

The Scandinavian market potential for coffee

Norway, Denmark and Sweden have some of the highest per capita coffee consumption rates in the world. Currently placed second, fourth and sixth respectively among [the top-10 coffee consuming countries](#), these markets are strongly directed towards high quality coffees. As such, the Scandinavian market imports relatively high volumes of Arabica and low volumes of Robusta. Interest in Rainforest Alliance-UTZ, organic and Fairtrade-certified coffees is strong in Scandinavia, where consumer preference for these products is growing.

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1. Product description

Approximately 124 coffee species exist in the wild, of which only a few are commercially relevant. The two most important species on the market are:

- *Coffea Arabica* (Arabica): Referred to as a highland coffee, because it grows best at altitudes between 600 and 2,000 metres, Arabica is the most dominant species in the coffee market, representing about 75% of global coffee production. Each coffee tree yields an average of two to four kilos of cherries. Arabica beans are fairly flat and elongated. Arabica coffee beans have a smoother, more aromatic and more flavourful taste compared to Robusta. Arabica beans have a caffeine content of approximately 1.5%.
The main sub-varieties of Arabica are the Yemeni coffees ([Typica](#) and [Bourbon](#)), the Ethiopian and the Sudanese coffees. Examples of Typica cultivars are [Java](#) and [Maragogipe](#) (known for its large bean size). Coffees related to Typica are the Hawaiian Kona and the Jamaican Blue Mountain. Examples of Bourbon cultivars are [Caturra](#), [Villa Sarchi](#), [Pacas](#) and [Pacamara](#) in Latin America, and [Batian](#), [SL28](#) and [SL34](#) in East Africa. [Jackson](#) is a coffee related to Bourbon which grows mostly in Burundi and Rwanda.
Examples of the Ethiopian and Sudanese coffee line are [Geisha](#), Sudan Rume and Tafari-kela.
- *Coffea Canephora* (Robusta): Robusta coffee can be considered a lowland coffee, as it grows best at altitudes below 600 metres. Robusta accounts for around 20% of global coffee production. Its beans have a caffeine content of approximately 2.7%. Robusta is less susceptible to pests and diseases than Arabica. Its beans are smaller and rounder than Arabica beans. When roasted, Robusta beans generally have a stronger and harsher taste than Arabica, which is often described as bitter. Robusta beans are often used in coffee blends. Examples of crossbreeds of the Arabica and Robusta species are [Catimor](#), [Castillo](#) (the most commonly coffee plant grown in Colombia), Colombia, Rairu 11 and Sarchimor.

Harmonised System (HS) codes are used to classify products and to calculate international trade statistics, such as imports and exports. The focus in this study is on green coffee beans, which are classified in HS codes 090111 (coffee, not roasted, not decaffeinated) and 090112 (coffee, not roasted, decaffeinated). The available data do not distinguish between conventional and specialty coffees.

2. What makes Scandinavia an interesting market for coffee?

Scandinavian countries feature among the highest per capita coffee consuming countries. Import volumes into Norway, Denmark and Sweden are relatively low compared to other countries in Europe, but are strongly directed towards high-quality coffees of mostly Arabica beans.

Scandinavian countries feature in the top-10 per capita coffee consuming

countries

Norway ranks second in the world in per capita coffee consumption at an estimated [9.9 kg annually](#), only surpassed by Finland, whose rate is 12 kg per capita per year. Denmark and Sweden rank fourth and sixth place in this ranking, with 8.7 kg and 8.2 kg respectively. Iceland at 9 kg and the Netherlands with 8.4 kg take the third and fifth places on this list. [The average per capita consumption in Scandinavia is unlikely to change significantly](#), like in other West European countries.

In Denmark, Sweden and Norway [coffee is predominantly consumed black](#), meaning without milk and sugar, so the quality of the actual coffee is very important in these markets. [Coffee in Scandinavia is generally considered to be of high quality](#).

Scandinavian coffee imports are relatively low in volume but directed towards high quality

While Scandinavian countries have high per capita coffee consumption, their share of green coffee imports in Europe is relatively low. Together, Sweden (2.9%), Norway (0.9%) and Denmark (0.5%) held a market share of 4.2% of total European imports in 2018, amounting to 156 thousand tonnes of green coffee. The largest supplier of green coffee to the region is Brazil, supplying 44% of Norway's coffee, 40% of Sweden's supplies and 27% of Denmark's coffee.

On average, import volumes between 2016 and 2018 declined for all three countries. Sweden registered the smallest decrease at -1.8%, while Norway (-5.4%) and Denmark (-5.6%) had deeper declines. Together, these countries sourced over 90% of their green coffee directly from producing countries. Brazil, Colombia and Peru are the largest coffee suppliers to Sweden, Norway and Denmark. Scandinavia predominantly imports Arabica beans, the share of lower-quality Robusta imports is small, especially compared to other European markets.

Most green coffee beans enter Scandinavia via the ports of [Oslo](#) (Norway), [Aarhus](#) (Denmark), [Gävle](#) or [Stockholm](#) (Sweden). Most Scandinavian green coffee traders are located near these ports.

Examples of large coffee importing and roasting companies in Scandinavia include [Friele](#), [Joh. Johansson Kaffe](#) (Norway), [Arvid Nordquist](#) (Sweden) and [BKI](#) (Denmark). Examples of specialised importers include [Collaborative Coffee Source](#) and [Nordic Approach](#) (Norway), which sells high-quality green coffee to roasters all over the world. In Europe, they store their coffees in warehouses in Belgium and the United Kingdom.

Tips:

If you use Chrome as a web browser, read [here](#) how to translate this study into another language.

Have a look at the websites of the [Port of Oslo](#) (Norway), the [Port of Aarhus](#) (Denmark), the [Port of Gävle](#) and the [Ports of Stockholm](#) (Sweden) to learn more about the ports themselves and potential trade partners based there.

Access the [EU Trade Helpdesk](#) to analyse European and Scandinavian trade dynamics and build your export strategy. Select Denmark or Sweden as a reporting country and follow the developments, such as the ups and downs of new and established suppliers. The data for Norway, which is not a EU member, is available on the website of the [Trade Map of the International Trade Centre](#).

See our study on [coffee trade statistics](#) for more detailed information about the European trade in green coffee beans.

3. Which trends offer opportunities in the Scandinavian market?

Scandinavian imports are directed towards high-quality coffees in general. Norway, Sweden and Denmark are regarded as important players in the global specialty coffee market, which continues to grow in the region. Sales of coffee with sustainability certifications show continuous growth in Scandinavia, while the market for organic coffee in the region provides interesting opportunities for coffee exporters.

Scandinavia's specialty coffee market is growing

High-quality coffees have been the main focus in the Scandinavian market. Norway, for instance, is where the [Specialty Coffee Association](#) started in Europe.

The [market for specialty coffee in Scandinavia continues to grow](#). This is partly reflected in the strong [growth of out-of-home consumption](#) from coffee drinkers in Denmark, Sweden and Norway increasingly look for unique, high-quality coffee in cafés. Within Europe, [Denmark, Sweden and Norway registered biggest growth in coffee shop retail sales since 2010](#).

As a result, the number of coffee chains and micro-roasteries also keeps growing in Scandinavia. [Sweden counted over 1,700 coffee outlets in 2018](#), and the number of small roasteries grows continuously at [a rate of 10 new venues opening every year](#). In the same year, Denmark even registered the highest rate of new coffee shops in Europe proportionally: [14.5%](#).

The largest coffee chain operating in Scandinavia is [Espresso House](#), which has approximately 350 shops in Sweden, Norway and Denmark. Other large chains include [Joe & The Juice](#) (Denmark) and [Wayne's Coffee](#) (Sweden). Examples of specialised coffee shops in Scandinavia include [Drop Coffee Roasters](#) (Sweden), [Sonny](#) (Denmark) and [Fuglen](#) (Norway). These roasters cater to niche markets and follow the principles of direct trade based on strong long-term relationships, transparency and high-quality products.

The growing demand for specialty coffee follows the growing consumer interest in how coffee is prepared, as well as where and how the coffee was grown. The upward trend of out-of-home consumption in Scandinavia brings opportunities for exporters of high-quality coffees, as coffee shops introduce more sophisticated and higher-valued varieties.

[Caravela](#) is an example of an exporting company in a coffee producing region serving the market with high-quality coffees. Caravela sources specialty coffee from different countries in Latin America and sells to roasters looking to buy from smallholder farmers, while building long-term relationships with them.

Scandinavia is home to a strong organics market

Scandinavian countries rank high when it comes to organic food sales and consumption in Europe. [Denmark and Sweden register the second and third highest per capita spending on organic products worldwide](#), only surpassed by Switzerland. Denmark's annual per capita consumption reached €278 euros in 2017, while Sweden registered €237. To put in perspective, the world average per capita consumption in 2016 was €11.

The market for organic products continues to grow in Scandinavia: [15% in Denmark in 2017](#), 9.3% in Sweden the same year. Denmark also had the largest market share for organics within its entire food market in 2017, with 10%. Danish organic retail sales amounted to €1.6 billion in 2017. In Sweden, the organics' market share reached 9.1%, with retail sales making €2.4 billion.

In Norway, [retail sales of organic products increased by 8% between 2017 and 2018](#), even if consumption of organic food is still small compared to that of most other North Western European countries. [Norway's organic market share was 1.7%](#), registering retail sales of €394 million.

The interest in organic coffee follows the general trend of a growing Scandinavian market for organic products. In 2017, [coffee was the fastest growing category in organic beverages in Denmark](#). Swedish consumers, too,

increasingly favour organic coffee. Scandinavian roasters and coffee brands consistently include organic products in their assortment. In another example, the large Swedish roaster [Löfbergs](#) is one of [the world's largest importers of organic and Fairtrade-certified coffee](#). Another brand which strongly focuses on organic and sustainable coffee in Scandinavia is [Arvid Nordquist](#). Retailers offer their own organic private labels, such as Anglamark from [Coop Denmark](#). On the producers' side, an example of a cooperative producing organic coffees is [COMSA](#) (Honduras).

Sustainably produced coffee widely available in Scandinavia

Sales of coffee with sustainability certifications show continuous growth in Scandinavia, thanks mostly to Scandinavian consumers' increasing demand for food with positive social and environmental impacts. In 2018, [62% of Norwegian consumers stated that sustainability is a leading theme in their purchasing decisions](#), in Sweden 73% and in Denmark 72%.

Fairtrade has a strong position in the Scandinavian market. [Denmark is among the fastest growing markets for Fairtrade-certified coffee, with a growth rate of 25% between 2016 and 2017](#), behind Ireland (36%) and Finland (35%) only. Total Fairtrade retail sales in Denmark amounted to €138 million in 2018, marking a revenue increase of 5.4% between 2017 and 2018.

[In Sweden, the total Fairtrade market grew by 10% between 2017 and 2018](#), reaching retail sales of €386 million in 2018. Fairtrade-certified coffee made up 11.3% of the total Swedish coffee market in 2018. In Norway, overall [Fairtrade retail sales reached €121 million in 2017](#), registering a growth rate of 22% between 2016 and 2017.

Rainforest Alliance-UTZ is also present in the Scandinavian coffee market. Many [coffee shops and brands in Scandinavia are Rainforest Alliance certified](#), including [Zoégas](#), [Gevalia](#) and coffee shop [Wayne's Coffee](#), in Sweden, for example. Since 2019, [100% of coffee retail products](#) from major Swedish roaster [Löfbergs](#) are Rainforest Alliance certified.

Roasters [Peter Larsen Kaffe](#) and [Risteriet Coffee](#) and retailer [Irma](#) are some of the Rainforest Alliance-certified players in Denmark. In Norway, one of the country's most popular coffee brands, [Evergood](#), and [Joh Johansson Kaffe](#) are Rainforest Alliance certified.

Rainforest Alliance and UTZ recently merged into one organisation, but UTZ was relatively small in Scandinavia, especially compared to other European markets. [Denmark and Norway, for example, only had three UTZ-certified coffee supply chains in 2019](#), and Sweden six. In comparison, Germany had 54 UTZ-certified players and Switzerland 40 in the same year. The following importers and roasters are among the main Scandinavian supply chain actors: [Drop Coffee Roasters](#) and [Arvid Nordquist](#) (Sweden), [NAF Trading](#) (Denmark) and [Nordic Approach](#) (Norway).

Tips:

See [our coffee trends study](#) to learn more about current trends in the European market.

See [the Norwegian website](#), [the Danish website](#) and [the Swedish website](#) of the Speciality Coffee Association (SCA) for more information about the specialty coffee markets in each of these countries.

Promote sustainable and ethical aspects of your production process. Support these claims with certification. See [our study on doing business with European coffee buyers](#) for more tips on marketing and promotional aspects of your coffee.


Before engaging in a certification programme, consult with your potential buyers and make sure to check that a label has sufficient demand in your target market and whether it will be costbeneficial for your product.


Find potential business partners in Scandinavia by checking the lists of [Fairtradecertified operators](#), [Scandinavian Rainforest Alliance certified coffee brands](#), [UTZ certified coffee supply chain actors](#) and [Scandinavian organic coffee importers](#).


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

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