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n. 13 - APRIL 2007

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Data on the importation and exportation of coffee offer an interesting statistical cross-section that reflects the success of the Italian coffee industry on the international markets in the course of the last ten years. According to the figures at our disposal, provided by the Italian Coffee Committee (CIC), the importation of green coffee last year increased by 4.81% putting it at on levels close to 7 million bags which is not far behind the figures for Japan, the third largest importer in the world. The imports of coffee in all its forms (figures are expressed in green coffee equivalent) register, for their part, an increase of 3.85%, reaching a level of 7,553,595 bags which include decaffeinated roasted coffee (+49.59%), instant (+12.81% and preparations based on coffee (+25.10%) as the products on the up and up, as well as decaffeinated roasted green coffee which is on the downturn.

Apparent consumption hovers around 5.6 million bags which means a drop of almost 1%. It should be added, however, that the official statistical figures provided by the authorities, do not take into account possible variations in stocks so that it is possible that these data do not fully reflect the real trend.

The most interesting aspect, however, and one that should be noted, is the steady rise in exports of roasted coffee which goes from 1.428.030 to 1.734.347 bags equal to an increase of 21.45%. Germany is still ahead of Italy in terms of volume, with 2.355.613 bags, but in terms of value Italy hold the lead in the world with around 651.85 million dollars (552.23 million in 2005) as against the 519.98 million dollars of the Germans. There has been considerable progress made over the last ten years, reflected above all in the worldwide success of espresso. In 1997, Italy exported 721,111 bags of roasted coffee. The one million bag milestone was reached in 2001 (1,098,486 bags). Growth continued at a sustained pace between 2002 and 2005. Finally in 2006 there was the great leap forward that led to the figures mentioned above. The general growth in exports, over the last ten years is, therefore, 140.5%.

Newscai, the Italian publisher who is responsible for the publication in Europe of two authoritative magazines on the coffee industry, will be taking part this year too in the Scaa Annual Conference & Exhibition. Thousands of copies of this number of the magazine in English will be distributed during the course of the convention. ■■■

Sommary

APRIL 2007

Summary

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From History to Lifestyle

How the British market has changed at the dawn of the Third Millenium

Don't waste your time looking for references to coffee in William Shakespeare's works, for within the detailed settings of his plays – for all that they are rich in descriptions of food, drink and table customs – you won't find any. This is not particularly surprising given the fact that the Bard of Stratford–upon-Avon died in 1616, a period when *qahwa* circulated widely in the Islamic world but was almost unknown in the West. Nonetheless, the mention of this exotic Oriental plant turns up for the first time in the history of English literature in the works of a contemporary of Shakespeare's, Sir Francis Bacon (1561-1626). Bacon referred to coffee by hearsay since he would not have had the opportunity to see it nor to taste it. In his *Historia Vitae et Mortis* (1623), he notes that "The Turks use likewise a kind of herb, called caphe". In *Sylva Sylvarum* (1624), he mentions a drink called coffa, "made of a Berry of the same Name, as Black as Soot, and of a Strong Scent, but not Aromatical" that is used in Turkey in the "in their Coffa-houses, which are like our Taverns". While describing its properties, he notes that it "this Drink comforteth the Brain, and Heart, and helpeth Digestion" and compares its effects to those of other fortifying and analeptic drugs such as tobacco, opium and betel which differ from coffee only in the way they are consumed namely by ingestion, smoking and chewing.

First Mentions

In England, as in the rest of Europe, the drinking of coffee substances aroused the interest, first and foremost, of doctors and apothecaries who were attracted by the pharmaceutical benefits of the Arabica bean. In the original version of Robert Burton's monumental *Anatomy of Melancholy* (1621) there is no mention of coffee but this lacuna is filled in the new, amplified edition of 1832 where the new substance is quoted in the section devoted to medicine. Interestingly, the first printed notice that came out in the English broadsheet, *The Public Adviser*

(1657) describes this exotic product as a miraculous cure that aids the digestion, enlivens spirits, lifts the heart, cures enflamed eyes, coughs, colds, emaciation, headache, dropsy, gout, scurvy, scrofula and much else.

Coffee Gets into Colleges

We have to consult the Oxford chronicles in order to go back to the first mentions of the consumption of the fragrant infusion. According to the scholar and diarist John Evelyn, the practice of coffee drinking was introduced into England by a certain Nathaniel Conopius, a Cretan exile who arrived in Balliol College Oxford from Constantinople around 1637. The actual opening of the first coffee house in Oxford is due to a Lebanese Jew named Jacob who launched a fashion that was soon to become unstoppable. In just ten years the coffee houses multiplied, giving rise to serious preoccupations on the part of the academic authorities. But not even the official bans succeeded in holding back the flood: in Oxford, as in Cambridge, the new coffee houses became the preferred meeting points not only for the students but also for the professors.

There began to form, around cups of aromatic coffee, informal gatherings that included some of the outstanding minds of the age. One of the many examples is that of the Oxford Coffee Club, founded in 1655 by certain young hopefuls, which formed the nucleus of what was to become the Royal Society of London. Among the founders were Isaac Newton

(who discovered the universal law of gravity), Hans Sloane (later founder of the British Museum) and Edmund Halley (astronomer noted for his discovery of the famous comet)).

Women and Coffee

The first London coffee house was opened in 1652 in St. Michael's Alley by Pasqua Rosee, (according to some sources a native of Ragusa and according to others a Greek, Turk or Armenian), a young servant who came to London in the employ of a merchant from Smyrna. The cafe was very successful and soon after many imitations sprang up. After they were stopped in their tracks by the Great Fire of London in 1666, the coffee houses took off again, giving rise to a real cultural phenomenon. Some of them became the favourite haunts of artists, scientists and literary men and became the backdrop for lively debates where the stimulation provided by caffeine contributed to inflaming spirits and feeding the fires of polemics. This all took place in locales that were rigorously masculine, given the fact that access to women was absolutely forbidden. The result was that many men, engaged as they were in these lively proceedings , probably ended up neglecting their wives to the extent that the latter reached the end of their tether and filed a Petition in 1674 in which they condemned "Grand inconveniencies accruing to their sex from the Excessive Use of that Drying, Enfeebling Liquor." The men soon retaliated by filing a counter petition in which they defended the new drink "from the Undeserved Aspersions lately cast upon Them, in their Scandalous Pamphlet ". Things got even worse when King Charles the second - fearing the seditious atmosphere created by the new findings as well as an actual security threat (the need to keep fires constantly lit increased the threat of a fire outbreak) - signed a proclamation on 23 December 1675 which prohibited the running of coffee houses in London. But even before the prohibition became operative, it was revoked, perhaps due to the pressure of the already powerful lobby of coffee merchants or to the protests of economic advisors who dissuaded the king from depriving himself of the colonial rights he had been conceded. Meanwhile, the use of tea drinking was becoming popular at court thanks to Catherine of Braganza who also promoted the use of sugar as opposed to honey as a sweetener.

In fact, included in the immensely rich dowry of the Portuguese princess, was the colony of Bombay which was fundamental to the development of the powerful East India Company. It was this Company (which Charles the second made into a civil and military plenipotentiary power in India) that was responsible for causing the government to sizeably reduce taxation on tea which, consequently, led to its becoming the nation's favourite drink.

The Golden Age

Between the end of the seventeenth and the beginning of the eighteenth centuries, coffee houses came into their own. A factor that contributed to this popularity was the new cultural climate in which distances were reduced and there was more contact between the aristocratic élite and the middle classes in the name of an emerging and converging aesthetic sensibility. The coffee house - a meeting place where men from all social extractions could get together and exchange opinions on familiar terms - became the symbol of what the French traveller Francis Maximilian Mission called "the universal freedom

Tab. 1 – Imports of green coffee non-decaffeinated

Countries of origin	2004	2005
Vietnam	660.518	468.490
Columbia	228.319	352.723
Indonesia	162.809	336.065
Brazil	400.221	222.261
Peru	84.662	97.848
Nicaragua	75.934	38.687
Kenya	57.121	37.877
Honduras	73.916	33.207
Ethiopia	29.556	31.899
Uganda	17.698	25.296
El Salvador	31.412	14.666
Guatemala	16.599	12.660
Costa Rica	24.218	12.248
India	17.194	12.220
Mexico	6.961	8.029
Papua New Guinea	4.341	5.958
Tanzania	5.646	4.983
Others	32.103	25.967
Total	**1.929.228**	**1.741.084**

Source: Coffee Trade Federation Ltd

of speech of the English". In exchange for the modicum price of a drink (it wasn't for nothing that coffee houses were also called "Penny Universities"), the middle classes were able to complete their education and take part in the great debates of the time. The coffee houses - as Harold Routh has written – although they were not entirely conscious of the fact, were almost like "confraternities intent on spreading a new humanism". This injection of pluralism also influenced the style of the English novel which was enriched, consequently, by a new desire for dialogue.

Amongst the London coffee houses where memorable conversations took place are Button's, Will's, Bedford's, The Grecian, Child's and Don Saltero's. In these coffee houses, as well as the Arts, literature and politics, business was also discussed and set up. Thomas Garraway's also acted as an auction house and stocks and shares were bought and sold in Jonathon's. Since its opening in 1687 by Edward Lloyd, Lloyd's became a compulsory meeting point for shipping pundits, merchants and bankers who exchanged vital information about maritime traffic. Four years later the coffee house was transferred to larger and more luxurious premises in the elegant Tower Street. The influx of clients was such that it practically never closed its doors. On popular demand, Lloyd's launched in 1696 the Lloyd's List which reported the arrival and departure of ships (regularly updated thanks to a relay system between the various anchorage points on

the Thames), as well as various information collected from a network of national and overseas correspondents. The list was amplified later in order to include stocks and shares quotations, bulletins about the tides, up-to-date news on foreign markets and in wartime, even reports about naval battles. The prestige of the publication (later called simply Lloyds) made it indispensable for all workers in the sector.

Lloyd's

Before any captain accepted an appointment to lift his anchor, he automatically popped into Lloyd's - to a corner specially set aside for the purpose - to consult up-to-date information on the risks of the voyage. Auctions were also held on the premises and after the hammer went down, transactions were put in black on white on the paper and with the ink provided by law by the house.

The coffee house became the headquarters for the single maritime insurers or "underwriters" (so called because, by signing their name, they assumed responsibility for any level of risk involved in the insurance of a shipment or a ship, editor's note) who got there all the information they needed to evaluate the degree of risk taken on. In 1774 some eighty clients of the coffee house - mostly shipping merchants and underwriters - formed the "Lloyd's Corporation" and set up their headquarters in the Royal Exchange. In 1871 the parliament in London recognised this body as the formal society of marine underwriters and so hastened the advent of the famous Lloyd's of London.

The Decline

When the excusive clubs took over, the coffee and chocolate houses went into a decline about the middle of the 18th Century. Many of them became simple taverns, but others became tea shops: emblematic is the famous Tom's Coffee House which was taken over by Thomas Twining who renamed it The Golden Globe and made it into one of the most fashionable meeting points in London. By the middle of the eighteenth century tea houses and gardens were coming into their own. One factor that certainly contributed to their success was the fact that women were admitted to them as they hadn't been to the coffee houses.

Opposing Destinies

In the 19th Century tea and coffee counted equally in an average English family's daily groceries, but their destinies were opposed. According to several statistical sources, between the middle of the 19th century and the first two decades of the 20th Century, the pro capita consumption of coffee in England went down from £1.25 to £0.75. At the same time the pro capita consumption of tea went from 3.42 pounds weight (1886) to 8.51 pounds weight (1921).

Tab. 2 - Percentage distribution of green coffee non-decaffeinated imports by main origin (in %)

Country	2004	2005
Vietnam	34,2	26,9
Columbia	11,8	20,3
Indonesia	8,4	19,3
Brazil	20,7	12,8
Peru	4,4	5,6
Nicaragua	3,9	2,2
Kenya	3,0	2,2
Honduras	3,8	1,9
Ethiopia	1,5	1,8
Uganda	0,9	1,5
El Salvador	1,6	0,8
Guatemala	0,9	0,7
Costa Rica	1,3	0,7
India	0,9	0,7
Mexico	0,4	0,5
Papua New Guinea	0,2	0,3
Tanzania	0,3	0,3
Others	1,8	1,5
Total	**100,0**	**100,0**

Source: Coffee Trade Federation Ltd

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These figures are reflected in the present situation. Nowadays 120 million cups of tea are drunk a day in the United Kingdom as against 80 million cups of coffee. The pro capita data for coffee consumption, in the last years, is around 2.2/2.3 kilograms.

Basic Figures

The UK has accustomed us in the last years to note relevant variations as regards volume and distribution by coffee groups. Having reached a high of 1,963,908 bags in 2002, imports of green coffee dropped to 1,756,410 bags in 2003. They went up again in 2004 to 1,929,228 bags and dropped again to 1,741,084 bags in 2005. From constituting in 2002 (thanks to Brazil's bumper crop) 70% of the total, Arabica coffee has gone down to being, in the last year, little more than half the raw coffee coming in. The four main producers have consolidated their leadership and by now cover 80% of the market. The power struggle between the top four is, however, a very fluid one.

Relevant Variations

In 2005, Vietnam confirmed its leadership despite the fact that it lost ground in absolute and percentage terms (**see tables 1 and 2 pages 16, 18**). Its market share, in fact, dropped from 34.2% to 26.9% which is equal to around 200.000 bags less exported to Britain.

With an increase of more than 54%, Columbia goes into second position. Just behind, Indonesia leaps forward with double its exportations to the UK (+106.4%) going from 8.4% to 19.3% of the total. The fluctuations recorded in Brazil reflect the strong oscillations connected with the biennial cycle of production in the country. After reaching a peak of 703,339 bags in 2002, exports to the UK from the South American colossus were almost halved in 2003 (356,773 bags), only to rise again to 400,000 bags in 2004 and plummet to little more than 220,000 bags in 2005. It is because of this last figure that Brazil slipped down to fourth place in the charts. Among the other producers, the progress made by Peru recently is worth noting whereas Kenya and Central America have lost some ground. This picture is reflected in the distribution by coffee groups (**see Table 3**) which signals a strong increase in Robustas and a general drop in Arabicas. The only exception to this are the Colombian Milds. **Table 4 (page 22)**, which sums up foreign trade in all its forms, shows, among other things, a consistent expansion in importation of instant coffee and coffee extracts (in excess of 30% more) and a concomitant reduction in exports.

The Uniqueness of British

What makes the UK unique in the European panorama is not only the annual pro capita figure which is decidedly lower than the average for Western Europe, but also the way consumption is structured, with instant coffee - despite a recent drop - still accounting for more than 85% of the volume and 80% of the value of the market. The largest slices of this segment are divided up between Nestlé (57% - mostly Nescafé) and Kraft (25% - mostly the Kenco brand). A long way behind are Douwe Egberts and the many brand names of the biggest retail groups (Tesco, Sainsbury, Safeway, Asda, Waitrose, Co-op, Somerfield and Morrison etc.). Mainstream brands are preva-

Tab. 3 – Imports by types of coffee (ICO) (in %)

Types of coffee	2003	2004	2005
Arabicas	**59**	**55**	**52**
Colombian Milds	18	15	23
Other Milds	20	18	14
Brazilian Naturals	21	22	15
Robustas	**40**	**44**	**47**
Unknows	**1**	**1**	**1**

Source: Coffee Trade Federation Ltd

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lent but premium products are on the increase, now making up around 20% of sales.
There is a positive trend (+7% increase as against 3% for instant coffee) in the roasted and ground sector (R&G) which is dominated by the retailers' private labels while big brands (to be noted, in particular, Douwe Egberts - www.de.nl - Lavazza - www.lavazza.it and Taylors of Harrogate - www.taylorsofharrogate.co.uk) make up a bare quarter of the total. In recent times there has been a strong upsurge in ethical products the sale of which showed an increase of 40% in 2005 compared to 2004 which even then showed an increase of more than 50%. Estimates for 2006 confirm the trend. Fair traded and/or sustainable products now constitute 5% of the market with peaks of 20% in premium niches. Thanks also to increasingly frequent partnerships with the biggest retail groups (but also with leading mainstream roasters and coffee shop chains), fair trade is steadily gaining visibility and brand identity. Café-direct (www.cafedirect.co.uk) ranks fourth in the R&G segment and leads the charts of the brands most recommended by British consumers ahead of Google, Waitrose, Toyota, Vodafone and Virgin (Douwe Egberts is in tenth place).

Prodcom data relative to 2002-2005 show a situation that is not altogether in agreement with the data given above and they reflect a stronger growth in non-decaffeinated roasted coffee. We intend to give a more detailed and complete evaluation in a future analysis.

Vending

The vending market has expanded considerably in recent times (+33% between 1997 and 2005) reaching in 2005 a turnover of 2.42 billion pounds sterling of which more than 2 billion pounds go on refreshment machines.

In the latter segment, coffee is the most important product counting for around 25% sales value. The largest group of vending machines (about 40% out of a total machine park of some 1.2 million units in the UK) serve hot beverages and are sited mostly in workplaces (29%) as well as sports and games centres.

Coffee Associations

The British Coffee Association (BCA, www.britishcoffeeassociation.org) started up in 2001 from a merger between the British Soluble Coffee Manufacturers' Association (BSCMA) and the Roast and ground Coffee Association (RGCA), the two associations that represent producers of instant and roast coffee respectively. Its activities include spreading information about the transformation, distribution and consumption of coffee.
It acts as a forum for debates about the main themes that crop up in the sector and provides declarations on the questions of most interest.
The constitution of the Coffee Trade Federation (www.coffeetradeassociation.org.uk) on the other hand goes back to 1972 and various companies operating in the field of production and trade are members.
As regards the internal organisation, the Federation has a Council and several committees with specific duties (International Committee, Arbitration & Contracts, Green

Tab. 4 – Foreign Trade in Green Coffee (in tons)

Forms of coffee	Imports		Esports	
	2004	2005	2004	2005
Green	115.754	104.465	1.732	1.818
Green Decaf	270	244	55	82
Roasted	717	841	2.489	2.774
Roasted Decaf	179	177	306	153
Soluble/Extracts	6.695	8.762	21.273	17.461

Source: Coffee Trade Federation Ltd

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London Rivals Manhattan

The anomaly of the British market doesn't end here. Paradoxically, the country that invented teatime is also the one in which brand name cafeterias mark the highest index of expansion in Europe. London has now got more Starbucks (www.starbucks.com) than Manhattan and the coffee shop sector is the most dynamic in the UK out-of-home sector. From London Bridge to Victoria Street, from Piccadilly to Notting Hill and in airports and railway stations, we can see the brightly lit signs of Starbucks, Costa Coffee (www.costa.co.uk), Caffè Nero (www.caffenero.com), Ritazza (www.ritazza.com) and Puccino's (www.puccinos.com). And at dawn of the new millennium, statistics show an epoch-making development: the consumption of coffee has taken over from tea out of the home: by now one English person in five drinks an espresso or a drink based on espresso in the coffee bars. What seemed at the beginning to be a passing fad imported from across the ocean has become a matter of custom and a phenomenon that is now a matter for sociological studies and market analyses. Amongst the studies that have appeared on the subject, worthy of note is "The Cappuccino Conquests" (www.cappuccinoconquests.org.uk): this is a project, directed by Professor Jonathan Morris of the University of Hertfordshire, within a research programme entitled The Cultures of Consumption, sponsored by the Economic and Social Research Council (www.esrc.ac.uk) and the Art and Humanities Research Board (www.ahrb.ac.uk).

The papers cover a wide gamma of themes in an attempt to trace the "trans-national history of Italian coffee". Another project worth mentioning is "The Cappuccino Community" (http://web.ges.gla.ac.uk/~elaurier/cafesite/index1.html) supported by ESRC and directed by Eric Laurier, researcher assistant in the Geography of the University of Glasgow.

"The Cappuccino Conquests"

The second part of this study traces the fundamental steps of the spread of espresso coffee in Britain. In a detailed analysis which starts of with the fifties, Professor Morris examines the evolution of the custom of drinking cappuccino through the decades up to what can be considered the key point: the emergence of a sophisticated and exclusive image of Italy thanks to the success of products made in Italy and the fact that Italy became one of the tourist attractions most favoured by the English. It was within this changed cultural climate that Costa Coffee – a chain founded by Sergio and Bruno Costa in 1971 – enjoyed a huge success. The real turning point, however, took place about the middle of the nineties when the first American style cafeterias took off. 1994 saw the founding of Seattle Coffee Company; a year later the Anglo-Iranian brothers Bobby and Sahar Hashemi founded Coffee Republic and from that there was no turning back.

A Complex Phenomenon

The rise of the coffee shops is a complex phenomenon that reflects, to a certain extent, the ferment that characterised British society in the nineties. Some people see in this boom (at least at the outset) an emblematic manifestation of the Blair revolution and the rise to political power of a new generation. Others see it as a desire to emulate the American lifestyle as seen on television (think of the famous "Central Perk" in the sit-com "Friends"). Others, yet again, quote the concept of the

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"Third Place" (defined thus by Ray Oldenburg in his famous essay "The Great Good Place") or in other words the propensity of consumers to find a public place outside of the home and the work place for relaxing and/or socialising. Other factors worth noting are the cosmopolitanism of coffee shops which is the main attraction for the female public compared to pubs and last but not least the lucky link up to the World Wide Web which left an indelible mark on the fate of the global village since the last decade. The first Internet Café, let's not forget, opened in London in 1994.

The Competitors

If the first phase of development is linked above all to independent café owners, the situation changed radically starting from 1997/98 with the rise of the large competitors. Caffè Nero was founded by the Californian business man Gerry Ford; Costa Coffee was taken over by Whitbread, UK's leading hospitality company, which also owns labels like Bella Pasta, Pizza hut and Premier Travel Inn. Starbucks took over Seattle Coffee Company, thus preparing the ground for its appearance on the market in its own right. After reaching a peak in 2001, the sector spread throughout the whole country (by now 70% of branded cafeterias are to be found outside the capital. At the top of the market is Starbucks with 485 branches (we have taken the statistics from Allegra Strategies; data are updated to December 2005, editor's note), followed by Costa Coffee (415) and Caffè Nero (250). With its 132 branches Caffè Ritazza (Compass Group) holds the fourth place just ahead of BB's Coffee and Muffins (116), a chained started in Australia in 1975 and imported into the UK at the beginning of 1995.

Other important names are Puccino's (which refers to Segafredo Zanetti Espresso) with 91 branches, Café Nescafé with 79 (caffe.nescafe.it/caffe-nescafe) and the German chain Tchibo with 52 (www.tchibo.de). The recent history of Coffee Republic (www.coffeerepublic.co.uk) is decidedly stormy. It has had several ups and downs including a failed take over bid on the part of Caffè Nero in 2002. The latest internal developments have included the sacking of Peter Hashemi following a "revolt" on the part of the shareholders who elected Peter Breach as president. Having been forced to cede part of its outlets to the competition, the company has an expansion programme underway which will include several new openings in the near future.

The Fascination of Tea

Reinforced by a rate of growth that has exceeded 400% from 1999 till today, the British coffee bar sector is going strong as testified to by the success obtained by Caffè Culture (www.caffeeculture.com), the specialised event that took place in 2006 and the second edition of which is planned for this year on 23rd and 24th May – once again within the framework of the London Olympia. With a typically British sense of fair play, the president of the UK Tea Council (www.tea.co.uk), Bill Gorman calls coffee "an honourable rival" But the rise of the black drink doesn't seem to be causing the tea industry many sleepless nights.

Tea, in fact, remains in the lead thanks to its supremacy in the household. In a country that is viscerally attached to its traditions, the London tea rooms continue to maintain their fascination intact appealing to a vast British and international clientele. Even today, a table in the exclusive Ritz Tea Room (www.theritzlondon.com/tea) for afternoon tea must be booked several weeks in advance. And if you want to spoil yourselves over the weekend, you will have to wait no less than a couple of months. ■■■

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A New Structure for ECF

Close up

In the middle of September the twenty-seventh edition of the European Coffee Report, the statistical roundup issued annually by ECF (the European CoffeeFederation, www.ecf-coffee.org), came out. The layout is the usual one, with a brief introduction and a survey of the general data of 2005 relating to production and commercialisation, followed by 16 country profiles. Finally, a summing-up of the figures for new members of the EU is provided.

The Year 2006 has marked a turning point for the European coffee sector

A Sole Voice

The year 2006 has marked a turning point for the Federation. From the first of January of last year, in fact, the three member associations (CECA, EUCA and AFCASOLE) have ceased to exist as autonomous bodies and form part of ECF which now becomes the sole voice for European coffee. In order to explain the various steps that have led to this fusion, we need to go back in time.

Some Background

The initial loose form of cooperation between CECA (Committee of the European Coffee Associations) and EUCA (European Federation of Coffee Roasters' Association)) goes back to the late seventies. It was then decided that it made more sense to combine the general assemblies of the two associations at the same time and place, followed by a joint meeting under the aegis of the European Coffee Federation. A Resolution, launched in 1981, formalised this plenary sitting making the Annual General Meeting (AGM) of 18 June 1981 the formal start of the ECF. Last year's meeting in Antwerp therefore marked the 25th Anniversary of the ECF AGM.

The collaboration became even closer in 1999 when the CECA secretariat, became permanently situated in the same office as the ECF and EUCA secretariats in Amsterdam (AFCASOLE secretariat also moved to Amsterdam in 2003). Finally, as from 1st January 2006 AFCASOLE, CECA and EUCA have merged fully into ECF whose present structure is comprised of a President, three Vice-Presidents


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(one each for green coffee, roasted coffee and instant coffee), an Executive Committee made up of thirteen members and a plenary Council. This restructured body aims to strengthen the role of ECF as the common voice for European coffee sector. Its activities are outlined below.

Areas of Intervention

Until 1989, the Federation had, amongst other things, the function of directing and co-ordinating coffee strategies by making regular recommendations to the EU government delegates on the operation of the International Coffee Agreement. Apart from this role which became superfluous with the ending of economic clauses, the traditional areas of intervention of ECF are many: they range from European Standard Coffee Contracts to the gathering and analysis of statistics, from rules of origin to sustainability.

Alimentary Safety

The Report concentrates, in particular, on the role that the Federation (along with the other associations in the industry) plays in harmonising the existing norms in the various countries of the EU as regards alimentary safety with a view to ensuring proper functioning on the internal market. ECF contributes to the coherent and consistent transposition of the European legislation by making recom-

Tab 1 – Imports of Green Coffee into European Countries from 2003 to 2005

	2003		2004		2005	
	tons	bags	tons	bags	tons	bags
Austria	62.894	1.048.230	59.386	989.763	48.338	805.633
Belgium	184.720	3.078.670	187.437	3.123.947	198.887	3.314.680
Cypus	1.879	31.322	1.527	25.448	1.776	29.600
Czech Republic	25.493	424.888	25.197	419.953	23.218	386.965
Denmark	51.263	854.377	54.813	913.553	35.917	598.623
Estonia	21	355	13	222	34	567
Finland	61.421	1.023.682	63.461	1.057.680	63.269	1.054.478
France	287.450	4.790.828	234.761	3.912.688	209.499	3.491.648
Germany	872.654	14.544.227	958.042	15.967.365	899.806	14.996.765
Greece	25.602	426.692	27.532	458.865	25.594	426.573
Hungary	37.067	617.780	34.290	571.498	17.058	284.292
Ireland	5.404	90.062	4.714	78.558	5.259	87.642
Italia	382.929	6.382.147	387.452	6.457.535	399.882	6.664.692
Latvia	2.779	46.320	2.309	38.490	1.828	30.473
Lithuania	133	2.212	204	3.392	186	3.093
Luxemburg	195	3.257	188	3.133	170	2.837
Malta	102	1.693	31	522	40	660
Holland	134.760	2.246.000	138.595	2.309.920	135.885	2.264.757
Poland	n.a.	n.a.	104.189	1.736.477	103.405	1.723.408
Portugal	41.989	699.810	41.808	696.805	39.897	664.953
Slovakia	n.a.	n.a.	6.606	110.098	7.334	122.237
Slovenia	8.979	149.645	9.492	158.192	9.301	155.008
Spain	220.169	3.669.485	218.998	3.649.963	232.237	3.870.615
Sweden	84.309	1.405.153	89.466	1.491.107	102.524	1.708.732
United Kingdom	107.760	1.796.007	118.601	1.976.680	108.193	1.803.220
EU (25) Total	**2.709.475**	**45.157.908**	**2.769.111**	**46.151.855**	**2.669.535**	**44.492.252**
Norway	35.300	588.326	36.038	600.627	37.410	623.492
Switzerland	72.243	1.204.050	65.846	1.097.433	89.843	1.497.223
Western Europe Total	**2.817.018**	**46.950.284**	**2.870.995**	**47.849.915**	**2.796.788**	46.612.977
Albania	4.289	71.475	-	-		
Belarus	1.934	32.239	-	-		
Bosnia-Erzegovina	10.974	182.899	-	-		
Bulgaria	20.606	343.432	25.401	423.350		
Croatia	22.255	370.915	24.920	415.341		
Kazakistan	2.095	34.923	-	-		
Macedonia	6.480	108.000	8.106	135.097		
Moldavia	779	12.980	-	-		
Rumenia	44.368	739.462	49.693	828.213		
Russian Federation	200.394	3.339.905	178.182	2.969.705		
Serbia-Montenegro	44.838	747.301	51.594	859.902		
Central and Eastern European Total	**359.012**	**5.983.531**	**337.896**	**5.631.608**		
European Total	**3.176.029**	**52.933.815**	**3.208.892**	**53.481.523**		

Source: Eurostat for the EU, ICO for Central and Easernt Europe, external statistical sources for the other countries.


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mendations to its members and by reporting seriously deviating applications to the attention of the EU bodies.

Sustainability

Another area to which ECF is increasingly turning its attention is that of sustainability where the Federation is actively present as one of the main sponsors of the Common Code for the Coffee Community. After four years of preparation, this project – which aims at fixing common standards applicable to the whole industry on a social, economic and environmental level – is now becoming reality. The aim is to ensure that in future all coffee dealt with commercially in Europe will conform to the criteria established by the Code. This is a long and arduous journey, but one which will, hopefully, increase consumer awareness.

Basic Figures

Compared to 2004, the importation of green coffee to Western Europe (a term which no longer has a geographical meaning insofar as it also includes East European countries that became part of the EU on 1st May 2004) has fallen by 2.6% to 46.6 million bags.

As far as the drop registered in the EU as a whole is concerned, the increase in Norway and, above all, in Switzerland (+36.4%) must be taken into account. The disaggregated data analysis shows, from one year to the next, significant variations linked to a number of factors that are not easy to evaluate or interpret. It goes without saying that the oscillations in the volumes that pass Customs do not necessarily reflect an increase or a drop in demand on the part of industry or the consumer.

Some Go Up and Some Come Down

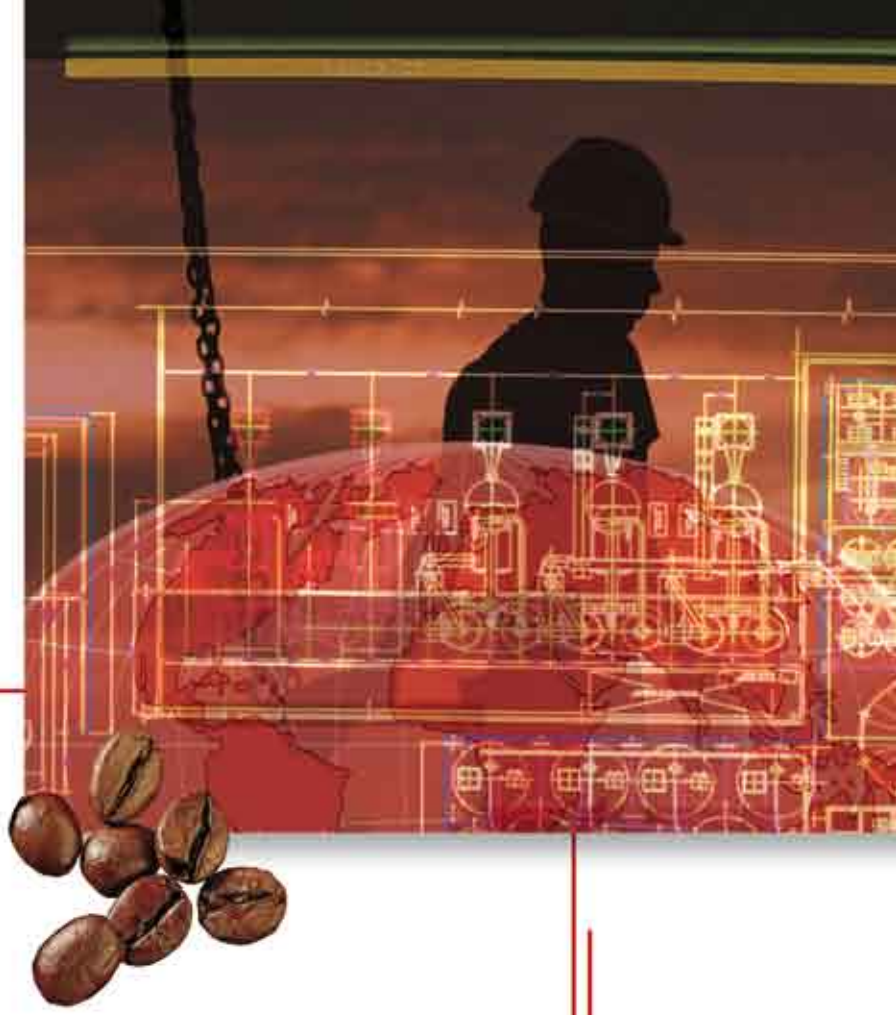
If we look at **table 1 (page 30)**, we notice immediately the drop in Germany's impor-

Tab. 2 – Imports of green, not decaffeinated coffee into the EU(25) (excluding intra-EU trade) in 2003 - 2005 by main origins

	2003		2004		2005	
Origin	**bags**	**%**	**bags**	**%**	**bags**	**%**
Brazil	12.786.317	30,0	12.343.735	28,7	11.991.303	29,2
Vietnam	6.948.805	16,3	8.092.197	18,8	7.231.003	17,6
Columbia	3.815.275	9,0	3.503.467	8,1	3.613.300	8,8
Indonesia	2.105.323	4,9	2.025.993	4,7	2.739.647	6,7
Uganda	2.133.788	5,0	1.823.617	4,2	1.595.758	3,9
Peru	1.395.868	3,3	1.673.783	3,9	1.592.118	3,9
India	1.717.537	4,0	1.857.012	4,3	1.482.243	3,6
Honduras	1.573.528	3,7	1.738.853	4,0	1.474.935	3,6
Ethiopia	1.168.437	2,7	1.307.928	3,0	1.355.588	3,3
Guatemala	1.078.258	2,5	914.393	2,1	855.708	2,1
The Ivory Coast	829.137	1,9	754.103	1,8	775.202	1,9
El Salvador	627.735	1,5	689.677	1,6	678.985	1,7
Cameroon	701.593	1,6	789.528	1,8	658.232	1,6
Kenya	674.375	1,6	664.952	1,5	598.702	1,5
Papua New Guinea	690.385	1,6	614.915	1,4	546.048	1,3
Costa Rica	739.712	1,7	633.612	1,5	497.802	1,2
Tanzania	533.548	1,3	329.222	0,8	481.998	1,2
Burundi	274.712	0,6	210.800	0,5	456.998	1,1
Nicaragua	444.628	1,0	587.620	1,4	453.327	1,1
Mexico	462.900	1,1	510.075	1,2	332.117	0,8
Others	2.814.257	6,6	3.026.852	7,0	2.439.500	5,9
Total	**42.608.590**	**100,0**	**42.994.638**	**100,0**	**41.065.072**	**100,0**

Source: Eurostat

leadership



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tation (nearly a million bags) which comes on the heels, however, of a substantial increase in the previous year. According to the Report, it should be noted that the German system of gathering data concentrates on the flow of goods entering the country rather than on a precise registration of imports.
In France too there is a sizeable drop in the importation of green coffee which is, however, partially compensated for by the increase in the importation of processed coffee. As far as the main markets of Western Europe are concerned, there are drops in importation on the part of Austria, Denmark and the United Kingdom; Belgium, Holland, Finland and Poland are basically stable while Sweden, Spain and Italy are on the increase.

The Top 5

Table 2 (page 34) shows the 20 main producers of green coffee in the EU. There are no significant variations in the "top 5" with the exception of Uganda which, taking advantage of the regression of India (which has been overtaken even by Peru), comes back into fifth place preceded by a steadily growing Indonesia. Despite a down swing of 2.85% (-352,432 bags), Brazil has increased its market share compared to 2004 but it is still below the 33% registered in 2003. After having gained more than a million bags in 2004, Vietnam has lost 10.64% in volume but it still maintains a solid second position. Colombia also gains some points and goes back to close on the levels of some three years ago (in terms of percentage). Amongst the African producers, Ethiopia and the Ivory Coast go ahead a little as do also, much more relevantly, Tanzania and Burundi; Kenya, and especial-

Tab. 3 – EU(25) exports of roasted coffee (incl. decaf) to non-EU destinations

	2003		2004		2005	
Destination	**ton**	**%**	**ton**	**%**	**ton**	**%**
United States	10.557	19	13.056	21	14.537	20
Rumania	5.133	9	7.568	12	9.735	14
Ukraine	8.748	16	8.119	13	8.772	12
Russia	3.370	6	4.619	7	6.138	9
Switzerland	4.078	7	4.463	7	4.786	7
Norway	1.761	3	2.327	4	3.003	4
Australia	2.763	5	2.186	3	2.238	3
Bulgaria	1.925	3	2.078	3	1.914	3
Canada	1.279	2	1.784	3	1.700	2
Croatia	1.361	2	1.544	2	1.672	2
Iceland	1.629	3	1.372	2	1.597	2
Japan	867	2	922	1	1.141	2
South Africa	708	1	839	1	992	1
Israel	987	2	991	2	980	1
Bosnia and Herzegovina	1.127	2	899	1	936	1
United Arab Emirates	420	1	688	1	933	1
Albania	439	1	520	1	767	1
Turkey	512	1	589	1	717	1
Macedonia	334	1	479	1	654	1
Ceuta	454	1	463	1	475	1
Others	6.927	13	7.779	12	7.245	10
Total	**55.379**	**100**	**63.285**	**100**	**70.934**	**100**

Source: Eurostat


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ly the Cameroon have lost ground. There is also a general drop in Central America and Mexico.

Exports

There is a positive note as far as the exportation of roasted coffee is concerned. A 12% rise in volume has been registered (**See table 3 page 36**)). The United States remains the chief market for placing European products. The first ten countries of destination take up more than three quarters of the total.

Even more relevant is the increase in the exportation of instant coffee which is around +54.38% or in other words about 53,192 tons. The most important client of EU industries is Russia (14,816 tons), followed by Australia (5,792 tons which represents a 170% increase), Ukraine (4,792 tons), Turkey (3,150 tons) and Japan (1,922 tons).

On the importation front, among the five main European suppliers, there are as many as four countries of production. In the lead is Brazil (13,232 tons) followed by Ecuador (8,552 tons), Switzerland (5,639 tons), Columbia (4,264 tons) and the Ivory Coast (2,559 tons).

The Industry

Table 4 sums up the volume of production of some of the main European countries, divided up according to typology, according to Eurostat Prodcom data. The Prodcom project is the instrument that the EU has adopted in order to set up a harmonized system across the EU for the collection and publication of product statistics. It is monitored by the ECC regulation N.3924/91 which sanctions the obligation and the way it should be applied throughout the Union. The Report underlines that these figures should be taken with ample reservations; nonetheless they offer some interesting points to be taken into consideration. They reflect, for example, the pre-eminence of Germany and Italy in the roasting sector. Even more interesting are data on value which show how Italy, although it remains far behind Germany in terms of volume (314,297 tons of roasted coffee in 2005 compared to 427,756 tons produced in Germany), last year made an income of 2.222 billion euros as against the 1.445 million of Germany, the 1.115 billion of France and the 470 billion of Spain. ■■■

Tab . 4 – Production of roasted and soluble coffee in selected EU and candidate EU member (in tons)

	Roasted coffee, not decaffeinated	Roasted decaffeinated coffee	Extracts, essences and concentrates of coffee in solid form (including instant coffee)	Extracts, essences and of coffee in liquid form; with a basis of extracts; essences concentrates of coffee or basis of coffee
Austria	15.510	217	-	-
Belgium	84.897	9.858	-	-
Bulgaria	10.884	-	10	-
Croatia	9.403	61	-	-
Denmark	18.030	-	107	168
Finland	53.257	-	17	-
France	180.606	10.664	-	-
Germany	427.756	80.969	113.703	29.596
Greece	10.723	-	8.024	-
Hungary	12.724	-	-	10.425
Iceland	645	-	-	-
Italy	314.297	13.466	-	3.304
Holland	94.112	7.228	-	-
Norway	30.504	304	-	-
Poland	81.336	222	1.700	4.980
Portugal	32.666	1.543	-	-
Rumenia	29.431	-	-	-
Slovakia	3.848	-	-	-
Spain	111.365	14.085	33.954	2.983
Sweden	-	-	-	-
United Kingdom	-	-	-	-

Source: Eurostat

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Fair Coffee for a Better Life

Sustainability

How Coffee Kids is helping farmer Communities

Half a billion people worldwide depend on coffee in one way or another for their income and 125 million of them depend solely on this crop. Most small-scale coffee farmers earn as little as 4¢ per pound of coffee they pick by hand. Everyday many of these families face chronic malnutrition, poor sanitation and little or no access to health care or education.

Throughout history, coffee has always been a boom or bust crop, a volatile agricultural commodity. While prices during boom years are significantly higher than in bust years, they are deceptive. In fact, the running average has been steadily dropping for generations.

According to the World Bank, when taking inflation into consideration, coffee farmers earn less today than their ancestors did 100 years ago. The effects of these prices are compounded by the fact that the majority of coffee farmers are completely dependent on coffee as the sole source of family income.

This dependency on coffee coupled with low prices has resulted in increased production as farmers attempt to shore up their income. In fact, when prices drop, coffee farmers do the only thing they know how to do, grow more coffee. And prices drop even further.

Fairtrade and other premiums have helped establish better prices for small farmers, and provided roasters and vendors with the opportunity to pay a fair price for their coffee, but an equal amount of effort needs to be dedicated to alleviating reliance on the coffee crop.

If coffee farmers are to liberate themselves from the cycle of poverty, they must wean themselves from dependency on coffee harvests. If coffee-farming families are helped to create alternate sources of income, savings groups or other forms of economic diversification, they will be better able to maintain themselves and their families. Then they can continue farming coffee knowing that a dip in international prices will not have a catastrophic effect on family income.

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The Facts of Coffee:

- After oil, coffee is the second-most valuable commodity of international trade.
- Most of this coffee is grown by small-scale, coffee-farming families.
- 25 million families around the world work in coffee fields and depend on coffee as their only source of income.

How you can help:

Coffee Kids is dedicated to improving the quality of life for children and families in coffee-growing communities around the world.

We alleviate the dependency on coffee through economic diversification and education. You can help Coffee Kids help coffee-farming families.

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Introduction to Coffee Kids

Coffee Kids is a non-profit organization dedicated to helping coffee-farming families improve the quality of their lives. We work with coffee-farming communities in Latin America and elsewhere to create alternatives that provide income throughout the year, not only during the coffee harvest.

Like most people, coffee-farming families identify and prioritize the problems that are most pressing to them. They solve these problems by creating strategies and implementing projects based upon their own values and culture. These projects focus on economic diversification, health care and nutrition, or education.

Coffee Kids listens to members of coffee-farming communities as they describe the challenges they face. We address these challenges by forming partnerships with local non-profit organizations and then work with them to develop projects that address community problems at a grassroots level.

We currently work with 11 projects in Mexico, Guatemala, Nicaragua, Costa Rica and Peru. Our primary projects include micro-credit and economic diversification, health care and education.

Our work is not related to the commercialization of coffee, but rather creating sustainable alternatives to coffee that will allow farmers and their families to reduce their reliance on this crop, while subsequently increasing economic independence.

Another aspect of the Coffee Kids mission is education and telling the stories of coffee-farming families to roasters, buyers and, ultimately, consumers. We do this through a quarterly newsletter delivered to donors and other supporters, our Web site, and presentations at conferences.

Funding for our programs primarily comes from businesses and individuals directly or indirectly related to the coffee trade. But like our coffee-farming partners who seek alternatives to supplement their income, we seek to diversify our revenue base in order to expand our reach. We welcome individual members and creative fund-raising ideas, and we seek to establish long-term agreements with large donors to provide our partners with consistent support.

Coffee Kids History

Bill Fishbein, a coffee roaster from Providence, R.I., USA, founded coffee Kids in 1988. Fishbein has been working in the specialty coffee industry since 1977 when it was still a cottage industry in the United States.

Upon traveling to Guatemala in 1988, his life was changed when he witnessed the poverty faced by those producing coffee throughout the world.

"I was shocked and amazed at the poverty," Fishbein said. "It is something I still have difficulty coming to terms with. But I was amazed at the spirit of the people.

"In spite of the poverty, or maybe because of it, the families I met had strong cohesive communities and a generosity that can only be matched by the poorest of the poor.

"Honestly, I wanted to learn from them. When I returned home, I started Coffee Kids to remain connected to them and because I couldn't sell another pound of coffe without doing something to help.'"

Fishbein returned home and began canvassing fellow coffee roasters and was overwhelmed by the support. Numerous roasters were confronting the same realities of the industry and looking for an outlet to support positive change.

Since then, Coffee Kids has raised and distributed over $4,000,000 in funds to help coffee-farming families in their efforts to improve the quality of their lives.

For more information on how you can help Coffee Kids help coffee-farming families improve their lives, visit www.coffeekids.org or send an e-mail to members@coffeekids.org. ■■■

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Pods are Here to Stay!

I was curious and visited one of those coffee chains the other day - it had only recently opened and they really didn't have customer service down to a science yet - but something happened that made me realize that pods have finally become mainstream. A customer was asking about the espresso machines that were on display in the store, specifically about how difficult it would be to make a good cup of espresso with one (I could just see the customer envisioning a huge owner's manual needed to master complex, arcane coffee brewing techniques). She informed him that he could just use one of those "pod things" in it instead of buying an espresso grinder or pre-ground espresso. She went on to say that the espresso pods were fresh, convenient, easy to use, and they took the guesswork out of making a great cup of espresso. I felt a certain smug satisfaction, because we've been preaching that for many years, and it was great to hear someone else delivering the message – our crusade had finally taken hold!

Fresh, convenient and easy to use

I let her do her job and kept my comments to myself, but if I had been the pushy type I might have told her a few things about pods.

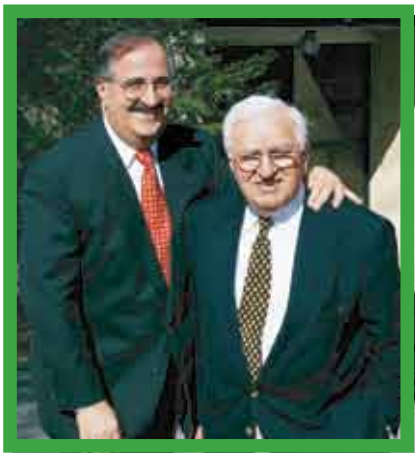
For instance:

· My dad invented pods along with pod packaging technology in the late 1950's. That's right, nearly 50 years ago, K. Cyrus Melikian, our founder (and my father), pioneered the development of automatic vending machines that used pods to deliver the first fresh brewed coffee on demand.

· We developed the finest pod packaging equipment. Our equipment has been time tested, producing virtually billions of pods over the years. Our TMM pod packaging machines can produce up to 3500 pods/hour on continuous perforated tapes, ready for easy bagging. ABCD's equipment can produce various sizes and weights to match any requirements, in both hard and soft pods.

· We're not coffee people, we're pod people. We do not compete with our customers;

we co-pack for clients all over the world. Our clients think of us as their Pod Packaging Department. Our facilities are



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Capacità: Kg. 6

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conveniently located in suburban Philadelphia.

· The industry is changing rapidly. The demand for pods has grown exponentially over the years. We are constantly expanding and improving our equipment in order to meet the growing demands for filtered and espresso coffee pods. ABCD's Modern Process 888 Granulizer can grind enough espresso beans to produce over 60,000 pods per hour! Pods are hermetically sealed and nitrogen flushed to insure a fresh cup every time.

Enough with the facts and figures, though. Nowadays you can find filtered coffee pods in every supermarket, coffee shop, office, and convenience store. Filtered pod brewers are available from inexpensive machines starting at $19.95 to units costing hundreds of dollars. The filtered coffee industry has finally caught on to the convenience of pods for the consumer, but I'll let you in on a little secret - there's a lot better reason to offer pods than just the convenience and quality.

Espresso pods have been in wide use in the food service industry for many years.

Pods make money not in the literal sense, of course, but pods are a profit center. They eliminate the need for grinders, make cleanup a snap, and allow coffee vendors to sell coffee by the cup. Wait a minute, you say, coffee vendors have always sold coffee by the cup. Nope, coffee vendors have always brewed batches of coffee that could sit (typically on heat) waiting to be sold to customers, just getting more bitter by the minute. And I don't have to tell you that bitter coffee makes for even more bitter customers. All that brewed coffee goes to waste, and that is literally money down the drain. Not so with pods. "You makes 'em as you needs 'em". And now you're truly selling coffee by the cup, not by the pot.

Office Coffee

Pods are particularly good for busy offices. Anyone who has worked in an office can testify to the experience of going to the coffee machine only to find that the pot is empty, and the last person to use it didn't turn off the coffee machine. So now you have to not only have to scrub out the coffee pot, but you have to brew a fresh pot of coffee. There goes your coffee break.

Now imagine the same scenario with a pod brewer. You go to the break room and make yourself a fresh cup of coffee in any flavor or variety you want. Life is good.

Food Service

Decaf espresso coffee has always been treated as a stepchild product. The dilemma is that the volume does not usually justify the added investment in an expensive commercial espresso grinder. So operators buy pre-ground decaf, which could be improperly ground and quickly goes stale so an inferior product is produced.

Another money loser can be low volume fresh brewed specialty coffee. Café operators want to offer more than the coffee of the day and decaf, but how to deal with waste and extra equipment tied up? Pods offer the ideal solution! Brew on demand one cup at a time any number of different specialty varieties with no waste! Wow! What a great new idea!

Tea pods are another exciting opportunity. Have you ever brewed tea in a (clean) portafiltro handle of your professional espresso machine? Try it and imagine the possibilities!

Retail

Why not jump into the fray and offer your espresso and coffee products in pods? It is a value added process, which allows you to sell by the cup – the way it is consumed – rather than by the pound. And if you compare prices with retail, your customers will be pleased, as will you!

So what is the future of the pod industry? We think it's only going to get better as pods make inroads in the consumer market. Judging by my experience during my local café visit, the message is finally taking hold - pods are here to stay.

Please feel free to contact me at ram@abcd-pods.com or call me in the US toll-free at 800- 939-1776, extension 117. ■■■

Robert Melikian

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Coffee Culture Grows in Asia

Market Outlook

W

With strong economic growth expected to stay on track, Asia's coffee outlook continue to offer growing opportunities for café chains, in turn boosting retail sales, while on the production side, future growth is unlikely and hinges on world prices for the commodity.

After storming as a world-leading supplier of coffee over the last decade, Asia, with more than half of the world's population, boast some of the best global coffee consumption growth rates.

Leading Robusta producer Vietnam and other rising economies in the region are expected to lead retail sales growth in the years to come, according to market sources. Participants note the beverage will get high exposure across China and the region during the 2008 Olympic Games in Beijing, and the World's Fair, scheduled for 2010, and many countries are positioning ahead of that.

By far, Japan, the world's fourth largest consumer, remains the largest coffee market in tea-loving Asia, but other countries are seeing a blossoming of coffee shops, including South Korea, Taiwan, Philippines, China and Thailand.

More cafes brewing, but (more) production hinges on prices

Instant coffee and ready-to-drink remain the preferred form of drinking coffee, but further exposure to Western standards and growing urban centers are some of the factors influencing consumption patterns in Beijing, Shanghai, New Delhi and other major cities. To be sure, per capita consumption still trails the global average, and instant coffee (which uses Robusta coffee as base) remains the preferred form of drinking the beverage. Chinese consumption, for example, remains low, around 0.01 kilograms per capita, versus 3.13 kilos in Japan and South Korea at 1.67 kilo. That compares with over 4 kilogram per capita in Brazil or Costa Rica, amongst producing countries, and above 10 kilogram per capita in the Scandinavian region.

But coffee shops are still rising. Only in South Korea, more than 300 new cafes are expected this year, and the names include international

café chains as well as local competitors.

Fresh from a trip to China, veteran U.S. coffee executive Rick Peyser, director of community outreach program for Vermont-based Green Mountain Coffee Roasters, says that he was very impressed with the growth in quantity and quality of cafes rising around China's major cities and outside urban areas.

"It's not only in the big cities, such as Shanghai, that you see coffee shops opened by Starbucks and other chains…but also in the smaller towns, new and unique cafes are opening," he told CoffeeNetwork recently.

In addition to Vietnam, other producing countries are reporting strong consumption growth rates. Indonesia's local demand is now 33% of production while consumption is growing 5% per annum. Vietnam's internal demand stands at 7% of production, and is growing at 6% per year, well above the world's average of 1.6%. India's local demand is 25% of local production, and growing 3% per year.

Asia's future coffee production, meanwhile, is likely to continue dominated by Vietnam, Indonesia and India, but Papua New Guinea may be poised to increase supply of Arabicas, say traders operating in the region.

According to Euromonitor International, coffee shops in Asia Pacific are expected to grow to about 18,000 outlets by 2010, up from some 14,000 expected by the end of 2007 (**see graph 1**).

Although the market is still trailing the U.S., which had 21,000 coffee shops last year, Asia had less than 4,000 cafes in 1999.

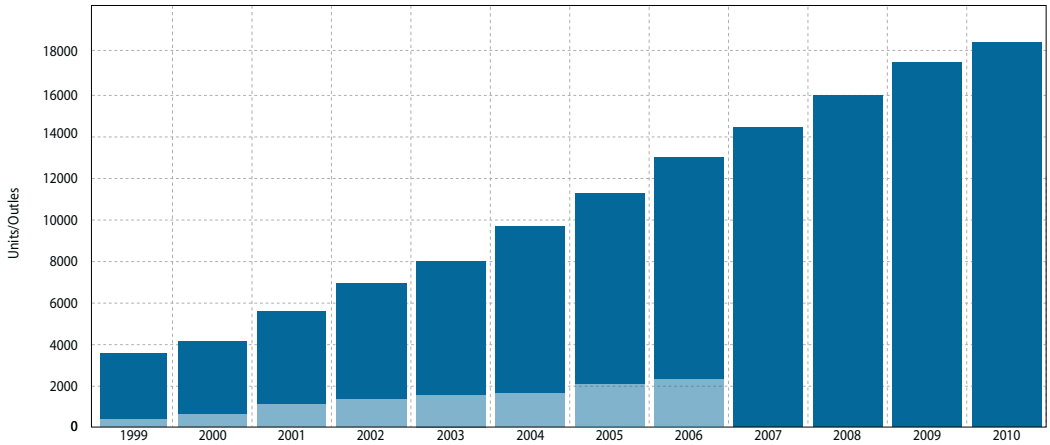
The rise of the coffeehouse is boosting overall retail sales across Asia. According to Euromonitor, Asia's average compound annual retail sales are expected to grow 4.2% between 2005-10 from 2.5% the previous five-year period (**see graph 2 page 52**).

Vietnam, the third fastest growing economy in Asia, will lead the retail coffee sales fro the region, seen up 17% per annum between 2005-10, following growth of 7.8% in 2000-05.

Compound coffee retail sales in China and India are also expected to grow 12% and 10.7% per year in the 2005-10 period. But the Philippines and Thailand are also expected to see double-digit growth.

In Japan, which has the most developed coffee shop scene in the region, retail sales are expected to grow just 1.9% annually in 2005-10 (see graphs).

Graph 1 - Coffee shops in Asia Pacific



Source: Euromonitor/Starbucks

...eppure tutto questo, può diventare

questo.

Lifestyle Changes, Starbucks Experience

Changes in life style, retail space availability amid strong economies and changing demographics towards a more professional and urban population and, government openness towards foreign investments, are some of the elements driving the coffee shop market, noted recently Alan Poncelet, global procurement manager for Starbucks Corp.

The ready-to-drink market continues as a dominant force, and is the favorite way of drinking coffee in Tokyo, Taiwan and South Korea. In Japan, the ready-to-drink market is already a $10 billion industry. In South Korea, around 80% of the coffee consumed is accounted for by vending machines. There are almost 500,000 vending machines in South Korea, of which 350,000-plus are serving coffee.

Growth in coffee consumption has been also attributed to increased traveling overseas, both for business trips and tourism. This has led to a greater exposure to the coffeehouse culture that originated in the west and to an increasing familiarity with a variety of coffee brands and blends.

Consumer trends for the region show a taste for sweet-/creamy beverages, while coffee is considered hip and trendy. More recently, there's an ongoing exploration for whole bean coffees. Asia consumers also show a tendency to eat-in in contrast with their American counterparts who show inclination for orders to go. Visits are also more frequent for Asians, already familiar with the teahouse, noted Mr. Poncelet.

In the Asian Pacific region, Starbucks had 200 stores in 1999. By 1Q 2007, the company had 1,831 outlets across the region. The company aims to have 10,000 across all of Asia, over the long term. Currently, its biggest presence is Japan, 665 stores, followed by China with over 400 (including Hong Kong and Macau) Taiwan, 189, and South Korea, 187.

Major Chains, local Competition

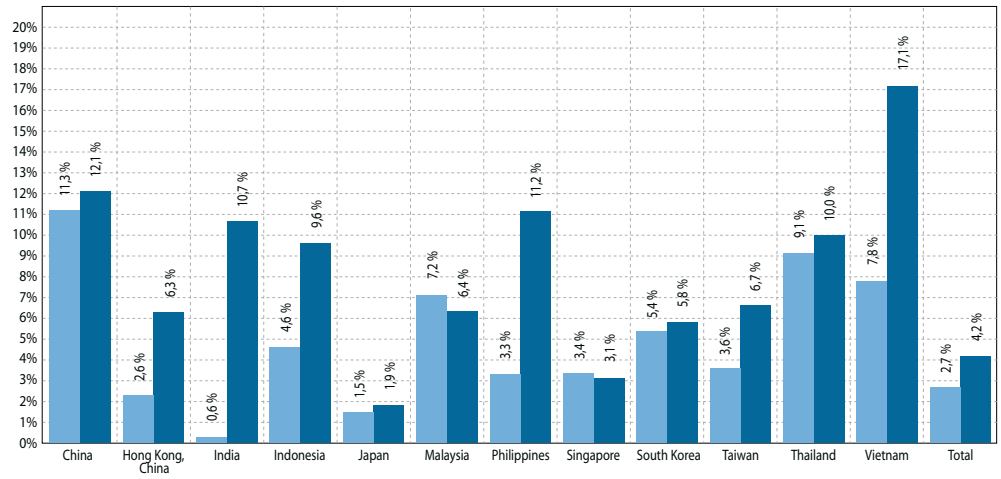
Starbucks is not the only international chain seizing on Asia's growth. This month saw the opening of the second Gloria Jean's Coffees franchise in Vietnam, with a shop now in Hanoi. The Australian-based chain debuted in Ho Chin Minh City in January. Bologna-based Segafredo Zanetti recently opened its second store in South Korea, and has opened many across Asia, including China.

California-based Coffee Bean & Tea Leaf is planning an aggressive expansion of 100 new shops this year, while Pascucci from Italy plans to open 50 new shops. Starbucks is said preparing to expand by 44 shops this year.

Earlier this year, Dunkin' Donuts opened its first store in Taiwan, and there are plans for 10 more there this year.

"Taiwan represents the first step in Dunkin' Donuts greater China strategy," said Anthony P. Pavese, Dunkin' Brands Vice President of International Asia Pacific. "We are actively look-

Graph 2 – Retail sales value of coffee
(compound annual growth rate comparaison)



Source: Euromonitor/Starbucks

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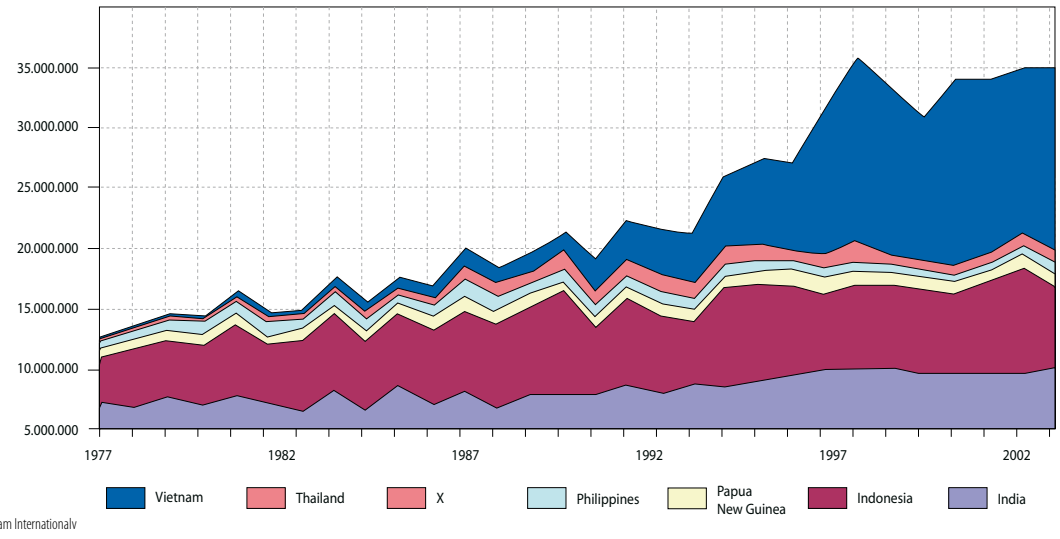
ing for Dunkin? Donuts partners in China," added Pavese.
In South Korea, the high-end coffee market has grown by more than 30% in the past few years, to its current W300 billion (US$1=W938) size. Starbucks is the dominant brand with sales last year of W109.4 billion.
Domestic brands are also growing. Hanwha Galleria announced that it would open a coffee shop subsidiary called Beans & Berries. Lotteria's Angel-In-Us says it will open 100 shops this year, and Ediya, a take-out chain, plans to open 60 more outlets this year to bring its total to 270.

Consuming More, Producing More

On the production side, Asia's coffee production has grown to about 30 million bags in 2007, from 8 million bags in 1977, most of the growth coming courtesy of Vietnam (**see graph 3**).
Over the last five to seven years, however, there's been no increase in acreage planted for Vietnam's Robusta production, notes Hans Van, executive with coffee merchant Olam International, which trades about 5 million bags of coffee per annum.
Mr. Van says Robusta future capacity could increase in Vietnam, India, Cambodia, Laos and Indonesia. But that would depend largely on land, labor and inputs, which are getting scarce across the region.
Mr. Hands warns though that Vietnam may not hold off increasing acreage for much longer.
In Vietnam, "Recently higher Robusta prices increased care but no signs yet of increased acreage…the market should soon discover at what price Vietnam's growers would increase acreage," he warns though.
The region's total costs of production for a new plantation are above the prices levels during the 2000-05 period, said Mr. Van, explaining acreage did not increase much at the beginning of the decade, when prices hovered 100 year lows, which put many producers out of business.
Amongst Arabica coffee producers "Papua New Guinea is showing enthusiasm for developing Arabica production," he says. Indeed, Papua New Guinea is aiming to produce about 1.5 million bags in the next couple of years, up from 1 million in 2002.
For more information:
mperez@coffeenetwork.com

Marvin Perez

Graph 3 – Asian production 1977 - 2006
Asian Production 1977 - 2006 - ICO



source: ICO/Olam Internationalv

Everything for Coffee in One Place

An in-depth look at SCAA's 19th Annual Conference & Exhibition in Long Beach

Settled along five-and-a-half miles of sandy coastline, Long Beach is the quintessential setting for an international conference, boasting both the ambience of a sophisticated urban center and the charm of a seaside community. Located just 20 miles south of Los Angeles, California's fifth largest city beckons the coffee industry for the Specialty Coffee Association of America's (SCAA) 19th Annual Conference & Exhibition. Taking place May 4-7 at the Long Beach Convention & Entertainment Center, the conference celebrates the 25th anniversary of the SCAA.

Right now the SCAA Conference Committee is hard at work putting the last-minute, finishing touches on a stellar conference agenda, which thousands of coffee professionals are preparing to take advantage of this spring. As the premiere coffee event of the year, the conference is expected to attract more than 10,000 specialty coffee professionals from over 40 countries. The conference represents the entire industry - coffee producers, exporters and importers, roasters, retailers, manufacturers and baristas.

2007 SCAA Conference Chair Mary Petitt, of the Colombian Coffee Federation, said, "Our industry has completely changed the way consumers perceive coffee worldwide. Before, coffee was a commodity. Today, coffee is a specialty product, marketed in creative ways that confer value never before imagined in our industry. This year's SCAA conference will help set the stage for the industry's next evolution, shaping the future of tomorrow's coffee marketplace."

Attendees will explore a multitude of exhibit booths featuring everything relating to coffee. The conference curriculum provides hours of education on topics such as growing and processing, roasting, brewing and serving, quality and standards, sustainability, industry trends, coffee cupping, business best practices and espresso basics, among others.

For roasters, the event offers direct access to growers. The

Dawn Jantsch
SCAA's new Executive Director

conference is also an excellent meeting place for the Roasters Guild and its members. Roasters will also find leading technical information and valuable information on certifications. Roaster attendees will perform comparative cuppings and meet buyers.

Retailer attendees should make the new Retailer Boot Camp a must. Also, delegates will be pleased to discover that all coffee and tea segments of the industry are under one roof---it's one-stop product sourcing. Retailers can compare vendors at the conference and learn new and specialized trends in the coffee and tea industries. Superior, cutting edge training sessions with industry experts make the 2007 conference a can't miss for retailers.

For food service specialists, understanding the trends on sustainability is important, and the conference will speak heavily on this topic. Food service professionals will also: learn coffee origins; appraise coffee as agricultural crop; access unusual estate blends; improve their knowledge of coffee as a profit center; and perform cupping/taste comparisons.

About the 2007 Conference

The Specialty Coffee Association of America's Conference Committee has been hard at work on the 19th Annual Conference & Exhibition, May 4 - 7. But what are some of the most notable agenda items at this year's event? SCAA Conference Committee Chairman Mary Petitt of the Colombian Coffee Federation - which is also the official conference host - says that attendees should expect a highly educational agenda with some exciting new topics.

"Whether you have been in the specialty coffee industry for years or are just getting started, this year's SCAA's conference program is packed with pertinent, cutting edge topics you won't want to miss," said Petitt. "The SCAA conference is the largest, most comprehensive annual coffee business gathering in the world, and it speaks to the greatest variety of attendees from all segments of our industry."

According to Petitt, the networking and educational and business opportunities at the event are "simply outstanding."

"The In-depth Friday Focus program features an opening General Session address by Ted Lingle on the 'State of Specialty Coffee,'" said Petitt. "The educational curriculum is organized into 'Pathways to Success' with sessions targeted to support the business development of each of SCAA's membership segments.

Petitt points out that the new "Culinary/Hospitality Pathway" will help attendees build bridges between suppliers of specialty coffee and the culinary and hospitality industry. Overall, the show schedule will provide a learning focus in the morning an exhibit show floor focus in the afternoon.

Conference Theme

"Celebrating Our Legacy… Shaping Our Future" is the theme and focus of SCAA's 2007 conference. Petitt said, "This theme reminds us how in just 25 years, our association members have carved out creative new ways of doing business to benefit the entire coffee industry, while also emphasizing a commitment to sustainable development. So we have many important accomplishments to acknowledge. It also reminds us that we are the architects of our own future. Now is our opportunity to be insightful, responsible business leaders and help SCAA shape its next 25 years to be as successful and beneficial as the last." ■ ■ ■

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