



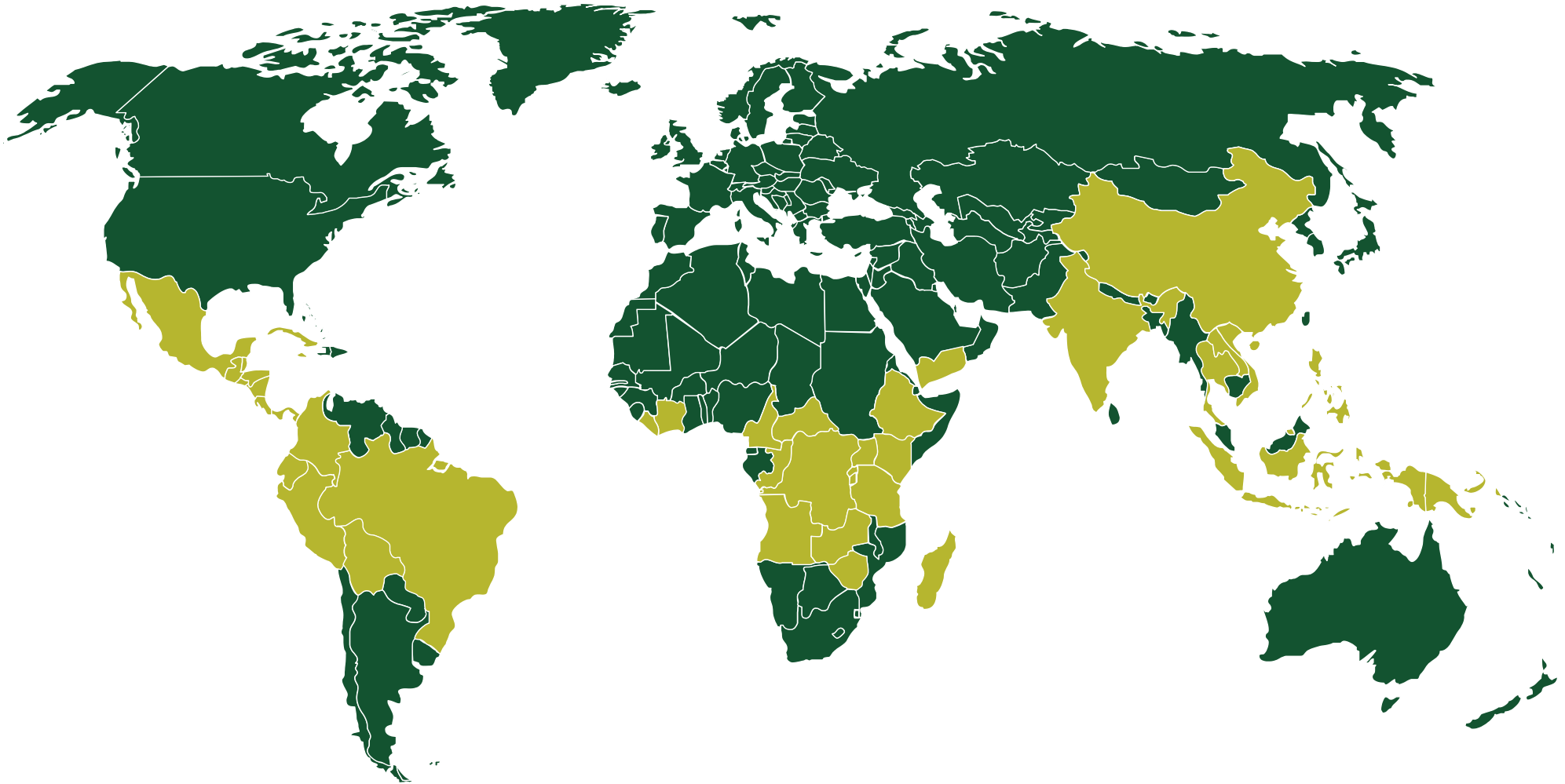
## The World of Coffee in 2017

David M. Neumann, CEO, Neumann Kaffee Gruppe

November 8, 2012

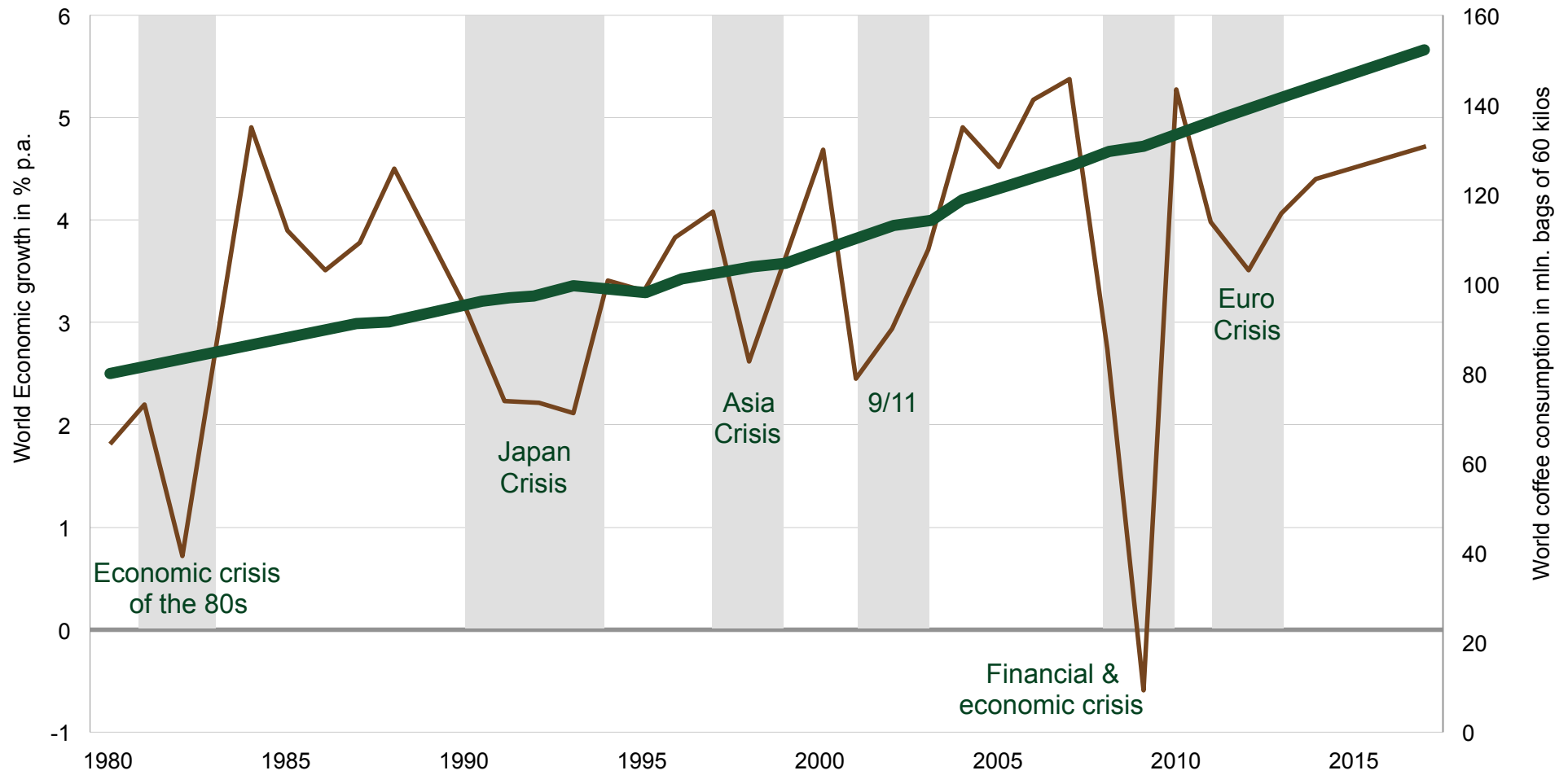


## Coffee producing and consuming countries



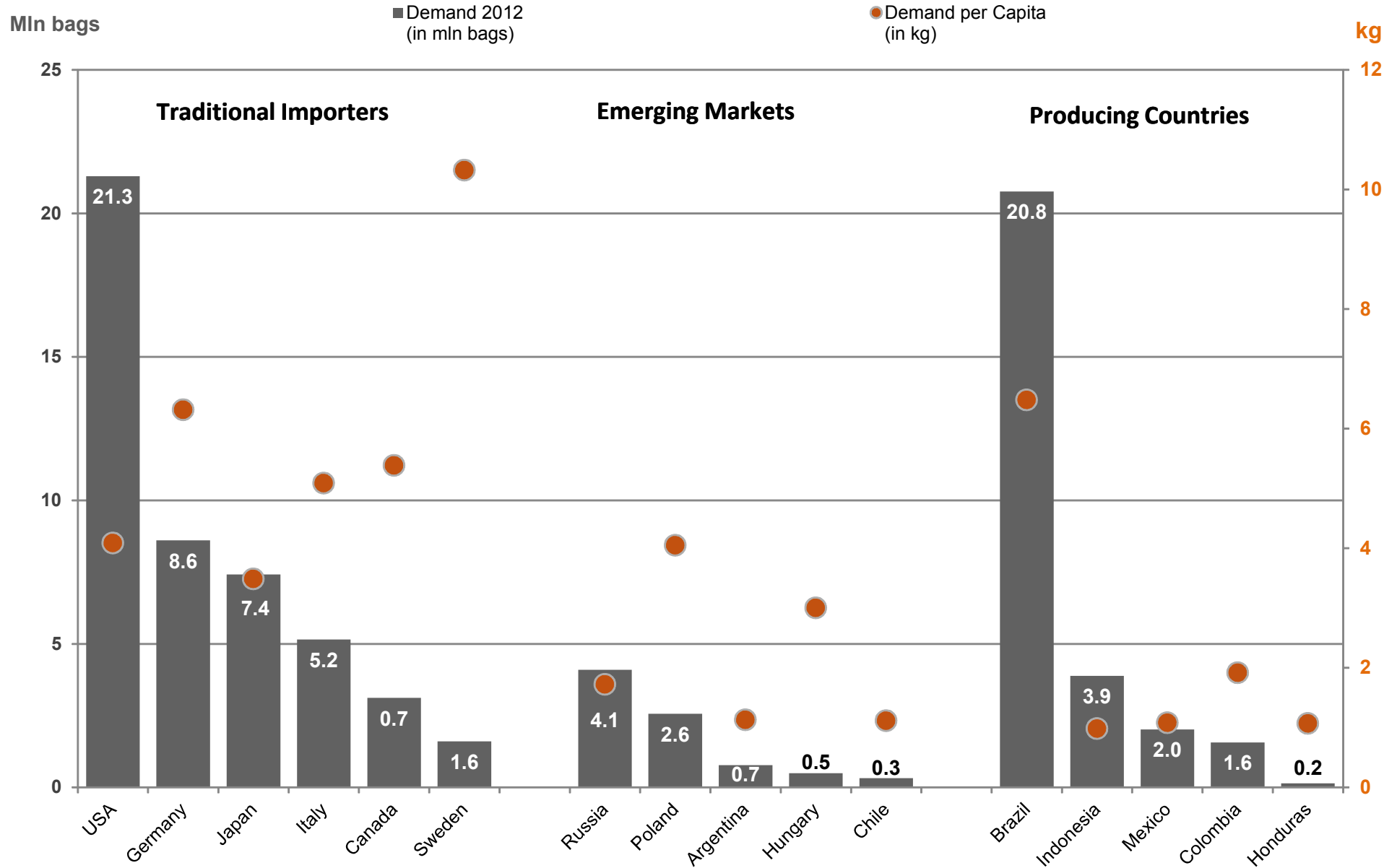


## Coffee consumption development is insensitive to economic events





## Total coffee demand and per-capita demand in selected countries





## Coffee demand in selected countries “Top 10”

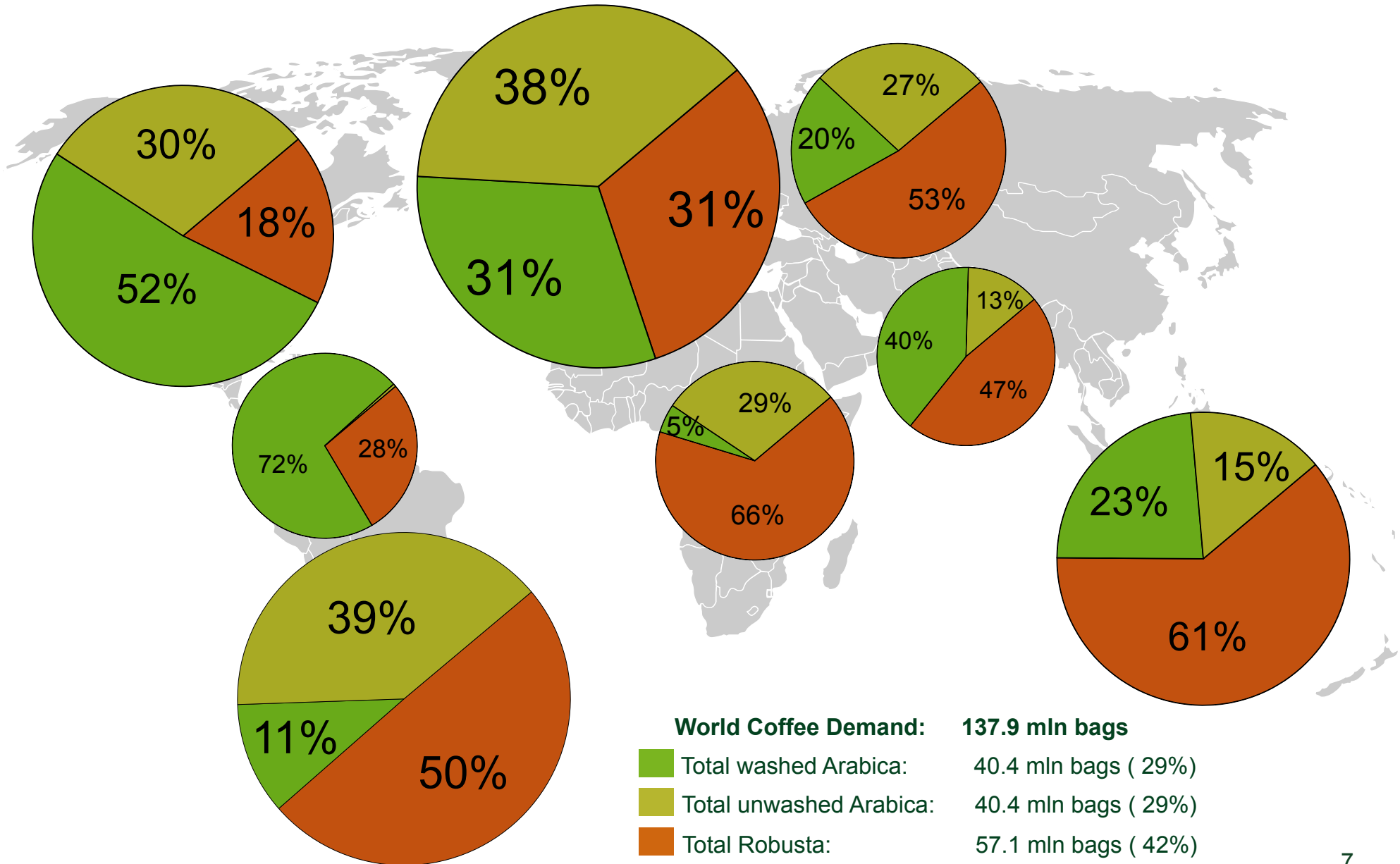
No.	Country	Demand 2011	in %	Demand 2012	in %	Change 2011-2012
1	United States of America	21,374,000	<b>15.8%</b>	21,304,200	<b>15.4%</b>	-0.3%
2	Brazil	20,169,000	<b>14.9%</b>	20,409,100	<b>14.8%</b>	1.2%
3	Germany	8,604,000	<b>6.4%</b>	8,605,600	<b>6.2%</b>	0.0%
4	Japan	7,207,000	<b>5.3%</b>	7,236,100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

## Coffee demand in selected countries “Top 20”

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



World coffee demand by quality groups 2012

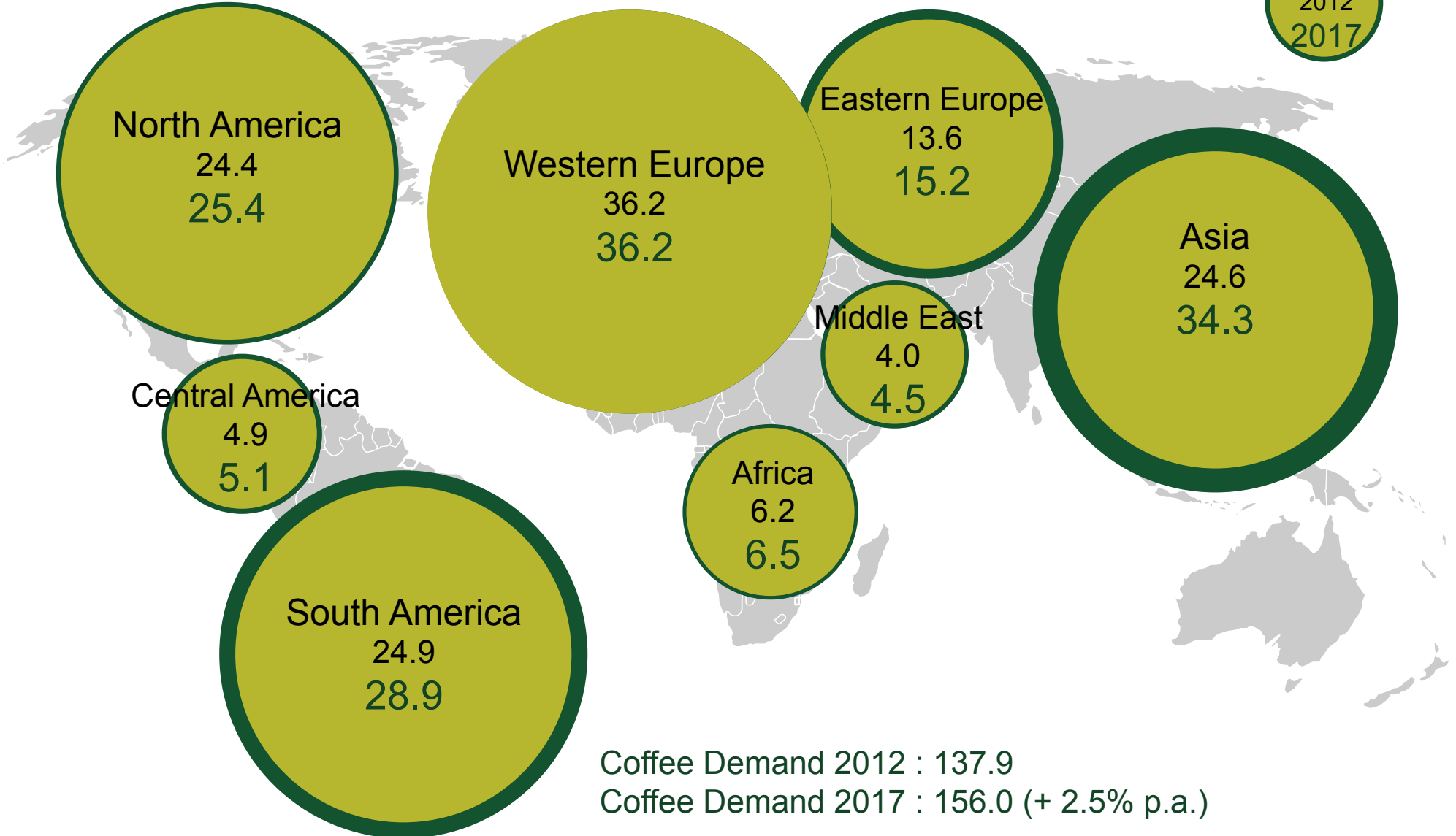




### World coffee demand 2012 and 2017 forecast

In mln bags of 60 kilo

Region  
2012  
2017

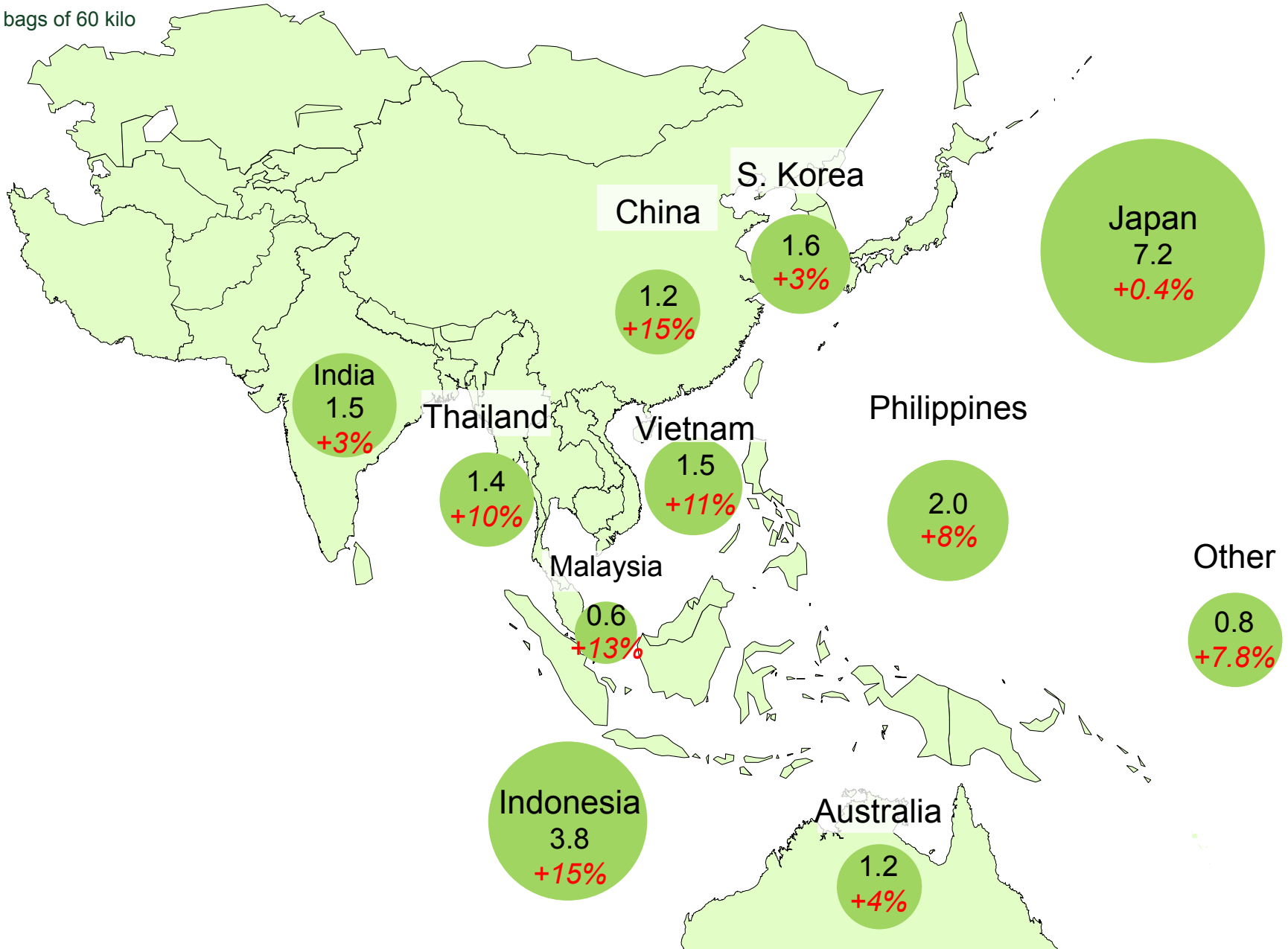






## Asia coffee demand 2012 & 2017 trend

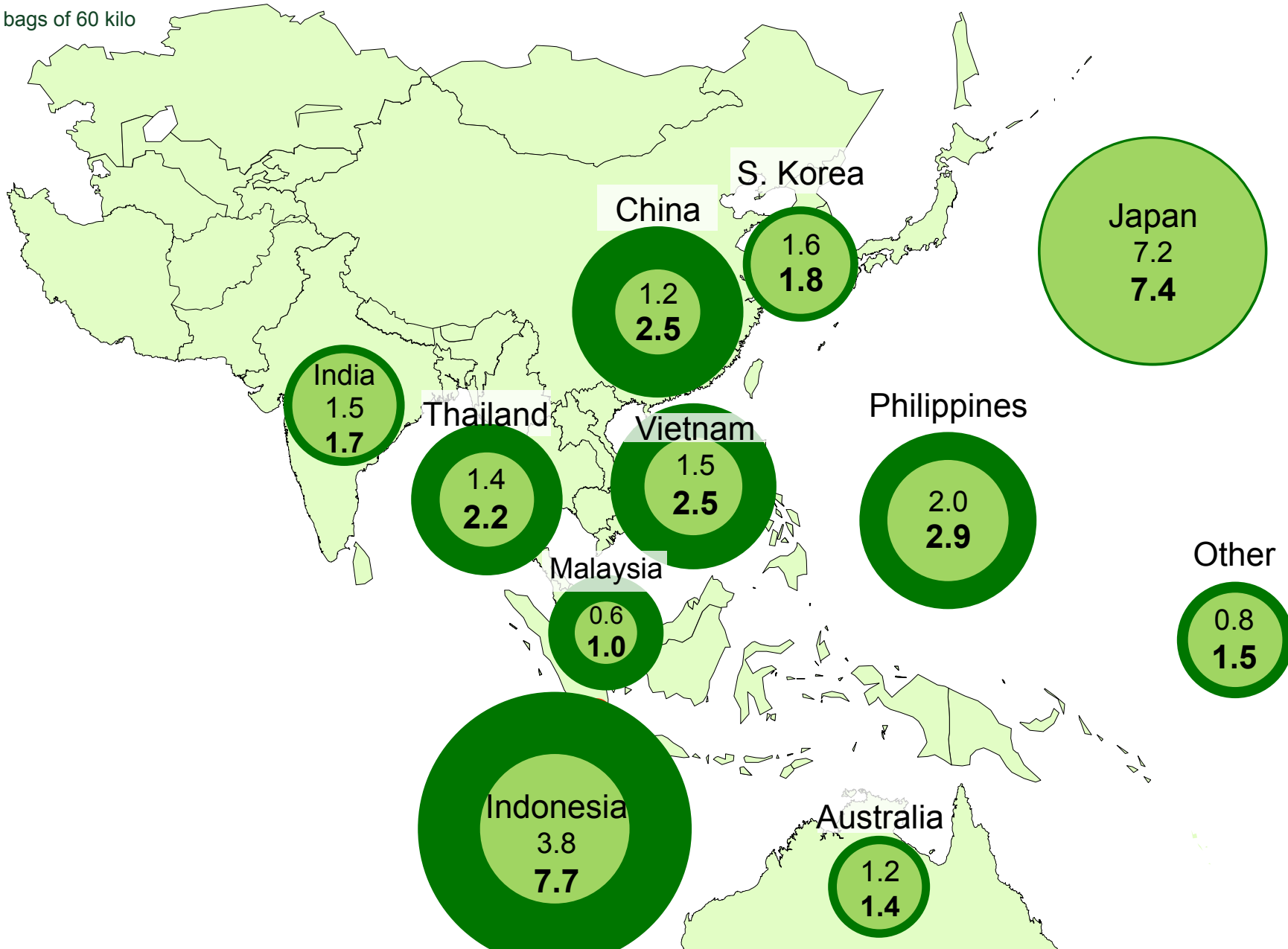
In mln bags of 60 kilo





## Asia coffee demand 2012 & 2017 forecast

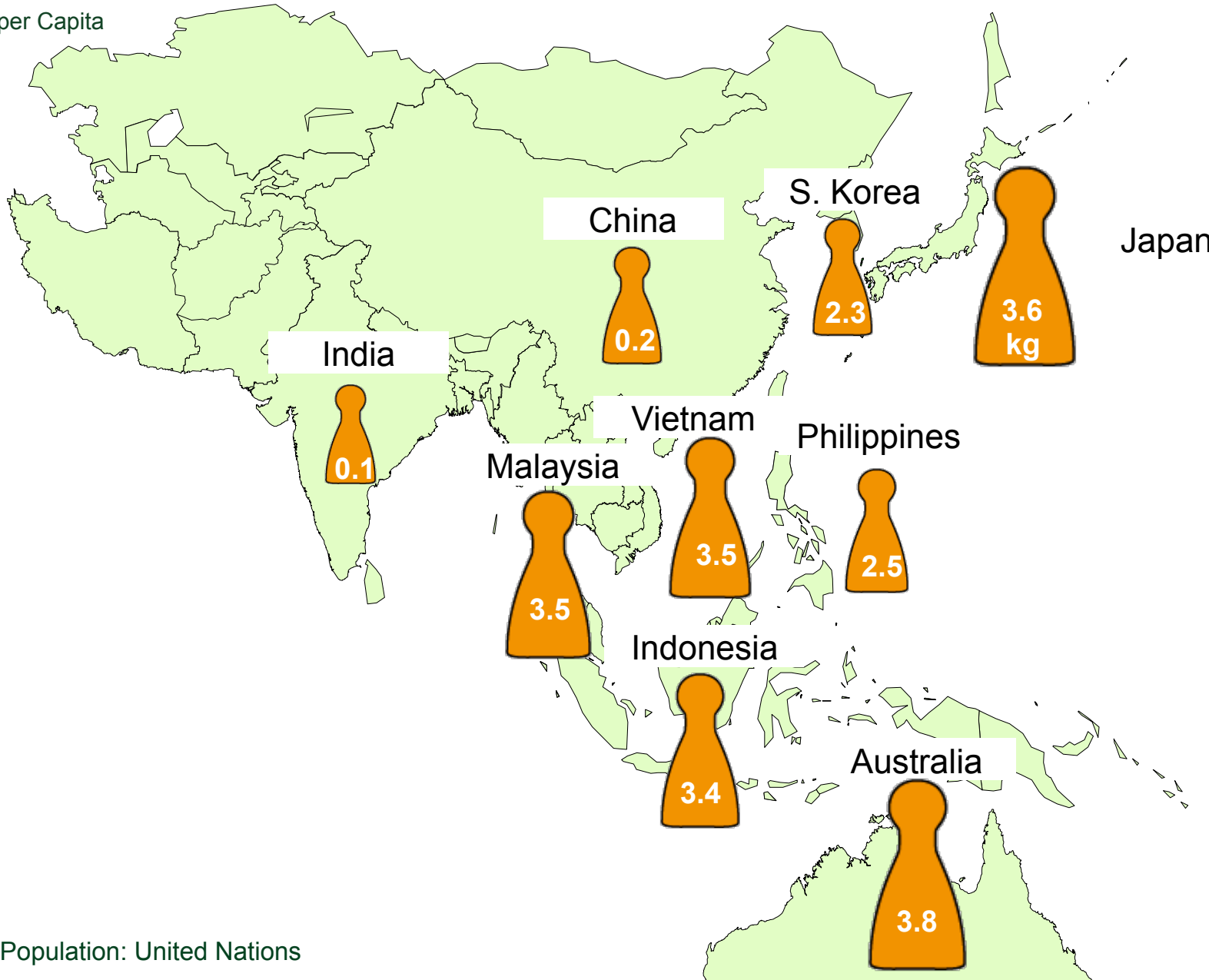
In mln bags of 60 kilo





### Asia coffee demand per capita in 2017

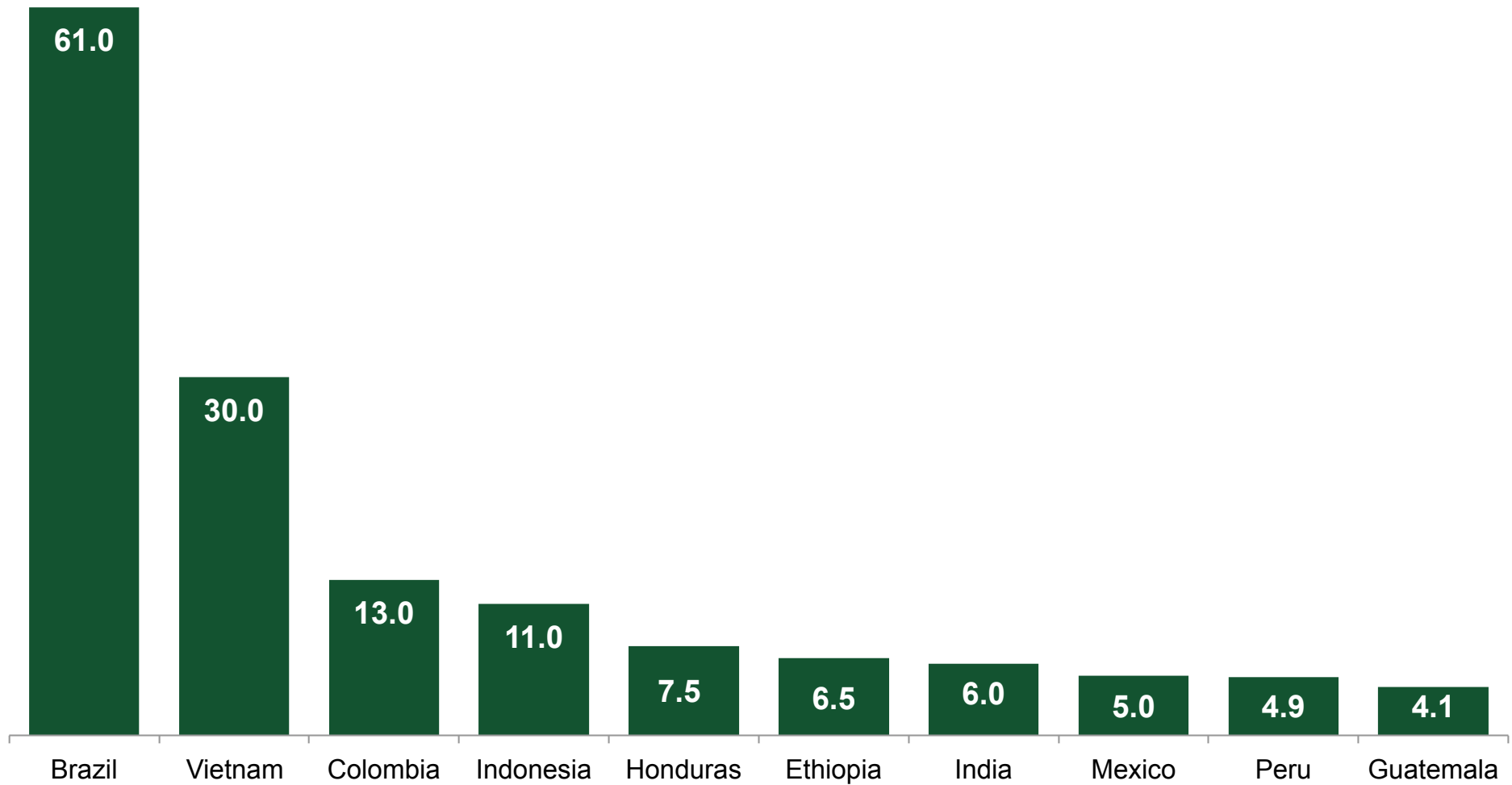
In kg per Capita





## Top 10 coffee producing countries by coffee year 2017/18

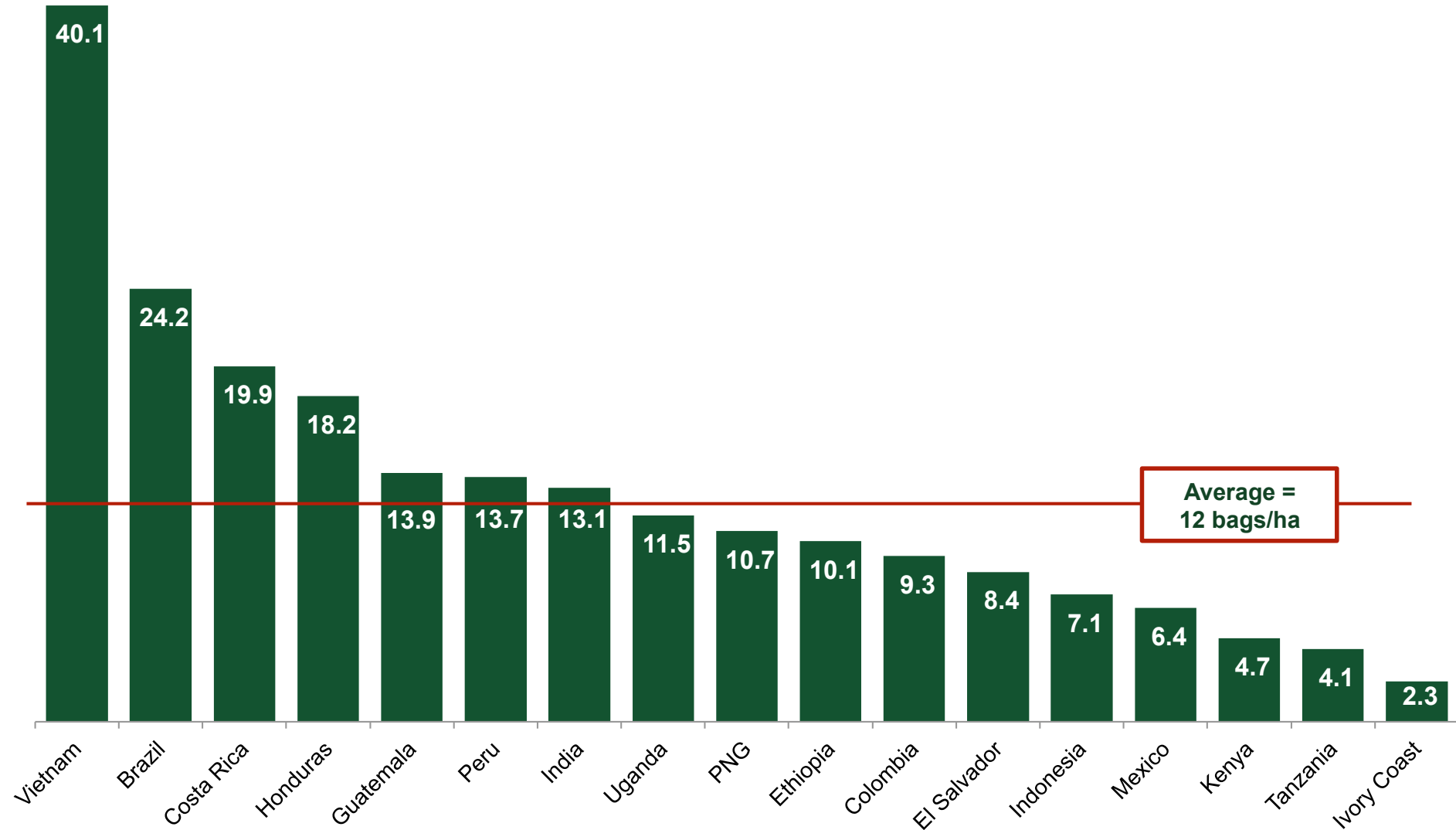
In mln bags of 60kg





## Yield in bags per hectare (2012)

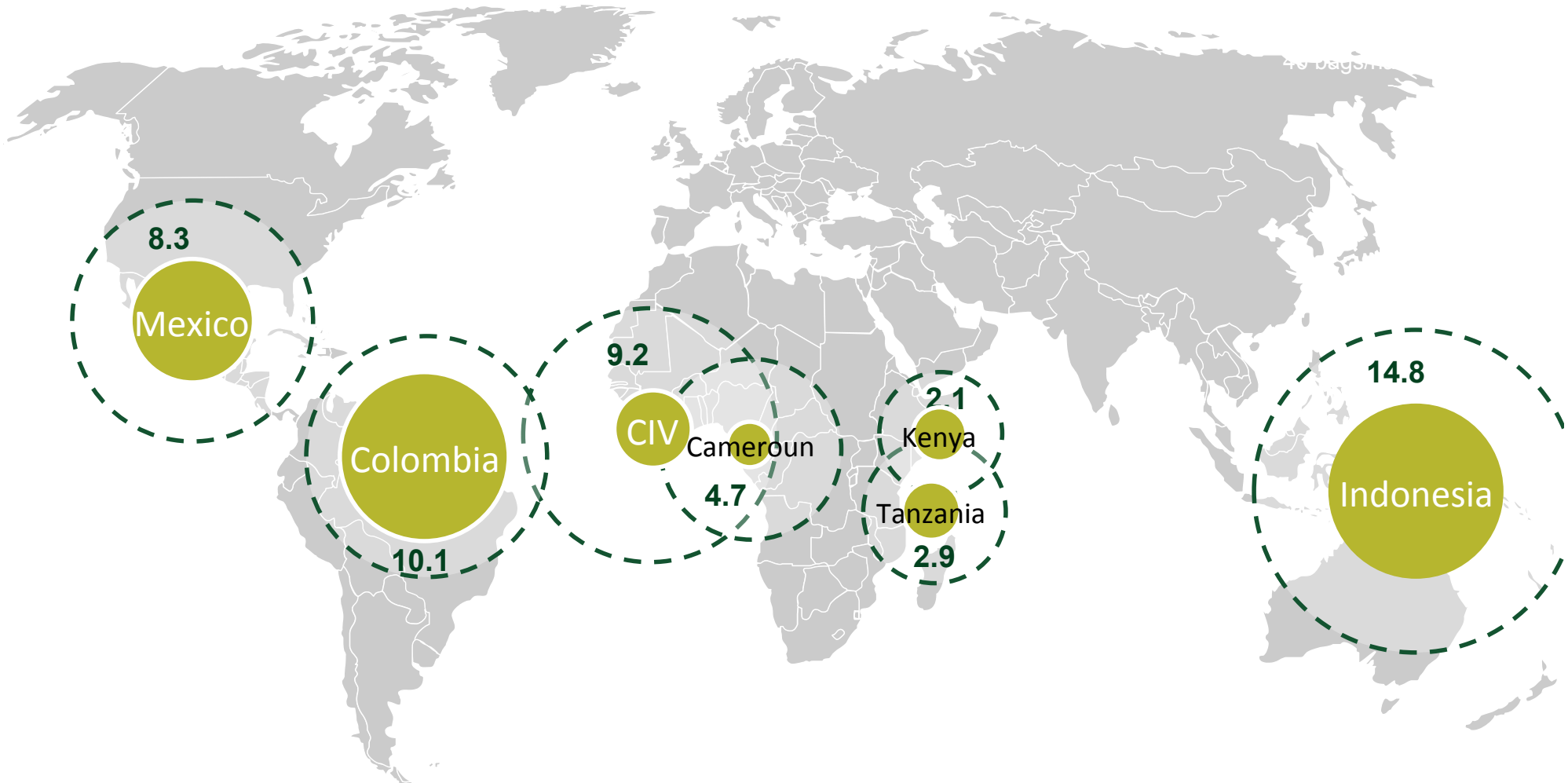
In bags of 60kg/ha





## World coffee production at world's average yield of 12.2 bags/ha

In mln bags of 60kg

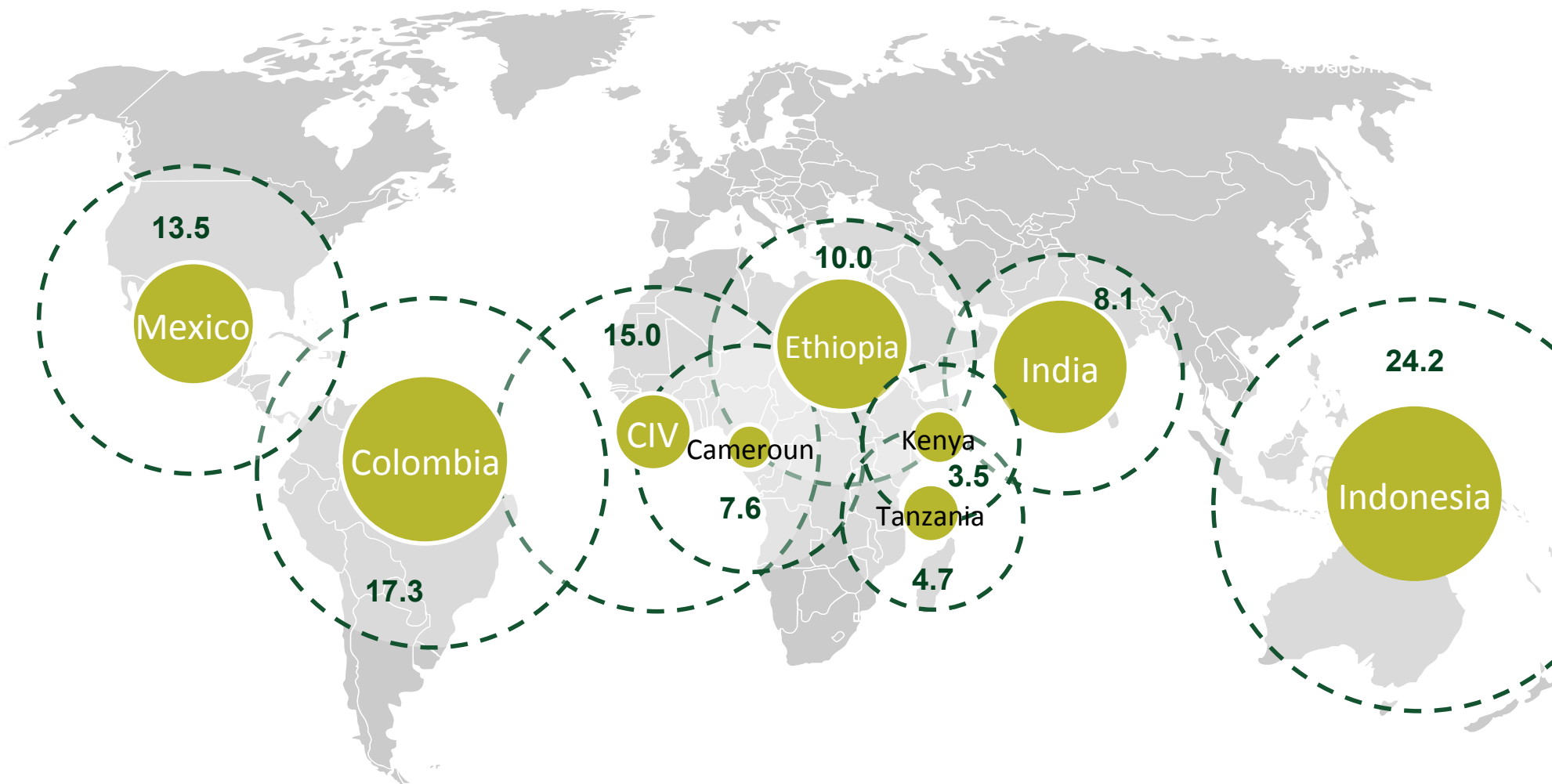




# Supply

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

In mln bags of 60kg

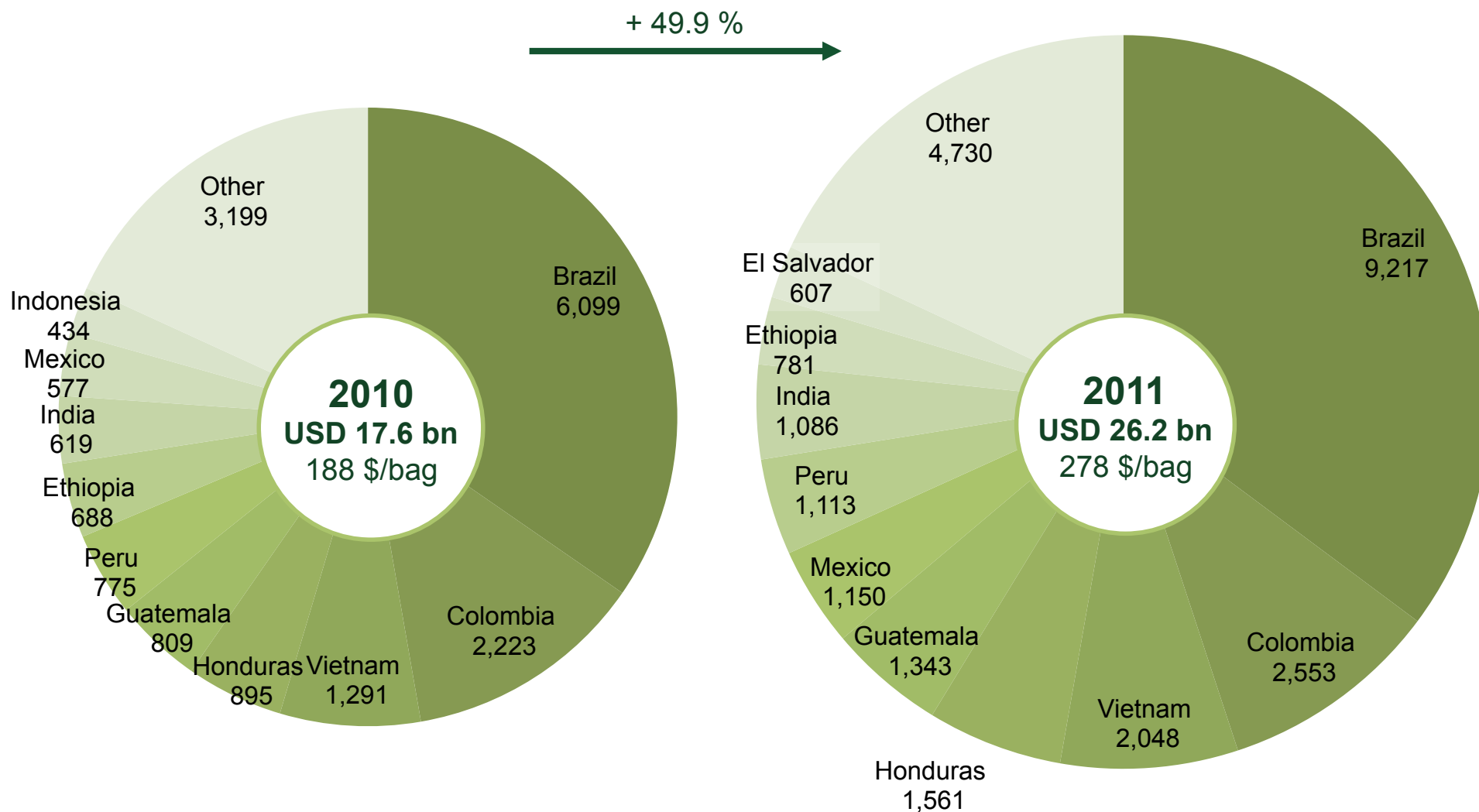




# Importance of coffee sector for various countries

## FOB export values of coffee exporting companies

In mln USD



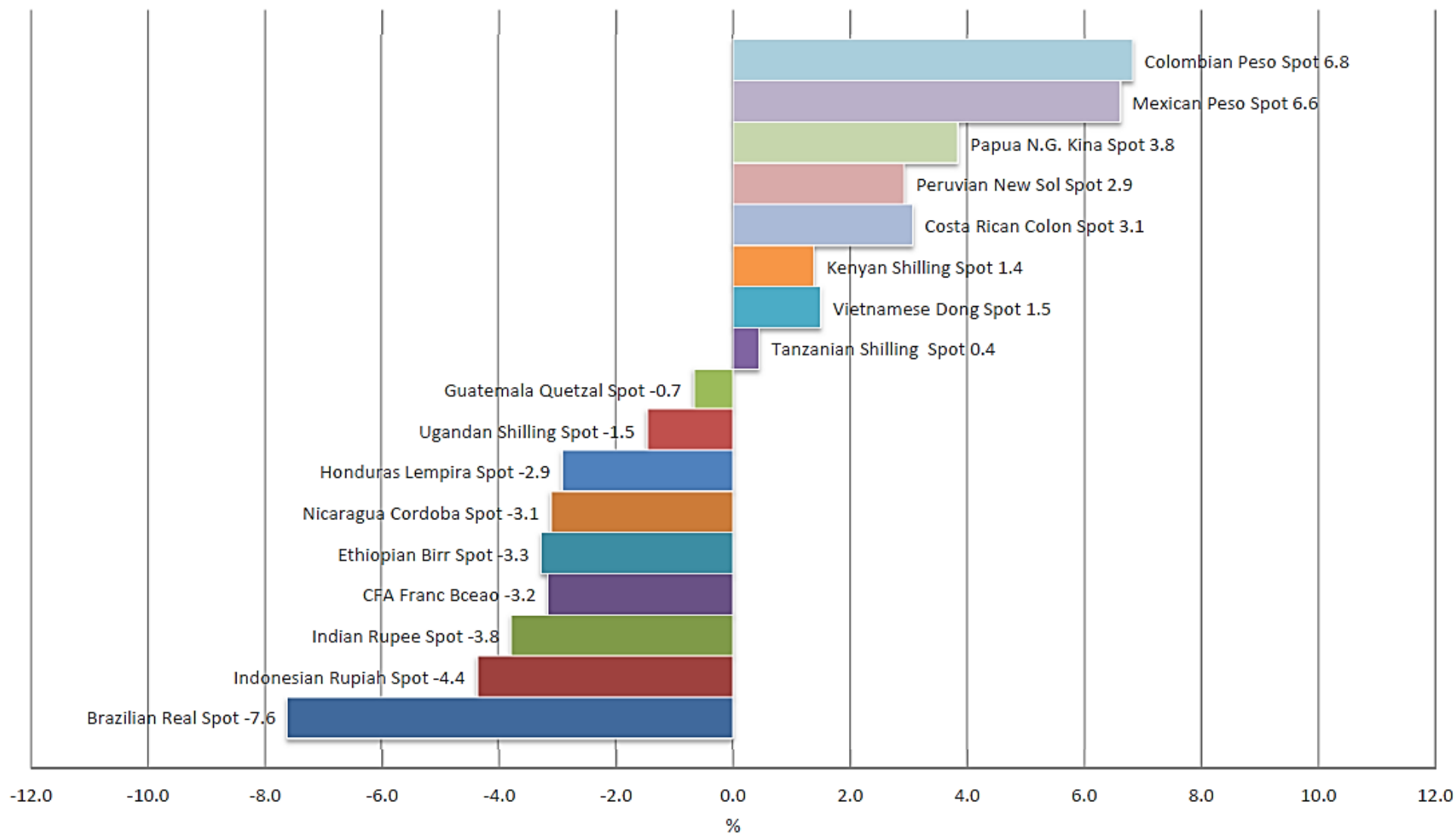




# Importance of coffee sector for various countries

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

In %

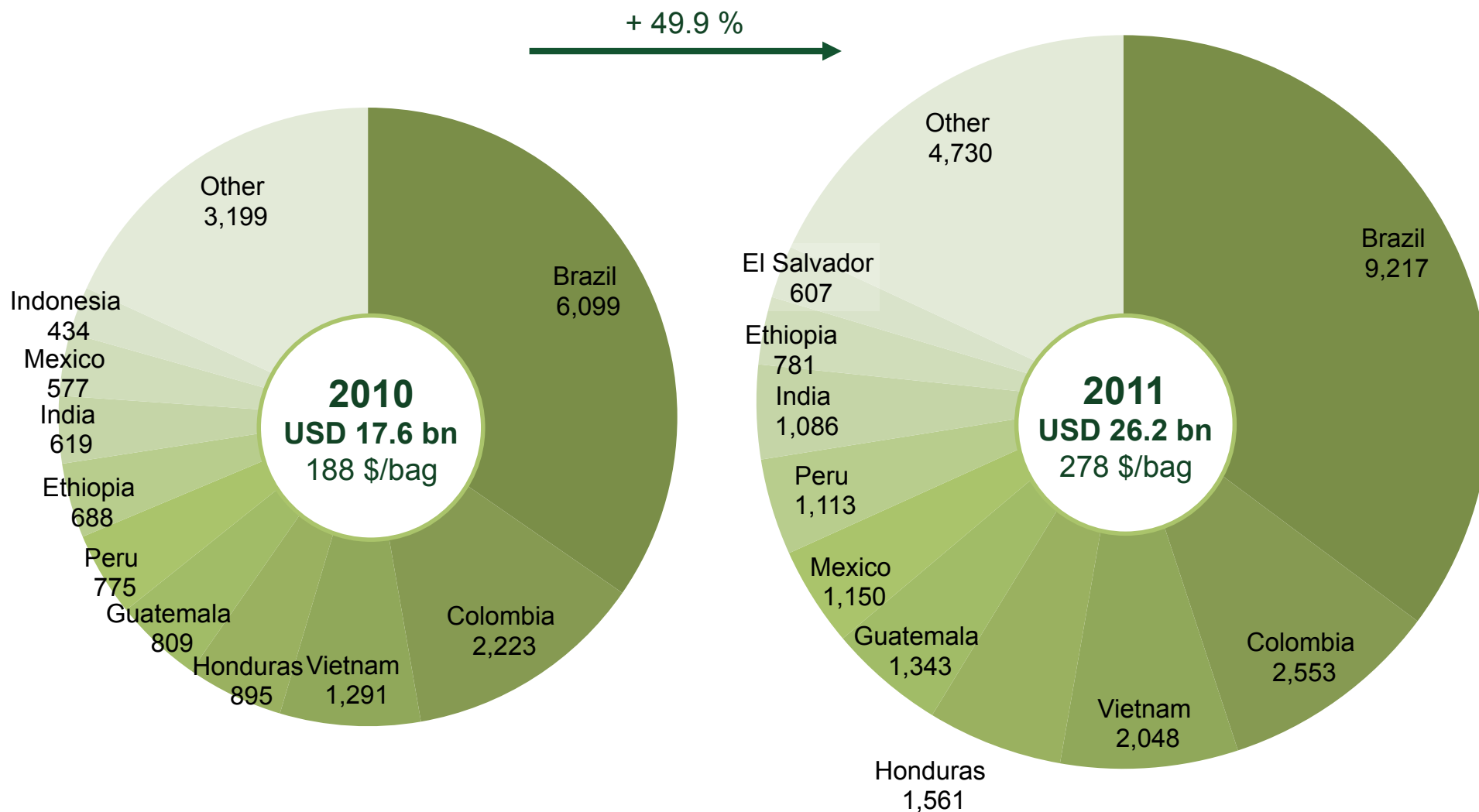




# Importance of coffee sector for various countries

## FOB export values of coffee exporting companies

In mln USD





# Importance of coffee sector for various countries

## Crop projection in major coffee producing countries

<b>Washed Arabicas</b>				
	<b>Ø Prod. in 60 kilo bags (11/12 &amp; 12/13)</b>	<b>Total Ha under prod/harv.</b>	<b>Number of Producers</b>	<b>Yield per Hectar</b>
<b>Mexico</b> Arabica (93%) & Robusta (7%)	4,300,000	675,258	510,544	6.4 bags
<b>Guatemala</b> Arabica	3,820,000	276,000	62,649	13.9 bags
<b>Honduras</b> Arabica	3,980,000	280,000	86,937	18.2 bags
<b>El Salvador</b> Arabica	1,470,000	160,969	23,488	8.4 bags
<b>Costa Rica</b> Arabica	1,570,000	93,000	49,923	19.9 bags
<b>Colombia</b> Arabica	8,000,000	869,000	527,609	9.3 bags
<b>Peru</b> Arabica	3,860,000	310,000	150,000	13.7 bags
<b>Kenya</b> Arabica	767,000	175,000	436,682	4.7 bags
<b>Tanzania</b> Arabica	920,000	235,200	475,000	4.1 bags
<b>PNG</b> Arabica	1,087,000	90,000	90,000	10.7 bags
<b>Robustas</b>				
<b>Ivory Coast</b> Robusta	1,883,000	750,000	250,000	2.3 bags
<b>Cameroun</b> Robusta	650,000	380,000	200,000	1.5 bags
<b>Uganda</b> Arabica (20%) & Robusta (80%)	2,937,000	272,000	500,000	11.5 bags
<b>India</b> Arabica (35%) & Robusta (65%)	5,117,000	404,645	269,565	13.1 bags
<b>Vietnam</b> Arabica (2%) & Robusta (98%)	19,943,000	625,000	550,000	40.9 bags
<b>Indonesia</b> Arabica (35%) & Robusta (65%)	9,703,000	1,210,000	1,100,000	7.1 bags
<b>Unwashed Arabicas</b>				
<b>Brazil</b> Arabica (65%) & Robusta (35%)	51,270,000	2,150,000	300,000	24.2 bags
<b>Ethiopia</b> Arabica (unwashed & washed)	4,670,000	500,000	1,200,000	10.1 bags

<b>Projection</b>	
Possible further yield increase	Possible extension of coffee areas
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What else?



Thank you for your kind attention!

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