

Entering the Eastern European coffee market

The Eastern European coffee market is dominated by international companies offering their own coffee brands. Slowly, however, the specialty market in Eastern Europe opens up doors for exporters of high-quality coffees. In spite of still being a very small niche market, the growing interest in specialty coffees creates opportunities for more direct relationships between specialised coffee roasters and coffee exporters.

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1. What are the requirements for coffee to enter the Eastern European market?

You can only export coffee to Eastern European countries which are 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, of which the most common are:

- Pesticides — consult the [EU pesticide database](#) for an overview of the maximum residue levels (MRLs) for each pesticide;
- Mycotoxins (fungi);
- 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 or dry process, washed or natural;
- 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.

Specialty coffee is graded according to its cupping profile. Fragrance, flavour, aftertaste, balance, acidity, sweetness, uniformity and cleanliness are important topics in the grading process. If you sell specialty coffee, it is important for buyers to know what the cupping score of your coffee is. Although not mandatory, it could be relevant to add this information to the documentation of the coffee you are exporting.

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 requirements

Labels of green coffee exported to Eastern Europe should comply with the general food labelling requirements of the European Union. The label 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 green coffee labelling





Source: commodity.com

Packaging requirements

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

Most green coffee beans of standard quality imported into Eastern Europe are packed in container-sized bulk flexi-bags that hold roughly 20 tonnes of green coffee beans each. The rest of the green coffee is transported in traditional 60 kg or 70 kg jute sacks, each with a net volume of 17 tonnes to 19 tonnes of coffee.

Other packaging used in transporting coffee includes polypropylene super sacks for 1 tonne of coffee, polyethylene liners for 21.6 tonnes and vacuum-packed coffee. These techniques provide two advantages in the coffee trade, namely increasing efficiency and maintaining or preserving quality.

Figure 2: Examples of coffee packing: jute bag, container-sized flexi bag, GrainPro and Videplast liner



Sources: raadtradingco.com, bls-bulk.com and GrainPro

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](#).

Additional requirements

Additional food safety requirements

Western and Northern European buyers generally have stricter additional requirements than buyers in Eastern Europe. Nevertheless, expect buyers in Eastern 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 a quality management system (QMS): A system based on [Hazard Analysis and Critical Control Points](#) (HACCP) is often a minimum standard for green coffee storage and handling.

It is good to keep in mind that your Eastern European importer might re-export green coffee to other destinations in Europe. Those other buyers push their requirements forward to other players in the supply chain, which might increase the need for you to adopt other specific certifications or standards. This will depend on the final market and market channel used.

Additional sustainability requirements

Corporate responsibility and sustainability are growing in importance in the coffee sector. Adopting codes of conduct or sustainability policies related to environmental and social impacts of your company will give you a competitive advantage.

Keep in mind that multinational companies lead the Eastern European coffee market. Roasters like [Tchibo](#) and

[Jacobs Douwe Egberts](#) tend to have sustainability policies in place. Retailer Kaufland, which operates stores throughout Eastern Europe, also has a range of roasted certified coffees in its assortment, such as [Rainforest Alliance-certified coffees](#).

The demand for organic-certified coffee products in Eastern Europe and the importance of fair trade certification is relatively small. Nevertheless, buyers operating in a wide range of products, such as importer [Bero Polska](#) or specialised buyers such as [Samay](#) (Slovenia), which imports Fairtrade and organic coffee, illustrate the possible market prospects for sustainably certified coffees.

In order to market your coffee as organic in the Eastern European market, it must comply with [the regulations of the European Union for organic production and labelling](#). Obtaining the [EU organic logo](#) is the minimum legislative requirement for marketing organic coffee in the European Union. There are no major private organic standards and labels in Eastern Europe.

Before you can market your coffee beans as fair trade or organic, an accredited certifier must audit your growing and processing facilities. Examples of accredited certifiers are [Control Union](#), [Ecocert](#), [FLOCERT](#), [ProCert](#) and [SGS](#).

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 or sustainability label depending on their end clients and distribution channels.

See the [list of Rainforest AllianceUTZ registered coffee actors in Eastern European countries](#) to identify interesting players. Learn which ones are certified to buy your Rainforest AllianceUTZ certified coffee.

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

Niche requirements

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 far beyond certification. These buyers will visit your coffee farm, evaluate your product, and try to establish a relationship with you. Besides high-quality, these buyers are interested in your stories from origin. This implies that you should know the specifics of your coffee, and be willing to honestly share this.

Tips:

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

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

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

If you produce coffee according to a fair trade scheme, find a specialised Eastern European buyer that is familiar with sustainable or fair trade products, for instance via the [FLOCERT customer database](#).

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.

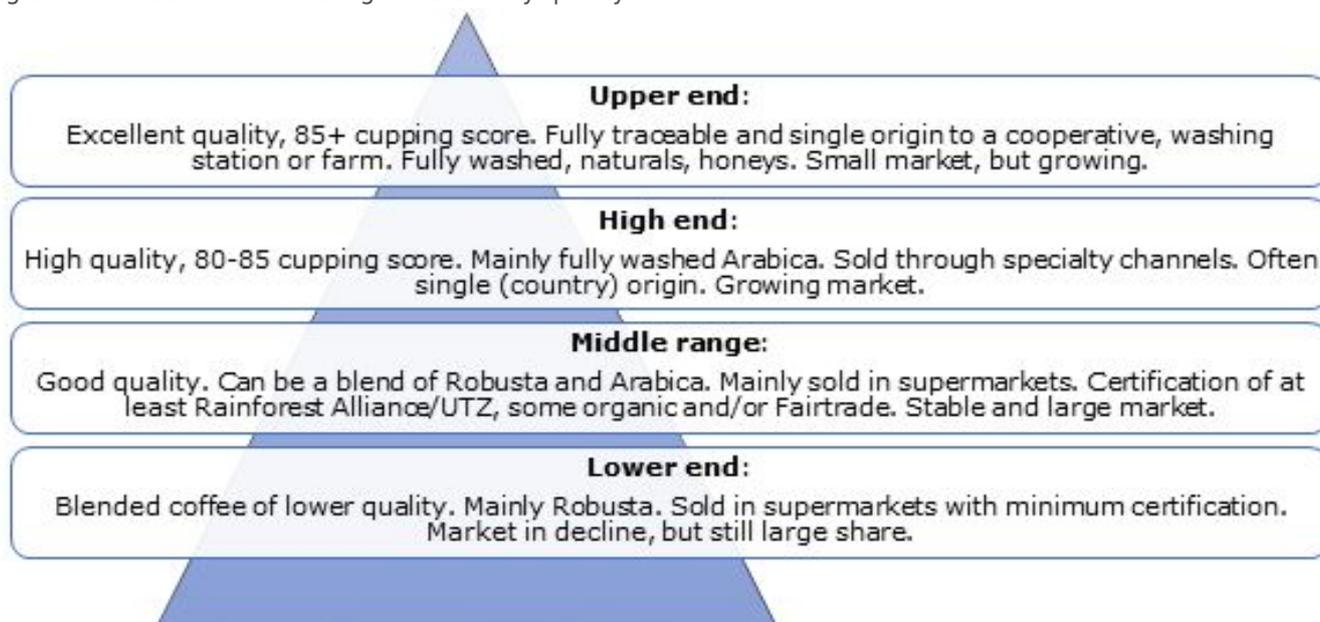
2. Through what channels can you get coffee on the Eastern European market?

How is the end market segmented?

The Eastern European market is dominated by international companies selling their own coffee brands. They include [Nestlé](#), [Tchibo](#) and [Jacobs Douwe Egberts](#), the latter being the owner of the traditional Polish coffee brand [Prima](#).

Eastern Europe's coffee market can be segmented as follows:

Figure 3: Coffee end market segmentation by quality



Low end: These are mainstream low-quality, mainly blended coffees. Approximately 40% to 100% of the beans in these blends are Robusta. Most coffee pads, ground coffee and instant coffee belong to this low-end segment. This market is in decline. Product and price examples in the low-end segment, based on [Tesco's retail prices in Poland](#) in 2019, include:

	Product	Price (€/kg)
Low end	Prima (ground coffee, 250 g package)	6.68
	Tchibo (ground coffee, 250 g package)	8.29
	Jacobs (ground coffee, 100 g package)	14.73

Coffees on the low end of the market are mainly sold in supermarkets and through service channels, such as offices and universities. The largest retailer groups in Eastern Europe include:

- Hypermarket [Kaufland](#), owned by the German [Schwarz Gruppe](#), is present in Bulgaria, Croatia, Czech Republic, Poland, Romania and Slovakia.
- Supermarket [Billa](#), owned by the German [REWE Group](#), operates stores in Bulgaria, Czech Republic and Slovakia.
- Supermarket [Biedronka](#) (Poland), owned by the Portuguese company [Jerónimo Martins](#).
- Supermarket [Dino](#) (Poland), owned by the Polish [Grupo Dino](#).
- Supermarket [Albert](#) (Czech Republic), owned by the Dutch-Belgian group [Ahold Delhaize](#).

Mid range: Good commercial quality coffee. Mid-range coffees typically consist of Arabica and Robusta varieties in blends, such as high-quality espresso. Sustainability certifications are important. The mid-range segment represents a stable coffee market. Mid-range coffees are often sold in supermarkets and by the food service industry. Examples of products and prices in this segment, based on [Tesco's retail prices in Poland](#) in 2019, include:

	Product	Price (€/kg)
Mid range	Dallmayr (Prodomo, whole beans, 250 g package)	18.44
	L'OR (Espresso Forza, whole beans, 500 g package)	18.44
	NaZemi Fair Café (whole beans, Fairtrade certified, 250 g package)	20.87
	Pellini (Top Espresso, ground coffee, 250 g package)	25.82

High and upper ends: High-quality coffee mainly consists of washed Arabicas. These coffees are often single origin and coffees with a background story. The upper end of this segment consists of specialty coffees of excellent quality, often from micro or nano lots that go through innovative processing such as naturals and honeys. These are mainly fully traceable and single origin Arabica beans with a cupping score of 85 and above. Long-term contracts between suppliers and buyers characterise this segment, as well as higher paid prices. Buyer's direct involvement makes sustainability certification uncommon. Buyer and supplier usually agree on projects for communities and distribution of money to farmers. The high or upper end segment is a small market but is growing.

These 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 [Prague Coffee Festival \(Czech Republic\)](#), [Warsaw Coffee Festival \(Poland\)](#), [Bucharest Coffee Festival \(Romania\)](#) and [Vilnius Coffee Festival \(Lithuania\)](#). [CoffeeDesk \(Poland\)](#) is an example of a specialised coffee website selling high-quality coffees. To find examples of specialty roasters and cafés in Eastern Europe, see the city guides at the [website of European Coffee Trip](#).

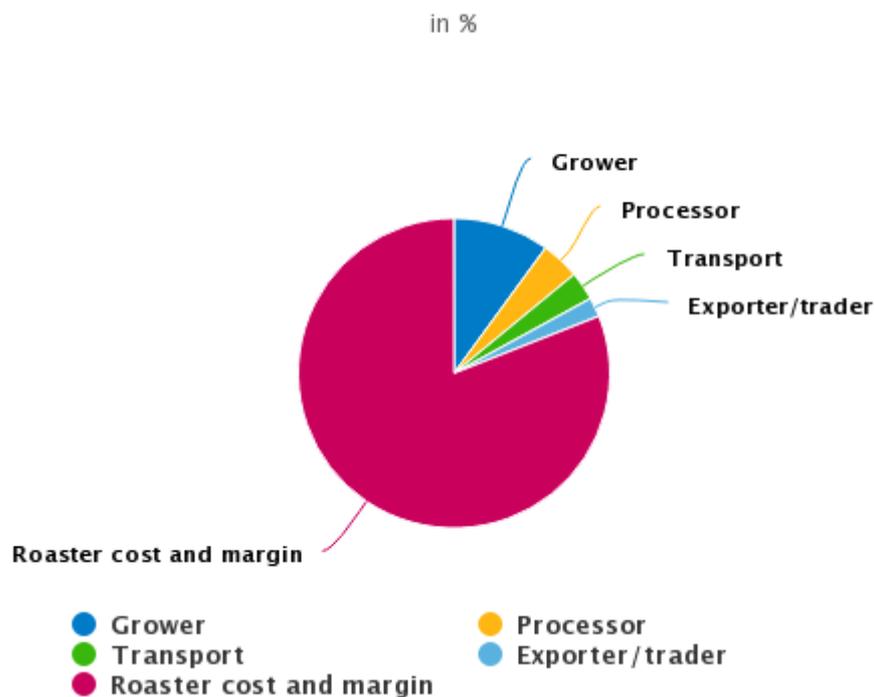
Examples of coffees in the high and upper end market segments include:

	Product	Retail price (€/kg)
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High and upper ends	Fully washed coffee, from farm Cerro Bueno, Marcala, La Paz, Honduras, roasted by Java Coffee (Poland), 250 g package	31.82
	Washed processed coffee, from Yirgacheffe, Gedeo, Ethiopia, roasted by Kokomo Coffee Roasters (Estonia), 1 kg package	37.00
	Natural processed micro lot coffee, from Mpanga, Kayanza, Burundi, roasted by Bob Coffee Lab (Romania), 1 kg package	39.18
	Fully washed coffee, from Karuhiu Utheri Coop, Kenya, roasted by Doubleshot (Czech Republic), 350 g package	48.23

Value distribution: As per the above examples, end market prices for coffee vary depending on the targeted market segment. Green coffee export prices typically amount to only 5% to 25% of the end market prices, depending on the coffee quality, the size of the lot and the supplier's relationship with the buyer. Figure 5 below shows the value distribution of wholesale coffee. Roasters end up taking more than 80% of the wholesale coffee price. A coffee farmer takes about 10%.

Figure 4: Wholesale coffee value distribution per actor



Source: Financial Times, 2019

In addition to the market segmentation by quality, the Eastern European coffee sector can also be segmented into in-home and out-of-home consumption:

- In-home consumption: Most coffee consumption in Eastern Europe takes place at home. In terms of volume, the share of retail and food service, which represents out-of-home consumption, varies substantially among East European markets. **The EU average share of retail coffee volume is 78% in 2018.** The retail channel

especially in the Baltic states absorbs a large share of sales in comparison with food service: approximately 93% of total coffee volumes were sold through retail channels in Estonia, 90% in Latvia and 88% in Lithuania. The Eastern European market where the retail channel is least prominent is Czech Republic, with 63%.

- Out-of-home consumption: Between 2016 and 2018, out-of-home consumption [grew strongly in Eastern Europe](#). The food service market share in coffee volume sales in Czech Republic increased by 29% between 2016 and 2018. In Poland, this share grew by 5%, and 11% in both Croatia and Hungary. The growth in out-of-home consumption is mainly linked to a [higher incomes in Eastern Europe](#) combined with growing [consumer interest for high-quality coffee](#).

Figure 5: Eastern European coffee sector segmentation by in-home and out-of-home consumption



Tips:

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

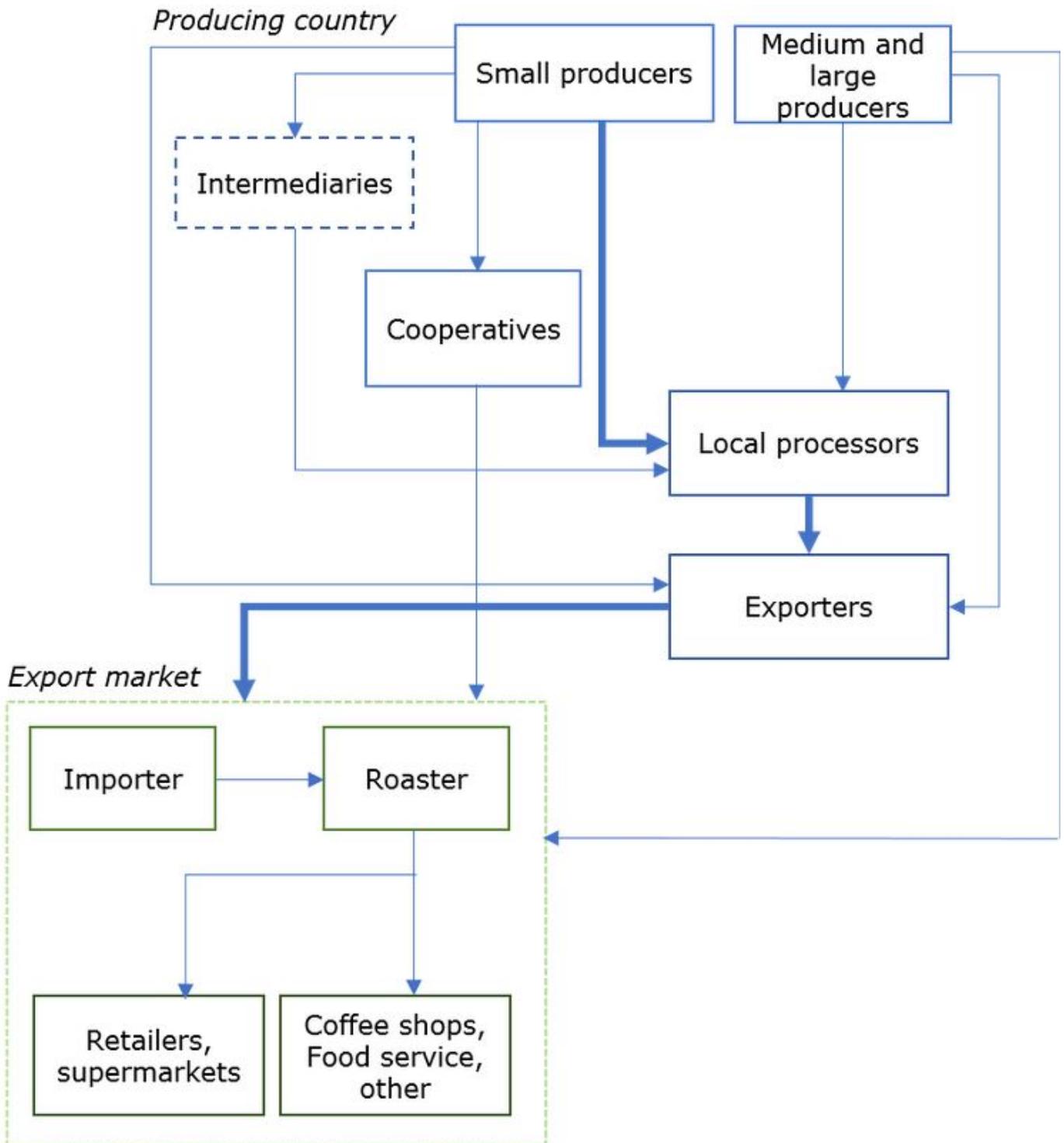
Check [the website of the Specialty Coffee Association \(SCA\)](#) to learn more about the highend coffee segment, market trends and main players.

Through what channels does coffee reach the end market?

As an exporter, you can use different channels to bring your coffee to the Eastern European market. Entering the market will vary according to the quality of your coffee and your supplying capacity. It is important to realise that shortened supply chains are a general trend in Europe. This means that retailers and coffee roasting companies are increasingly sourcing their green coffee directly.

In Eastern Europe, an estimated [76% of end market consumption consisted of roasted coffee in 2018](#), while the remaining 24% related to instant coffee and extracts. Hence, the trade channels discussed here relate to roasted coffee, particularly specialty coffee. Figure 7 below shows the most important channels for distribution of your green coffee beans in Eastern Europe.

Figure 6: Market channels for green coffee in Eastern Europe



Importers

Importers play a vital role in the coffee market, functioning as supply chain managers. They maintain wide portfolios from various origins, 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.

In general, importers either sell the green beans to roasting companies in Eastern Europe or they re-export the green beans to other European buyers. Large-scale importers usually have minimum quantity requirements starting at around 10 containers, covering a wide ranges of qualities, varieties and certifications. At the same time, they provide strong support on logistics, marketing and financial operations.

An example of a large importer in Eastern Europe is Poland's [Bero Polska](#), the leading supplier of green coffee in

Poland and other Eastern European countries. Bero Polska belongs to the [German Neumann Kaffee Gruppe](#) and handles a large range of products, both conventional and specialty coffees. [The Olam Group](#) is also present in Eastern Europe, with offices in [Poland](#) and [Slovenia](#). Olam imports large quantities, mainly of Robusta coffee, being an important distributor of green coffee to other parts of Eastern Europe.

Specialised importers are able to buy small volumes of high-quality and single origin coffees. An example of a specialised importer in Eastern Europe is [Anfrawer](#) (Poland).

Who may find this an interesting channel? The most interesting channel for you will depend on the quality of your coffee and your supply capacity in terms of volume. If you are an exporter of green coffee beans and can you offer high volumes (10 containers or more), you should look into entering the Eastern European market through large importing companies. These companies usually have agents or representative offices in producing countries, which can be your first point of contact.

Specialised traders can be interesting if you have evidence of high cupping scores at least 80 or higher, although some buyers may require scores higher than 85, plus sustainability certification, such as organic or fair trade, or you are selling single origin coffee. Keep in mind that many specialised importers prefer to work directly with producers or cooperatives.

Large roasters and private labels

Most large roasters buy their own coffee beans at the country of origin, although they might also source through importers. Roasters 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. Large roasters usually blend different qualities of green coffees to maintain quality constant. The final product is distributed to retailers and the food service industry.

Roasters can operate under their own brands or private labels. Examples of large roasters operating under their own brands in Eastern Europe include: [Anamaria](#) (Croatia), [Kafina](#) (Bulgaria) and [Café Sati](#) (Poland). Another large multinational roaster present in the East European market is [Nestlé](#). Examples of private label coffee roasters in Eastern Europe are [René Café](#) and [Instanta](#) (Poland).

Who may find this an interesting channel? Supplying to large-scale roasters is only interesting if you are able to supply large volumes at consistent quality. If you work with bulk coffees, discuss minimum quality and other requirements, such as certification, with your potential buyer.

Small roasters

Even though small roasters mostly source their green coffee from importers that also help with finance services, quality control and logistics, a growing number of small roasters import green coffee directly from origin. Small roasters are often specialised in certain high-quality blends and single origins. However, 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 and pre financing. Therefore, many small roasters continue to buy via importers, but still maintain direct connection with their producers.

Polish specialty roaster [Coffee Lab](#), for example, buys coffee from importers [Belco](#) (France), [Falcon](#) (United Kingdom) and [List + Beisler](#) (Germany). Other small Eastern European coffee roasters include: [Rebel Bean](#) (Czech Republic), [Mamacoffee](#) (fair trade, Czech Republic), [Samay](#) (Fairtrade and organic, Slovenia), [Illimité Coffee Roasters](#) (Slovakia), [Java Coffee Roasters](#) (Poland), [Black Sheep](#) (Hungary) and [Coffee Proficiency](#) (Poland).

Who may find this an interesting channel? Supplying to small roasters is interesting if you have high-quality coffees, micro lots, sustainability certification or if you are willing to engage in long-term partnerships. So if you have very high-quality coffees and are working through an importer, for example, you could explore direct trade

possibilities and connect with specialised roasters. In addition, if you are a farmer that has the financial means and technical know-how to organise export activities, then you can offer your coffee directly to specialised coffee importers and small coffee roasters.

Intermediaries and agents

Agents act as intermediaries between you, coffee importers and roasters. Some agents are independent, others are hired to make purchases on behalf of a company. An agent acts as an intermediary and has the knowledge to evaluate and select interesting buyers for you. An example of agent in Eastern Europe is: [Łukasz Pelczarski Coffee And Tea Agents](#) (Poland).

Who may find this an interesting channel? If you have limited experience exporting to European countries, agents can play a very important role. Agents are also interesting if you have limited quantities of non-specialty coffee or if you lack financial and logistical resources to carry out trade activities. Working with an agent is also useful if you need a trusted and reputable partner within the coffee sector. Be prepared to pay an extra commission for their work.

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), [Anuga](#) and [COTECA](#) (all in Germany). Interesting coffee events in Eastern Europe include the [Prague Coffee Festival \(Czech Republic\)](#), [Warsaw Coffee Festival](#) (Poland), [Bucharest Coffee Festival](#) (Romania) and [Vilnius Coffee Festival](#) (Lithuania). Attending such events can provide you with additional insight into the preferences of Eastern European buyers with regard to origin, flavour and sustainability certification.

Invest in longterm relationships. Whether you are working through importers or roasters, it is important to 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 which 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.

3. What is the competition like in the Eastern European coffee market?

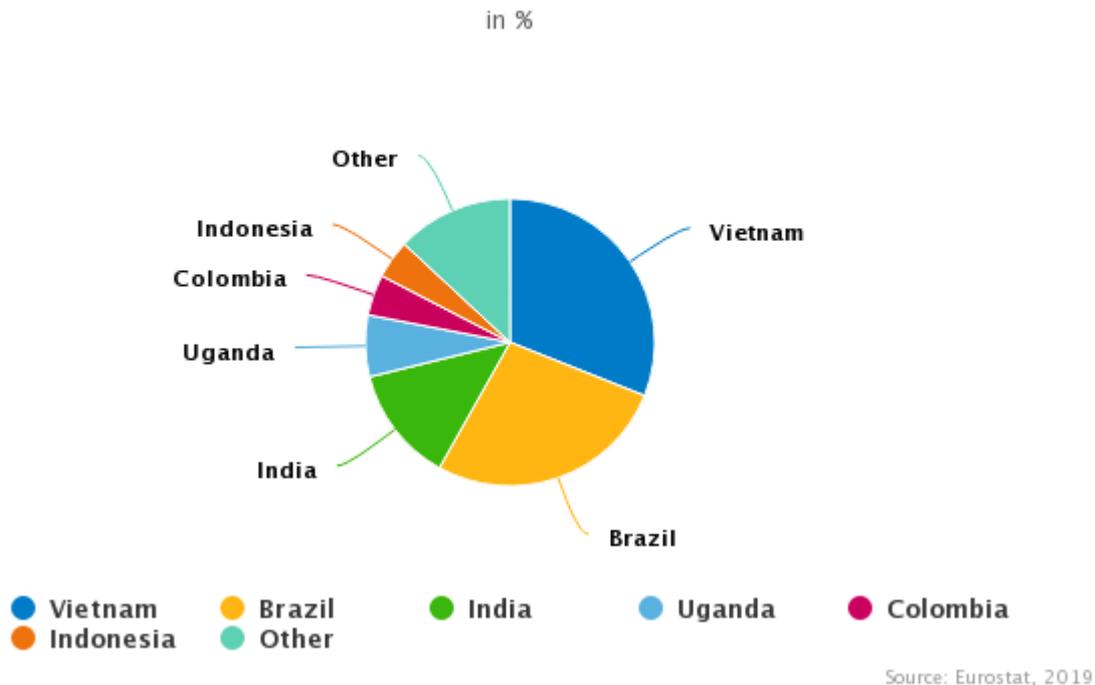
Eastern European buyers sourced approximately 42% of its coffee imports directly from producing countries in 2018. Most of it was imported via Germany (46%) and Belgium (3.6%). The three main coffee producing suppliers were Vietnam, Brazil and India, accounting for 71% of Eastern Europe's direct supplies.

In general, competition is higher for mainstream coffee with low added value. This segment is mainly dominated by major suppliers and cooperatives which are able to deliver large quantities so they can compete on price. It is difficult for small and medium-sized companies to compete in this segment. The level of competition is generally lower in the specialty coffee market, where volumes are smaller and the focus is more on quality, origin and sustainability. However, the entry point into this segment is much higher and may require larger

investments.

New entrants to the market may face some extra competition from already successful coffee exporters, especially so because of their already established long-term relationships with buyers. Entering the market as a newcomer requires you to have extensive knowledge of your product assortment, stable quality and volumes, and open and honest communication to start building your own new relationships with buyers.

Figure 7: Main coffee producing suppliers to Eastern Europe 2018



Eastern Europe mainly sources Robusta coffee from Asia

Asia is mainly known for its Robusta production, particularly Vietnam, which is the world's second-largest coffee producer. Robusta coffees make up approximately 95% coffee exports from Vietnam, whose production is strongly focused on creating large volumes of standard quality coffees mostly directed to the instant coffee market. Vietnam's coffee exports to Eastern Europe amounted to 32 thousand tonnes in 2018, declining -3.4% in volume since 2014.

[Sustainability issues are a major concern in Vietnam.](#) Climate change poses a serious threat to the country's coffee sector, while poor farming practices cause environmental degradation. [Sustainable coffee makes up an estimated 9% of Vietnam's coffee exports.](#)

Vietnam's exports to Eastern Europe may have slightly decreased between 2014 and 2018, but India's exports to the region increased by 13% in the same period, reaching 14 thousand tonnes in 2018. The world's sixth-largest coffee producer, India has an estimated [70% of its production dedicated to Robusta](#); the largest Indian exporter of Robusta is [Olam Agro India](#).

[Indian Robusta is often preferred for blends thanks to its good blending quality.](#) In addition to being known as an interesting Robusta producer, India is also known for its unique [Monsoon Malabar](#) coffee, which is exposed to the salty sea air during the monsoon season to acquire a specific taste. The coffee sector in India is promoted by the [Coffee Board of India](#).

Indonesia also exports Asian Robusta to Eastern Europe: 4.5 thousand tonnes in 2018, a 4.3% increase of between 2014 and 2018. Indonesia is the world's second-largest exporter of Robusta, after Vietnam. However,

Indonesia only [exports an estimated 46% of its green coffee production](#), as domestic consumption is growing rapidly. An estimated [15% of Indonesia's coffee exports are certified or verified as sustainably produced](#).

Uganda is the main supplier of Robustas from Africa

Another major Robusta producer, Uganda increased its supplies to Eastern Europe by 1.3% between 2014 and 2018, reaching 7 thousand tonnes in 2018. Approximately [81% of Uganda's coffee is destined for the European market](#). Africa's second-largest coffee producer and the world's tenth-largest, Uganda exports [approximately 75% Robusta](#) coffees.

Coffee in Uganda is mainly grown by smallholder farmers, who are organised under [NUCAFE](#), the national umbrella coffee farmers' organisation. NUCAFE's membership counts 213 farmer cooperatives and associations. The [Uganda Coffee Development Authority](#) (UCDA) helps to promote and guide the development of the Ugandan coffee industry through quality assurance, research and improved marketing techniques.

Arabica supplies mainly sourced from Brazil

Brazil is the world's largest coffee producer and Eastern Europe's second-largest supplier. Brazilian supplies to the region reached 28 thousand tonnes in 2018, registering a slight average annual increase of 1.2% since 2014. Brazil produces both Arabica (75%) and Robusta (25%), but [exports 95% Arabica](#).

Brazil's coffee producing areas are relatively flat, which has [intensified the use of mechanical pickers in the industry](#). This has drastically reduced labour costs in Brazil's coffee production, but also resulting in lower quality, as machines do not distinguish between ripe and unripe cherries. Coffee prices in Brazil went down, especially in relation to other coffee producing countries. Low-grade Brazilian Arabica is mostly used in blends.

Colombian supplies to Eastern Europe increased by 6.6% between 2014 and 2018, amounting to 4.8 thousand tonnes of green coffee in 2018. 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.

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, for example, [Indian Organic Farmers Producer Company](#) (India), [ACPU](#) (Uganda), [O'Coffee](#) (Brazil), [Bourbon Specialty Coffees](#) (Brazil) and [La Meseta](#) (Colombia). 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 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 your company size or product volume are too small. As a group, you can promote good quality coffee from your region and be more attractive and more competitive in the European market.

Develop long-term 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 Eastern European market. See our [tips for 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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