



ASTA Crop Report

ASTA Meeting

May 8-11, 2006

Alfons van Gulick

NEDSPICE

Supply & Demand of Pepper

- Trends in Demand
- Trends in Supply
- Trends in Prices
- 2006

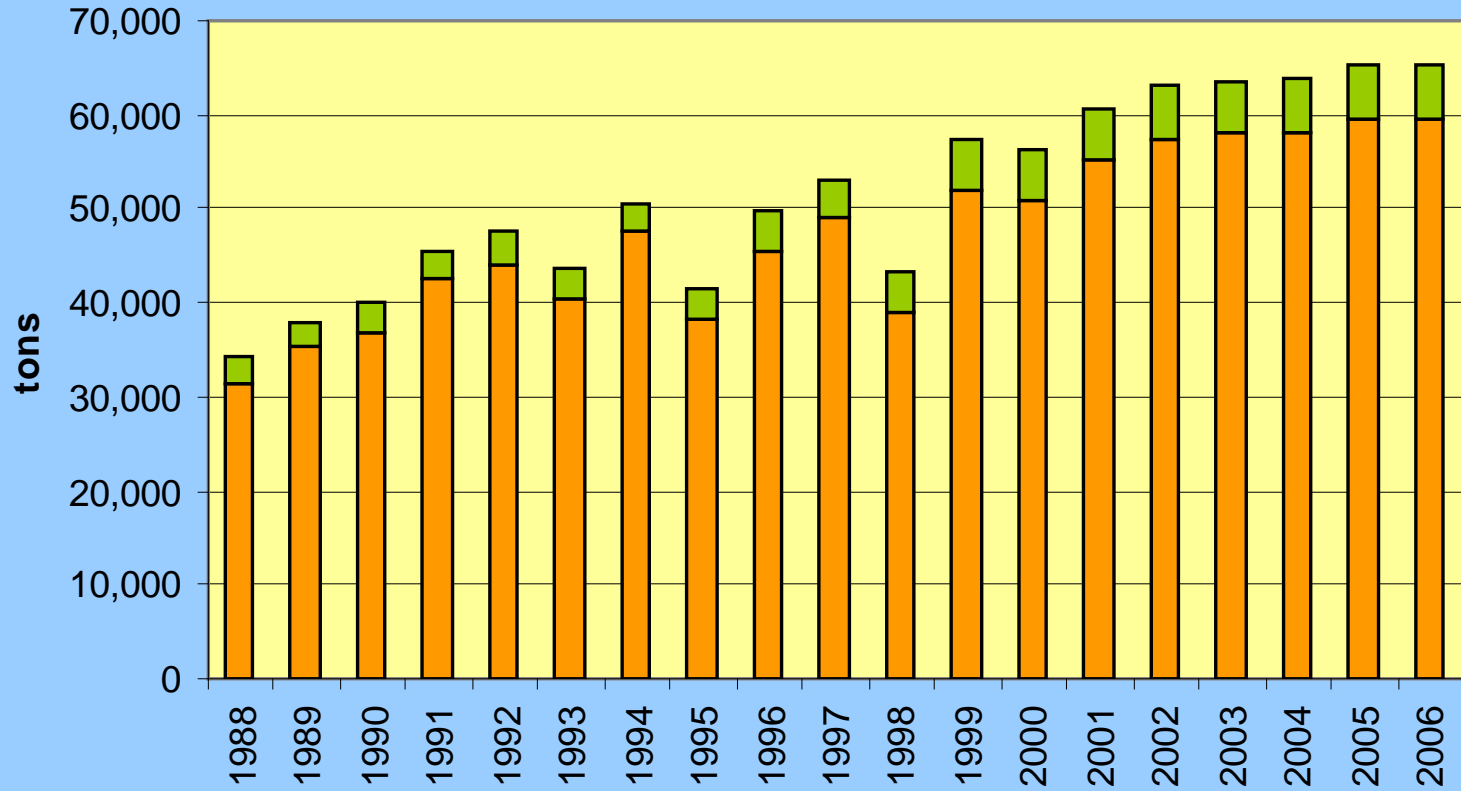
NEDSPICE



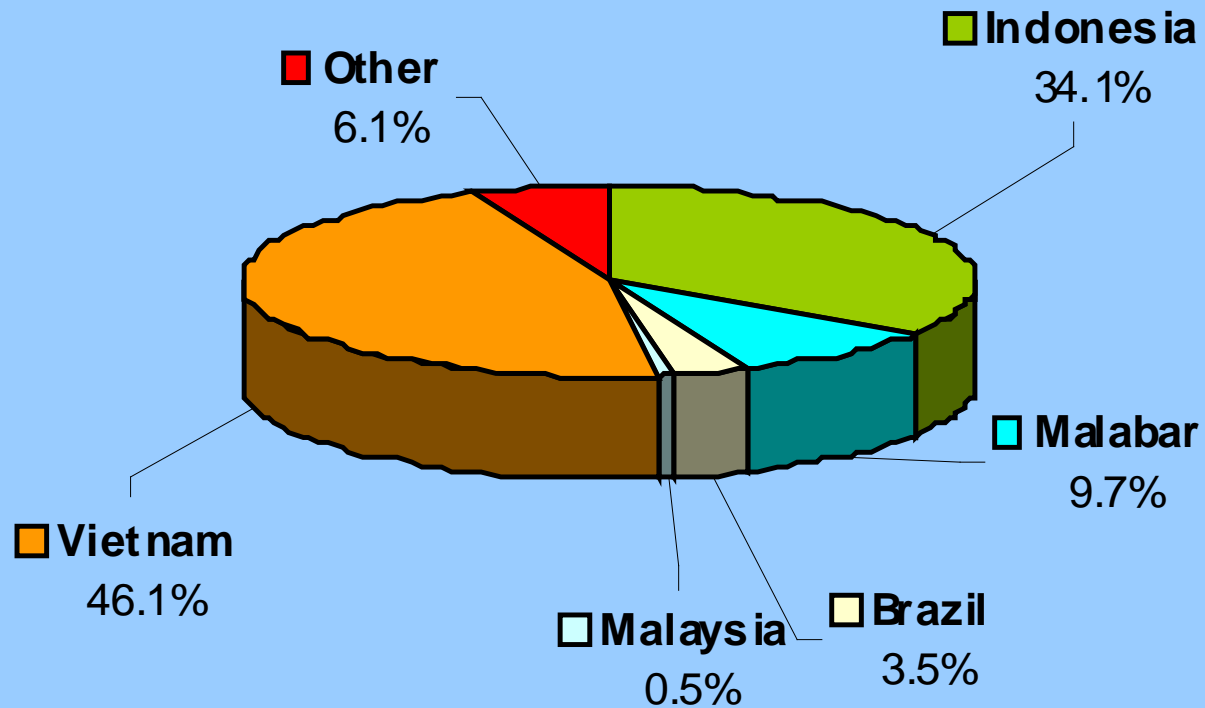
**YOUR TRUST IN PROCESSED SPICES
DIRECTLY FROM ORIGIN**

DEMAND

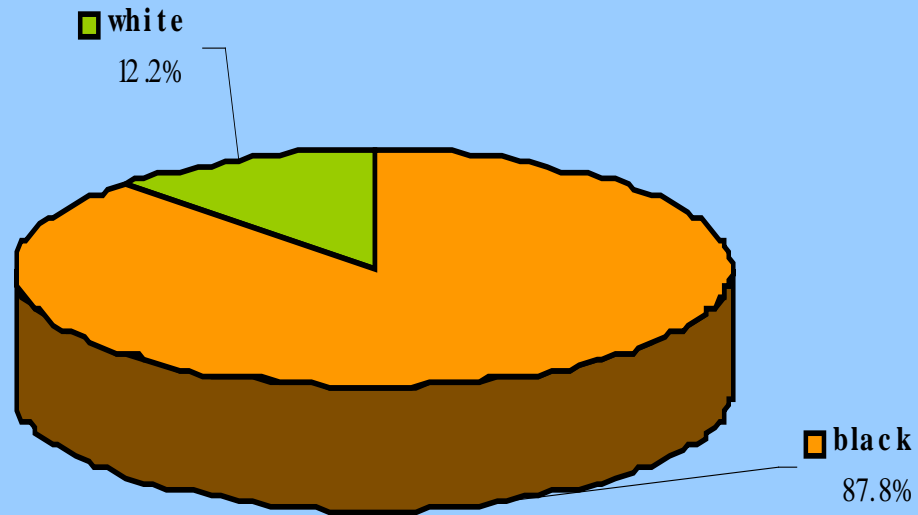
Pepper imports USA and Canada



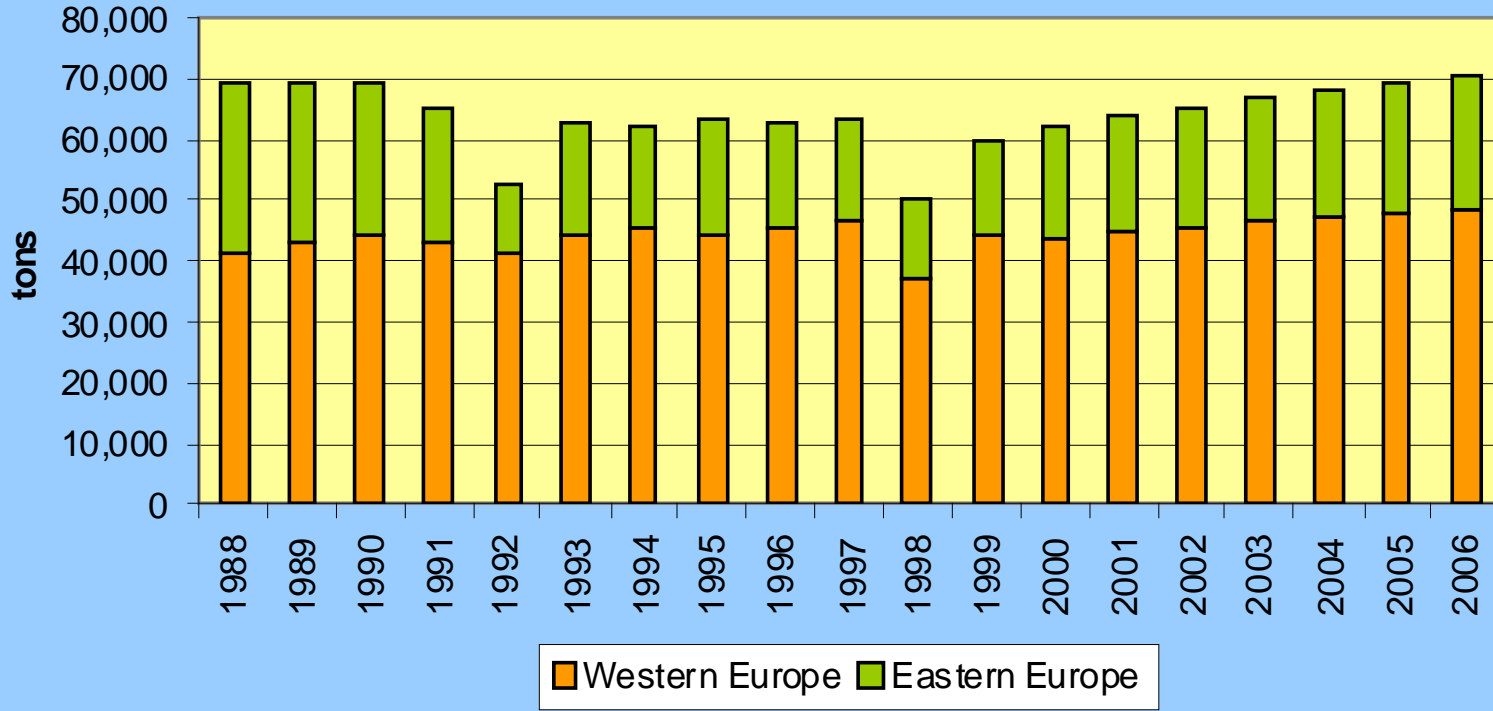
Breakdown n pepper imports USA 2005 (59,400 tons)



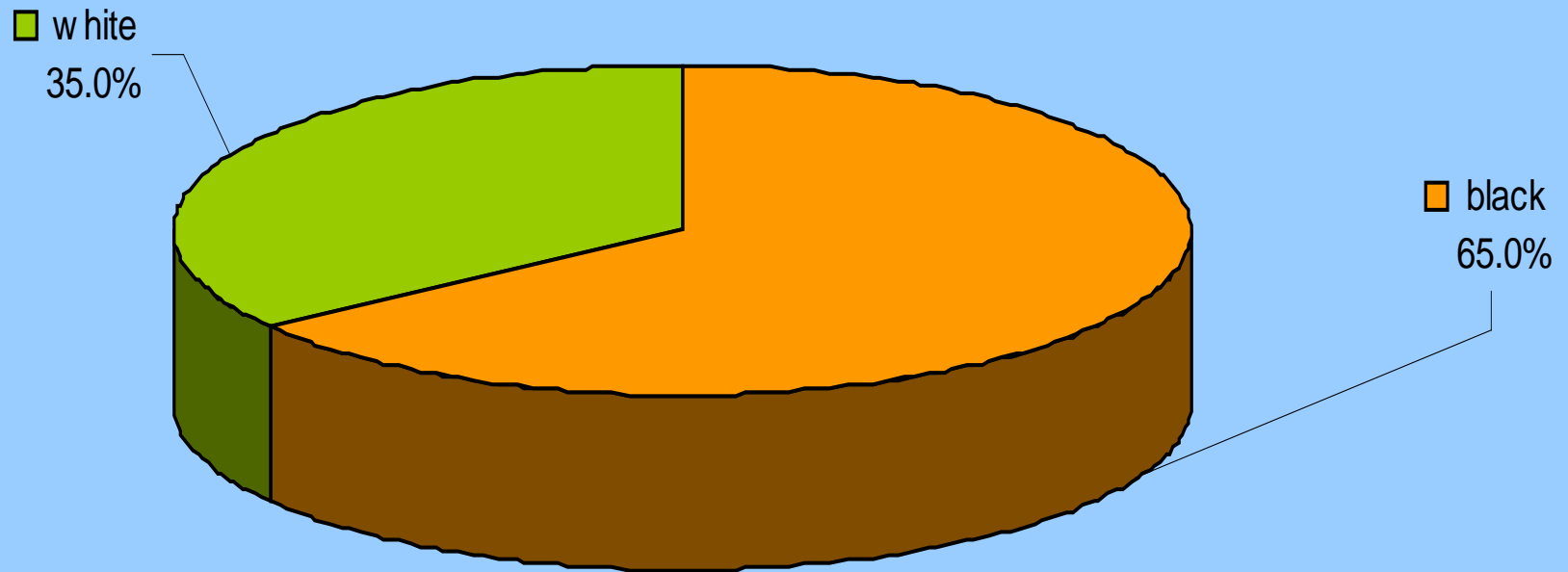
Breakdown of black and white pepper imports USA 2005 (59,400 tons)



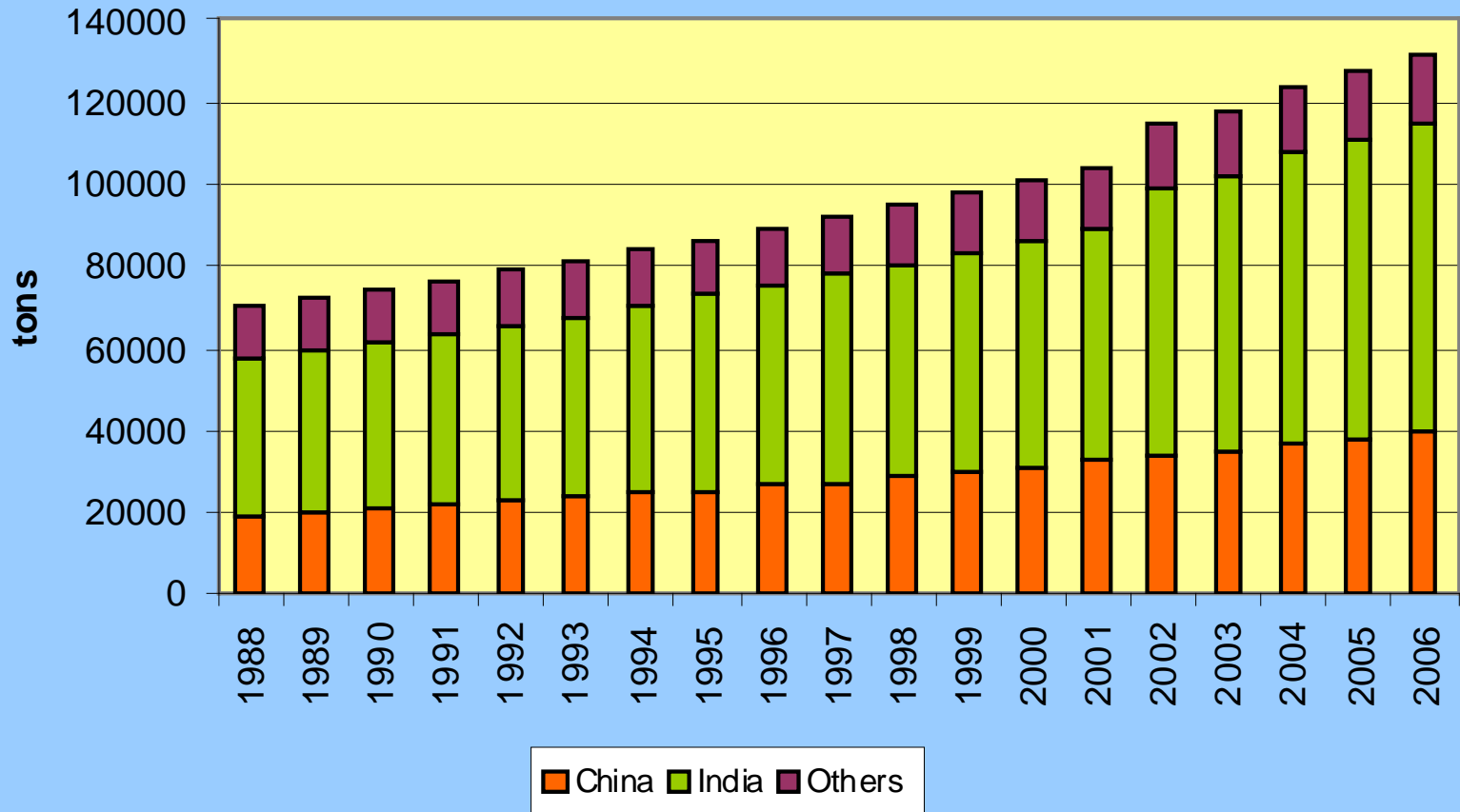
Pepper imports Europe



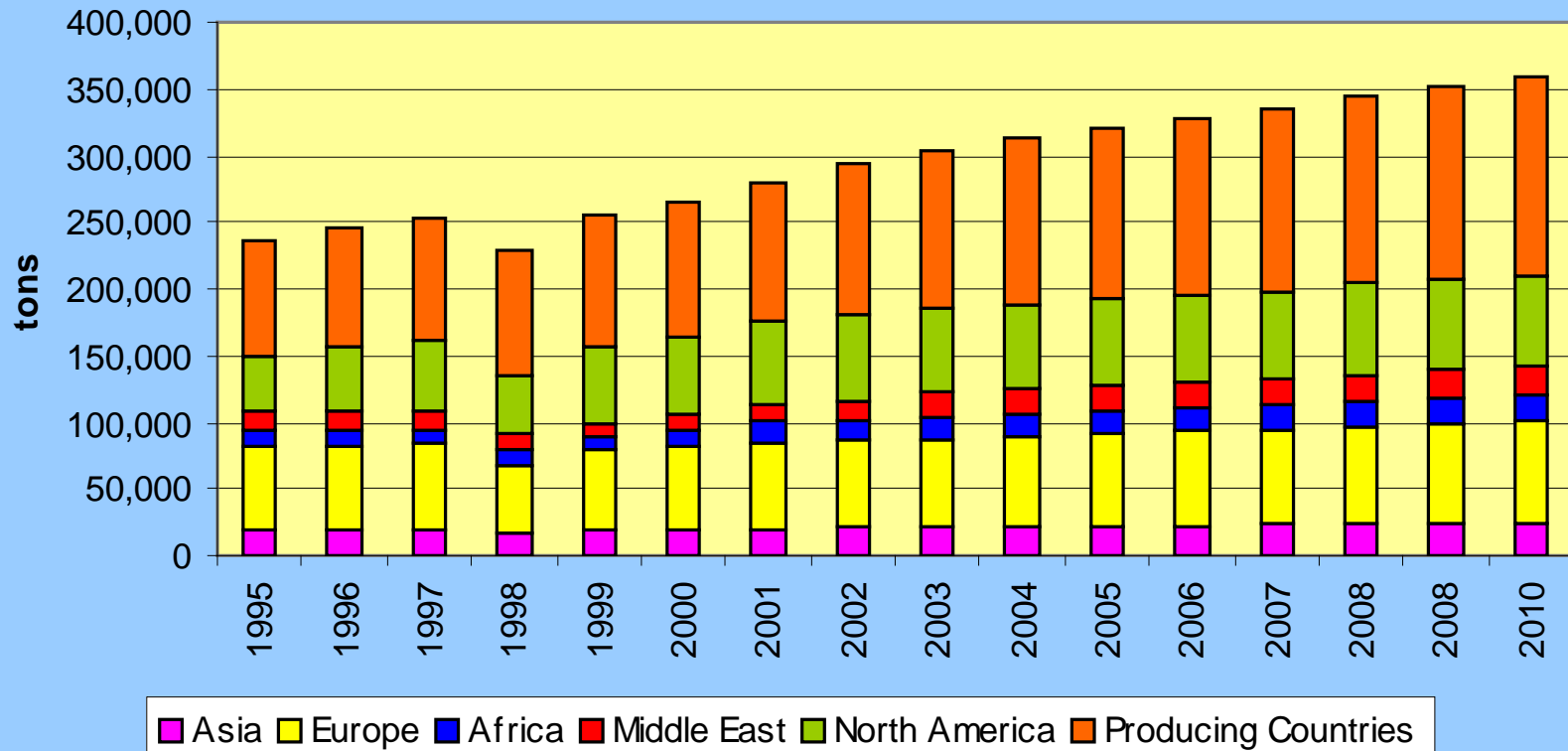
Breakdown of black and white pepper imports Europe 2005 (78.778 tons)



Consumption in Producing Countries

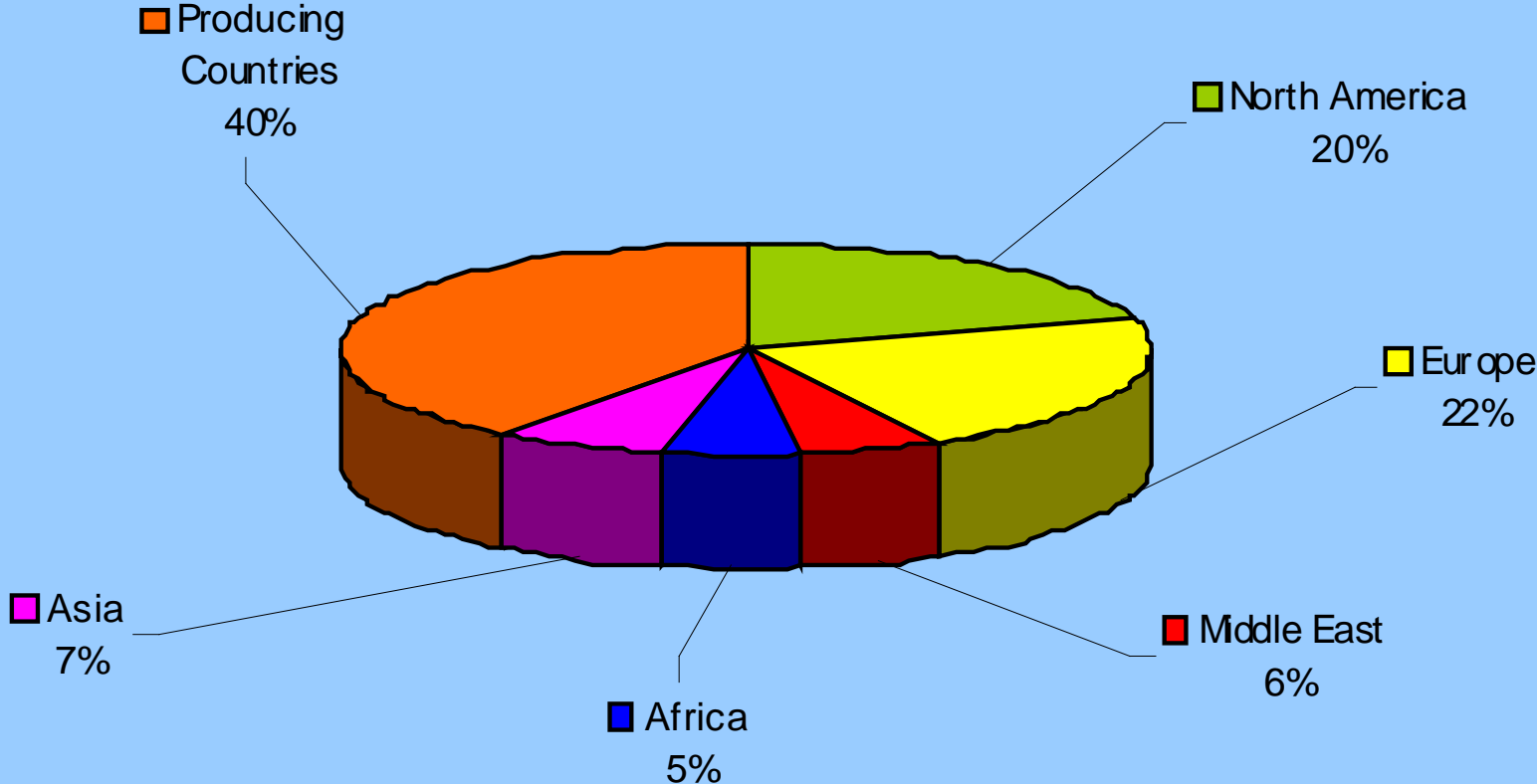


Global Pepper Consumption



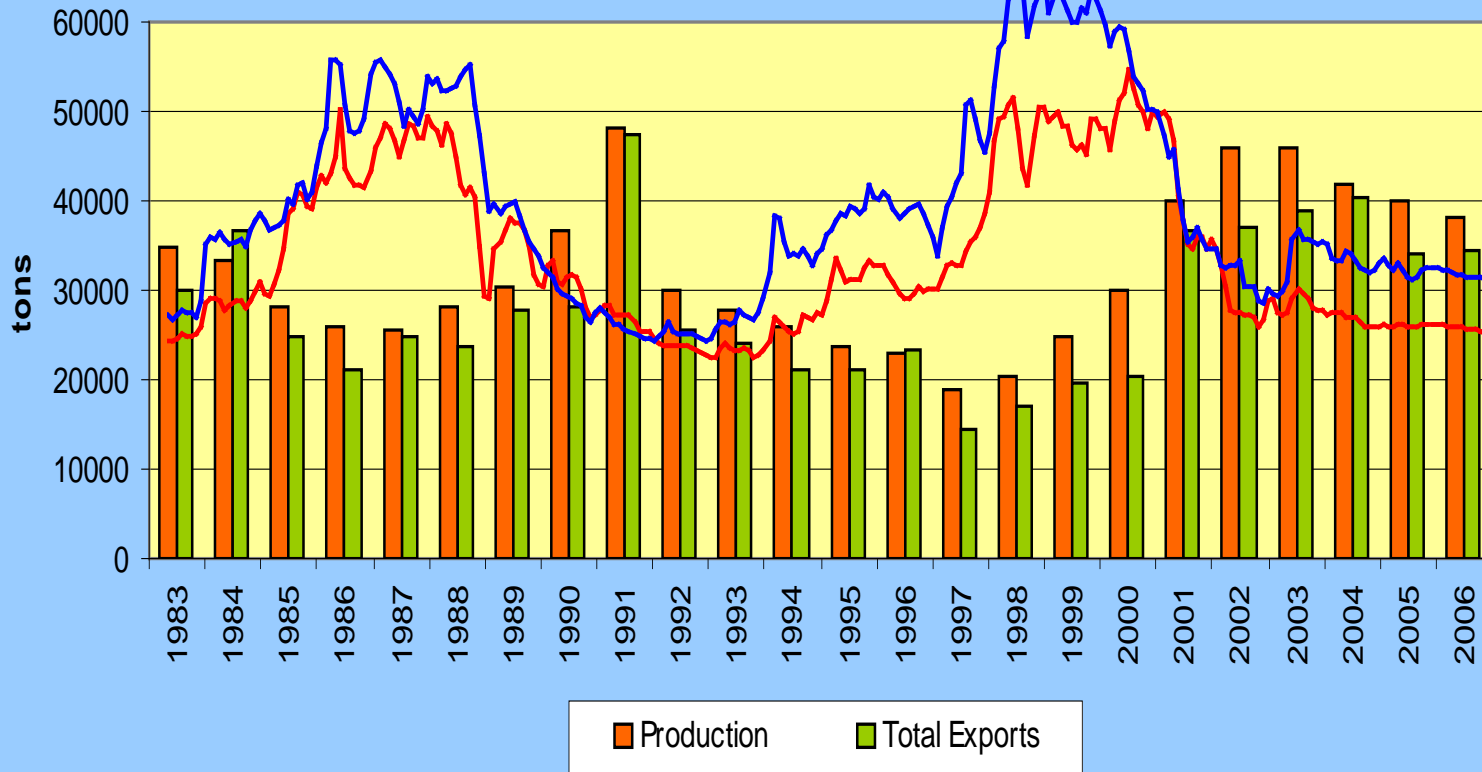
Breakdown of Global Consumption by Region

320.000 tons 2005

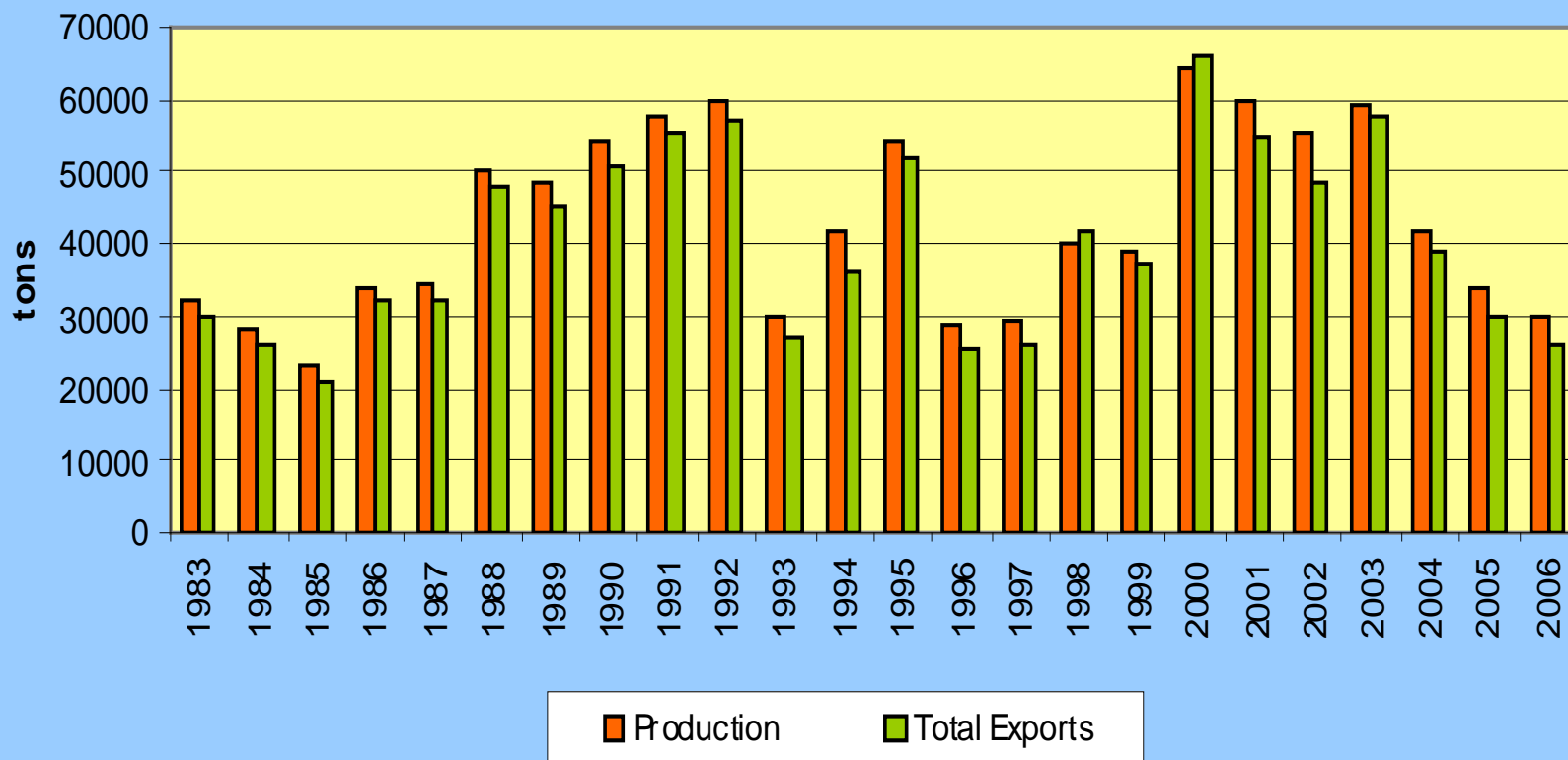


SUPPLY

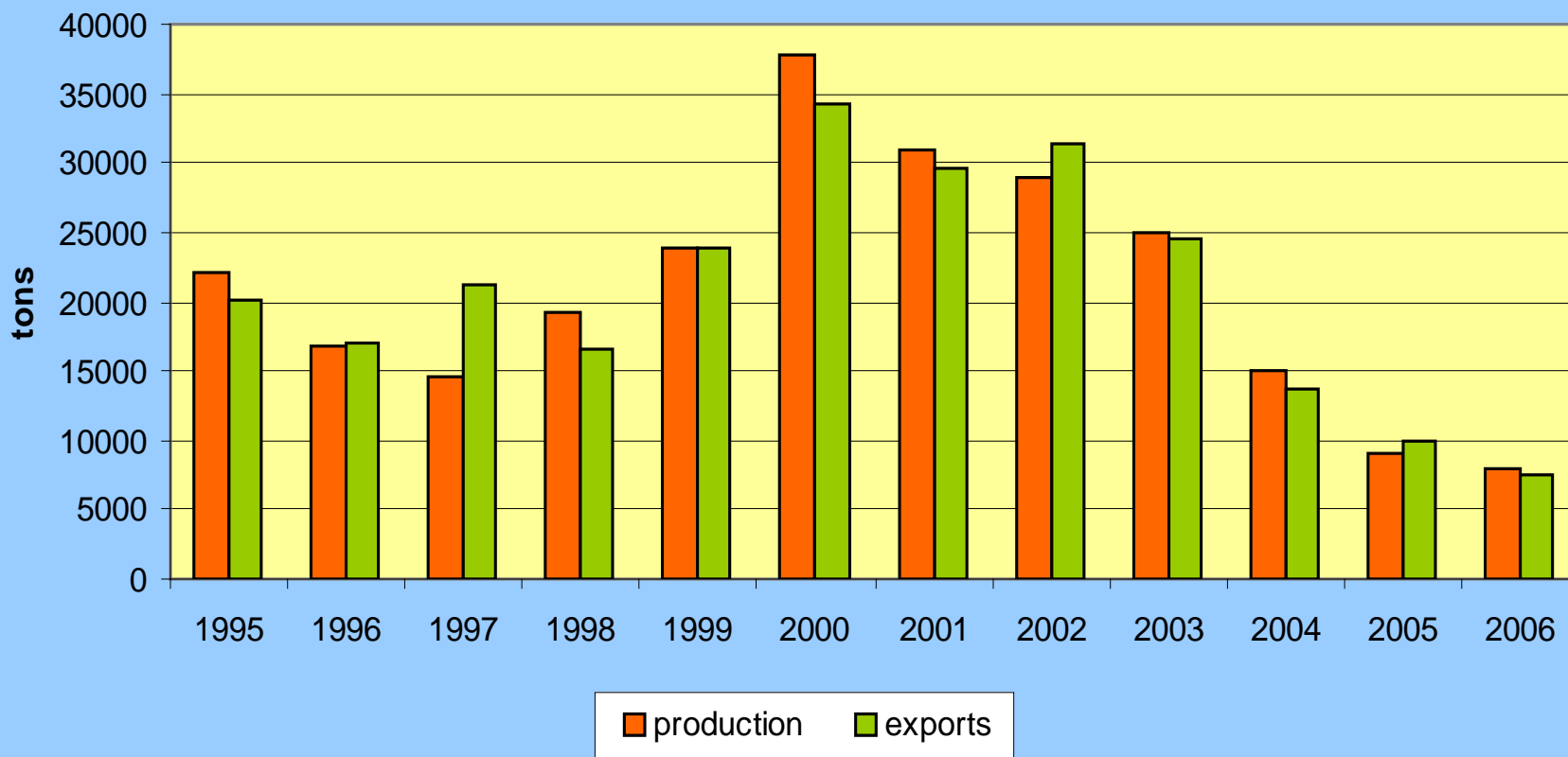
Brazil production and exports



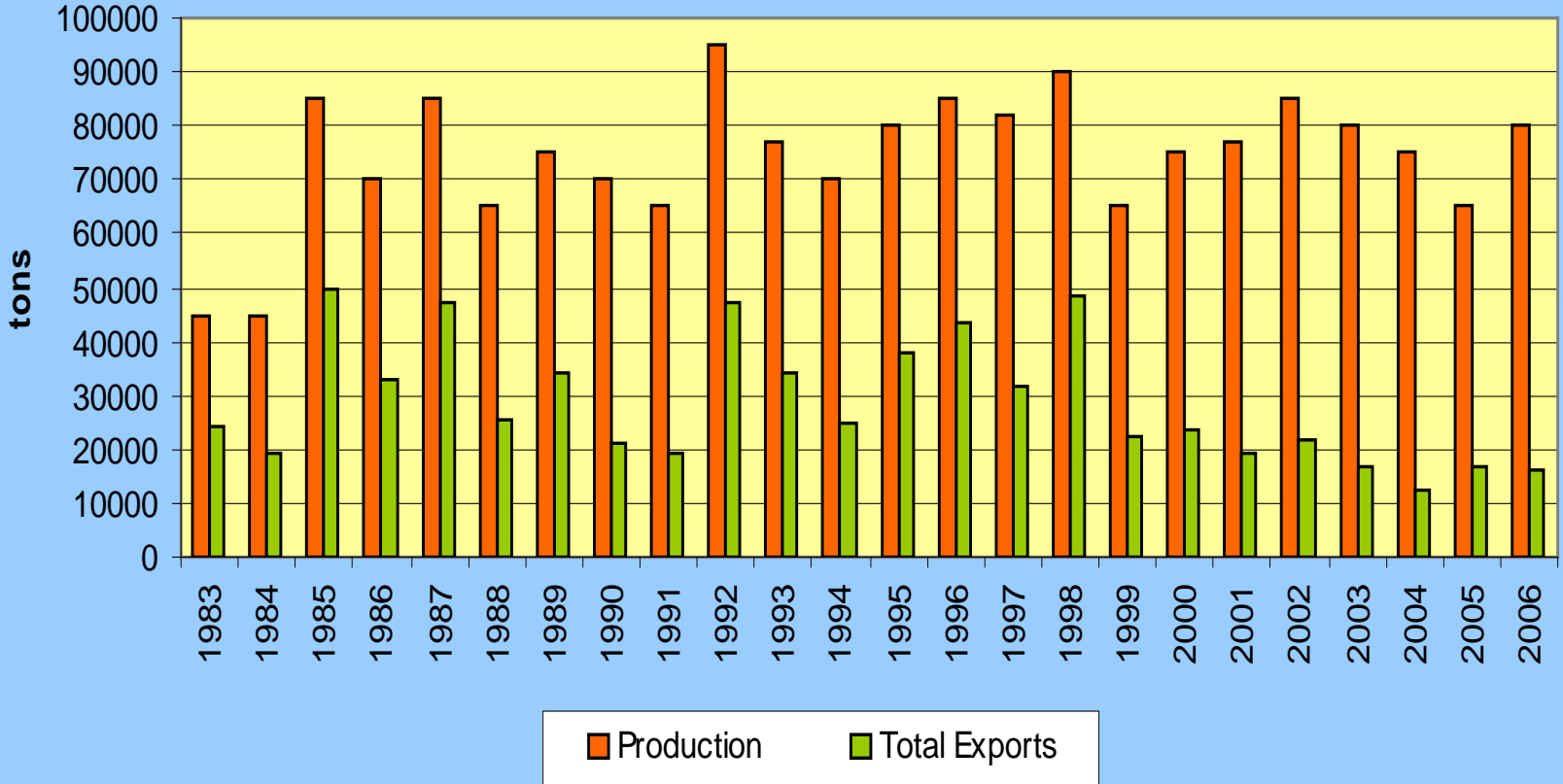
Indonesia production and exports



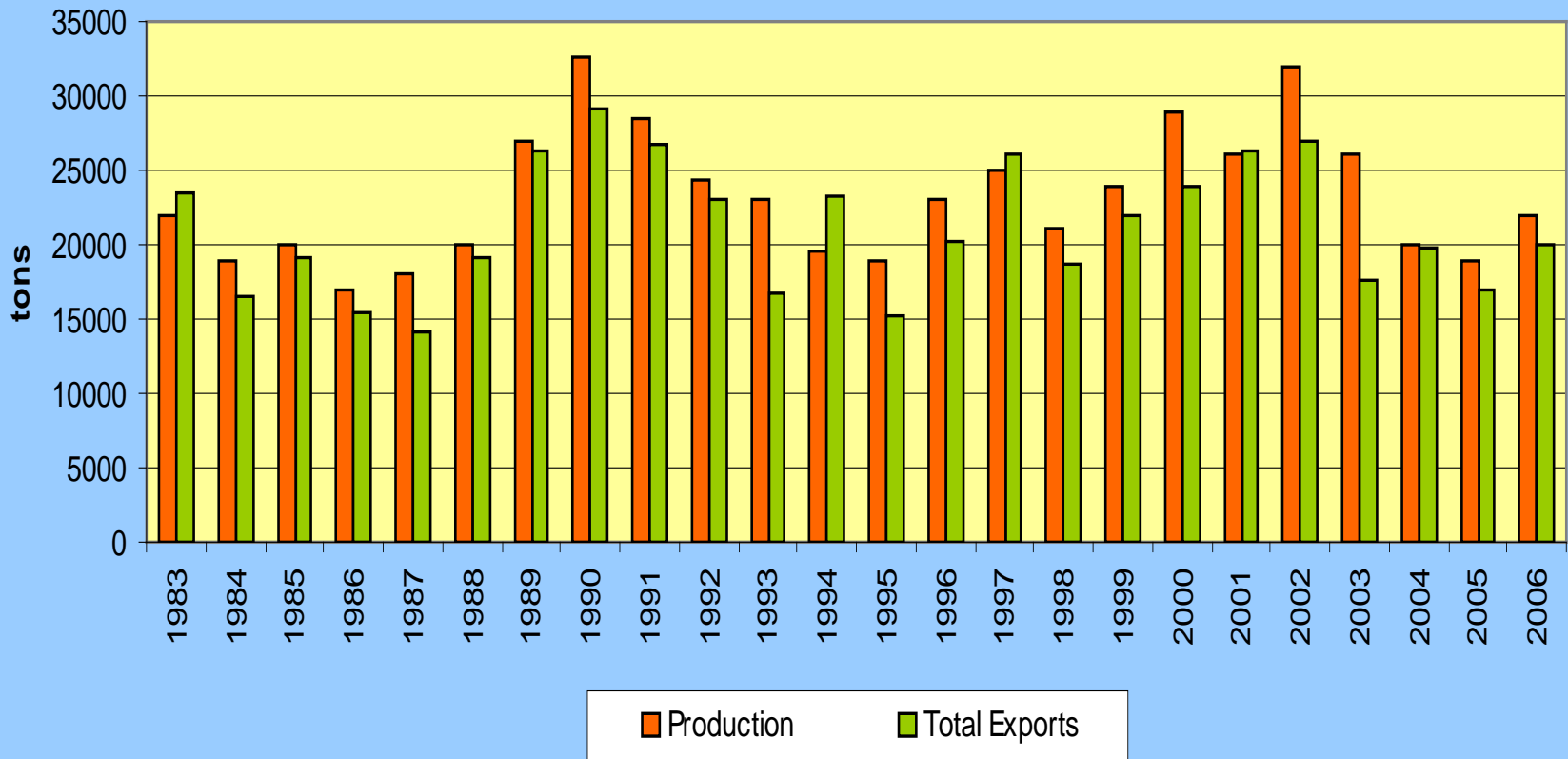
Indonesia Production and Exports White Pepper



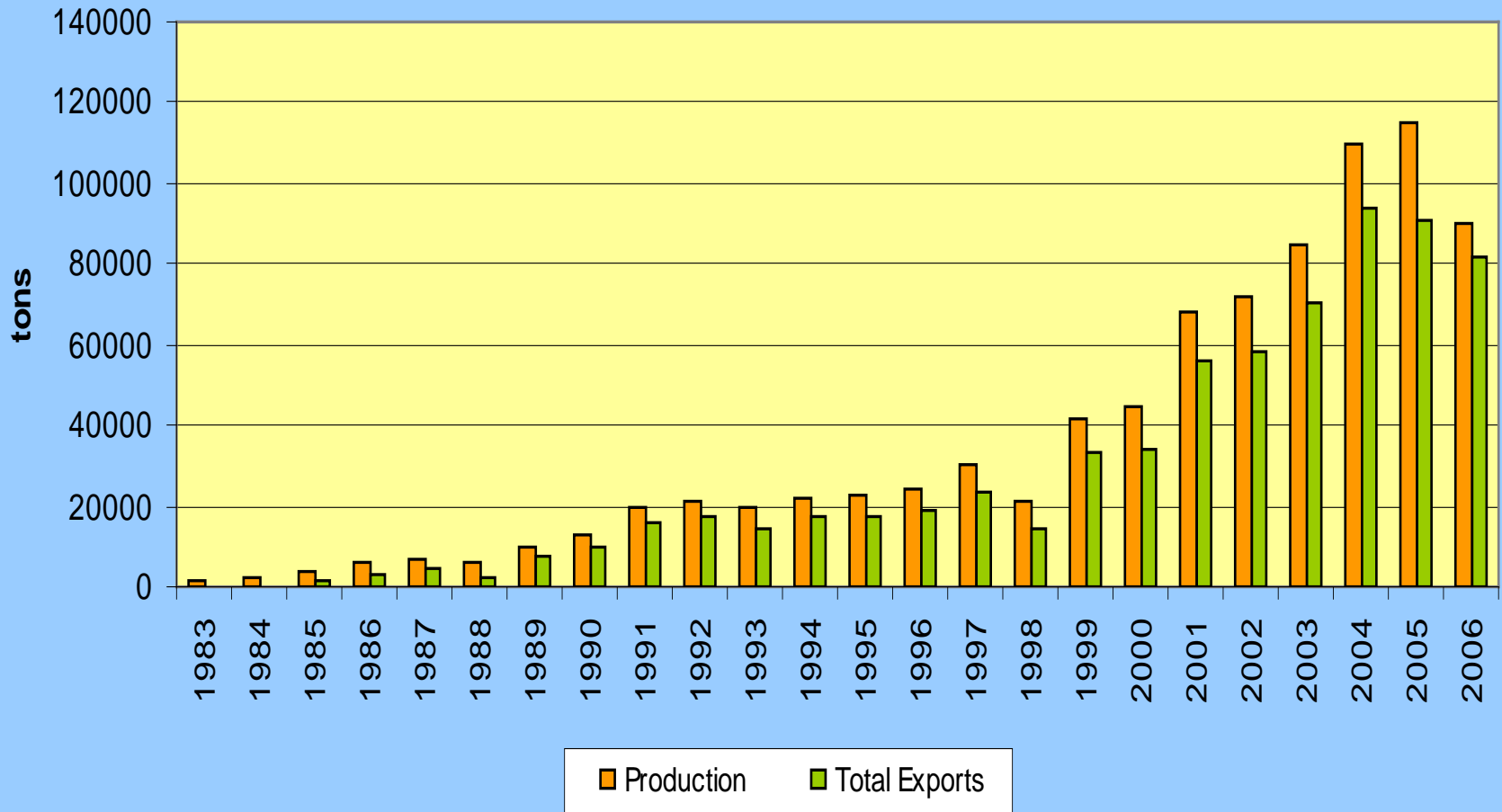
India production and exports



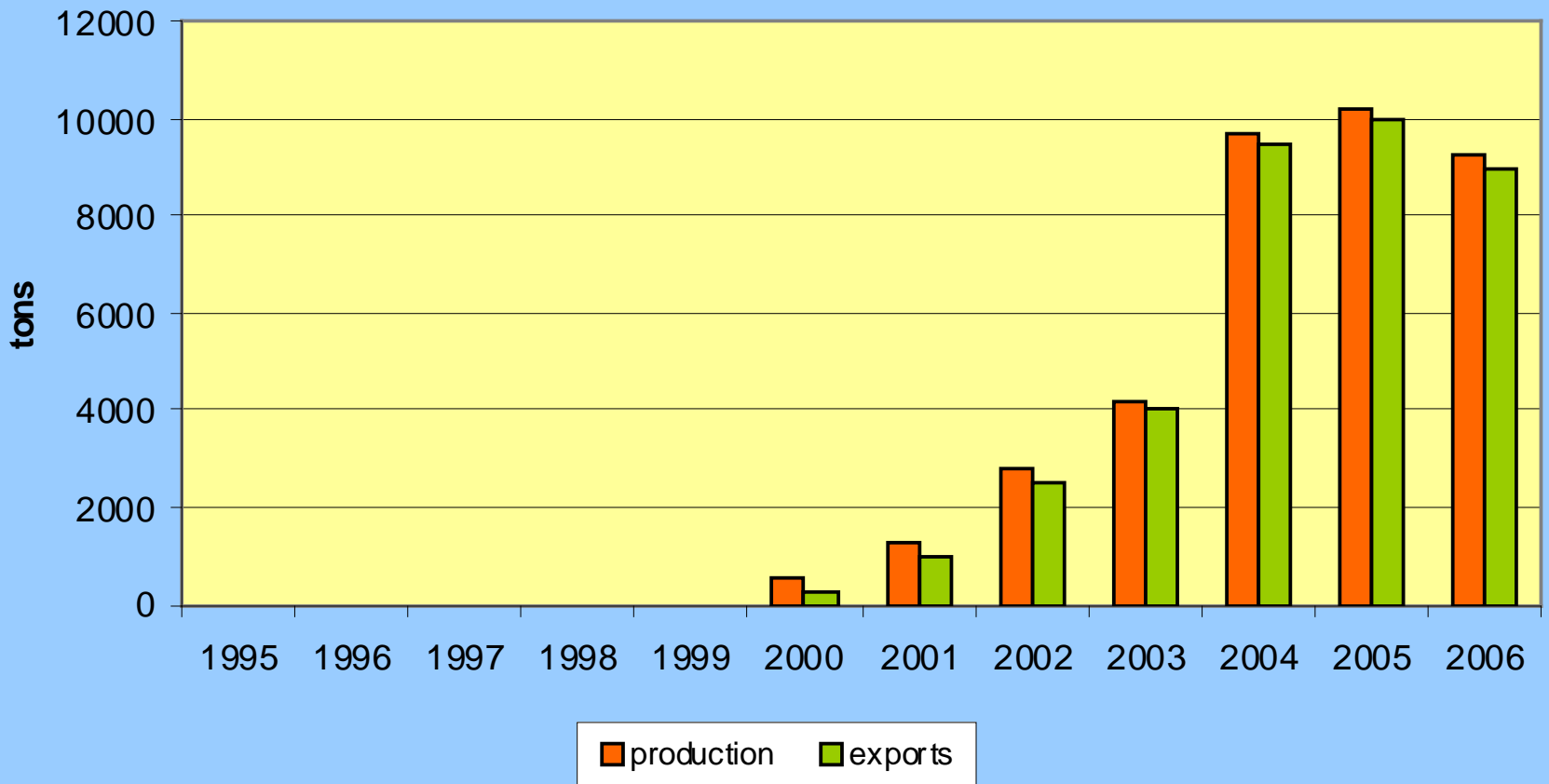
Malaysia production and exports



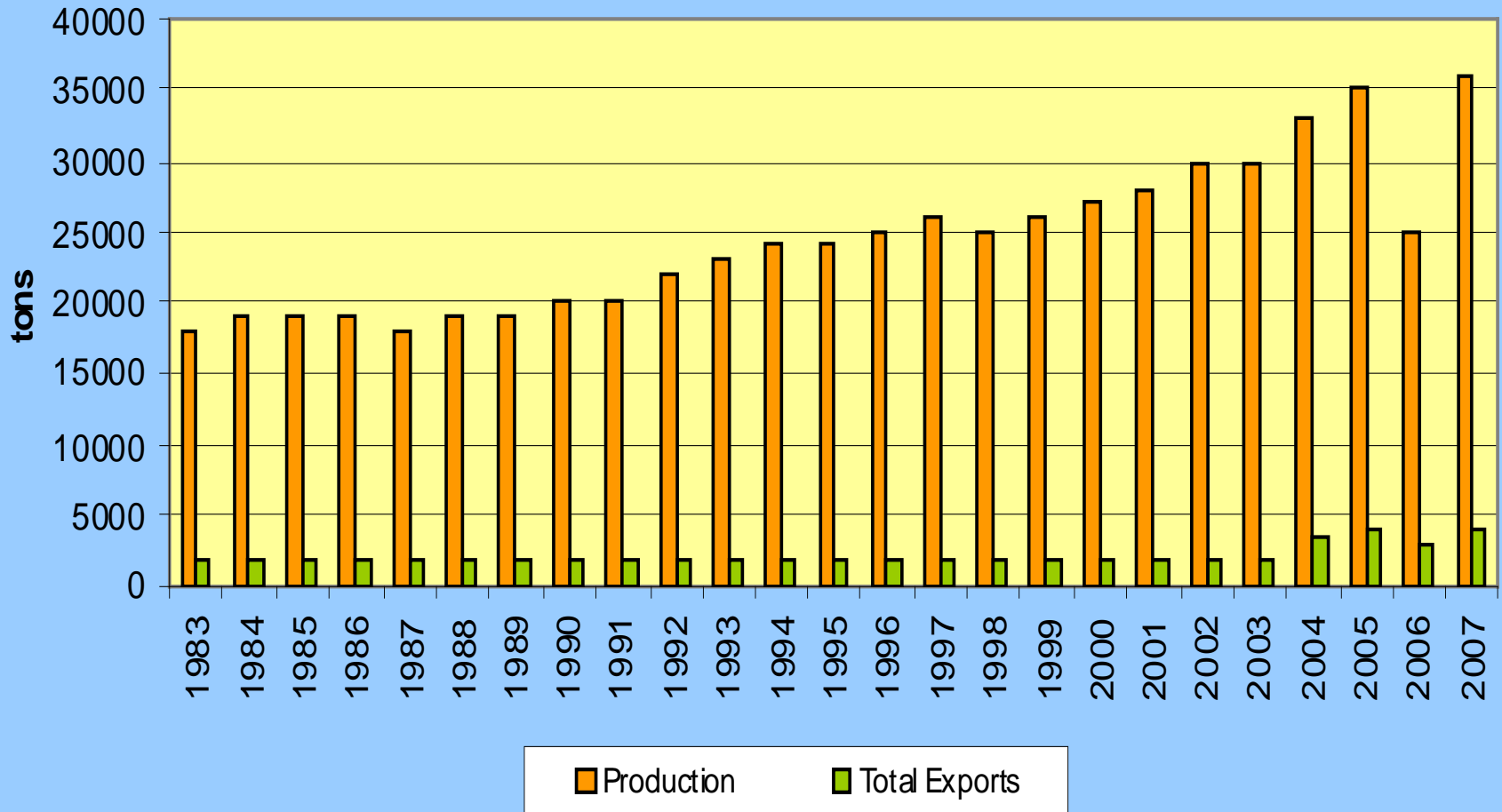
Vietnam production and exports



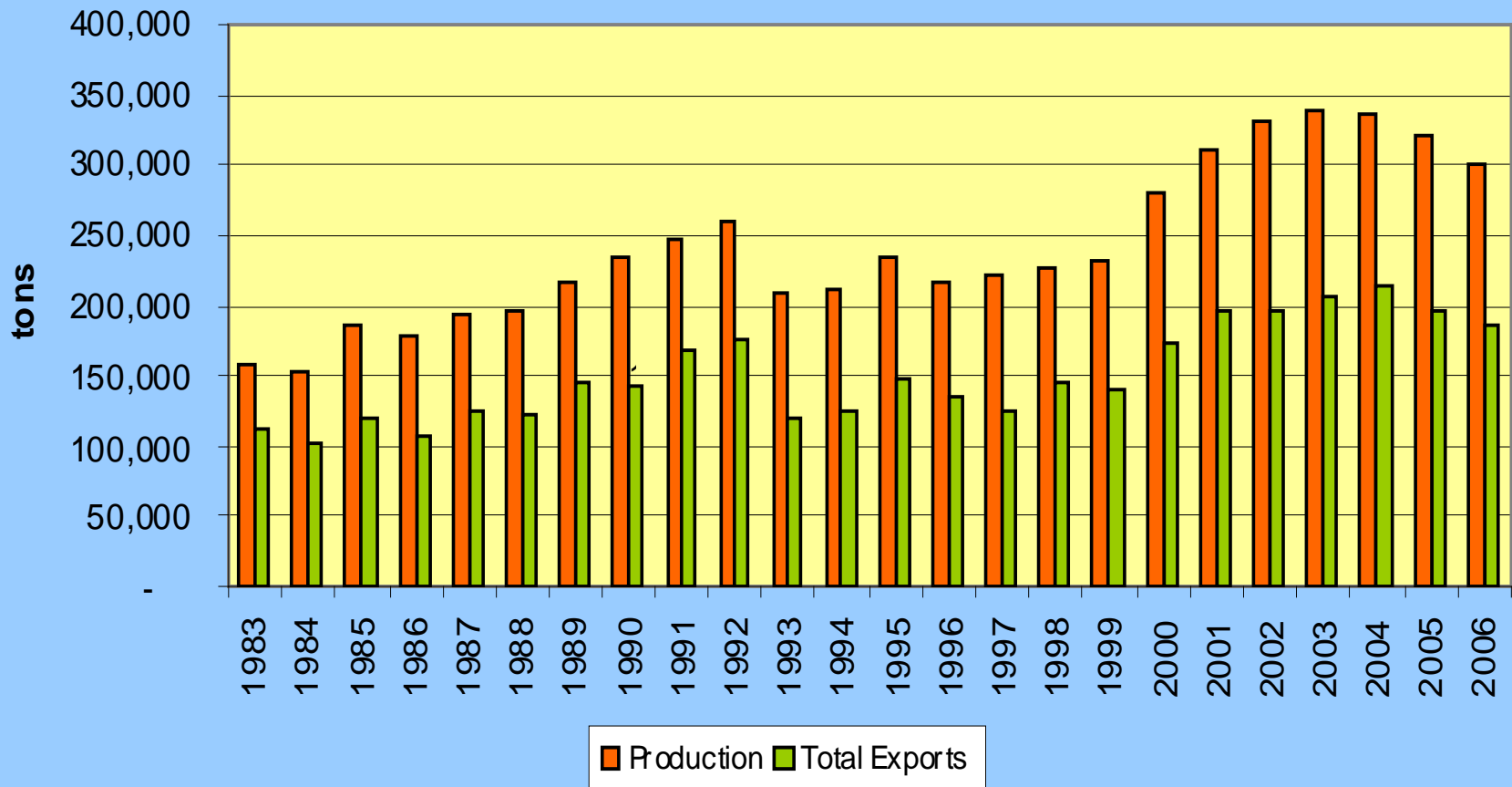
Vietnam Production and Exports White Pepper



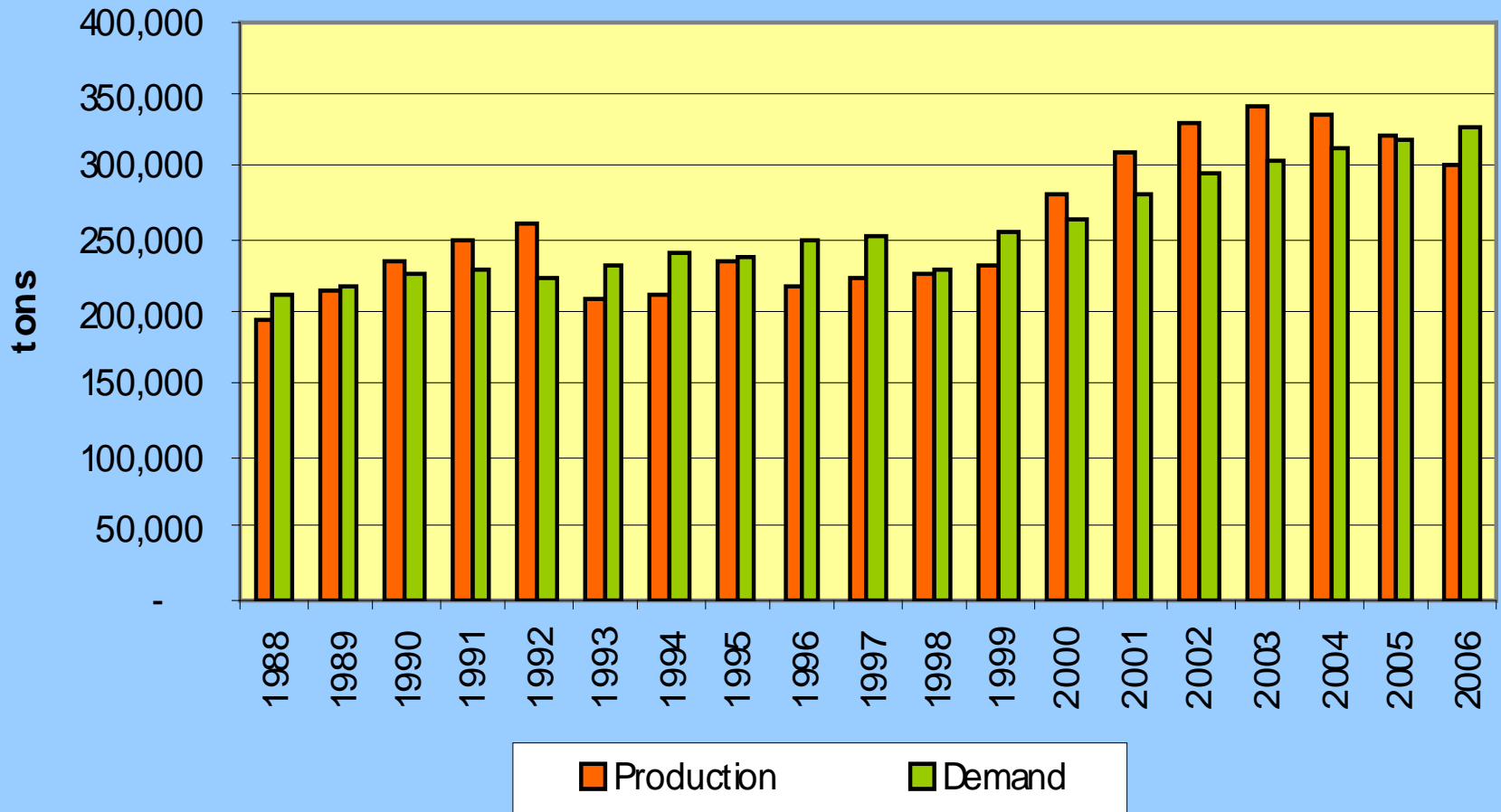
China production and exports



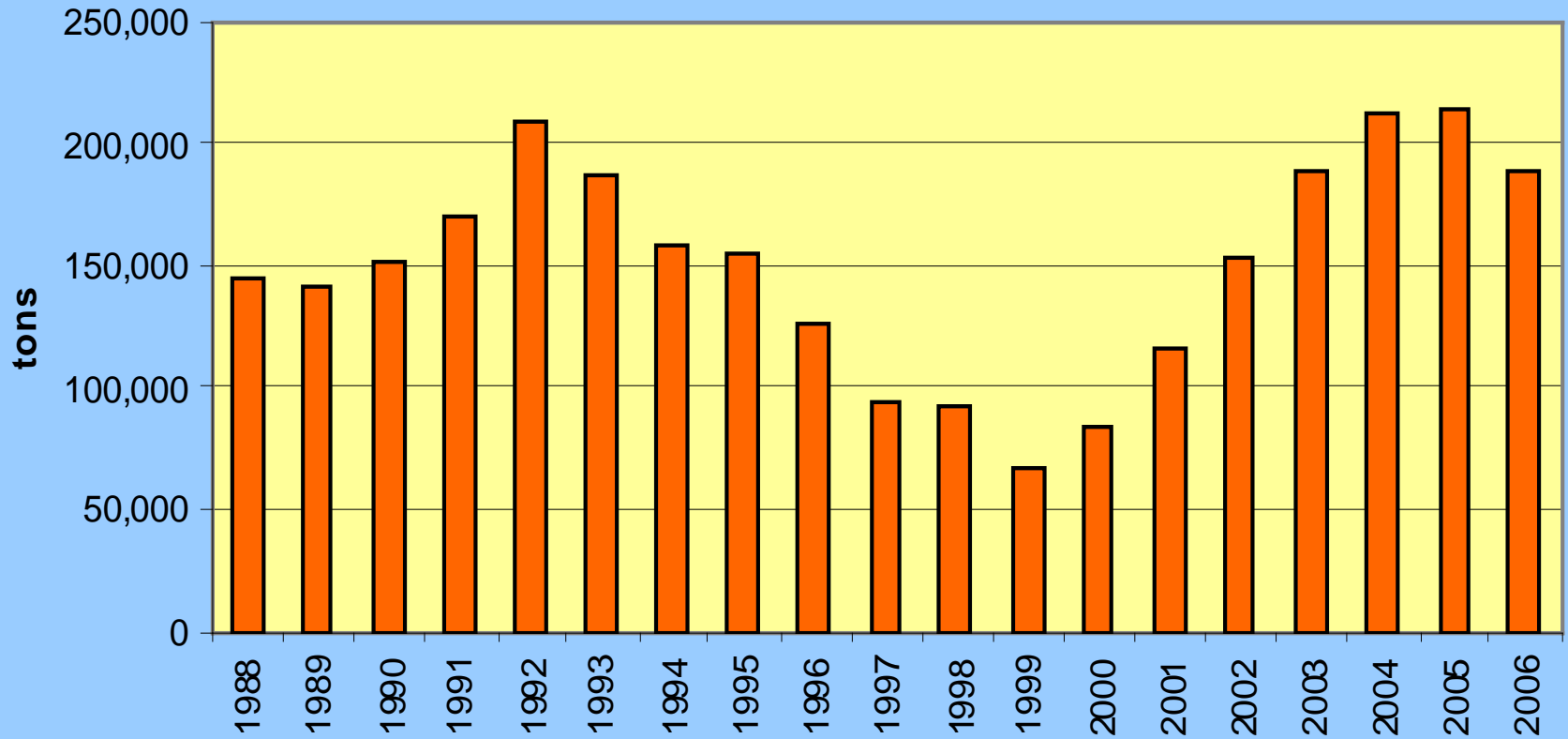
World Production and Exports



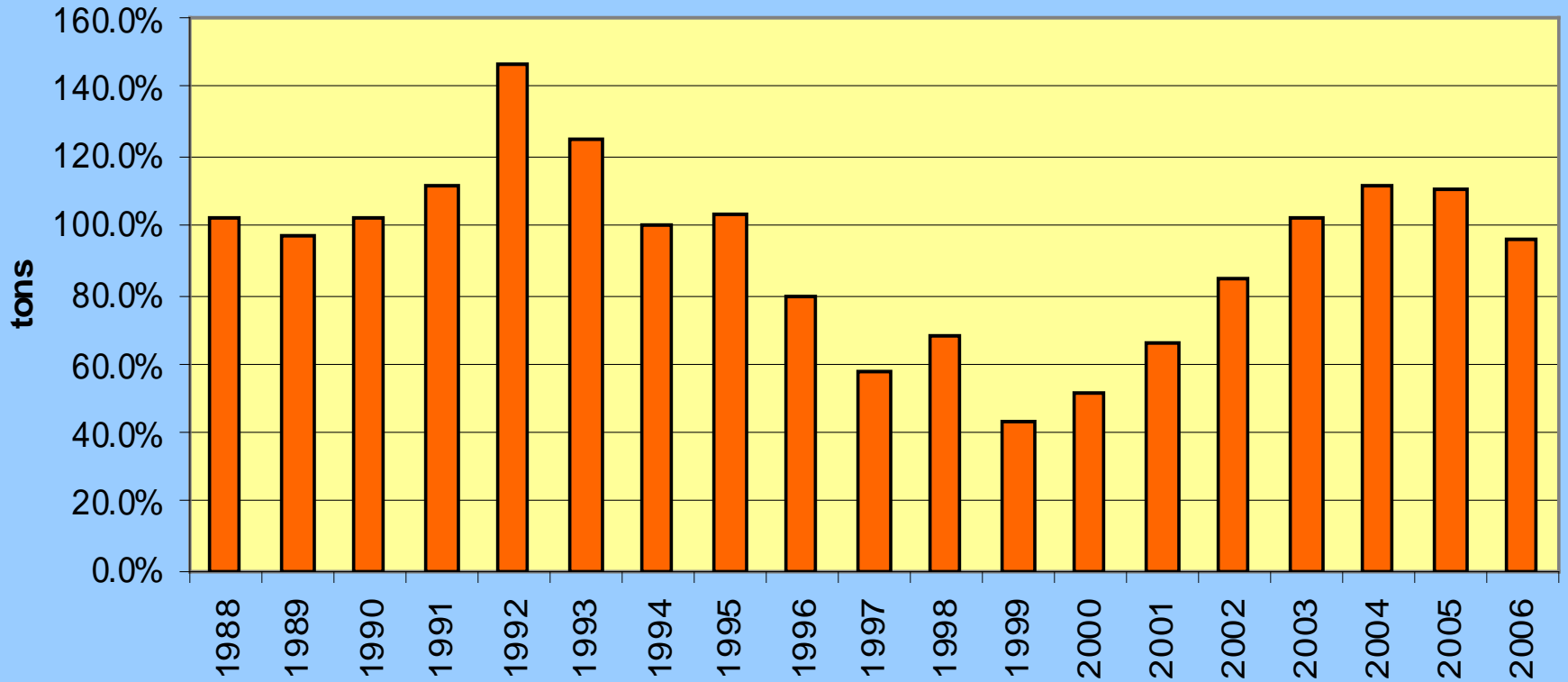
Global Consumption and Production



Global Stock Position



Global Stock Ratio



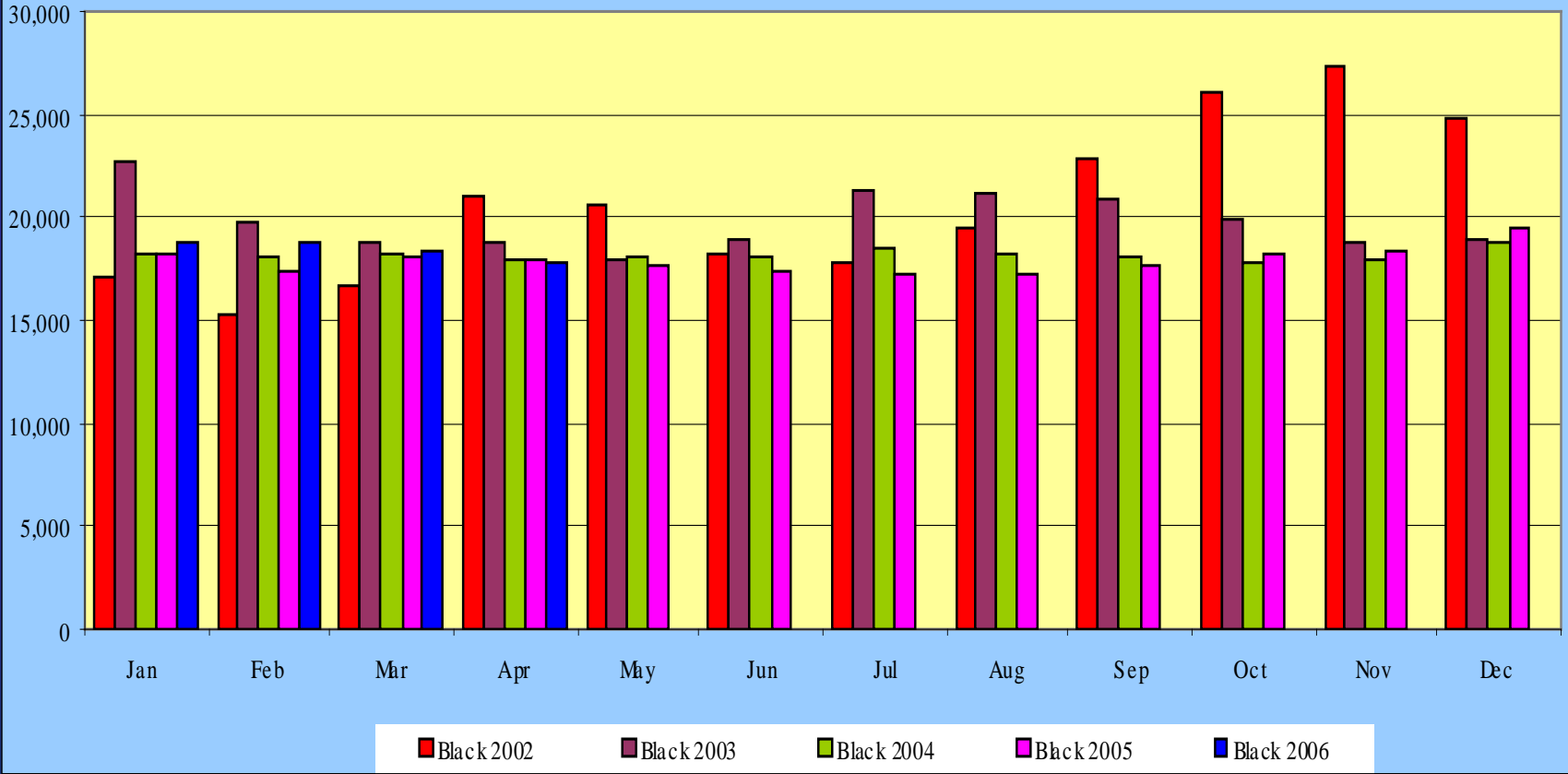
PRICES

Pepper Prices

average monthly spot New York



Vietnam Black peper price spot origin in VND

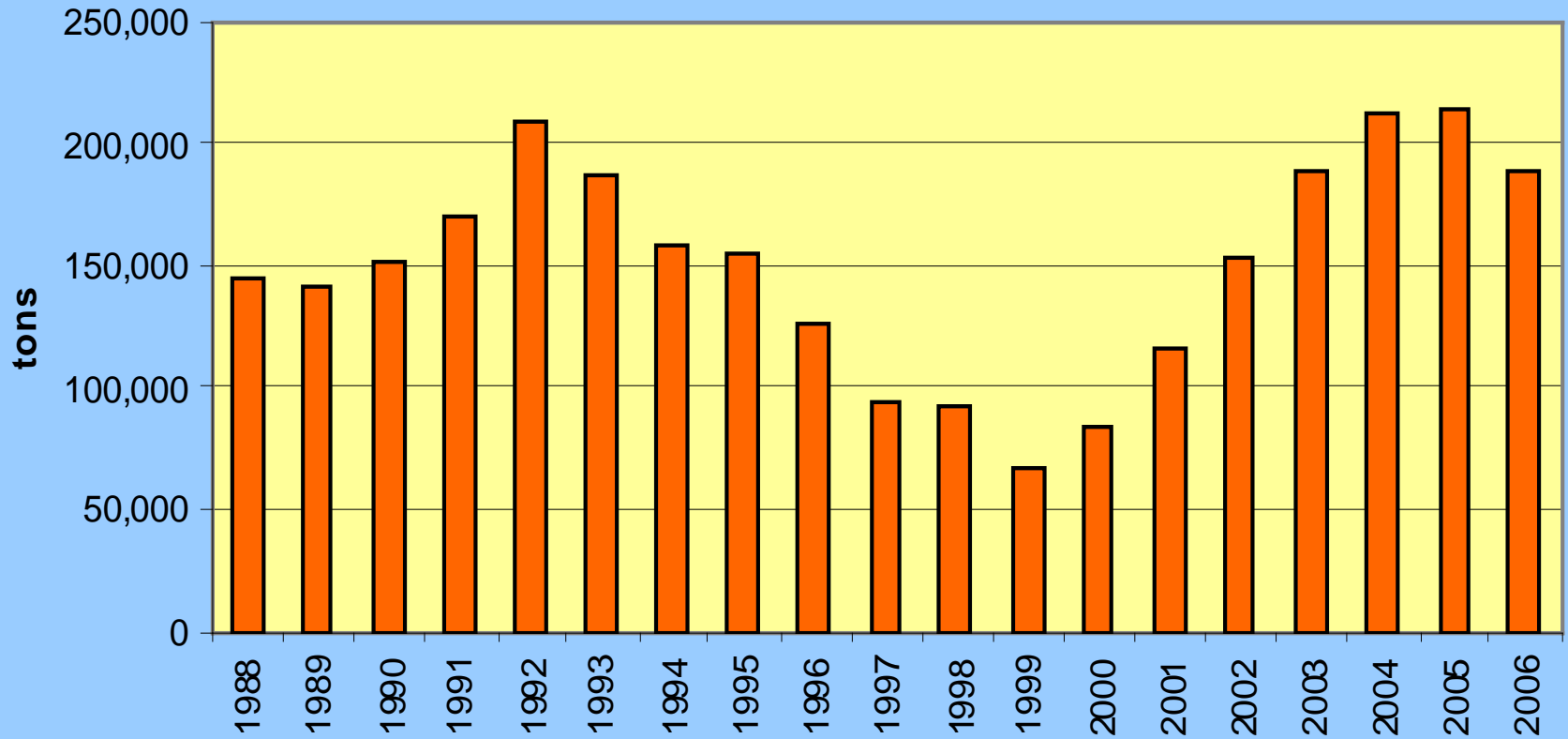


2006

Supply 2006	Indonesia	Vietnam	Brazil	India	Malaysia	China	Sri Lanka	Others	Total
Opening Stock	7,686	18,232	11,314	20,325	7,950	9,762	802	560	76,631
Production	30,000	90,000	38,000	80,000	22,000	25,000	8,000	6,500	299,500
Imports	-	-	-	8,712	-	11,026	-	-	19,738
Domestic Consumption	- 3,154	- 1,577	- 4,731	- 75,129	- 2,365	- 39,435	- 2,000	- 3,154	-131,545
Exportable Production	26,846	88,423	33,269	13,583	19,635	- 3,409	6,000	3,346	187,693

	Total		White	Black
Global opening stocks	76,631		16,000	60,631
Exportable production	187,693		31,250	156,443
Demand				
North America	65,441		8,000	57,441
Europe	70,587		24,000	46,587
Africa	18,221		250	17,971
Asia	22,548		2,000	20,548
other	18,765		500	18,265
	195,562		34,750	160,812
Global closing stocks	68,763		12,500	56,263

Global Stock Position





ASTA Annual Meeting

May 8-11, 2006

Thank you!

NEDSPICE



2006 ASTA Annual Meeting

Q & A

NEDSPICE