

# Entering the European market for specialty coffee

The growing demand for specialty coffees in Europe has opened up opportunities for high-quality coffees and suppliers of emerging origins offering unique products. In the specialty market, competition is on quality and long-term relationships, rather than on price. Direct trade relations open up interesting opportunities for reaching top quality and value-added coffees.

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## 1. What requirements must specialty coffee comply with to be allowed on the European Market ?

You can only export coffee to European countries which are European Union (EU) Members if you comply with the strict EU requirements. For a complete overview of these standards, refer to our study on [buyer requirements for coffee](#) or consult the specific requirements for coffee in the [EU Trade Helpdesk](#).

Buyer requirements can be divided into:

1. Musts: legal and non-legal requirements you must meet to enter the market;
2. Additional requirements: those you need to comply with to stay relevant in the market;
3. Niche requirements: applying to specific niche markets.

The highlights for these requirements are given below, specified for the Eastern European market where relevant.

## Legal and non-legal requirements you must comply with

### Legal requirements

You must follow the European Union legal requirements applicable to coffee. These rules mainly deal with food safety, where traceability and hygiene are the most important themes. Special attention should be given to specific sources of contamination, namely:

- Pesticides – consult the [EU pesticide database](#) for an overview of the maximum residue levels (MRLs) for each pesticide;
- Mycotoxins and mould;
- Salmonella (although coffee is considered low-risk).

### Quality requirements

Green coffee is graded and classified for quality before export. There is no universal grading and classification system for coffee. The Specialty Coffee Association's [standards for green coffee grading](#) are often used as a point of reference. However, most producing countries have and use their own [grading systems](#).

According to the International Trade Centre, grading is usually based on the following criteria:

- altitude and region;
- botanical variety;
- preparation – wet processed (washed), dry processed (natural), semi-washed (wet-hulled), pulped natural or honey processed;
- bean size or screen size, sometimes also bean shape and colour;
- number of defects or imperfections;
- roast appearance and cup quality in relation to flavour, characteristics and cleanliness;

- bean density.

Screen size is important to ensure that coffee batches are uniform in size, which allows for uniform roasting, which in turn improves the quality of the final product.

Specialty coffee is graded according to its cupping profile. Fragrance, flavour, aftertaste, balance, acidity, sweetness, uniformity and cleanliness are important factors in the grading process. If you sell specialty coffee, it is important for buyers to know the cupping score of your coffee. Although not mandatory, it is highly relevant to add this information to the documentation of the coffee you are exporting, which may add value to your product. Therefore, it is very important be aware of the quality of your coffee, either through local cupping experts or by becoming a cupping expert yourself.

Note that there is no exact definition of specialty coffee within the coffee industry. The [Coffee Quality Institute](#) and the cupping protocols of the [Specialty Coffee Association](#) consider that coffees graded and cupped with scores below 80 are considered standard quality and not specialty. Nevertheless, the exact minimum scores defining specialty coffee differ per country and per buyer. Some buyers consider 80 too low and demand a cupping score of 85 or higher.

## Labelling and packaging requirements

Green coffee beans are traditionally shipped in woven bags made from jute or hessian natural fibre. Jute bags are strong and robust. For specialty coffees, however, materials such as [Grainpro](#) or other innovative materials like [Videplast](#) liners are often used to pack specialty coffees inside the jute bags.

Labels of green coffee exported to Europe should be written in English and should include the following information to ensure traceability of individual batches:

- product name
- [International Coffee Organisation \(ICO\) identification code](#)
- country of origin
- grade
- net weight in kilograms
- for certified coffee: name and code of the inspection body and certification number

Figure 1: Examples of specialty coffee packing: GrainPro, Videplast liner and jute bag



Sources:

raadtradingco.com and GrainPro

Figure 2: Examples of green coffee labelling



Source: commodity.com

## Tips:

For the full buyer requirements, read the CBI study on [buyer requirements](#) for coffee in Europe.

Check [EURLex](#) for more information on limits for different contaminants and read more about contaminants in coffee on the [EU Trade Helpdesk](#). For specific information on the prevention and reduction of Ochratoxin A contamination, refer to the [Codex Alimentarius CXC 692009](#).

For information on safe storage and transport of coffee, refer to [the website of the Transport Information Service](#).

Read more about quality requirements for coffee on [the website of the Coffee Quality Institute](#).

Have your coffee cupped by local cupping experts (preferably ones with a Q-grader diploma) to know your coffee's cupping score and organoleptic characteristics before sending it to buyers. Or consider taking cupping classes in your country to become an expert in evaluating coffee yourself. Think about setting up your own cupping lab to do constant cupping of various batches of coffee that you produce or which you buy from your farmers.

## Additional requirements

### Additional food safety requirements

Expect buyers in Europe to request extra food safety guarantees from you. Regarding production and handling processes you should think of:

- Implementation of good agricultural practices (GAP): The main standard for good agricultural practices is [GLOBALG.A.P.](#), a voluntary standard for certification of agricultural production processes that provide safe

and traceable products. Certification organisations, such as Rainforest Alliance-UTZ, often incorporate GAP in their standards.

- Implementation of regular checking of residue levels: Ochratoxin A (OTA), polyaromatic hydrocarbons (PAHs) and glyphosate contamination should be prevented and monitored. It is recommended to proactively obtain certificates of analysis periodically for the coffee you produce and export, preferably from an EU-accredited laboratory, such as [Eurofins](#) or [Tüv](#).
- Implementation of a quality management system (QMS): A system based on [Hazard Analysis and Critical Control Points](#) (HACCP) is increasingly required by buyers as a minimum standard for green coffee production, storage and handling. The above described implementation of checking residue levels would be part of this system.
- For roasted coffee, HACCP is the minimum standard that an exporter must comply with, preferably complemented by a global food safety initiative (GFSI) such as: [BRC Global Standard Food Safety](#), [FSSC 22000](#), [IFS Food](#) or [SQF](#).

## Additional sustainability requirements

Traders and small-scale roasters in the specialty segment usually work under the principles of ethical and sustainable sourcing. This means that direct contact with producers, transparency and promoting sustainable practices are key aspects of their operations. Examples of importers that have high Corporate Social Responsibility (CSR) standards include: Dutch companies [Trabocca](#) and [This Side Up](#); French companies [Ethiquable](#) and [Alter Eco](#); German companies [GEPA](#) and [El Puente](#), among others. These importing companies work on projects with coffee-producing cooperatives in the countries of origin.

Certification standards like Rainforest Alliance-UTZ have gained importance in the mainstream coffee market. They are usually part of the sustainability strategy of traders, roasters and retailers. Large European importers such as the [Neumann Kaffee Gruppe](#) and [List + Beisler](#) (both from Germany) handle a wide range of coffees of various origins and certifications.

### Tips:

Refer to the [International Trade Centre Standards Map](#) or the [Global Food Safety Initiative website](#) to learn about the different food safety management systems, hygiene standards and certification schemes.

Find out which standards or certifications potential buyers in your target segment prefer. Buyers may have preferences for a certain food safety management system.

See our [study on sustainable coffee](#) for more information about the demand for sustainability in the European market, trends and specific trade channels.

## Niche requirements

### Organic certification

Demand for certified organic coffee is growing rapidly in Europe, making this an interesting niche within specialty coffee. In order to market your coffee as organic in the European market, it must comply with [the regulations of the European Union for organic production and labelling](#). Obtaining the [EU organic label](#) is the minimum legislative requirement for marketing organic coffee in the European Union.

Note that some changes to the EU organic regulation will enter into force as of 1 January 2021; the website of [IFOAM](#) describes these changes in detail, and highlights the implications to exporters. An important change, already implemented as of February 2020, is that [Certificates of Inspection \(COIs\)](#) must be issued by control authorities prior to the departure of a shipment. If this is not done, your product cannot be sold as organic in the

EU, and will be sold as a conventional product. COIs can be completed by using the European Commission's electronic [Trade Control and Expert System](#) (TRACES).

If you want to export to countries outside of the EU, check the requirements from that country. For instance, Switzerland has its own [Swiss Organic Law](#) and the [Organic Products Regulations 2009](#) apply in the United Kingdom.

Note that most private standards demand additional requirements, in addition to those of the EU organic legislation. Therefore, always check the requirements asked for by the official website of the standard itself. For instance, [this Natureland handout](#) compares the additional requirements set by Naturland with the EU organic regulation.

Before you can market your coffee as organic, an accredited certifier must audit your growing and processing facilities. Refer to [this list of recognised control bodies and control authorities](#) issued by the EU, to ensure that you always work with an accredited certifier. After being audited and receiving an organic certificate, you can use the [EU organic logo](#) on your products.

## Direct trade

Direct trade relations, and high transparency and traceability from source to consumer characterise the high-end specialty coffee segment. This means that buyers of these types of coffees ask for requirements that go beyond certification; buyers will visit your coffee farm, evaluate your product, and try to establish a relationship with you.

Keep in mind that supply chain transparency is important in the specialty segment. Besides high quality, buyers are also interested in the background stories on the origin of your coffee. This implies that you should know the specifics of your coffee and be willing to honestly share it. Establish and promote a traceable and clear direct link between yourself as a producer, your buyer and the consumer.

### Tips:

Learn more about organic farming and organic guidelines on the [European Commission website](#) and the [Organic Export Info website](#).

Familiarise yourself with the range of organisations and initiatives that offer technical support to help you convert to organic farming. Start your search at the organic movement in your own country and ask if they have their own support programmes or know about existing initiatives. Refer to the database of [affiliates of IFOAM Organics](#) to search for organic organisations in your country.

Find importers that specialise in organic products on the [Organic-bio](#) website.

Try to visit trade fairs for organic products, like [Biofach](#) in Germany. Check their website for a list of exhibitors, seminars and other events.

Try to combine audits in case you have more than one certification, saving time and money. Also investigate the possibilities for group certification with other producers and exporters in your region.

## 2. Through what channels can you get specialty coffee on the European market?

As an exporter, you can use different channels to bring your specialty coffee to the European market. Entering the market will vary according to the quality of your coffee and your supplying capacity. The market for

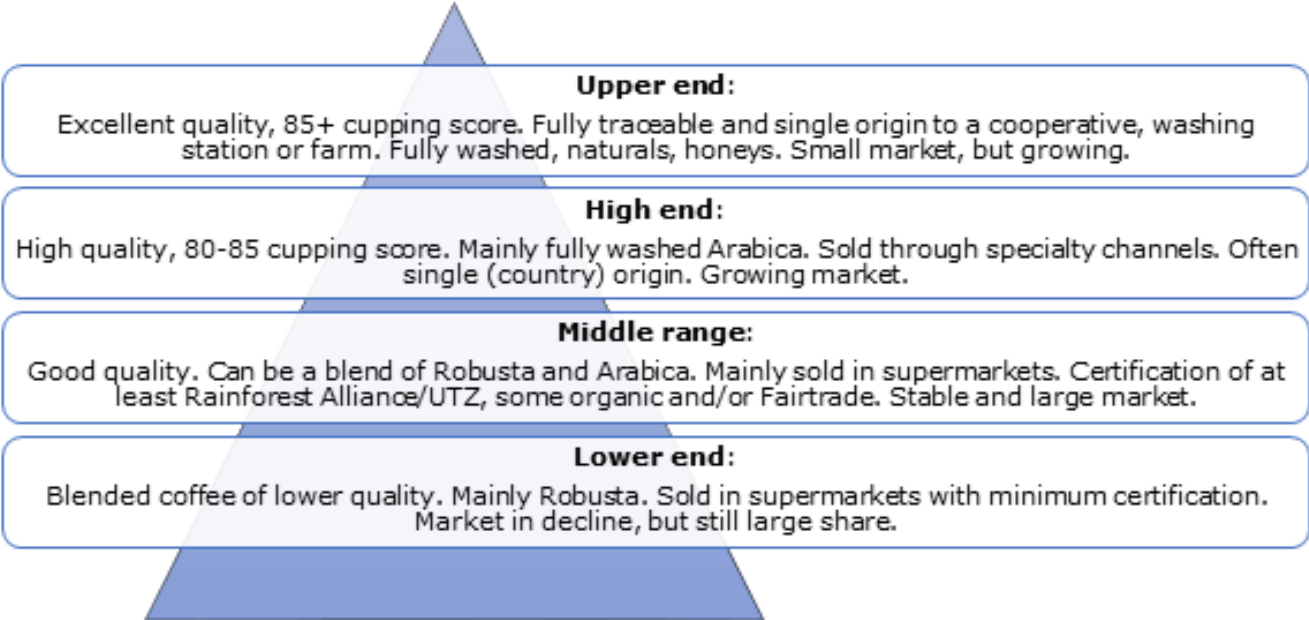


specialty coffee is relatively small and highly specialised, with its own characteristics of supply and demand. Farmers often sell their specialty coffee either directly to specialised importers or small-scale roasters.

How is the end market segmented?

Specialty coffee beans belong to the high and upper end segments. The figure below shows the general segmentation of the coffee end market.

Figure 3: Coffee end market segmentation by quality



High end: High-end coffees mainly refer to coffees cupped with scores between 80 and 85. High-quality coffee mainly consists of washed Arabicas. These coffees are often single origin and coffees with a special story. The production of high-end specialty coffee is estimated at 10% of the total coffee volume.

Sustainability certifications are more uncommon in this segment. This is because sustainability practices are often commonplace among buyers. The high- and upper-end segments do see, however, a growth in organic-certified coffees.

Examples of coffees in the high-end market segment include (based on European retail prices in 2020):

	Product	Retail price (€/kg)

High end	Natural processed coffee beans from El Boquerón, Guatemala, roasted by <a href="#">District Five Coffee Roasters</a> (Germany), 250 g package	31.40
	Natural processed Red Catuai, from Mantiqueira, Lambardi, Brazil, roasted by <a href="#">Java Coffee</a> (Poland), 250 g package	43.40
	Washed SL28/SL34, from Gicherori, Embu, Kenya, roasted by <a href="#">Parlor Coffee Roasters</a> (Belgium), 250 g package	56.00
	Washed Red Bourbon, from Maridadi Hill, Kayanza, Burundi, roasted by <a href="#">Alchemy</a> (United Kingdom), 250 g package	56.36

Upper end: The upper end of the specialty segment consists of excellent quality coffees, often from micro or nano lots using innovative processing, such as naturals and honeys. These are mainly Arabica beans with a cupping score of 85 and above, fully traceable and single origin. Long-term contracts between suppliers and buyers and high prices characterise this segment. The direct involvement of buyers makes sustainability certification uncommon, but often buyers and suppliers agree on projects for the producing communities and distribution of money to farmers. The [production of upper-end specialty coffee is estimated at 4% of the world's total coffee volume](#).

Examples of coffees in the upper-end market segment include (based on European retail prices in 2020):

	Product	Retail price (€/kg)
Upper end	Natural processed Geisha, from Finca Hartmann, Santa Clara, Panama, roasted by <a href="#">Doubleshot</a> (Czech Republic), 200 g package	90.25
	Washed processed Geisha, from El Puente, Chinacla, La Paz, Honduras, roasted by <a href="#">Tim Wendelboe</a> (Norway), 250 g package	108.08
	Natural, aerobic maceration processed Aramosa, from Daterra Estate, Brazil, cupping 92.5, roasted by <a href="#">Gardelli Coffee</a> (Italy), 250 g package	200.00

Sales channels: Specialty coffees are mainly sold directly by specialty roasters and specialised coffee houses at their physical or web shops and at coffee events, such as the coffee festivals in [Berlin](#), [London](#), [Amsterdam](#), [Milan](#), [Warsaw](#), [Barcelona](#) and [Paris](#).

To find examples of European specialty roasters and cafés, refer to the city guides on the [European Coffee Trip](#) website. There are also several coffee web shops in Europe, where you can find high and upper end coffees,

including [Roast Market](#) (Germany) and [Specialty Coffee](#) (Netherlands).

Value distribution: As the above shows, end-market prices for coffee vary depending on which segment of the market is targeted. Typically, export prices of green coffee only account for 5% to 25% of the end-market prices, depending on the coffee quality, the origin, the size of the lot and the supplier's relationship with the buyer.

Prices for specialty coffee may have a reference on the international London and New York market prices, but will command differentials. In the specialty segment, the shares of added value for farmers tend to be much higher than in the mainstream coffee market, where approximately **10%** of the added value of sold coffee goes to farmers.

The Specialty Coffee Association provides an illustrative example of how exporters should look into their [value chain, in terms of different costs and margins](#). Also, refer to the [Specialty Coffee Transaction Guide](#) to get an idea of current market prices for specialty coffee. This guide quantifies anonymous contract and pricing data of importers and roasters, based on quality, quantity, and origin of purchased coffee.

## Tips:

Learn more about the difference between retail prices by comparing prices in different market segments. For instance, check the websites of European supermarkets such as [REWE](#) (Germany) and [Albert Heijn](#) (Netherlands) to get an idea of prices for lower-end and middle-range coffees. Compare their product assortment and price levels with specialised stores selling higher-end coffees, such as the [Roast Market](#) web shop (Germany) and [Specialty Coffee](#) (Netherlands).

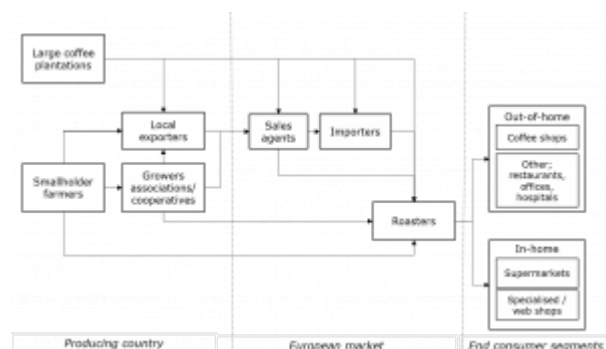
Refer to our study on [trends in the coffee sector](#) to learn more about developments in different market segments.

Check [the website of the Specialty Coffee Association \(SCA\)](#) to learn more about the specialty coffee segment, market trends and its main players.

## Through what channels does specialty coffee reach the end market?

The market for specialty coffee is relatively small and highly specialised, with its own characteristics of supply and demand. In general, the specialty value chain is short and transparent, unlike the longer value chain for mainstream coffee. Farmers often sell their specialty coffee either directly to specialised importers or small-scale roasters. This increases the possibilities of reaching a more efficient and equitable distribution of prices across different actors along the chain.

Figure 4: Main specialty coffee export channels to Europe





## Importers

Importers play a vital role in the coffee market, functioning as supply chain managers. They maintain wide portfolios with various origins, provide pre-finance operations, perform quality control, manage price fluctuations and establish contact between producers and end buyers, such as roasters. In most cases, importers have long-standing relationships with their suppliers and customers.

Specialised importers are able to buy small volumes of high-quality or single origin coffees. Examples of small and large specialised importers in Europe are: [Cafe Imports Europe](#), [Rehm & Co](#) and [Touton Specialties Coffee](#) (Germany), [Trabocca](#), [The Coffee Quest](#), [This Side Up](#) and [Daarnhouwer](#) (Netherlands), [Belco](#) (France), [Sucafina Specialty](#) (Belgium), [Falcon Coffees](#) (United Kingdom), [Imperator](#) (Italy) and [Nordic Approach](#) (Norway).

## Small roasters

Small roasters mostly source green coffee from importers which also provide finance and logistics, but a growing number of small specialty roasters import green coffee directly from origin. Small roasters often specialise in certain high-quality blends and single origins. They usually perform analysis and cup testing to check the evenness of the roast and to identify any defects that can occur in post-harvest processes, such as fermentation, drying and storage.

Not all small roasters are able to sustain direct trade relations, since they have to take on additional responsibilities which are usually outsourced to traders, such as logistics, documentation, quality control and pre financing. Therefore, many small roasters continue to buy via importers, but still maintain direct connection with their producers. These importers can also guarantee traceability and pass on the story behind the coffee beans accurately along the chain.

Examples of small roasters directly sourcing coffee from producing countries include: [Flying Roasters](#) and [Röstfrisch](#) (Germany), [OR coffee](#) (Belgium), [Gardelli Specialty Coffees](#) (Italy), [Johan & Nyström](#) (Sweden), [Lippe](#) (Norway), [Coffee Collective](#) (Denmark) and [Yellow Bourbon Coffee Roasters](#) (United Kingdom).

## Which of these channels is most interesting for you?

Specialised traders can be interesting if you have evidence of high cupping scores at least 80, although some buyers may require scores above 85 and single origin coffee. Many specialised importers prefer to work directly with producers or cooperatives.

Targeting small roasters directly is recommended for producers and exporters dealing with very high-quality beans, micro lots or willing to engage in long-term partnerships. Note that this channel also requires you to have the financial means and technical know-how to organise export activities.

### Tips:

Find buyers that match your business philosophy and export capacities in terms of quality, volume and certifications. For more tips on finding the right buyer for you, see our study on [finding buyers in Europe](#).

Attend trade fairs to meet potential Eastern European buyers. Interesting trade fairs include SCA's [World of Coffee](#) (every year in a different European city), [Biofach](#) (organic) and [COTECA](#) (both in Germany). [Producer & Roaster Forum](#) (yearly taking place in a different coffee-producing country) is another interesting fair to attend, aimed at connecting producers and roasters. There are also coffee festivals for consumers in most large European cities, including [Berlin](#), [London](#), [Amsterdam](#), [Milan](#), [Warsaw](#), [Barcelona](#) and [Paris](#). Attending these events can provide you with additional insight into the preferences of European buyers and consumers with regard to origin, flavour and sustainability certification.

Contact industry associations focused on the specialty market to find potential buyers in Europe, such as the [Specialty Coffee Association](#) and the [Coffee Roasters Guild](#).

Invest in long-term relationships. Whether you are working through importers or roasters, it is important that you establish strategic and sustainable relationships with them. This will help you manage market risks, improve the quality of your product and reach a fair quality-price balance.

See our study on [buyer requirements for coffee](#) to learn about the European market standards and requirements you need to comply with when supplying to Europe.

See our study on [how to do business with European buyers](#) for more information about complying with buyer requirements, how to send samples and how to draw up contracts.

Provide correct documentation, such as a detailed cupping reports and full description profiles of your coffees. Buyers expect evidence of [the grading process](#) and the final cupping score of your coffee. Being able to indicate the coffee's variety, altitude, fragrance, aftertaste, balance, sweetness and uniformity will be important in conveying that you know the coffee you have. Note that buyers will cup and regrade your coffee.

### 3. What competition do you face on the specialty coffee market?

The specialty segment focus strongly on quality, taste, origin, sustainability and long-term direct trade relations. Annual competitions identify the highest quality coffees produced worldwide. Specialty coffees are produced around the world, but the role of governments in producing countries and their policies for the coffee sector are important to take into account as they have a big influence on the opportunities and the development of the sector.

#### Green coffee competitions for the highest quality coffees

The [Cup of Excellence](#) is an annual competition held in several coffee-producing countries to identify the highest quality coffees produced. Rewarded coffees are sold in global online auctions at premium prices. The competition is organised by the Alliance for Coffee Excellence.

Countries that currently host the Cup of Excellence competition are Brazil, Burundi, Colombia, Costa Rica, El Salvador, Guatemala, Honduras, Mexico, Rwanda and Peru. In 2020, the Cup of Excellence competition takes place in Ethiopia for the first time. Indonesia intends to host the competition soon, but [currently faces funding and logistics hurdles](#). Ecuador will host a [pilot programme of the competition in 2020](#).

Several other countries hold similar competitions based on selecting the best national coffees, which are later sold through auctions. Examples include the [Taza Dorada Arábigo](#) and [Taza Dorada Robusta](#) (Ecuador), [Best of Panama](#), [Philippine Coffee Quality Competition](#), and the [Taste of Harvest](#), which includes the African Fine Coffees Association member from Burundi, DRC Congo, Ethiopia, Malawi, Kenya, Tanzania, Uganda and Zambia. DRC Congo organises [Saveur du Kivu](#), a popular coffee competition also for countries surrounding lake Kivu.

Investigate whether you qualify for these green coffee competitions, as participating in them can be an interesting way to profile yourself and your coffee origin in the market for high-quality coffee. Winning coffees are often sold for very high auction prices. Moreover, being recognised as a producer of high-quality coffees might provide you with long-term benefits, as this often has a positive impact on future prices years after the competition.

#### Brazil is the world's largest coffee producer and a prominent specialty

## supplier

Brazil is the world's largest coffee producer and Europe's largest supplier. Brazilian supplies to Europe exceeded 1,024 thousand tonnes in 2019. Brazil produces both Arabica (75%) and Robusta (25%), but [exports 95% Arabica](#). The [country is mainly known for exporting large volumes of standard quality](#)

Nevertheless, the reputation of Brazil for specialty coffee has grown rapidly in recent years. This is in part thanks to the [Brazil Specialty Coffee Association](#), which aims to elevate the quality standards and enhance value in the production and marketing of Brazilian coffees. Examples of successful exporters of specialty coffees in Brazil are [Burgeon](#) and [Bourbon Specialty Coffees](#). Large Brazilian exporter [Costa Café](#) has also started exporting specialty coffees in addition to its regular mainstream coffee exports.

## Colombia is the world's largest producer of washed Arabica

Colombian coffee supplies to Europe reached 206 thousand tonnes in 2019. Colombia is the world's largest producer of washed Arabica, home to a strong national coffee industry offering technical assistance, research and quality development. The [Colombian Coffee Growers Federation](#) strategically promotes and markets Colombian coffee, solidifying the country's established image and brand for high-quality coffees. The Café de Colombia trademark is a [registered protected geographical indication \(PGI\)](#) in Europe, which is unique among coffee-producing countries.

The Colombian coffee industry is developing rapidly, as coffee companies increasingly invest in capacity building and product quality. Colombian producers can follow coffee quality and tasting programmes to earn a professional tasting certificate. [The Coffee Quality Institute \(CQI\) has a strong presence in Colombia](#), providing courses in partnership with the national institute of professional training, [SENA](#).

## The world's largest organic coffee producers are Mexico, Ethiopia and Peru

As organic certification grows within specialty coffees, it presents opportunities for countries that have scalable organic coffee production. The [countries with the largest organic coffee production areas in 2018 were](#):

- Ethiopia: 161 thousand hectares
- Peru: 121 thousand hectares
- Tanzania: 82 thousand hectares
- Uganda: 66 thousand hectares
- Indonesia: 60 thousand hectares
- Mexico: 44 thousand hectares

Ethiopia is Europe's eighth-largest coffee supplier at 93 thousand tonnes in 2019. The EU imported an estimated [5.3 thousand tonnes](#) of organic coffee from Ethiopia. [The Ethiopian government highly encourages the sector to adopt more sustainable growing techniques](#) and to focus on producing high-quality Arabicas. Ethiopian producers rely on the uniqueness of Ethiopia as an origin, which it is considered by many as the birthplace of coffee. Ethiopia's coffees have high potential in the specialty market.

Peru is Europe's seventh-largest coffee supplier at 124 thousand tonnes in 2019. Peru supplied almost [46 thousand tonnes](#) of organic coffee to the EU in 2019. Having the [fourth-largest coffee production with sustainable certification](#) gives Peru a competitive advantage to promote its specialty coffees. Peru actively promotes its unique origin and high-quality coffees, having recently introduced a national coffee brand, [Cafés del Peru](#), to the international market.

Indonesia supplied 90 thousand tonnes of green coffee to Europe in 2019. About [90%](#) of Indonesian exports are Robusta, making Indonesia the world's second-largest exporter of Robusta, only after Vietnam. However, as domestic consumption is growing rapidly, Indonesia only [exports an estimated 46% of its green coffee production](#). An estimated [15% of Indonesia's coffee exports are certified or verified as sustainably produced](#). Specialty coffee is also exported by Indonesian producers, such as the Gayo 1 ('Satu') from Sumatra.

With a green coffee supply of 38 thousand tonnes, Mexico only supplied a very small share of total European coffee imports in 2019. In 2019, Mexico supplied an estimated [10 thousand tonnes](#) of organic coffee to the EU. Mexico's coffee exports have fallen drastically in recent years, due to [resistant pests and diseases combined with increasing domestic demand](#) for coffee. Mexico does not have a national coffee institute anymore, which has pushed Mexican coffee farmers to form collectives. The country does have a cross-sector Mexican Association of the Productive Coffee Chain ([AMECAFE](#)), which aims to boost Mexican production, focusing on specialty coffee. In general, [the Mexican specialty market for quality coffee still has a big untapped potential](#).

## African Great Lakes specialty coffees

The countries nestling around the Great Lakes of Africa (Rwanda, Burundi, Uganda, Kenya, Tanzania and Democratic Republic Congo) are recognised as important origins, offering distinctive specialty coffees. In this region, Kenya's coffee industry is among the strongest and most advanced. [Kenya's grading system makes it easy to source high-quality coffee and its coffees are rated high for both flavour and quality](#).

The coffee region in the Kivu provinces of the Democratic Republic Congo has an impressive number of growing cooperatives, which produce specialty K3 coffee in addition to multiple certifications. Rwanda made an important improvement in quality in the last decades, after investing in centralised pulping with strong governmental support for companies and farmers. Traditional Bourbon varieties in this region, such as Jackson and BM 139, are famous for their high quality. The work of [World Coffee Research](#) in the region promises to provide new varieties to expand the Rwandan range in the long run. The need for more climate-resilient varieties is complemented by the use of mulching, shade trees and organic composting.

Tanzania is a small coffee supplier to the European market. In 2019, European imports from Tanzania reached 31 thousand tonnes, 0.8% of total imports that year. Most coffee in Tanzania is traded through a centralised auction system, but for some years now, exporters of specialty coffees can also engage in direct trade relationships. Tanzania's Kilimanjaro coffee is internationally renowned for its unique taste.

Burundi is internationally known as a supplier of high-quality coffees. Bourbon and its sub varieties (like Jackson and Blue Mountain) are mostly grown in the country. The production of specialty coffees is promoted by the coffee association [Intercafé Burundi](#). This association also helps promoting, branding, and marketing 'Café du Burundi' in the international market. The privatisation of the country's coffee market has boosted direct trade between importers and roasters and farmers.

Uganda is especially known as a standard quality Robusta producer and exporter. Yet, in recent years Uganda has also become known as a supplier of specialty coffees, of both Fine Robusta and Specialty Arabica. About [18%](#) of Uganda's coffee production was Arabica in 2018, a share that has grown significantly over the years. The [Uganda Coffee Development Authority](#) grades, classifies and cups all coffee before export to ensure quality.

## Central America is known for high-quality specialty coffees

Central America's product range consists of mostly Arabica varieties. Panama, Costa Rica, Nicaragua, Honduras, El Salvador and Guatemala established themselves among the world's leading specialty coffee producers and exporters. In most countries in the region, more than half of the coffee production can be classified as in the highest quality echelon. Most Central American countries have the infrastructure and expertise to process coffee cleanly and consistently, focusing on high-quality Arabica. In Costa Rica, Robusta varieties were even prohibited by law until recently.

The largest Arabica producer in the region is Honduras [at 420 thousand tonnes in 2018](#). Approximately 56% of the Honduran production in 2018 was exported to Europe. The Honduran Coffee Institute [IHCAFE](#) has been promoting the production of value-added coffees, either through certification or by actively improving coffee quality. Honduran exports of specialty organic coffees increased by [30%](#) between 2016 and 2017 because of these efforts. In addition to the growing reputation as a high-quality coffee supplier, a relatively large share of Honduras' coffee supplies is organic. Honduras is the second-largest supplier of organic coffees to the EU in 2019, with [37 thousand tonnes](#) or 26% of European organic coffee imports.

Guatemala is the second-largest producer in the region with 210 thousand tonnes in 2018. Guatemalan coffees have a good reputation for high-quality coffees. Panama is the smallest coffee producer in the region, but is widely recognised as producing some of the world's most valued coffees, such as the Geisha varietal. Panama's producers export many micro lots and [have also developed unique processing methods, such as wine naturals](#).

## The world's fine Robusta suppliers

Asia is mainly known for its Robusta production, particularly Vietnam, which is the world's second-largest coffee producer. Approximately 95% of Vietnamese coffee exports consist of Robusta coffees. Vietnam's coffee production is strongly focused on creating large volumes of standard quality coffees mostly directed to the instant coffee market. Meanwhile, as high-quality Robusta gains interest in consumer markets, [Vietnam's specialty coffee industry is slowly developing](#).

Brazil is the world's second-largest Robusta producer. In recent years, [the interest in the production of high-quality Robustas](#) has slowly taken off in the country. Although the number of Brazilian farmers growing Fine Robusta is still very small, this might change in the future. In part because the [Brazilian Specialty Coffee Association](#) has recognised that there is a growing international market interest in high-quality Robusta. Farmers and organisations have started to organise themselves to share experiences and knowledge to improve farming practices and reach higher-quality Robustas.

Uganda is a key country when it comes to Fine Robusta. It is home to the [Center of Robusta Excellence \(CORE\)](#), which is focused on research, quality improvement and marketing of coffee. CORE, together with the Coffee Quality Institute, developed the industry's first [standards and procedures defining Fine Robusta coffee](#).

Other countries partly focusing on Fine Robusta production and export include [Ghana](#), [Guatemala](#) and [India](#).

### Tips:

Identify your potential competitors. To be successful as an exporter, it is important to learn from them too. Look into their marketing strategies, the product characteristics they highlight and their value addition approaches. Successful companies that already export to the European market from which you can learn include [Bench Maji Coffee](#) (Ethiopia), [Sumatera Arabika Gayo](#) (Indonesia), [ACODIHUE](#) (Guatemala), [Nyamurinda Coffee](#) (Rwanda), [La Meseta](#) (Colombia) [Café Mesa de los Santos](#) (Colombia), [ACPU](#) (Uganda), [O'Coffee](#) (Brazil) and [Bourbon Specialty Coffees](#) (Brazil). Another interesting exporting company to learn from is [Caravela Coffee](#), which has a wide portfolio of specialty coffees from Latin America, facilitates contact between roasters and producers, and sets up representative offices in destination markets.

Identify and promote your unique selling points. Give detailed information about your coffee growing region or origin, the varieties, qualities, postharvesting techniques and certification of the coffee you offer. You can also tell the history of your organisation, your coffee growing farm and the passion and dedication of the people working there. These are all elements that make your company unique.

Actively promote your company on your website and during trade fairs. Flavour quality competitions also provide good opportunities to share your story. See [this list of competitions and awards](#) provided by the SCA.

Are you interested in exporting highquality coffee? Learn more about cupping scores on [the website of the Specialty Coffee Association \(SCA\)](#). You can also consider getting a [Q Arabica or Q Robusta Grader certificate](#) to be able to cup and score your coffee through smell and taste according to international standards.

Work with other coffee producers and exporters in your region if you company size or product volume are too small. As a group, you can promote goodquality coffee from your region and be more attractive and more competitive in the European market.




Develop longterm partnerships with your buyers, including always complying with their requirements and keeping your promises. This will give you a competitive advantage, more knowledge and stability in the European market. See our [tips on doing business with European coffee buyers](#) for more information.


This study has been carried out on behalf of CBI by [ProFound – Advisers In Development](#).

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