The World of Coffee in 2017

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About Coffee

Coffee producing and consuming countries

[Map of the world showing countries producing and consuming coffee]
About Coffee

Coffee consumption development is insensitive to economic events

World Economic growth in % p.a.

World coffee consumption in mln. bags of 60 kilos

- Economic crisis of the 80s
- Japan Crisis
- Asia Crisis
- 9/11
- Financial & economic crisis
- Euro Crisis
Total coffee demand and per-capita demand in selected countries

Demand

<table>
<thead>
<tr>
<th>Mln bags</th>
<th>kg</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>21.3</td>
</tr>
<tr>
<td>Germany</td>
<td>8.6</td>
</tr>
<tr>
<td>Japan</td>
<td>7.4</td>
</tr>
<tr>
<td>Italy</td>
<td>5.2</td>
</tr>
<tr>
<td>Canada</td>
<td>0.7</td>
</tr>
<tr>
<td>Sweden</td>
<td>1.6</td>
</tr>
<tr>
<td>Russia</td>
<td>4.1</td>
</tr>
<tr>
<td>Poland</td>
<td>2.6</td>
</tr>
<tr>
<td>Argentina</td>
<td>0.7</td>
</tr>
<tr>
<td>Hungary</td>
<td>0.5</td>
</tr>
<tr>
<td>Chile</td>
<td>0.3</td>
</tr>
<tr>
<td>Brazil</td>
<td>20.8</td>
</tr>
<tr>
<td>Indonesia</td>
<td>3.9</td>
</tr>
<tr>
<td>Mexico</td>
<td>2.0</td>
</tr>
<tr>
<td>Colombia</td>
<td>1.6</td>
</tr>
<tr>
<td>Honduras</td>
<td>0.2</td>
</tr>
</tbody>
</table>

Demand 2012 (in mln bags)
Demand per Capita (in kg)
## Coffee demand in selected countries “Top 10”

<table>
<thead>
<tr>
<th>No.</th>
<th>Country</th>
<th>Demand 2011</th>
<th>in %</th>
<th>Demand 2012</th>
<th>in %</th>
<th>Change 2011-2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>United States of America</td>
<td>21,374,000</td>
<td>15.8%</td>
<td>21,304,200</td>
<td>15.4%</td>
<td>-0.3%</td>
</tr>
<tr>
<td>2</td>
<td>Brazil</td>
<td>20,169,000</td>
<td>14.9%</td>
<td>20,409,100</td>
<td>14.8%</td>
<td>1.2%</td>
</tr>
<tr>
<td>3</td>
<td>Germany</td>
<td>8,604,000</td>
<td>6.4%</td>
<td>8,605,600</td>
<td>6.2%</td>
<td>0.0%</td>
</tr>
<tr>
<td>4</td>
<td>Japan</td>
<td>7,207,000</td>
<td>5.3%</td>
<td>7,236,100</td>
<td>5.2%</td>
<td>0.4%</td>
</tr>
<tr>
<td>5</td>
<td>Italy</td>
<td>5,203,000</td>
<td>3.9%</td>
<td>5,149,600</td>
<td>3.7%</td>
<td>-1.0%</td>
</tr>
<tr>
<td>6</td>
<td>France</td>
<td>4,909,000</td>
<td>3.6%</td>
<td>4,927,400</td>
<td>3.6%</td>
<td>0.4%</td>
</tr>
<tr>
<td>7</td>
<td>Russia</td>
<td>4,100,000</td>
<td>3.0%</td>
<td>4,223,000</td>
<td>3.1%</td>
<td>3.0%</td>
</tr>
<tr>
<td>8</td>
<td>Indonesia</td>
<td>3,397,000</td>
<td>2.5%</td>
<td>3,804,700</td>
<td>2.8%</td>
<td>12.0%</td>
</tr>
<tr>
<td>9</td>
<td>Canada</td>
<td>3,124,000</td>
<td>2.3%</td>
<td>3,124,200</td>
<td>2.3%</td>
<td>0.0%</td>
</tr>
<tr>
<td>10</td>
<td>United Kingdom</td>
<td>2,997,000</td>
<td>2.2%</td>
<td>3,044,600</td>
<td>2.2%</td>
<td>1.6%</td>
</tr>
<tr>
<td></td>
<td><strong>Total Top 10</strong></td>
<td><strong>81,084,000</strong></td>
<td><strong>60.0%</strong></td>
<td><strong>81,828,500</strong></td>
<td><strong>59.3%</strong></td>
<td><strong>0.9%</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Total Other</strong></td>
<td><strong>53,968,000</strong></td>
<td><strong>40.0%</strong></td>
<td><strong>56,071,500</strong></td>
<td><strong>40.7%</strong></td>
<td><strong>3.9%</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Total Demand</strong></td>
<td><strong>135,052,000</strong></td>
<td><strong>100.0%</strong></td>
<td><strong>137,900,000</strong></td>
<td><strong>100.0%</strong></td>
<td><strong>2.1%</strong></td>
</tr>
</tbody>
</table>
## Coffee demand in selected countries “Top 20”

<table>
<thead>
<tr>
<th>No.</th>
<th>Country</th>
<th>Demand 2011</th>
<th>in %</th>
<th>Demand 2012</th>
<th>in %</th>
<th>Change 2011-2012</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Total Top 10</td>
<td>81,084,000</td>
<td>60.0%</td>
<td>81,828,500</td>
<td>59.2%</td>
<td>0.9%</td>
</tr>
<tr>
<td>11</td>
<td>Spain</td>
<td>2,870,000</td>
<td>2.1%</td>
<td>2,812,600</td>
<td>2.0%</td>
<td>-2.0%</td>
</tr>
<tr>
<td>12</td>
<td>Poland</td>
<td>2,527,000</td>
<td>1.9%</td>
<td>2,610,600</td>
<td>1.9%</td>
<td>3.3%</td>
</tr>
<tr>
<td>13</td>
<td>Netherlands</td>
<td>2,369,000</td>
<td>1.8%</td>
<td>2,372,700</td>
<td>1.7%</td>
<td>0.2%</td>
</tr>
<tr>
<td>14</td>
<td>Algeria</td>
<td>2,194,000</td>
<td>1.6%</td>
<td>2,232,300</td>
<td>1.6%</td>
<td>1.7%</td>
</tr>
<tr>
<td>15</td>
<td>Mexico</td>
<td>2,016,000</td>
<td>1.5%</td>
<td>2,171,800</td>
<td>1.6%</td>
<td>7.7%</td>
</tr>
<tr>
<td>16</td>
<td>Philippines</td>
<td>1,809,000</td>
<td>1.3%</td>
<td>1,993,400</td>
<td>1.4%</td>
<td>10.2%</td>
</tr>
<tr>
<td>17</td>
<td>Ethiopia</td>
<td>1,650,000</td>
<td>1.2%</td>
<td>1,650,000</td>
<td>1.2%</td>
<td>0.0%</td>
</tr>
<tr>
<td>18</td>
<td>Sweden</td>
<td>1,593,000</td>
<td>1.2%</td>
<td>1,599,600</td>
<td>1.2%</td>
<td>0.4%</td>
</tr>
<tr>
<td>19</td>
<td>India</td>
<td>1,558,000</td>
<td>1.2%</td>
<td>1,480,600</td>
<td>1.1%</td>
<td>-5.0%</td>
</tr>
<tr>
<td>20</td>
<td>Colombia</td>
<td>1,549,000</td>
<td>1.1%</td>
<td>1,566,400</td>
<td>1.1%</td>
<td>1.1%</td>
</tr>
<tr>
<td></td>
<td>Total Top 20</td>
<td>101,219,000</td>
<td>74.9%</td>
<td>102,318,500</td>
<td>74.2%</td>
<td>1.1%</td>
</tr>
<tr>
<td></td>
<td>Total Other</td>
<td>33,833,000</td>
<td>25.1%</td>
<td>35,581,500</td>
<td>25.8%</td>
<td>5.2%</td>
</tr>
<tr>
<td></td>
<td>Total Demand</td>
<td>135,052,000</td>
<td>100.0%</td>
<td>137,900,000</td>
<td>100.0%</td>
<td>2.1%</td>
</tr>
</tbody>
</table>
World coffee demand by quality groups 2012

World Coffee Demand: 137.9 mln bags
- Total washed Arabica: 40.4 mln bags (29%)
- Total unwashed Arabica: 40.4 mln bags (29%)
- Total Robusta: 57.1 mln bags (42%)
World coffee demand 2012 and 2017 forecast

In mln bags of 60 kilo

- **North America**: 24.4 → 25.4
- **Western Europe**: 36.2 → 36.2
- **Eastern Europe**: 13.6 → 15.2
- **Middle East**: 4.0 → 4.5
- **South America**: 24.9 → 28.9
- **Central America**: 4.9 → 5.1
- **Africa**: 6.2 → 6.5
- **Asia**: 24.6 → 34.3

Coffee Demand 2012: 137.9
Coffee Demand 2017: 156.0 (+2.5% p.a.)
Asia coffee demand 2012 & 2017 trend

In mln bags of 60 kilo

- India: 1.5 mln bags, +3%
- Australia: 1.2 mln bags, +4%
- Japan: 7.2 mln bags, +0.4%
- Philippines: 2.0 mln bags, +8%
- Thailand: 1.4 mln bags, +10%
- China: 1.6 mln bags, +3%
- Vietnam: 1.5 mln bags, +11%
- S. Korea: 1.6 mln bags, +3%
- Indonesia: 3.8 mln bags, +15%
- Malaysia: 0.6 mln bags, +13%
- S. Korea: 1.6 mln bags, +3%
- Other: 0.8 mln bags, +7.8%
Asia coffee demand 2012 & 2017 forecast

In mln bags of 60 kilo

- **Indonesia**: 3.8 → 7.7
- **India**: 1.5 → 1.7
- **Thailand**: 1.4 → 2.2
- **Vietnam**: 1.5 → 2.5
- **Malaysia**: 0.6 → 1.0
- **China**: 1.2 → 1.8 → 2.5
- **S. Korea**: 1.6 → 1.8
- **Japan**: 7.2 → 7.4
- **Other**: 0.8 → 1.5
- **Philippines**: 2.0 → 2.9
- **Vietnam**: 1.5 → 2.5
- **Australia**: 1.2 → 1.4
Asia coffee demand per capita in 2017

In kg per Capita

- China: 3.6 kg
- S. Korea: 2.3 kg
- India: 0.2 kg
- Japan: 3.6 kg
- Vietnam: 3.5 kg
- Philippines: 2.5 kg
- Malaysia: 3.5 kg
- Indonesia: 3.5 kg
- Australia: 3.4 kg

Source Population: United Nations
Supply

Top 10 coffee producing countries by coffee year 2017/18

In mln bags of 60kg

- Brazil: 61.0
- Vietnam: 30.0
- Colombia: 13.0
- Indonesia: 11.0
- Honduras: 7.5
- Ethiopia: 6.5
- India: 6.0
- Mexico: 5.0
- Peru: 4.9
- Guatemala: 4.1
Supply

Yield in bags per hectare (2012)

In bags of 60kg/ha

Vietnam: 40.1
Brazil: 24.2
Costa Rica: 19.9
Honduras: 18.2
Guatemala: 13.9
Peru: 13.7
India: 13.1
Uganda: 11.5
PNG: 10.7
Ethiopia: 10.1
Colombia: 9.3
El Salvador: 8.4
Indonesia: 7.1
Mexico: 6.4
Kenya: 4.7
Tanzania: 4.1
Ivory Coast: 2.3

Average = 12 bags/ha
Supply

World coffee production at world’s average yield of **12.2 bags/ha**

In mln bags of 60kg

- **Mexico**: 8.3
- **Colombia**: 10.1
- **CIV (Cameroun)**: 9.2
- **Kenya**: 2.1
- **Tanzania**: 2.9
- **Indonesia**: 14.8
Supply

World coffee production at Costa Rican yield of 20 bags/ha

In mln bags of 60kg

- Mexico: 13.5
- Colombia: 17.3
- Ethiopia: 15.0
- Cameroon: 7.6
- CIV: 3.5
- Tanzania: 4.7
- India: 8.1
- Kenya: 3.5
- Indonesia: 24.2
Importance of coffee sector for various countries

FOB export values of coffee exporting companies

In mln USD

Source: NKG Stat. Unit, ICO (Indicator Prices)
Importance of coffee sector for various countries

Coffee currencies - performance versus USD (2012 Year to date)

In %

- Brazilian Real Spot -7.6
- Indonesian Rupiah Spot -4.4
- Indian Rupee Spot -3.8
- CFA Franc Beac -3.2
- Ethiopian Birr Spot -3.3
- Nicaragua Cordoba Spot -3.1
- Honduras Lempira Spot -2.9
- Ugandan Shilling Spot -1.5
- Guatemala Quetzal Spot -0.7
- Tanzanian Shilling Spot 0.4
- Vietnamese Dong Spot 1.5
- Kenyan Shilling Spot 1.4
- Costa Rican Colon Spot 3.1
- Peruvian New Sol Spot 2.9
- Papua N.G. Kina Spot 3.8
- Mexican Peso Spot 6.6
- Colombian Peso Spot 6.8
Importance of coffee sector for various countries

FOB export values of coffee exporting companies

In mln USD

Source: NKG Stat. Unit, ICO (Indicator Prices)
# Importance of coffee sector for various countries

## Crop projection in major coffee producing countries

<table>
<thead>
<tr>
<th>Country</th>
<th>Variety</th>
<th>Production in 60 kilo bags (11/12 &amp; 12/13)</th>
<th>Total Ha under prod/harv.</th>
<th>Number of Producers</th>
<th>Yield per Hectar</th>
<th>Possible further yield increase</th>
<th>Possible extension of coffee areas</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Mexico</strong></td>
<td>Arabica (93%) &amp; Robusta (7%)</td>
<td>4,300,000</td>
<td>675,258</td>
<td>510,544</td>
<td>6.4 bags</td>
<td><img src="green" alt="arrow" /></td>
<td><img src="green" alt="arrow" /></td>
</tr>
<tr>
<td><strong>Guatemala</strong></td>
<td>Arabica</td>
<td>3,820,000</td>
<td>276,000</td>
<td>62,649</td>
<td>13.9 bags</td>
<td><img src="green" alt="arrow" /></td>
<td><img src="green" alt="arrow" /></td>
</tr>
<tr>
<td><strong>Honduras</strong></td>
<td>Arabica</td>
<td>3,980,000</td>
<td>280,000</td>
<td>86,937</td>
<td>18.2 bags</td>
<td><img src="green" alt="arrow" /></td>
<td><img src="green" alt="arrow" /></td>
</tr>
<tr>
<td><strong>El Salvador</strong></td>
<td>Arabica</td>
<td>1,470,000</td>
<td>160,969</td>
<td>23,488</td>
<td>8.4 bags</td>
<td><img src="green" alt="arrow" /></td>
<td><img src="green" alt="arrow" /></td>
</tr>
<tr>
<td><strong>Costa Rica</strong></td>
<td>Arabica</td>
<td>1,570,000</td>
<td>93,000</td>
<td>49,923</td>
<td>19.9 bags</td>
<td><img src="green" alt="arrow" /></td>
<td><img src="green" alt="arrow" /></td>
</tr>
<tr>
<td><strong>Colombia</strong></td>
<td>Arabica</td>
<td>8,000,000</td>
<td>869,000</td>
<td>527,609</td>
<td>9.3 bags</td>
<td><img src="green" alt="arrow" /></td>
<td><img src="green" alt="arrow" /></td>
</tr>
<tr>
<td><strong>Peru</strong></td>
<td>Arabica</td>
<td>3,860,000</td>
<td>310,000</td>
<td>150,000</td>
<td>13.7 bags</td>
<td><img src="green" alt="arrow" /></td>
<td><img src="green" alt="arrow" /></td>
</tr>
<tr>
<td><strong>Kenya</strong></td>
<td>Arabica</td>
<td>767,000</td>
<td>175,000</td>
<td>436,682</td>
<td>4.7 bags</td>
<td><img src="green" alt="arrow" /></td>
<td><img src="green" alt="arrow" /></td>
</tr>
<tr>
<td><strong>Tanzania</strong></td>
<td>Arabica</td>
<td>920,000</td>
<td>235,200</td>
<td>475,000</td>
<td>4.1 bags</td>
<td><img src="green" alt="arrow" /></td>
<td><img src="green" alt="arrow" /></td>
</tr>
<tr>
<td><strong>PNG</strong></td>
<td>Arabica</td>
<td>1,087,000</td>
<td>90,000</td>
<td>90,000</td>
<td>10.7 bags</td>
<td><img src="green" alt="arrow" /></td>
<td><img src="green" alt="arrow" /></td>
</tr>
<tr>
<td><strong>Ivory Coast</strong></td>
<td>Robusta</td>
<td>1,883,000</td>
<td>750,000</td>
<td>250,000</td>
<td>2.3 bags</td>
<td><img src="green" alt="arrow" /></td>
<td><img src="green" alt="arrow" /></td>
</tr>
<tr>
<td><strong>Cameroon</strong></td>
<td>Robusta</td>
<td>650,000</td>
<td>380,000</td>
<td>200,000</td>
<td>1.5 bags</td>
<td><img src="green" alt="arrow" /></td>
<td><img src="green" alt="arrow" /></td>
</tr>
<tr>
<td><strong>Uganda</strong></td>
<td>Arabica (20%) &amp; Robusta (80%)</td>
<td>2,937,000</td>
<td>272,000</td>
<td>500,000</td>
<td>11.5 bags</td>
<td><img src="green" alt="arrow" /></td>
<td><img src="green" alt="arrow" /></td>
</tr>
<tr>
<td><strong>India</strong></td>
<td>Arabica (35%) &amp; Robusta (65%)</td>
<td>5,117,000</td>
<td>404,645</td>
<td>269,565</td>
<td>13.1 bags</td>
<td><img src="green" alt="arrow" /></td>
<td><img src="green" alt="arrow" /></td>
</tr>
<tr>
<td><strong>Vietnam</strong></td>
<td>Arabica (2%) &amp; Robusta (98%)</td>
<td>19,943,000</td>
<td>625,000</td>
<td>550,000</td>
<td>40.9 bags</td>
<td><img src="green" alt="arrow" /></td>
<td><img src="green" alt="arrow" /></td>
</tr>
<tr>
<td><strong>Indonesia</strong></td>
<td>Arabica (35%) &amp; Robusta (65%)</td>
<td>9,703,000</td>
<td>1,210,000</td>
<td>1,100,000</td>
<td>7.1 bags</td>
<td><img src="green" alt="arrow" /></td>
<td><img src="green" alt="arrow" /></td>
</tr>
<tr>
<td><strong>Brazil</strong></td>
<td>Arabica (65%) &amp; Robusta (35%)</td>
<td>51,270,000</td>
<td>2,150,000</td>
<td>300,000</td>
<td>24.2 bags</td>
<td><img src="green" alt="arrow" /></td>
<td><img src="green" alt="arrow" /></td>
</tr>
<tr>
<td><strong>Ethiopia</strong></td>
<td>Arabica (unwashed &amp; washed)</td>
<td>4,670,000</td>
<td>500,000</td>
<td>1,200,000</td>
<td>10.1 bags</td>
<td><img src="green" alt="arrow" /></td>
<td><img src="green" alt="arrow" /></td>
</tr>
</tbody>
</table>
What else?
Thank you for your kind attention!
Neumann Gruppe

David M. Neumann

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