

# CONGRESO DE LA CAFICULTURA

2022 • Edición 31





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**EMERGING SPECIALTY MARKETS:**  
COFFEE TRENDS & CONSUMPTION  
IN THE MIDDLE EAST



**MOHAMAD MERHI**  
MANAGING PARTNER & CO-FOUNDER  
CYPHER URBAN ROASTERY

# GREEN BEANS

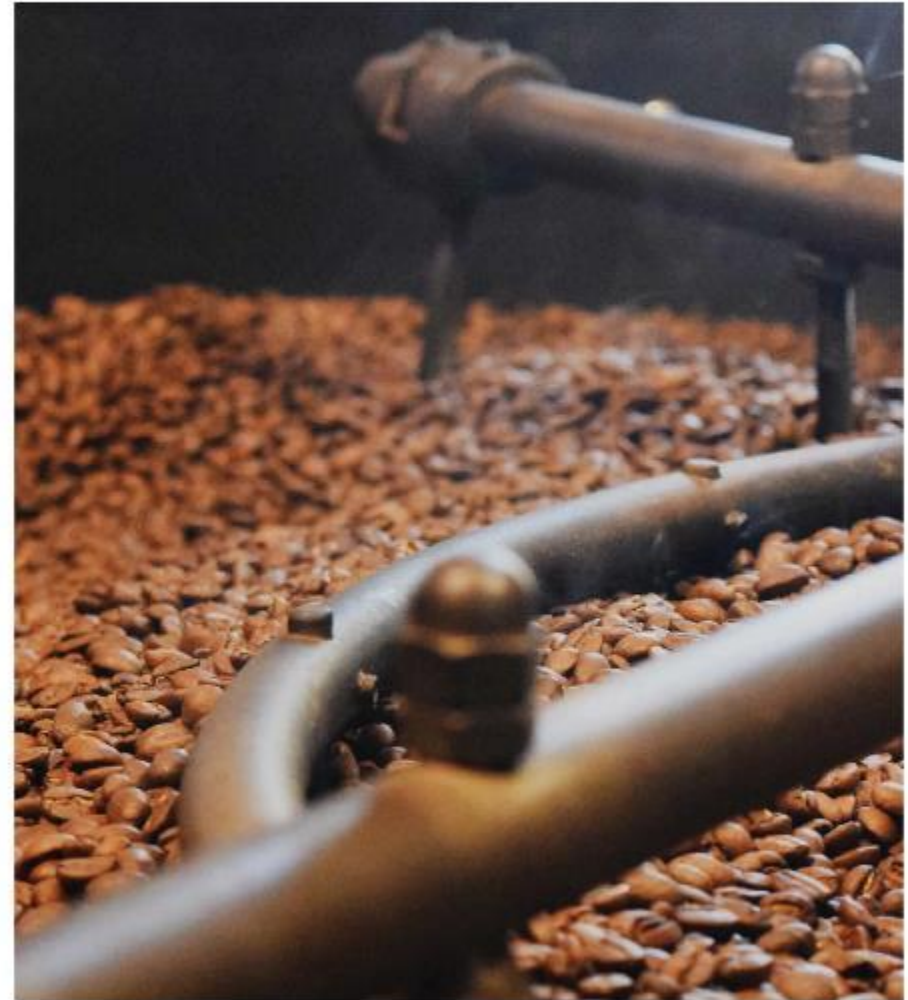
- ▶ SPECIALTY COFFEES
- ▶ COE
- ▶ NEW COFFEE VARIETIES
- ▶ NEW COFFEE PROCESSES
- ▶ NEW ORIGINS OR ORIGINS UNDER DEVELOPMENT





# ROASTERS

- ▶ BIODEGRADABLE PACKAGE SOLUTIONS
- ▶ ONLINE PLATFORM OR APPS TO INCREASE SALES
- ▶ CERTIFIED COFFEES
- ▶ SUSTAINABILITY PROGRAMS FROM BEAN TO CUP
- ▶ TRACEABILITY
- ▶ COFFEE AT HOME SOLUTIONS  
NEW GADGETS AND PRODUCTS
- ▶ PARTNERSHIP WITH COFFEE FARMERS



# COFFEE SHOPS & ROASTERS

- ▶ INCREASE OF NUMBER COFFEE SHOPS OPENING IN THE REGION
- ▶ FOCUS ON COFFEE QUALITY AND STANDARD OF SERVICE
- ▶ SCA AND Q-GRADER COURSES IN HIGH DEMAND
- ▶ COFFEE ACADEMIES
- ▶ BARISTA COMPETITIONS
- ▶ MILK-BASED BEVERAGES REPRESENT 80% OF COFFEE CONSUMPTION IN COFFEESHOPS





# ARABIC COFFEE GAHWA

- ▶ 2015 - UNESCO WAS INSCRIBED ON THE REPRESENTATIVE LIST OF THE INTANGIBLE CULTURAL HERITAGE OF HUMANITY – UAE, SAUDI ARABIA, OMAN, AND QATAR AS A SYMBOL OF GENEROSITY.
- ▶ TODAY MANY ROASTERS HAVE SPECIALTY COFFEE TO OFFER AS GREEN BEANS TO BE ROASTED AT HOME OR ALREADY ROASTED.



# TURKISH & ARABIC COFFEE

- ▶ PART OF TRADITION AND WITH DIFFERENT ROAST PROFILES AND BLENDS POSSIBILITIES OR AS SINGLE ORIGINS.
- ▶ SOME COFFEE CHAINS ARE OFFERING EVEN ESPRESSO TURKISH BLENDS TO THEIR CUSTOMERS.





# THE PRICE OF A CUP OF COFFEE IN THE MENA

- ▶ ACCORDING TO DATA FROM STATISTA AND CASHNETUSA, AS OF 2021, UAE, QATAR, KUWAIT, LEBANON AND KSA RANK AMONGST THE WORLDS TOP 10 MOST EXPENSIVE PLACES TO DRINK A CUP OF COFFEE.
- ▶ THE AVERAGE PRICE OF A CUP OF COFFEE IN QATAR IS \$6.79 MAKING IT THE MOST EXPENSIVE MIDDLE EASTERN COUNTRY TO HAVE A DRINK OF COFFEE.

## COFFEE PRICES ACROSS THE MIDDLE EAST



Location	Price (\$)
QATAR	\$6.79
KUWAIT	\$5.71
LEBANON	\$5.71
UAE	\$5.63
SAUDI ARABIA	\$5.05
BAHRAIN	\$4.37
OMAN	\$4.03
JORDAN	\$3.86
CYPRUS	\$3.86
EGYPT	\$2.34
TURKEY	\$1.45
IRAN	\$0.46

## TOP 10 MOST EXPENSIVE COUNTRIES FOR COFFEE

CONTINENT	COUNTRY	AVG. PRICE OF CUP OF COFFEE
ASIA	SOUTH KOREA	\$7.77
MIDDLE EAST	QATAR	\$6.79
MIDDLE EAST	KUWAIT	\$5.71
MIDDLE EAST	LEBANON	\$5.71
EUROPE	SWITZERLAND	\$5.65
MIDDLE EAST	UAE	\$5.63
EUROPE	DENMARK	\$5.54
ASIA	JAPAN	\$5.29
MIDDLE EAST	SAUDI ARABIA	\$5.05
ASIA	SINGAPORE	\$4.87

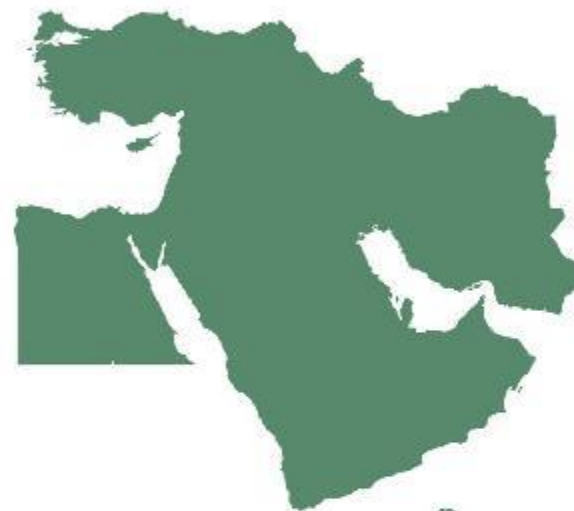
SOURCE: STATISTA, [HTTPS://WWW.CASHNETUSA.COM/](https://www.cashnetusa.com/)



# COFFEE CONSUMPTION IN THE MENA

- ▶ IN 2021, LEBANON WAS IN THE TOP 10 LARGEST COFFEE CONSUMERS IN THE WORLD, RANKING 9TH AND DRINKING ROUGHLY 5.7 KG OF COFFEE PER CAPITA.
- ▶ WHILE QATAR CONSUMED 5.2 KG OF COFFEE PER CAPITA, THE HIGHEST AMONGST GCC PEERS, LUXEMBOURG DOMINATED THE TOP 10 SPOT, DRINKING APPROX. 11.1 KG OF COFFEE IN 2021.

## COFFEE CONSUMPTION ACROSS THE MIDDLE EAST



Location	KG
LEBANON	5.7 KG
QATAR	5.2 KG
CYPRUS	3.9 KG
BAHRAIN	3.9 KG
KUWAIT	3.1 KG
JORDAN	2.7 KG
UAE	1.5 KG
OMAN	1.4 KG
SAUDI ARABIA	1.3 KG
EGYPT	0.3 KG
TURKEY	0.2 KG
IRAN	0.2 KG

## TOP 10 COFFEE CONSUMING NATIONS

CONTINENT	COUNTRY	AVG. WEIGHT OF COFFEE
EUROPE	LUXEMBOURG	11.1 Kg
EUROPE	NETHERLANDS	8.2 Kg
EUROPE	FINLAND	8.2 Kg
EUROPE	SWEDEN	7.7 Kg
EUROPE	DENMARK	7.4 Kg
EUROPE	NORWAY	6.8 Kg
EUROPE	AUSTRIA	6.6 Kg
NORTH AMERICA	CANADA	5.8 Kg
MIDDLE EAST	LEBANON	5.7 Kg
SOUTH AMERICA	BRAZIL	5.4 Kg

SOURCE: STATISTA, [HTTPS://WWW.CASHNETUSA.COM/](https://www.cashnetusa.com/)

# MENA COFFEE IMPORTS BY VALUE

- ▶ MIDDLE EASTERN COFFEE IMPORTS REACHED \$1.4BN BY TRADE VALUE IN 2021, GROWING AT A 4-YEAR CAGR OF 6.85%, ROUGHLY 3 TIMES FASTER THAN THE GROWTH OF WORLD IMPORTS OVER THE PERIOD.

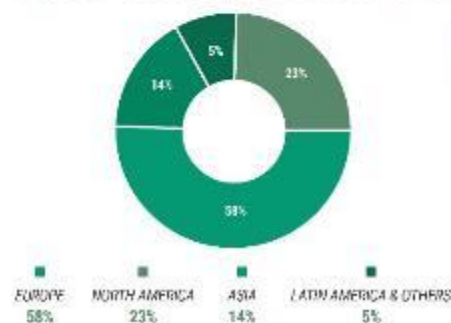
- ▶ SAUDI ARABIA REMAINED THE MIDDLE EAST'S LARGEST IMPORTER OF COFFEE IN 2021 WITH A TRADE VALUE OF \$351.5M, AND REPRESENTING A 12.5% GROWTH RATE OVER THE 4 YEARS FROM 2017 TO 2021.

## COFFEE IMPORTS BY TRADE VALUE (US\$)

IMPORTERS	2017	2018	2019	2020	2021	4-YR CAGR (2017-2021)	1-YR CAGR (2020-2021)
WORLD	33,332,344,000	31,890,253,000	30,970,200,000	31,517,354,000	36,182,595,000	2.07%	4.71%
MIDDLE EAST	1,095,093,000	1,196,583,000	1,266,798,000	1,295,959,000	1,427,379,000	6.85%	4.92%
GCC	391,088,000	397,376,000	430,163,000	501,531,000	572,602,000	10.00%	4.55%
SAUDI ARABIA	219,132,000	212,719,000	247,471,000	281,404,000	351,530,000	12.54%	7.70%
TURKEY	191,908,000	186,564,000	206,686,000	202,873,000	232,670,000	4.95%	4.67%
ISRAEL	123,690,000	132,767,000	127,595,000	139,544,000	180,404,000	9.89%	8.80%
EGYPT	101,750,000	120,428,000	123,338,000	115,523,000	155,211,000	11.13%	10.35%
UAE	101,763,000	108,936,000	111,065,000	124,994,000	145,145,000	0.78%	5.11%
JORDAN	85,704,000	106,367,000	87,707,000	93,564,000	111,057,000	6.85%	5.84%
IRAN	23,356,000	28,209,000	45,301,000	45,494,000	70,300,000	31.72%	15.61%
LEBANON	76,684,000	73,902,000	76,617,000	41,204,000	52,174,000	-9.18%	8.19%
KUWAIT	59,307,000	41,022,000	44,598,000	58,318,000	44,150,000	2.93%	-3.66%
SYRIA	60,036,000	46,131,000	52,847,000	49,568,000	40,914,000	-9.14%	-6.20%
QATAR	15,690,000	17,371,000	21,184,000	23,568,000	21,765,000	8.62%	1.74%
OMAN	13,204,000	17,816,000	12,740,000	14,591,000	7,880,000	-12.21%	-18.56%
IRAQ	6,465,000	5,244,000	5,613,000	10,523,000	6,496,000	0.12%	-14.65%
BAHRAIN	6,532,000	7,322,000	5,603,000	6,379,000	4,963,000	-6.99%	-16.02%
YEMEN	1,882,000	4,512,000	2,104,000	1,356,000	2,132,000	3.17%	16.23%
PALESTINE	28,371,000	28,553,000	31,729,000	27,639,000	593,000	61.98%	72.15%

SOURCE: UN COMTRADE, OEC WORLD, ITC TRADE MAP

## 2021 % SHARE OF WORLD IMPORTS



AREA / TERRITORY	2021 IMPORTS (\$)	% OF WORLD IMPORTS	AREA / TERRITORY	2021 IMPORTS (\$)	% OF WORLD IMPORTS
NORTH AMERICA	8,431,500,000	23%	MIDDLE EAST	1,427,379,000	3.94%
EUROPE	20,779,291,000	57%	GCC	572,602,000	1.58%
ASIA	5,158,368,000	14%	KSA	351,530,000	0.97%
LATIN AMERICA & OTHER	1,813,356,000	5%	UAE	145,145,000	0.40%
TOTAL	36,182,595,000	100%			

SOURCE: UN COMTRADE, OEC WORLD, ITC TRADE MAP



# MENA COFFEE EXPORTS BY VALUE

▶ MIDDLE EASTERN COFFEE EXPORTS REACHED \$136M BY TRADE VALUE IN 2021, DECLINING ROUGHLY 4% FROM 2020 LEVELS BUT GAINING APPROX. 4.5% OVER THE 4-YEAR PERIOD FROM 2017 TO 2021.

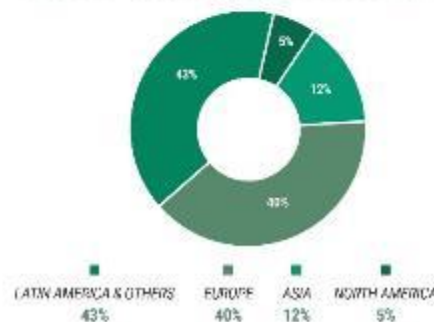
▶ THE UAE REMAINED THE GCC'S LARGEST EXPORTER OF COFFEE IN 2021 WITH A TRADE VALUE OF \$29.2M, AND REPRESENTING A 3.3% GROWTH RATE OVER THE 4 YEARS FROM 2017 TO 2021.

## COFFEE EXPORTS BY TRADE VALUE (US\$)

EXPORTERS	2017	2018	2019	2020	2021	4-YR CAGR (2017-2021)	1-YR CAGR (2020-2021)
<b>WORLD</b>	32,472,241,000	30,536,081,000	29,648,211,000	30,767,351,000	36,349,277,000	2.86%	5.71%
<b>MIDDLE EAST</b>	114,114,000	123,121,000	127,300,000	151,892,000	136,020,000	4.49%	-4.02%
<b>GCC</b>	41,243,000	45,002,000	40,809,000	53,238,000	35,673,000	-3.56%	-12.49%
<b>TURKEY</b>	10,704,000	12,082,000	11,877,000	30,342,000	35,122,000	34.59%	5.00%
<b>UAE</b>	25,610,000	31,037,000	30,568,000	46,913,000	29,160,000	3.30%	-14.66%
<b>YEMEN</b>	18,659,000	19,467,000	20,289,000	21,350,000	26,449,000	9.11%	7.40%
<b>LEBANON</b>	22,540,000	24,307,000	22,664,000	22,754,000	20,984,000	-1.78%	-2.66%
<b>JORDAN</b>	9,651,000	8,456,000	9,666,000	12,979,000	8,443,000	-3.29%	-13.35%
<b>SYRIA</b>		3,771,000	4,754,000	5,341,000	5,896,000	11.51%	3.00%
<b>SAUDI ARABIA</b>	6,479,000	7,707,000	2,516,000	2,700,000	4,270,000	-9.72%	16.91%
<b>ISRAEL</b>	4,603,000	5,695,000	5,417,000	7,656,000	7,748,000	-17.10%	1.15%
<b>KUWAIT</b>	4,120,000	4,969,000	349,000	2,597,000	2,739,000	-15.12%	-6.99%
<b>EGYPT</b>	290,000	37,000	120,000	330,000	651,000	22.42%	25.42%
<b>BAHRAIN</b>	441,000	128,000	181,000	452,000	56,000	-40.31%	-53.15%
<b>PALESTINE</b>	2,899,000	4,193,000	3,484,000	4,759,000	53,000	-61.20%	-77.75%
<b>IRAQ</b>	8,000	-	10,000	14,000	35,000	64.65%	35.72%
<b>QATAR</b>	20,000	340,000	356,000	375,000	27,000	7.79%	-65.40%
<b>IRAN</b>	3,000	14,000	13,000	30,000	26,000	-71.58%	-4.66%
<b>OMAN</b>	4,623,000	821,000	49,000	207,000	27,000	-74.04%	-53.36%

SOURCE: UN COMTRADE, OEC.WORLD, ITC TRADE MAP V

## 2021 % SHARE OF WORLD EXPORTS



AREA / TERRITORY	2021 EXPORTS (\$)	% OF WORLD EXPORTS	AREA / TERRITORY	2021 EXPORTS (\$)	% OF WORLD EXPORTS
NORTH AMERICA	1,787,608,000	5%	MIDDLE EAST	136,020,000	0.37%
EUROPE	14,478,997,000	40%	GCC	35,673,000	0.10%
ASIA	4,351,369,000	12%	KSA	29,160,000	0.08%
LATIN AMERICA & OTHER	15,731,303,000	43%	UAE	4,270,000	0.01%
<b>TOTAL</b>	<b>36,349,277,000</b>	<b>100%</b>			

SOURCE: UN COMTRADE, OEC.WORLD, ITC TRADE MAP

# UAE AND KSA RETAIL COFFEE MARKET

▶ SALES OF COFFEE IN THE UAE WERE ESTIMATED TO BE \$864M IN 2021, GROWING AT A RATE OF 6.5% OVER 4-YEARS (2017/21), WHILE KSA HIT \$569M IN SALES IN 2021 AND A 4-YR GROWTH OF 6.3%.

▶ SALES OF 'FRESH GROUND COFFEE' WAS THE FASTEST GROWING SEGMENT FOR BOTH THE UAE AND KSA, INCREASING 9.5% AND 7.4% RESPECTIVELY OVER THE 4 YEARS BETWEEN 2017 AND 2021.

## RETAIL SIZE AND SALES VALUE OF UAE COFFEE MARKET

TONNES	2017	2018	2019	2020F	2021F	4-YR CAGR (2017-21)	1-YR CAGR (2020-21)
FRESH COFFEE	10,124	11,243	11,700	12,325	13,487	7.4%	7.4%
FRESH COFFEE BEANS	238	275	288	306	322	5.3%	5.2%
FRESH GROUND COFFEE	3,876	10,768	11,497	12,211	13,165	7.3%	7.2%
FRESH GROUND COFFEE PODS	248	273	294	307	314	5.1%	2.4%
STANDARD FRESH GROUND COFFEE	3,628	10,495	11,203	11,944	12,851	7.3%	7.2%
INSTANT COFFEE	12,515	13,246	12,905	14,061	13,362	5.8%	5.4%
COFFEE	22,545	24,268	25,722	27,417	29,150	6.5%	6.3%

USD MILLION	2017	2018	2019	2020F	2021F	4-YR CAGR (2017-21)	1-YR CAGR (2020-21)
FRESH COFFEE	264	300	331	355	379	6.5%	6.8%
FRESH COFFEE BEANS	6	7	7	8	8	7.8%	5.9%
FRESH GROUND COFFEE	257	293	323	347	371	6.5%	6.9%
FRESH GROUND COFFEE PODS	23	22	24	24	25	6.3%	2.5%
STANDARD FRESH GROUND COFFEE	238	271	293	322	346	6.9%	7.2%
INSTANT COFFEE	409	434	458	475	406	4.4%	2.1%
COFFEE	672	734	789	830	881	6.5%	6.3%

SOURCE: EUROMONITOR INTERNATIONAL, COFFEE IN THE UAE, NOV 2019

## RETAIL SIZE AND SALES VALUE OF KSA COFFEE MARKET

TONNES	2017	2018	2019	2020F	2021F	4-YR CAGR (2017-21)	1-YR CAGR (2020-21)
FRESH COFFEE	11,142	12,290	12,992	13,020	14,276	6.4%	2.4%
FRESH COFFEE BEANS	321	323	326	336	345	1.5%	2.8%
FRESH GROUND COFFEE	11,321	11,927	12,314	12,684	12,571	5.5%	2.4%
FRESH GROUND COFFEE PODS	464	339	340	378	625	7.7%	8.0%
STANDARD FRESH GROUND COFFEE	10,857	11,420	11,824	12,266	12,547	5.9%	2.2%
INSTANT COFFEE	4,945	5,054	5,120	5,208	5,323	1.5%	2.2%
COFFEE	16,568	17,314	17,812	18,228	18,639	5.0%	2.4%

USD MILLION	2017	2018	2019	2020F	2021F	4-YR CAGR (2017-21)	1-YR CAGR (2020-21)
FRESH COFFEE	230	281	317	319	332	7.4%	3.8%
FRESH COFFEE BEANS	4	5	5	5	5	4.1%	3.6%
FRESH GROUND COFFEE	245	277	325	315	307	7.4%	3.8%
FRESH GROUND COFFEE PODS	63	70	70	83	86	6.9%	6.7%
STANDARD FRESH GROUND COFFEE	184	207	235	232	224	6.8%	3.1%
INSTANT COFFEE	193	212	222	222	227	5.0%	2.2%
COFFEE	493	493	530	581	584	6.3%	3.2%

SOURCE: EUROMONITOR INTERNATIONAL, COFFEE IN SAUDI ARABIA, DEC 2019





 @BY\_CYPHER |  BYCYPHER.COM

## MOHAMAD MERHI

MANAGING PARTNER & CO-FOUNDER  
CYPHER URBAN ROASTERY

[merhi@bycypher.com](mailto:merhi@bycypher.com)

