in 2004/05 is estimated at 28.52 million bags. Table 10 shows domestic consumption in selected exporting countries from 2000/01 to 2004/05. Brazil's consumption increased by 36.36% from 13.75 million bags in 2003/04 to 14.25 million in 2004/05, and it represents about half the total consumption of all exporting countries and 12.57 % of world consumption. Mexico, Indonesia, Colombia, India, Vietnam and many African countries possess a significant potential for domestic consumption which should be tapped.

Consumption in importing countries

27. Table 11 contains summary data on trade and consumption in importing countries (Members and non-members) for calendar years 2000 to 2004. Consumption in importing countries has gone from 78.90 million bags in 2000 to 86.18 million in 2004.

28. Table 12 gives per capita consumption in importing countries from 2000 to 2004. Countries which have seen a fall in per capita consumption are: Switzerland (-15.80%), Belgium/Luxembourg (-15.10%), the Netherlands (-12.57%) and France (-8.03%). On the other hand, others recorded large increases in per capita consumption, particularly Ireland (+43.42%), Germany (+17.62%), Denmark (+16.79%), Cyprus (+11%) and Malta (+10%).

Conclusion

29. Price movements in the last six months reveal a recovery in exporting countries following a long period of decline in income to very low levels. Market fundamentals will likely underpin current price levels since there is a 2005 deficit between production and consumption of approximately 8 million bags. The firmness of coffee prices will depend primarily on the ability shown by producing countries in implementing policies to foster production limited to consumption requirements.

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Table 1: ICO composite and group prices, and average of 2nd and 3rd positions in New York and London futures markets

Monthly averages: January 1999 to April 2005
(US cents/lb)

	ICO composite	Colombian Milds	Other Milds	Brazilian Naturals	Robustas	Average 2nd/3rd		Differential		
						New York	London	CM-BN	OM-Rob	NY-Lon
Jan-99	97.63	123.07	112.96	99.43	82.29	114.26	77.41	23.64	30.67	36.85
Feb-99	92.36	116.92	105.48	91.72	79.23	106.13	74.52	25.20	26.25	31.61
Mar-99	89.41	117.05	105.39	88.90	73.42	106.17	70.41	28.15	31.97	35.76
Apr-99	85.72	114.02	102.11	86.14	69.32	102.93	66.86	27.88	32.79	36.07
May-99	89.51	123.95	111.07	96.29	67.94	112.85	65.95	27.66	43.13	46.90
Jun-99	86.41	121.45	107.21	91.69	65.59	109.66	64.12	29.76	41.62	45.54
Jul-99	78.21	107.05	94.85	78.13	61.56	96.74	59.37	28.92	33.29	37.37
Aug-99	77.22	105.28	91.37	76.67	63.07	94.83	60.50	28.61	28.30	34.33
Sep-99	71.94	97.77	84.31	70.43	59.57	88.51	57.00	27.34	24.74	31.51
Oct-99	76.36	103.69	94.20	78.74	58.52	98.20	55.40	24.95	35.68	42.80
Nov-99	88.22	126.76	113.38	98.41	63.05	118.14	59.52	28.35	50.33	58.62
Dec-99	95.63	140.35	124.46	109.47	66.79	129.30	57.72	30.88	57.67	71.58
Jan-00	82.15	130.13	111.11	97.68	53.18	119.02	52.07	32.45	57.93	66.95
Feb-00	76.15	124.73	103.44	91.51	48.86	109.75	48.21	33.22	54.58	61.54
Mar-00	73.49	119.51	100.73	89.93	46.25	106.97	44.99	29.58	54.48	61.98
Apr-00	69.53	112.67	94.61	86.46	44.45	100.89	43.14	26.21	50.16	57.75
May-00	69.23	110.31	94.15	87.23	44.32	101.17	42.75	23.08	49.83	58.42
Jun-00	64.56	100.30	86.44	78.32	42.68	94.30	41.87	21.98	43.76	52.43
Jul-00	64.09	101.67	87.35	79.89	40.82	96.48	39.87	21.78	46.53	56.61
Aug-00	57.59	91.87	76.92	70.57	38.25	86.69	37.31	21.30	38.67	49.38
Sep-00	57.31	89.98	75.78	71.14	38.83	84.85	36.68	18.84	36.95	48.17
Oct-00	56.40	90.25	76.66	72.28	36.14	86.63	34.96	17.97	40.52	51.67
Nov-00	52.18	84.01	71.54	68.95	32.81	77.82	30.81	15.06	38.73	47.01
Dec-00	48.27	75.81	66.16	64.39	30.38	70.43	28.60	11.42	35.78	41.83
Jan-01	49.19	75.33	65.98	62.38	32.40	70.13	29.76	12.95	33.58	40.37
Feb-01	49.39	76.70	67.19	62.50	31.58	66.71	28.81	14.20	35.61	37.90
Mar-01	48.52	76.94	66.50	60.35	30.52	65.30	27.63	16.59	35.98	37.67
Apr-01	47.31	78.25	66.13	55.11	28.49	62.74	26.20	23.14	37.64	36.54
May-01	49.38	80.92	69.22	57.19	29.54	67.41	26.58	23.73	39.68	40.83
Jun-01	46.54	74.38	63.90	51.86	29.17	62.26	26.28	22.52	34.73	35.98
Jul-01	43.07	69.70	58.72	46.43	27.43	57.43	24.28	23.27	31.29	33.15
Aug-01	42.77	73.50	59.72	46.49	25.82	55.73	22.53	27.01	33.90	33.20
Sep-01	41.17	68.80	58.07	42.42	24.27	52.32	20.84	26.38	33.80	31.48
Oct-01	42.21	62.88	56.40	38.63	23.24	48.09	18.02	24.25	33.16	30.07
Nov-01	44.24	64.89	58.85	42.82	23.68	49.74	17.64	22.07	35.17	32.10
Dec-01	43.36	62.33	56.72	42.21	24.35	48.48	18.44	20.12	32.37	30.04
Jan-02	43.46	62.51	58.25	43.14	22.81	51.15	17.43	19.37	35.44	33.72
Feb-02	44.30	62.67	59.12	43.17	24.37	48.49	18.80	19.50	34.75	29.69
Mar-02	49.49	68.27	64.47	48.70	29.10	54.60	22.92	19.57	35.37	31.68
Apr-02	50.19	69.76	65.43	49.70	29.34	57.44	23.93	20.06	36.09	33.51
May-02	47.30	65.95	61.40	45.39	28.32	52.88	23.79	20.56	33.08	29.09
Jun-02	45.56	62.94	58.57	43.00	28.42	52.19	24.29	19.94	30.15	27.90
Jul-02	44.70	60.60	56.48	43.31	28.60	52.37	24.15	17.29	27.88	28.22
Aug-02	42.79	58.10	54.27	40.18	27.88	52.60	23.99	17.92	26.39	28.61
Sep-02	47.96	64.15	60.67	44.53	32.08	60.29	28.53	19.62	28.59	31.76
Oct-02	50.79	67.92	65.73	46.08	33.33	65.68	30.90	21.84	32.40	34.78
Nov-02	54.69	70.70	69.87	49.25	37.93	70.43	35.63	21.45	31.94	34.80
Dec-02	51.68	65.38	64.16	46.55	38.06	66.14	36.11	18.83	26.10	30.03
Jan-03	54.04	67.27	65.57	49.31	41.18	68.60	38.96	17.96	24.39	29.64
Feb-03	54.07	67.47	66.41	48.97	40.67	66.47	38.31	18.50	25.74	28.16
Mar-03	49.61	62.16	61.75	43.77	37.17	61.64	34.15	18.39	24.58	27.49
Apr-03	51.87	64.40	64.69	48.55	37.42	65.16	34.56	15.85	27.27	30.60
May-03	53.19	65.74	66.26	51.12	37.80	67.35	34.47	14.62	28.46	32.88
Jun-03	48.90	61.61	61.04	46.88	34.21	62.28	31.44	14.73	26.83	30.84
Jul-03	50.89	64.87	62.95	49.50	35.35	64.06	32.13	15.37	27.60	31.93
Aug-03	52.22	65.65	63.89	52.48	36.30	65.31	33.54	13.17	27.59	31.77
Sep-03	54.10	67.55	66.41	54.86	37.35	67.53	34.53	12.69	29.06	33.00
Oct-03	51.72	66.17	64.30	52.81	35.88	65.86	33.11	13.36	28.42	32.75
Nov-03	49.81	64.39	62.28	50.73	34.11	62.85	31.28	13.66	28.17	31.57
Dec-03	52.44	66.68	64.86	54.79	35.90	65.82	32.85	11.89	28.96	32.97
Jan-04	58.69	73.76	72.73	62.06	39.84	74.86	35.95	11.70	32.89	38.91
Feb-04	59.87	76.53	76.21	65.52	37.05	75.75	34.68	11.01	39.16	41.07
Mar-04	60.80	77.97	78.06	66.97	36.70	76.67	33.54	11.00	41.36	43.13
Apr-04	58.80	75.22	75.44	63.70	36.37	73.51	33.57	11.52	39.06	39.93
May-04	59.91	77.17	76.99	65.16	36.56	75.62	33.31	12.01	40.43	42.31
Jun-04	64.28	82.51	82.21	69.61	39.87	81.48	35.93	12.90	42.34	45.55
Jul-04	58.46	76.13	74.94	62.89	36.02	73.40	32.18	13.24	38.92	41.22
Aug-04	56.98	75.35	73.61	61.75	33.91	72.73	30.88	13.59	39.70	41.85
Sep-04	61.47	81.02	80.47	68.90	34.24	80.37	30.62	12.12	46.23	49.75
Oct-04	61.10	83.02	80.55	69.91	31.67	79.79	28.23	13.11	48.88	51.56
Nov-04	67.74	92.83	90.27	79.39	32.71	87.98	29.94	13.44	57.56	58.04
Dec-04	77.72	105.75	104.12	91.76	36.92	102.18	35.29	13.99	67.20	66.89
Jan-05	79.35	108.22	107.16	93.63	36.96	104.57	34.13	14.59	70.21	70.44
Feb-05	89.40	121.56	120.86	106.11	41.24	117.13	39.05	15.44	79.62	78.08
Mar-05	101.44	135.54	135.03	120.12	49.51	131.04	45.44	15.42	85.52	85.60
Apr-05	98.20	129.51	129.53	114.48	50.75	124.84	47.36	15.03	78.78	77.48

Table 2: Retail prices of roasted coffee in selected importing countries Calendar year averages (US cents/lb)				
	2001	2002	2003	2004
U.S.A.	309.26	292.38	291.63	284.94
<i>European Community</i>				
Austria	293.23	285.70	317.98	332.38
Belgium	299.75	305.13	259.53	387.23
Cyprus	358.16	405.01	491.67	523.35
Denmark	318.79	309.24	356.94	395.72
Finland	198.02	184.03	213.11	233.74
France	199.30	207.22	249.82	272.08
Germany	318.05	321.77	368.28	
Italy	433.07	457.12	546.72	601.12
Luxembourg	407.08	428.56	528.10	578.63
Netherlands	255.28	260.34	320.01	
Portugal	383.76	385.32	455.63	484.90
Slovakia	225.63	219.89	247.05	269.97
Slovenia	304.70	310.50	373.95	376.09
Spain	254.15	258.11	300.07	323.38
Sweden	253.54	255.04	293.55	308.34
United Kingdom 1/	1185.00	1210.68	1333.62	1455.58
<i>Other importing countries</i>				
Japan	860.15	812.51	818.55	875.00
Norway	285.57	309.10	348.00	383.70
Switzerland	408.58	446.12	512.44	568.54

1/ Soluble coffee

Table 3: Average prices paid to growers
Calendar year averages: 2001 to 2004

	(US cents/lb)			
Exporting Member	2001	2002	2003	2004
<i>Colombian Milds</i>				
Colombia	57.77	52.43	48.34	60.83
Kenya	69.39	67.67	41.07	71.01
Tanzania	34.86	25.93	24.78	23.20
<i>Other Milds</i>				
Burundi	32.19	29.17	24.88	27.36
Costa Rica	46.12	46.12	52.92	58.19
Cuba	188.57	188.57	168.93	70.18
Dominican Republic	42.04	50.83	49.57	75.72
Ecuador	27.28	27.36	31.06	51.19
El Salvador	17.63	21.84	25.69	39.30
Guatemala	45.34	49.61	48.42	66.74
Honduras	34.32	37.06	41.73	50.28
India	43.82	39.61	43.45	58.32
Indonesia	53.61	59.66	42.05	
Jamaica	169.59	237.60	185.62	164.65
Malawi	46.42	39.79	39.61	51.84
Mexico	53.98	43.02	59.66	
<i>OAMCAF</i>				
Cameroon	19.09	24.56	35.27	
Madagascar	12.92	14.50	35.90	46.19
Papua New Guinea	33.09	31.66	36.86	40.71
Peru	34.75	29.50	32.93	41.91
Rwanda	23.26	17.88	24.88	29.60
Uganda	53.43	53.41	58.16	74.49
<i>Brazilian Naturals</i>				
Brazil	36.87	30.90	42.82	56.33
Ethiopia	43.78	26.88	35.94	48.51
Philippines	49.36	21.72	39.85	68.90
<i>Robustas</i>				
Angola	21.07	10.71	6.61	9.80
Brazil	19.24	19.99	31.61	34.85
Congo, Dem. Rep. of	81.03			
Ecuador	11.26	12.00	21.86	29.75
India	23.44	22.08	28.60	30.80
Indonesia	13.57	14.55	16.61	
<i>OAMCAF</i>				
Cameroon	21.11	16.05	22.26	
Central African Rep.	13.21	11.94	18.06	20.17
Cote d'Ivoire		13.44	17.71	17.72
Gabon	47.88	44.58		
Madagascar	10.33	11.14	19.72	16.68
Togo	15.30	18.27	22.77	21.91
Papua New Guinea	12.04	13.31	17.25	22.33
Philippines	23.63	21.44	31.35	33.20
Tanzania	5.21	4.30	6.72	6.70
Thailand	30.59	25.78	31.80	30.79
Uganda	21.93	25.49	41.24	52.74
Vietnam	15.12	18.14	27.92	27.99

Table 4: Supply of coffee by group
Crop years 1999/00 to 2004/05

	(000 bags)					
Crop commencing	1999	2000	2001	2002	2003	2004
<u>TOTAL PRODUCTION</u>	<u>115 117</u>	<u>112 683</u>	<u>109 675</u>	<u>121 978</u>	<u>103 177</u>	<u>113 385</u>
Colombian Milds	11 532	12 182	13 400	13 381	12 250	12 882
Other Milds	32 621	28 748	27 016	26 585	26 441	26 015
Brazilian Naturals	31 149	29 981	31 695	40 967	28 889	36 015
Robustas	39 815	41 772	37 564	41 045	35 597	38 473
<i>Arabicas</i>	<i>75 302</i>	<i>70 911</i>	<i>72 111</i>	<i>80 933</i>	<i>67 580</i>	<i>74 912</i>
<i>Robustas</i>	<i>39 815</i>	<i>41 772</i>	<i>37 564</i>	<i>41 045</i>	<i>35 597</i>	<i>38 473</i>
<u>DOMESTIC CONSUMPTION</u>	<u>24 702</u>	<u>25 939</u>	<u>27 206</u>	<u>27 315</u>	<u>27 968</u>	<u>28 524</u>
Colombian Milds	1 460	1 460	1 460	1 459	1 366	1 366
Other Milds	4 923	5 129	5 569	5 522	5 662	5 614
Brazilian Naturals	12 406	12 128	11 567	12 424	11 386	13 299
Robustas	5 913	7 222	8 610	7 910	9 554	8 245
<i>Arabicas</i>	<i>18 789</i>	<i>18 717</i>	<i>18 596</i>	<i>19 405</i>	<i>18 414</i>	<i>20 279</i>
<i>Robustas</i>	<i>5 913</i>	<i>7 222</i>	<i>8 610</i>	<i>7 910</i>	<i>9 554</i>	<i>8 245</i>
<u>EXPORTABLE PRODUCTION</u>	<u>90 415</u>	<u>86 744</u>	<u>82 469</u>	<u>94 663</u>	<u>75 209</u>	<u>84 861</u>
Colombian Milds	10 072	10 722	11 940	11 922	10 884	11 516
Other Milds	27 698	23 619	21 447	21 063	20 779	20 401
Brazilian Naturals	18 743	17 853	20 128	28 543	17 503	22 716
Robustas	33 902	34 550	28 954	33 135	26 043	30 228
<i>Arabicas</i>	<i>56 513</i>	<i>52 194</i>	<i>53 515</i>	<i>61 528</i>	<i>49 166</i>	<i>54 633</i>
<i>Robustas</i>	<i>33 902</i>	<i>34 550</i>	<i>28 954</i>	<i>33 135</i>	<i>26 043</i>	<i>30 228</i>
<u>GROSS OPENING STOCKS</u>	<u>23 402</u>	<u>21 810</u>	<u>21 294</u>	<u>19 470</u>	<u>22 096</u>	<u>17 433</u>
Colombian Milds	3 301	2 587	1 957	2 051	2 071	1 517
Other Milds	2 036	2 413	2 594	3 174	2 886	3 128
Brazilian Naturals	13 000	11 171	10 786	8 536	9 574	7 982
Robustas	5 065	5 639	5 956	5 710	7 565	4 806
<i>Arabicas</i>	<i>18 337</i>	<i>16 171</i>	<i>15 338</i>	<i>13 760</i>	<i>14 531</i>	<i>12 627</i>
<i>Robustas</i>	<i>5 065</i>	<i>5 639</i>	<i>5 956</i>	<i>5 710</i>	<i>7 565</i>	<i>4 806</i>
<u>TOTAL EXPORTS</u>	<u>92 279</u>	<u>87 531</u>	<u>85 278</u>	<u>89 979</u>	<u>87 223</u>	
Colombian Milds	10 785	11 351	11 847	11 902	11 439	
Other Milds	27 598	23 721	21 107	21 351	20 534	
Brazilian Naturals	20 566	18 221	22 900	25 897	23 850	
Robustas	33 330	34 238	29 424	30 829	31 400	
<i>Arabicas</i>	<i>58 949</i>	<i>53 293</i>	<i>55 854</i>	<i>59 150</i>	<i>55 823</i>	
<i>Robustas</i>	<i>33 330</i>	<i>34 238</i>	<i>29 424</i>	<i>30 829</i>	<i>31 400</i>	

Table 5: Supply of coffee by group
Crop years 1999/00 to 2004/05

(percentage share)						
Crop commencing	1999	2000	2001	2002	2003	2004
<u>TOTAL PRODUCTION</u>	<u>100.00</u>	<u>100.00</u>	<u>100.00</u>	<u>100.00</u>	<u>100.00</u>	<u>100.00</u>
Colombian Milds	10.02	10.81	12.22	10.97	11.87	11.36
Other Milds	28.34	25.51	24.63	21.79	25.63	22.94
Brazilian Naturals	27.06	26.61	28.90	33.59	28.00	31.76
Robustas	34.59	37.07	34.25	33.65	34.50	33.93
<i>Arabicas</i>	<i>65.41</i>	<i>62.93</i>	<i>65.75</i>	<i>66.35</i>	<i>65.50</i>	<i>66.07</i>
<i>Robustas</i>	<i>34.59</i>	<i>37.07</i>	<i>34.25</i>	<i>33.65</i>	<i>34.50</i>	<i>33.93</i>
<u>DOMESTIC CONSUMPTION</u>	<u>100.00</u>	<u>100.00</u>	<u>100.00</u>	<u>100.00</u>	<u>100.00</u>	<u>100.00</u>
Colombian Milds	5.91	5.63	5.37	5.34	4.88	4.79
Other Milds	19.93	19.77	20.47	20.22	20.24	19.68
Brazilian Naturals	50.22	46.76	42.52	45.48	40.71	46.62
Robustas	23.94	27.84	31.65	28.96	34.16	28.91
<i>Arabicas</i>	<i>76.06</i>	<i>72.16</i>	<i>68.35</i>	<i>71.04</i>	<i>65.84</i>	<i>71.09</i>
<i>Robustas</i>	<i>23.94</i>	<i>27.84</i>	<i>31.65</i>	<i>28.96</i>	<i>34.16</i>	<i>28.91</i>
<u>EXPORTABLE PRODUCTION</u>	<u>100.00</u>	<u>100.00</u>	<u>100.00</u>	<u>100.00</u>	<u>100.00</u>	<u>100.00</u>
Colombian Milds	11.14	12.36	14.48	12.59	14.47	13.57
Other Milds	30.63	27.23	26.01	22.25	27.63	24.04
Brazilian Naturals	20.73	20.58	24.41	30.15	23.27	26.77
Robustas	37.50	39.83	35.11	35.00	34.63	35.62
<i>Arabicas</i>	<i>62.50</i>	<i>60.17</i>	<i>64.89</i>	<i>65.00</i>	<i>65.37</i>	<i>64.38</i>
<i>Robustas</i>	<i>37.50</i>	<i>39.83</i>	<i>35.11</i>	<i>35.00</i>	<i>34.63</i>	<i>35.62</i>
<u>GROSS OPENING STOCKS</u>	<u>100.00</u>	<u>100.00</u>	<u>100.00</u>	<u>100.01</u>	<u>100.00</u>	<u>100.00</u>
Colombian Milds	14.11	11.86	9.19	10.53	9.37	8.70
Other Milds	8.70	11.06	12.18	16.30	13.06	17.94
Brazilian Naturals	55.55	51.22	50.65	43.84	43.33	45.79
Robustas	21.64	25.86	27.97	29.33	34.24	27.57
<i>Arabicas</i>	<i>78.36</i>	<i>74.14</i>	<i>72.02</i>	<i>70.68</i>	<i>65.76</i>	<i>72.43</i>
<i>Robustas</i>	<i>21.64</i>	<i>25.86</i>	<i>27.97</i>	<i>29.33</i>	<i>34.24</i>	<i>27.57</i>
<u>TOTAL EXPORTS</u>	<u>100.00</u>	<u>100.00</u>	<u>100.00</u>	<u>100.00</u>	<u>100.00</u>	
Colombian Milds	11.69	12.97	13.89	13.23	13.11	
Other Milds	29.91	27.10	24.75	23.73	23.54	
Brazilian Naturals	22.29	20.82	26.85	28.78	27.34	
Robustas	36.12	39.12	34.50	34.26	36.00	
<i>Arabicas</i>	<i>63.88</i>	<i>60.88</i>	<i>65.50</i>	<i>65.74</i>	<i>64.00</i>	
<i>Robustas</i>	<i>36.12</i>	<i>39.12</i>	<i>34.50</i>	<i>34.26</i>	<i>36.00</i>	

Table 6: Gross opening stocks in exporting countries
Crop years 2000/01 to 2004/05

		(000 bags)				
Crop year commencing		2000	2001	2002	2003	2004
TOTAL		21 811	21 295	19 471	22 054	17 223
	<i>1 April</i>	<i>11 622</i>	<i>11 770</i>	<i>8 776</i>	<i>12 653</i>	<i>9 365</i>
Angola	(R)	5	15	5	30	40
Bolivia	(A)	6	6	6	6	6 1/
Brazil	(A/R)	10 225	10 654	8 088	11 256	8 264 2/
Burundi	(A/R)	81	9	49	49	49 1/
Ecuador	(A/R)	85	55	35	32	20 1/
Indonesia	(R/A)	793	490	150	822	572
Madagascar @	(R/A)	9	84	29	63	42
Malawi	(A)	9	3	3	1	1
Papua New Guinea	(A/R)	105	94	60	90	83
Paraguay	(A)	136	136	136	136	136 1/
Peru	(A)	157	214	205	147	133 3/
Rwanda	(A)	1	0	0	11	9
Zimbabwe	(A)	10	10	10	10	10 1/
	<i>1 July</i>	<i>1 523</i>	<i>1 447</i>	<i>1 309</i>	<i>1 088</i>	<i>1 144</i>
Congo, Rep. of @	(R)	0	0	0	0	0 1/
Cuba	(A)	126	130	103	60	60 1/
Dominican Republic	(A)	360	350	355	297	297 1/
Haiti	(A)	25	25	25	32	32 1/
Philippines	(R/A)	930	882	814	698	754
Tanzania	(A/R)	82	60	12	1	1 1/
Zambia	(A)	0	0	0	0	0 1/
	<i>1 October</i>	<i>8 666</i>	<i>8 078</i>	<i>9 386</i>	<i>8 313</i>	<i>6 714</i>
Benin @	(R)	0	0	0	0	0 1/
Cameroon @	(R/A)	118	11	11	11	11 1/
Central African Rep. @	(R)	37	43	8	58	58 1/
Colombia	(A)	2 095	1 790	1 764	1 775	1 221 4/
Congo, Dem.Rep. of	(R/A)	18	29	88	31	9
Costa Rica	(A)	319	212	242	279	304
Côte d'Ivoire @	(R)	552	811	701	936	689
El Salvador	(A)	235	126	176	141	129
Equatorial Guinea @	(R)	0	0	0	0	0 1/
Ethiopia	(A)	2 400	2 083	2 067	1 650	1 317
Gabon @	(R)	2	0	0	0	0 1/
Ghana	(R)	18	21	21	21	21 1/
Guatemala	(A/R)	80	306	345	150	154
Guinea	(R)	56	56	59	59	29 1/
Honduras	(A)	69	36	255	113	87
India	(A/R)	364	258	653	635	170 4/
Jamaica	(A)	21	17	9	13	13 1/
Kenya	(A)	412	130	278	295	98
Liberia	(R)	0	0	0	0	0 3/
Mexico	(A)	193	354	399	338	966 4/
Nicaragua	(A)	108	82	97	133	115
Nigeria	(R)	0	0	0	0	0 1/
Panama	(A)	42	75	90	79	79 3/
Sierra Leone	(R)	7	17	17	17	17 3/
Sri Lanka	(R/A)	15	25	25	25	25 3/
Thailand	(R)	116	124	79	112	90
Togo @	(R)	34	34	34	34	34 1/
Trinidad and Tobago	(R)	0	0	0	0	0 3/
Uganda	(R/A)	500	510	373	313	150
Venezuela	(A)	188	428	428	428	428 1/
Vietnam	(R)	667	500	1 167	667	500 1/
1/ Estimate to be confirmed by the Member						
2/ Excludes stocks held by the private sector						
3/ Estimated						
4/ Derived on the basis of production estimates made by the Member						

Table 7: Inventories and stocks of green coffee in selected importing countries at the end of December 2000 to 2004

(000 bags)

Importing Member	2000	2001	2002	2003	2004
<u>TOTAL</u>	<u>9 325</u>	<u>9 430</u>	<u>10 099</u>	<u>9 883</u>	<u>9 515</u>
U.S.A.	5 593	5 398	5 720	5 490	5 075
<i>European Community</i>	<i>2 037</i>	<i>2 297</i>	<i>2 356</i>	<i>2 308</i>	<i>2 303</i>
Austria	162	142	135	131	131
Belgium/Luxembourg	100	100	100	100	100
Denmark	89	89	89	89	89
Finland	101	90	77	94	83
France	379	612	747	678	649
Germany	400	400	400	400	400
Ireland	0	0	6	7	10
Italy	150	150	150	150	150
Netherlands	63	63	63	63	63
Portugal	124	106	111	111	111
Spain	250	250	250	250	250
Sweden	87	87	87	87	87
United Kingdom	132	208	141	148	180
<i>Other importing Members</i>	<i>1 695</i>	<i>1 735</i>	<i>2 023</i>	<i>2 085</i>	<i>2 137</i>
Japan	1 400	1 383	1 717	1 733	1 783
Norway	124	124	124	124	124
Switzerland	171	228	182	228	230

Table 8: Total exports by exporting countries
Calendar years 1999 to 2004

Exporting country	(000 bags)					
	1999	2000	2001	2002	2003	2004
TOTAL	85 772	89 468	90 364	88 477	85 867	89 623
<i>Colombian Milds</i>	<i>11 500</i>	<i>11 164</i>	<i>11 675</i>	<i>11 365</i>	<i>11 787</i>	<i>11 438</i>
<i>Other Milds</i>	<i>24 600</i>	<i>27 095</i>	<i>22 878</i>	<i>21 410</i>	<i>20 946</i>	<i>20 892</i>
<i>Brazilian Naturals</i>	<i>21 672</i>	<i>18 303</i>	<i>22 077</i>	<i>24 645</i>	<i>23 773</i>	<i>26 680</i>
<i>Robustas</i>	<i>28 000</i>	<i>32 906</i>	<i>33 734</i>	<i>31 057</i>	<i>29 361</i>	<i>30 613</i>
Angola	50	22	14	9	16	6
Bolivia	124	106	70	79	73	93
Brazil	23 151	18 016	23 172	28 161	25 694	26 410
Burundi	409	444	301	289	476	339
Colombia	9 995	9 177	9 944	10 273	10 244	10 194
Congo, Dem.Rep. of	374	334	154	201	194	228
Costa Rica	2 195	1 965	2 018	1 784	1 702	1 429
Cuba	77	113	109	57	50	25
Dominican Republic	161	155	95	112	145	46
Ecuador	988	697	756	565	623	704
El Salvador	1 890	2 537	1 533	1 533	1 304	1 325
Ethiopia	1 818	1 982	1 376	2 055	2 229	2 491
Ghana	102	32	45	23	21	14
Guatemala	4 681	4 852	4 110	3 491	3 821	3 310
Guinea	301	292	349	136	333	303
Haiti	72	72	87	41	37	16
Honduras	1 987	2 879	2 392	2 711	2 425	2 779
India	3 622	4 445	3 740	3 544	3 707	3 577
Indonesia	5 115	5 358	5 243	4 286	4 753	4 431
Jamaica	24	29	28	26	24	29
Kenya	1 114	1 328	1 082	736	920	751
Liberia	15	4	7	6	5	0
Malawi	54	61	64	44	49	26
Mexico	4 358	5 304	3 333	2 645	2 595	2 361
Nicaragua	984	1 367	1 365	955	1 013	1 311
Nigeria	9	7	7	5	8	3
<i>OAMCAF</i>	<i>4 544</i>	<i>8 017</i>	<i>5 596</i>	<i>4 234</i>	<i>3 692</i>	<i>3 730</i>
Cameroon	1 154	1 205	1 125	640	814	734
Central African Rep.	195	203	94	95	40	67
Cote d'Ivoire	2 406	6 110	4 095	3 253	2 647	2 603
Equatorial Guinea	1	-	0	0	0	0
Gabon	3	1	2	-	1	0
Madagascar	464	216	87	145	119	177
Togo	321	283	193	100	72	149
Panama	118	72	57	83	86	90
Papua New Guinea	1 320	1 043	1 095	1 057	1 147	1 048
Paraguay	5	5	1	6	4	6
Peru	2 407	2 362	2 663	2 789	2 503	3 184
Philippines	9	5	3	7	12	29
Rwanda	314	270	279	330	245	518
Sierra Leone	23	40	38	53	14	12
Sri Lanka	17	3	3	2	2	2
Tanzania	634	756	866	496	883	543
Thailand	493	970	1 117	117	226	403
Trinidad and Tobago	3	2	-	1	1	-
Uganda	3 841	2 513	3 060	3 358	2 522	2 627
Venezuela	464	38	26	192	210	161
Vietnam	7 727	11 615	13 946	11 771	11 631	14 859
Zambia	51	65	115	99	131	136
Zimbabwe	131	117	105	112	96	76

A dash "-" indicates less than 500 bags

Table 9: Total exports by exporting countries
Calendar years 1999 to 2004

(million US dollars)						
Exporting country	1999	2000	2001	2002	2003	2004
TOTAL	9 494	8 197	5 386	5 128	5 562	6 562
<i>Colombian Milds</i>	<i>1 672</i>	<i>1 416</i>	<i>1 017</i>	<i>978</i>	<i>1 040</i>	
<i>Other Milds</i>	<i>3 175</i>	<i>3 207</i>	<i>1 829</i>	<i>1 701</i>	<i>1 712</i>	
<i>Brazilian Naturals</i>	<i>2 422</i>	<i>1 876</i>	<i>1 417</i>	<i>1 312</i>	<i>1 477</i>	
<i>Robustas</i>	<i>2 224</i>	<i>1 698</i>	<i>1 123</i>	<i>1 136</i>	<i>1 333</i>	
Angola	4	1	1	3	1	-
Bolivia	14	14	9	9	6	6
Brazil	2 461	1 772	1 412	1 370	1 533	2 013
Burundi	42	39	20	17	26	30
Colombia	1 422	1 196	870	874	903	1 060
Congo, Dem.Rep. of	28	13	6	5	7	12
Costa Rica	326	260	171	157	163	150
Cuba	12	18	11	7	6	3
Dominican Republic	24	22	11	13	17	6
Ecuador	78	46	44	42	36	59
El Salvador	245	302	116	105	103	121
Ethiopia	264	251	141	161	173	228
Ghana	8	2	2	1	1	1
Guatemala	587	571	305	270	297	328
Guinea	29	19	16	6	15	11
Haiti	8	8	7	3	4	1
Honduras	256	335	161	184	183	251
India	384	417	245	243	239	238
Indonesia	437	312	216	278	235	155
Jamaica	24	33	31	32	29	36
Kenya	193	148	96	76	93	98
Liberia	1	-	-	-	-	0
Malawi	5	5	4	2	3	2
Mexico	581	647	290	232	246	249
Nicaragua	141	172	105	80	93	129
Nigeria	1	-	-	-	1	-
<i>OAMCAF</i>	<i>393</i>	<i>475</i>	<i>236</i>	<i>192</i>	<i>214</i>	<i>179</i>
Cameroon	92	77	55	42	62	54
Central African Rep.	14	9	3	2	1	3
Cote d'Ivoire	231	367	169	139	143	111
Equatorial Guinea	-	-	0	0	0	0
Gabon	-	-	-	-	-	0
Madagascar	30	8	3	5	4	5
Togo	25	14	6	4	3	6
Panama	15	9	7	10	9	11
Papua New Guinea	156	107	77	73	87	89
Paraguay	-	-	-	-	-	1
Peru	265	222	180	188	162	290
Philippines	1	-	-	1	2	3
Rwanda	41	35	34	16	15	27
Sierra Leone	2	2	1	2	1	-
Sri Lanka	2	-	-	-	-	-
Tanzania	79	79	62	33	58	30
Thailand	39	47	31	8	13	13
Trinidad and Tobago	1	1	-	-	-	-
Uganda	274	125	98	98	104	121
Venezuela	57	7	4	14	15	14
Vietnam	563	459	343	303	450	578
Zambia	9	8	10	8	9	12
Zimbabwe	24	15	10	10	8	6

1/ Data are partial for some countries

A dash "-" indicates less than US\$500,000

**Table 10: Domestic consumption in selected exporting countries
Crop years 2000 to 2004**

(000 bags)

Crop year commencing	2000	2001	2002	2003	2004
<u>TOTAL</u>	<u>25 940</u>	<u>27 206</u>	<u>27 314</u>	<u>27 967</u>	<u>28 523</u>
Brazil	13 000	13 250	13 500	13 750	14 250
Indonesia	1 667	2 000	1 833	2 000	2 000
Ethiopia	1 667	1 833	1 833	1 833	1 833
Mexico	1 305	1 500	1 500	1 500	1 500
Colombia	1400	1 400	1 400	1 300	1 300
India	917	1134	1134	1134	1134
Philippines	820	821	829	917	917
Venezuela	690	690	690	690	690
Thailand	500	500	500	500	500
Vietnam	500	500	500	500	500
Madagascar @	90	128	217	333	433
Dominican Republic	325	340	340	378	378
Haiti	340	340	340	340	340
Cote d'Ivoire @	317	317	317	317	317
Guatemala	300	300	300	300	300
Cuba	213	220	224	224	224
Congo, Dem. Rep. of	200	200	200	200	200
Honduras	230	200	200	200	200
Costa Rica	249	255	225	272	192
Nicaragua	176	181	185	190	190
Uganda	120	150	150	150	160
El Salvador	101	144	153	153	153
Ecuador	200	200	150	150	150
Others	613	603	594	636	662

**Table 11: Trade and consumption in importing countries
Calendar years 2000 to 2004**

	(million bags)				
	2000	2001	2002	2003	2004 1/
Importing Members					
a. Imports	85 585	85 371	87 077	89 152	92 073
b. Re-exports	17 922	19 716	20 963	22 104	23 255
c. Net Imports (a)-(b)	67 663	65 655	66 114	67 048	68 818
d. Inventories of green coffee at the end of year	9 325	9 430	10 099	9 883	9 515
e. Disappearance	64 312	65 550	65 445	67 264	69 186
Non-members					
Net imports	14 593	16 185	17 101	17 000	17 000
Consumption by country					
All importing countries	78 905	81 735	82 546	84 264	86 186
<i>European Union</i>	<i>37 643</i>	<i>37 744</i>	<i>38 186</i>	<i>38 463</i>	<i>39 838</i>
Austria	888	1 049	952	757	1 025
Belgium/Luxembourg	1 304	987	1 635	1 719	1 458
Czech Republic	551	655	646	556	545
Denmark	784	863	806	728	850
Finland	972	952	974	971	1 041
France	5 400	5 241	5 492	5 428	4 999
Germany	9 183	9 468	9 064	9 133	10 741
Greece	713	579	865	1 003	927
Hungary	732	739	710	612	560
Italy	5 163	5 252	5 180	5 503	5 405
Netherlands	1 911	1 732	1 641	1 827	1 599
Poland	1 765	1 958	1 952	2 096	2 203
Portugal	681	768	739	745	771
Spain	3 058	2 869	2 908	2 826	2 790
Sweden	1 182	1 259	1 235	1 181	1 241
United Kingdom	2 363	2 185	2 202	2 189	2 387
Other EU members	993	1 188	1 185	1 189	1 296
Japan	6 626	6 935	6 874	6 770	7 142
Norway	658	711	692	682	709
Switzerland	826	819	824	844	711
USA	18 558	19 343	18 870	20 505	20 783

1/ Includes estimates

Table 12: Percapita consumption in importing countries
Calendar years 2000 to 2004

	(kilograms)				
	2000	2001	2002	2003	2004
TOTAL	4.43	4.49	4.47	4.57	4.69
U.S.A.	3.96	4.09	3.95	4.25	4.26
<i>European Community</i>	<i>5.01</i>	<i>5.00</i>	<i>5.06</i>	<i>5.09</i>	<i>5.27</i>
Austria	6.57	7.74	7.10	5.64	7.64
Belgium/Luxembourg	7.32	5.52	9.13	9.60	8.15
Cyprus	5.23	4.18	3.98	4.00	4.44
Czech Republic	3.22	3.85	3.80	3.27	3.21
Denmark	8.84	9.66	8.97	8.10	9.46
Estonia	4.34	4.85	4.94	5.21	5.47
Finland	11.26	11.01	11.22	11.18	11.99
France	5.50	5.31	5.54	5.48	5.04
Germany	6.70	6.90	6.59	6.64	7.81
Greece	4.27	3.47	5.18	6.01	5.55
Hungary	4.38	4.35	4.19	3.64	3.33
Ireland	1.31	2.29	2.08	2.28	3.27
Italy	5.36	5.44	5.41	5.73	5.63
Latvia	2.84	3.97	3.87	4.38	4.25
Lithuania	2.95	3.50	3.60	3.05	3.26
Malta	2.92	2.31	3.90	3.00	3.30
Netherlands	7.21	6.47	6.10	6.76	5.91
Poland	2.74	3.04	3.03	3.29	3.46
Portugal	4.08	4.47	4.28	4.29	4.44
Slovakia	2.92	3.45	3.32	3.55	3.56
Slovenia	5.34	5.82	6.03	5.46	6.03
Spain	4.60	4.27	4.27	4.08	4.03
Sweden	8.00	8.49	8.31	7.88	8.28
United Kingdom	2.37	2.19	2.23	2.23	2.43
<i>Other importing countries</i>	<i>3.51</i>	<i>3.66</i>	<i>3.62</i>	<i>3.57</i>	<i>3.68</i>
Japan	3.13	3.27	3.24	3.18	3.36
Norway	8.79	9.46	9.15	8.95	9.31
Switzerland	6.90	6.80	6.78	6.90	5.81

1/ Estimated

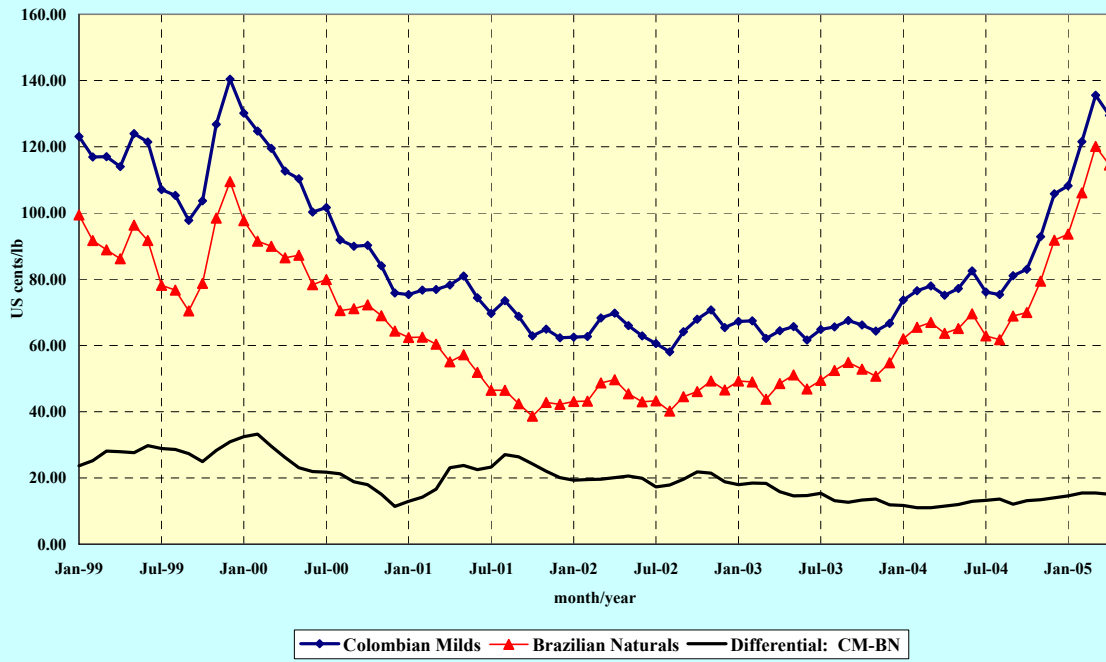
Graph 1: ICO composite indicator price
Monthly average: January 1999 to April 2005



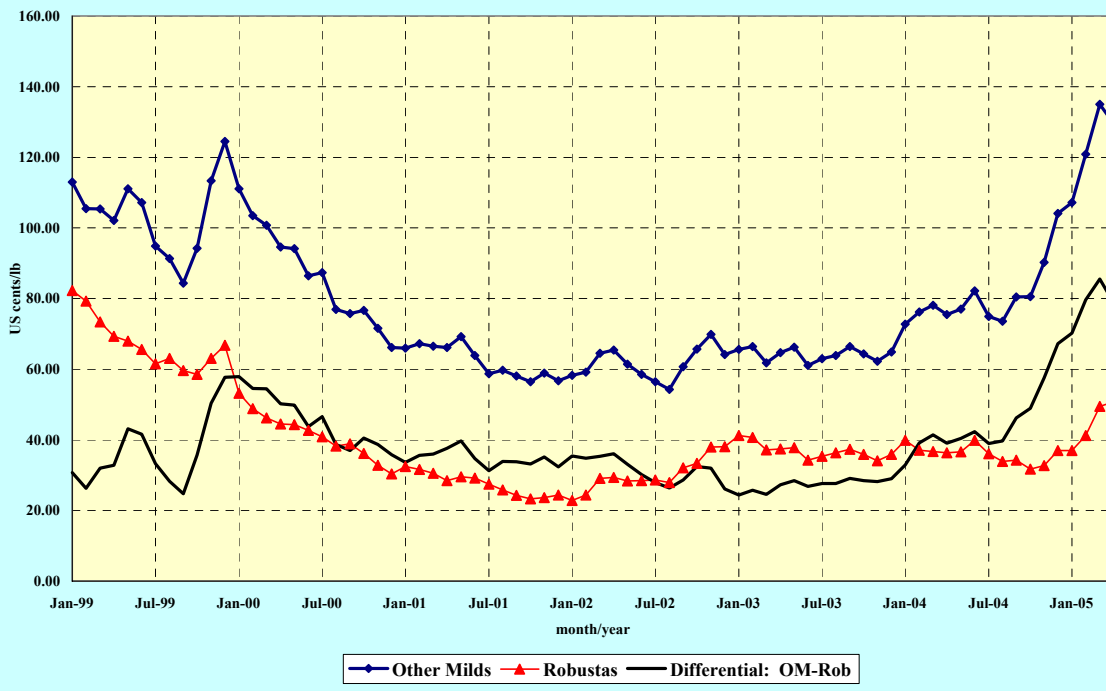
Graph 2: ICO daily composite indicator price
5 January to 12 May 2005



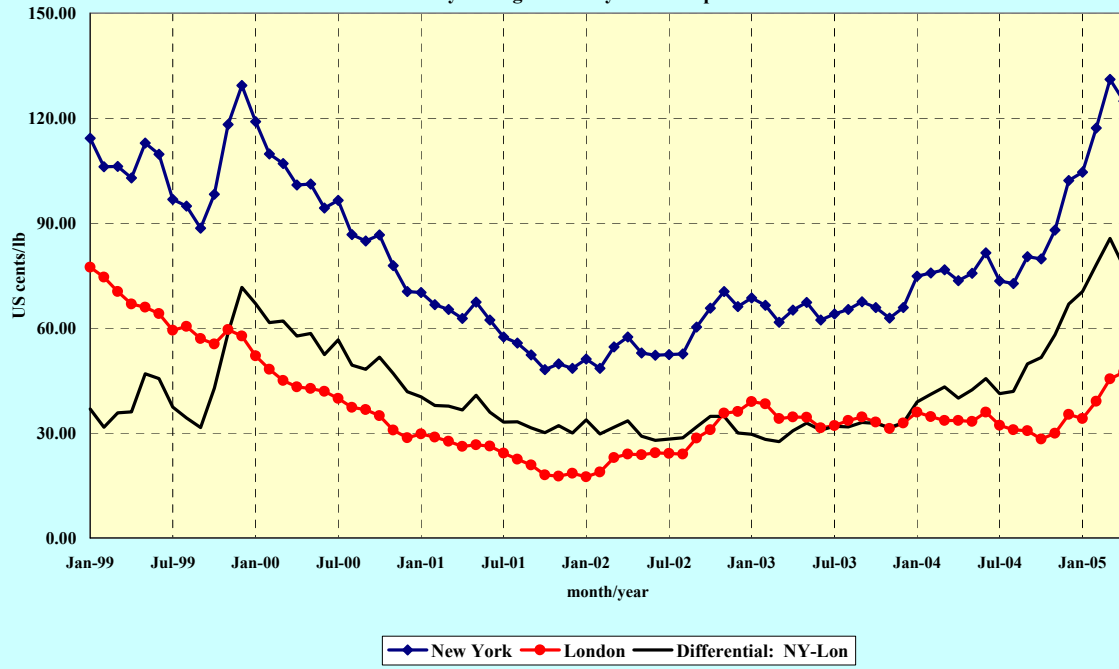
Graph 3: Colombian Milds; Brazilian Naturals and differential (CM-BN)
 Monthly averages: January 1999 to April 2005



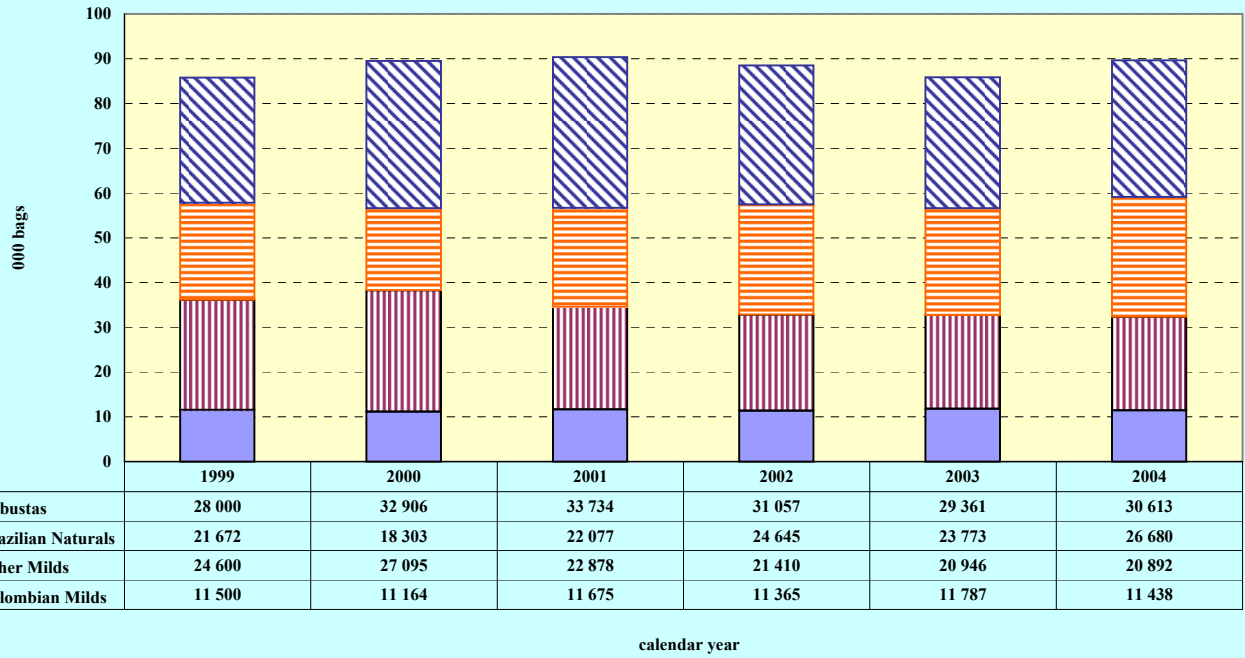
Graph 4: Other Milds, Robustas and differential (OM-Rob)
 Monthly averages: January 1999 to April 2005



Graph 5: New York and London terminal markets
 Average of 2nd and 3rd positions and differential (NY-Lon)
 Monthly averages: January 1999 to April 2005



Graph 6: Total exports by group
Calendar years 1999 to 2004



calendar year

Colombian Milds
 Other Milds
 Brazilian Naturals
 Robustas