

Entering the German coffee market

More than 96% of the coffee imported by Germany is sourced directly from producing countries. Sustainability is very important in the German coffee market, and sales of coffee with sustainability certifications show continuous growth. Especially organic certification can be an interesting proposition for coffee exporters. However, as an exporter you will also encounter a competitive market that is the prime destination for producers of organic-certified coffee. The growing niche market for specialty coffees in Germany also brings interesting opportunities for exporters of high-quality coffees from special origins with unique stories.

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

You can only export coffee to Germany if you comply with strict European Union requirements. 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 German 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, particularly Ochratoxin A (OTA) which is heat-resistant;
- Salmonella (although coffee is considered low-risk).

Germany applies the same legal requirements as other European Union countries, but industry sources indicate that import controls for factors such as pesticides and moulds are very strict in the country.

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 also 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 – this 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 requirements

Labels of green coffee exported to Germany 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 Germany 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

Expect buyers in Germany 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, often incorporate GAP in their standards.
- Implementation of regular checking of residue levels in your green and roasted coffee: Ochratoxin A (OTA), polycyclic aromatic 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](#).

It is good to keep in mind that your German importer might re-export large quantities of 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 practices are growing in the coffee sector. Adopting codes of conduct or sustainability policies related to the environment and to producing communities will give you a competitive advantage. The leading companies in the German coffee market, such as [Tchibo](#) and [Jacobs](#), have sustainability policies highlighting their relationship with farmers, transparency of their operations, as well their social and environmental impact at origin.

Certification standards like Rainforest Alliance-UTZ have also become important in the mainstream coffee market. These certification standards are usually part of the sustainability strategy of traders, roasters and retailers. Large German importers, such as the [Neumann Kaffee Gruppe](#) and [List + Beisler](#), handle a wide range of coffees of various origins and certifications. Roaster [Tchibo](#) also cooperates with all main certification schemes for coffee (Fairtrade, Rainforest Alliance and organic) to achieve its sustainability mission. Large German retailers, such as [Lidl](#), [Aldi](#) and [Edeka](#), also have roasted coffee certified by the main certification schemes in their assortments.

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 Germany](#) 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

Germany is an important market for organic, fair trade and high-quality coffees. Every major German coffee company and all German small roasters offer ranges of high-quality and certified coffees to meet consumer demand in Germany.

Organic

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. Coffee controlled according to the EU legislation on organic farming can also be labelled with the official German [Bio-Siegel](#) label, in addition to the EU organic label.

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 European Union 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).

The German organic market also handles private organic standards, such as [Naturland](#). This private scheme has its own standards and may be required by specific buyers. Check the differences between [Naturland and the EU organic regulation](#). Note that Naturland sets higher standards, and covers areas which are not covered by EU organic regulation, such as organic forest management and certain social standards.

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.

Fair trade

The niche market for fair-trade coffee is also growing in Germany, offering interesting opportunities. Before you can market your coffee as fair trade, an accredited certifier must audit your growing and processing facilities. The most common fair trade standards in the German market are [Fairtrade](#) (accredited certifier is [FLOCERT](#)) and Fair+ (by company [GEPA](#)). The private standard [Naturland Fair](#) certifies products that are both organic and fair trade.

[Fair for Life](#) (by IMO/Ecocert) and [Fair Choice](#) (by Control Union) are other fair-trade certifications that producers may choose. Although less recognised in the German market, Fair for Life and Fair Choice have the advantage of costing less, as the control bodies may combine the fair-trade audit with the organic or Rainforest Alliance audit. However, always check demand and interest for a specific certification with your buyer.

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. 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 information. Other than that, direct trade may result in more frequent coffee farm visits and product assessments by your buyers, as well as long-term business relations.

Tips:

Check [the website of the German organic certification organisation Naturland](#) to learn more about opportunities for organic coffee in the German market.

Read on [Naturland's production standards](#) to learn more about the requirements that apply to the organic cultivation of coffee under Naturland rules.

Learn more about organic farming and European 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 [website Organic-bio](#).

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. Here you will also find booths of the organic certification bodies.

If you produce coffee according to a fair-trade scheme, find a specialised German 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.

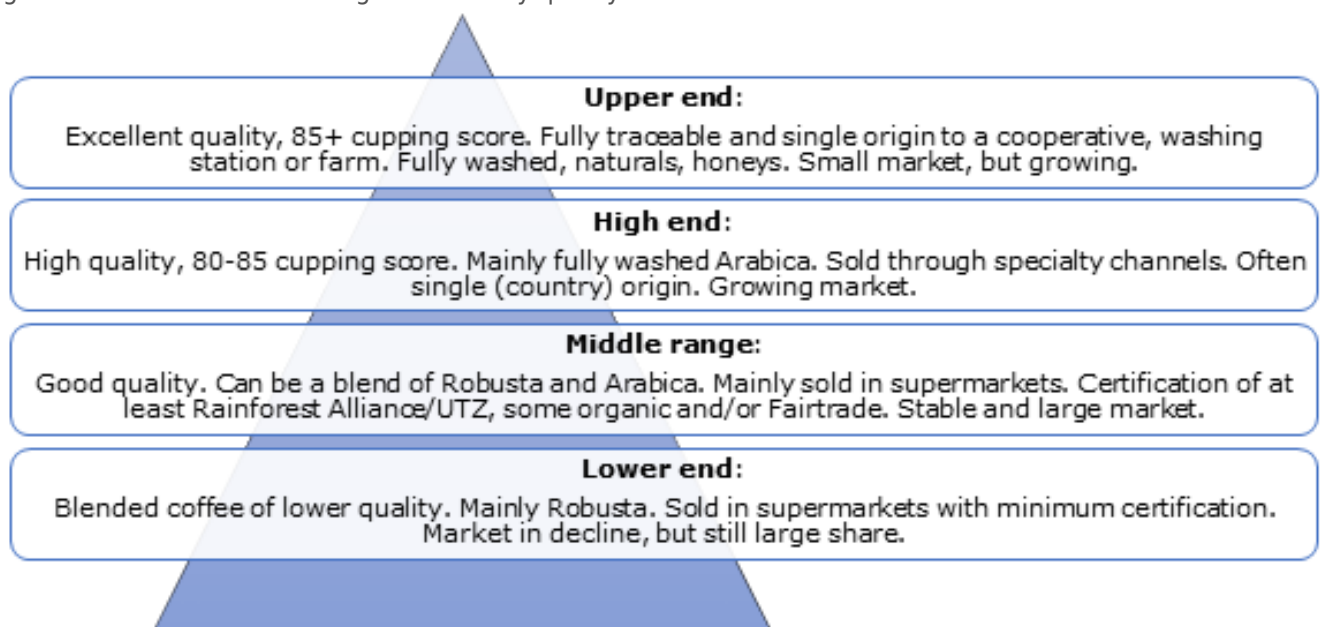
2. Through what channels can you get coffee on the German market?

The German end market for coffee can be segmented by quality and by in-home and out-of-home consumption. The high-end segment represents a growing niche market in both the in-home and out-of-home segments, as consumers increasingly demand specialty coffees. Suppliers in producing countries mainly enter the German market through an importer, but there has been an increase in direct trade between coffee roasters and producers.

How is the end market segmented?

The German end market for coffee can be segmented by quality, as shown in the below figure:

Figure 3: Coffee end market segmentation by quality



Low end: These are mainstream low-quality and mainly blended coffees. These blends are characterised by high shares of Robusta coffees. Most coffee pads and instant coffee belong to this low-end segment, which also includes low-quality private label products from supermarkets. Product and price examples in the low-end segment, based on [REWE's retail prices](#) in 2020, include:

	Product	Price (€/kg)
Low end	Jacobs (Krönung Mild, ground coffee, 500 g package)	5.98
	Ja! (Café Crema, whole bean, 1 kg package)	6.99
	Melitta (Barista Crema, whole bean, 1 kg package)	11.99

Coffees in 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 Germany are:

- Edeka Group, which includes supermarkets [Edeka](#) and [Netto](#)
- REWE Group ([REWE](#) and [Penny](#))
- Schwarz Gruppe ([Lidl](#) and [Kaufland](#))
- Aldi, with [Aldi Süd](#) and [Aldi Nord](#)

Mid range: Mid-range coffees are commercial coffees with a good and consistent quality profile, such as quality espresso. This segment typically consists of blends with a higher proportion of Arabica compared to the low-end segment. The mid-range segment represents a stable coffee market, in which sustainability certifications are important.

Mid-range coffees are often sold in supermarkets and by the food service industry. Premium private label ranges of retailers typically belong to the mid-range segment. In 2019, the market share of private labels in Germany was about [43%](#) of the entire market. Examples of mid-range products and prices, based on [REWE's retail prices](#) in 2020, include:

	Product	Price (€/kg)
Mid range	Lavazza (Crema and Aroma, whole bean, 1 kg package)	15.99
	JJ Darboven Café Intención (organic, fair trade, whole bean, 1 kg package)	16.99
	Illy (Espresso, whole bean, 250 g package)	34.00

High and upper ends: High-quality coffee mainly consists of washed Arabicas. These coffees are often single-origin and coffees with a special 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. The high and upper-end segments are a small but growing market.

Sustainability certifications are more uncommon in this segment. This is because sustainability practices are often commonplace among buyers. Long-term contracts between suppliers and buyers characterise the high and upper-end segments, as well as higher prices. Also, buyer and supplier usually agree on projects for communities and distribution of money to farmers, a common characteristic of certifications aimed at social impact. The high and upper-end segments do see, however, growth in organic-certified coffees.

Coffees from this segment are mainly sold directly by specialty roasters, at their physical and web shops as well as at coffee events. To find examples of German specialty roasters and cafés, refer to the [European Coffee Trip](#) website. Examples of events in Germany include the [Berlin Coffee Festival](#) and the [Hamburg Coffee Festival](#). An example of a specialised German coffee web shop where you can find high and upper-end coffees is [Roast Market](#).

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

	Product	Retail price (€/kg)
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High and upper ends	Natural processed coffee beans from El Boquerón, Guatemala, roasted by District Five Coffee Roasters , 250 g package	31.40
	Natural processed coffee beans from Sasaba, Ethiopia, roasted by Bonanza Coffee Roasters , 250 g package	50.00
	Washed processed Geisha coffee beans, from La Claudina, Antioquia, Colombia, roasted by Hunt Coffee Roasters , 250 g package	51.60

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 4 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%.

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

- In-home consumption: Most coffee consumption in Germany takes place at home. In 2018, retail sales in Germany accounted for approximately **88%** of the country's coffee volume sales. Home consumption is becoming increasingly diverse because of different qualities and the use of coffee pods and capsules. Filter coffee or ground beans is the preference in Germany (**57%**), however, consumer interest in whole beans (29% market share in 2019) is growing. Capsules and pods have a market share of 14%.
- Out-of-home consumption: Germany is Europe's third-largest out-of-home market, with nearly 51 thousand tonnes of green and instant coffee in 2018. The out-of-home channel accounted for **12%** all German coffee volume sales. Out-of-home consumption is expected to grow; **especially traditional German bakeries will be**

large drivers of this growth, increasingly focusing on coffee sales. At-work consumption accounts for the largest share of out-of-home consumption (approximately 60%). Another potential driver of more out-of-home consumption is the expansion of the range of specialty coffees sold in coffee shops, for example.

Figure 5: German coffee-market segmentation by in-home and out-of-home consumption



Tips:

Learn more about mainstream German supermarkets, such as [REWE](#) and [Lidl](#), promoting of standard quality and high-quality coffees. Compare their product assortment and price levels with specialised stores, such as the German web shop [Kaffee Zentrale](#).

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

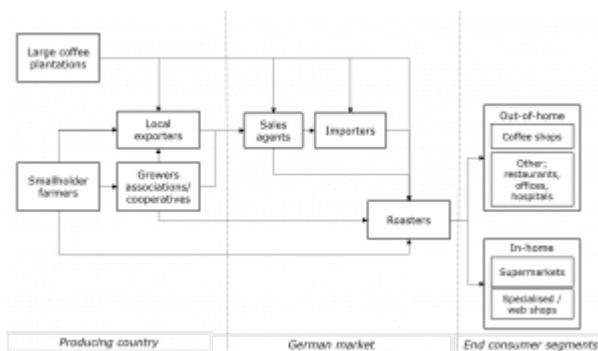
Check the website of the [Specialty Coffee Association \(SCA\)](#) to learn more about the high-end coffee segment, market trends and main players.

Through what channels does coffee reach the end market?

As an exporter, you can use different channels to bring your coffee to the German market. Entering the market will vary according to the quality of your coffee and your supplying capacity. Bear in mind 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 Germany, [approximately 87% of end-market consumption consisted of roasted coffee in 2018](#), while the remaining 13% related to instant coffee and extracts. Hence, the trade channels discussed here relate to roasted coffee, particularly specialty coffee. Figure 7 shows the most important channels for your green coffee beans in Germany.

Figure 6: Market channels for green coffee in Germany



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.

Green coffee beans mainly enter Germany via the [Port of Hamburg](#) and the [ports of Bremen and Bremerhaven](#). Most green coffee traders in Germany are located near these ports. In general, importers either sell the green beans to roasting companies in Germany or re-export them 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. Examples of large-scale importers in Germany include: [Neumann Kaffee Gruppe](#), [Benecke Coffee](#) and [List + Beisler](#).

Specialised importers are able to buy small volumes of high-quality and single origin coffees. Examples of specialised importers in Germany are: [Rehm & Co](#) (specialty coffee), [Touton Specialties Coffee](#) (specialty coffee), [Interamerican](#) (specialty coffee), [GEPA](#) (fair trade), [Rapunzel](#) (organic and fair trade), [El Puente](#) (fair trade) and [Slokoffie](#) (organic sustainable coffee).

For whom is this an interesting entry 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 German 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 safeguard quality consistency. The final product is distributed to retailers and the food service industry.

Roasters can operate under their own brands or private label. Examples of large roasters operating under their own brands in Germany include: [Jacobs](#), [Tchibo](#), [Dallmayr](#), [Melitta](#) and [J.J. Darboven](#). Examples of private label coffee roasters in Germany are: [Wertform](#), [Schirmer Kaffee](#) and [Miko](#).

For whom is this an interesting entry 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

Many small roasters continue to buy their coffee via importers, because not all roasters can take on the additional responsibilities necessary to import directly from source. Importers help roasters with financial services, quality control and logistics. Nevertheless, small roasters often maintain a direct connection with their producers.

A growing number of small roasters does import green coffee directly from origin. Small roasters are often specialised in single origins and the finest specialty coffees. Examples of small roasters in Germany that import coffee directly from origin include: [Benslips Kaffee](#), [Flying Roasters](#), [Röstfrisch](#) and [Supremo](#).

For whom is this an interesting entry channel? Supplying to small roasters is interesting for producers and exporters that have high-quality coffees, micro lots, sustainability certification, and who are willing to engage in long-term partnerships. If you have very high-quality coffees and are currently working through an importer, for example, it would be interesting to explore direct trade possibilities to see whether you could connect directly with roasters. This requires you to have the financial means and technical know-how to organise export activities.

Intermediaries and agents

Agents act as intermediaries between you, coffee importers and roasters. These are actors with vast market knowledge, and can help you assess and select interesting buyers. Some agents are independent, while others are hired to make purchases on behalf of a company. Examples of agents in Germany include [Eugen Atté](#) and [Euroca](#).

For whom is this an interesting entry 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 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 and other events to meet potential German buyers. Interesting events include SCA's [World of Coffee](#) (every year in a different European city), [Biofach](#) (organic), [Anuga](#) and [COTECA](#) (all in Germany), the [Berlin Coffee Festival](#) and the [Hamburg Coffee Festival](#). Attending such events can provide you with additional insight into the preferences of German buyers with regard to origin, flavour and sustainability certification.

Check out [this map](#) and [the list of importers](#) on the website of the German Coffee Association, highlighting several coffee roasters in Germany. It will help you find potential partners and learn more about the German market.

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 German coffee market?

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 (exporting less than twenty containers) 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 stronger on quality, origin and sustainability. However, as demanded volumes are smaller, and more and more producers focus on this segment, competition can also be quite high. Also, the entry point into this segment is much higher and may require larger investments.

New entrants to the market will face competition from already successful coffee exporters, especially due to 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 good communication skills to start building your own new relationships with buyers.

German buyers sourced 96% of their coffee imports in 2019 directly from producing countries. The three main green coffee supplying countries to Germany were Brazil, Vietnam and Honduras, accounting for 64% of all German imports.

Latin American countries are Germany's main Arabica coffee suppliers

Brazil is the world's largest coffee producer and Germany's largest supplier. Brazilian supplies to Germany reached 376 thousand tonnes in 2019, registering a slight increase of 0.3% on average annually since 2015. 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.

Other large Arabica suppliers to Germany are Honduras and Colombia, with 103 thousand tonnes and 61 thousand tonnes respectively in 2019. Honduras' coffee exports to Germany increased at an average annual rate of 5.0% between 2015 and 2019, while Colombian supplies increased at a year-to-year growth of 1.0% in the same period.

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

Germany's main organic coffee suppliers are Honduras, Peru and Ethiopia

In 2019, Honduras supplied 9.1% of the German market's total imports. Honduras is Central America's largest coffee producer, of which a large share is organic. In 2018, about [24 thousand](#) hectares were dedicated to organic coffee farming in Honduras, approximately 4.7% of the total Honduran coffee area. This relatively low share underlines the existing growth potential of Honduras as an organic producer. [Approximately 28% of total Honduran coffee exports](#) consist of [sustainably produced coffee](#).

Peru is Germany's fifth-largest coffee supplier with 51 thousand tonnes in 2019. A large share of Peruvian coffee is organically produced; in 2019, [Peru was the world's second-largest producer of organic coffee](#). The Andean country took [fourth place for coffee production with sustainable certification](#), which 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.

Germany is the largest export destination of Ethiopian coffee. German coffee imports from Ethiopia amounted to 45 thousand tonnes in 2019, after growing at an average annual rate of 5.9% since 2015. The Ethiopian government highly encourages the sector to adopt more sustainable growing techniques, and to focus on producing high-quality Arabicas. In 2019, [Ethiopia was the world's largest organic coffee producer](#).

Almost all coffee in Ethiopia is traded on the [Ethiopian Commodities Exchange](#) (ECX). However, since 2017 exporters are allowed to sell directly to international buyers, due to recurring issues related [to the lack of traceability of farm-specific or organic-certified coffees sold through ECX](#).

Vietnam is Germany's largest Robusta supplier

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 total coffee exports reached approximately [1,482 thousand tonnes between October 2018 and September 2019](#), of which 245 thousand tonnes to Germany in 2019. Between 2015 and 2019, Vietnamese exports to Germany increased at an average annual rate of 1.8%.

Vietnam's coffee production is strongly focused on creating large volumes of standard quality coffees mostly directed to the instant coffee market. However, as of 2018, [government efforts](#) have been more and more directed towards improving the quality of coffee beans. As high-quality Robusta gains interest in consumer markets, [Vietnam's specialty coffee industry is slowly developing](#).

[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. [Sustainably produced coffee](#) makes up an estimated [9%](#) of Vietnam's coffee exports.

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, post-harvesting 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 high-quality 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 German 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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