Exporting coffee to Germany

Germany is the most important European importer of green coffee beans. German consumers prefer high quality, lightly roasted Arabica coffee. Their interest in other varieties of coffee products is growing, including specialty coffee and freshly ground coffee pods. Organic certification and other sustainability certifications for coffee are increasingly important on the German market. Given the continuous growth of the organic coffee market in Germany, organic certification can be an interesting proposition for coffee exporters.

1. Product description

There are two main types of green coffee beans:

- **Coffea Arabica**: Plantations are generally at altitudes over 1,000 metres. This makes it a so-called highland coffee. The average length of coffee beans of this variety is around 9 mm. Their colour is greenish to blue-green. The coffee beans have a strong, full flavour. Arabica beans have a caffeine content of approximately 1.2%.

- **Coffea Robusta**: Robusta coffee can be considered a lowland coffee. Its plantations are below 1,000 metres. Robusta beans are small, round and generally brownish to yellowy green. Their beans have a higher water content than Arabica coffee. They generally have a less powerful flavour. Robusta beans have a caffeine content of approximately 2.3%.

In Europe, the Combined Nomenclature (CN) uses Harmonized System (HS) codes to classify products that are traded. The HS codes for green coffee beans are given below. The available data do not distinguish between conventional and specialty coffees.

Specialty coffee is defined by the Speciality Coffee Association of Europe (SCAE, now integrated into the Specialty Coffee Association - SCA) as the art of manufacturing a quality cup of coffee, which is judged by the consumer to have a unique quality, characteristic taste and personality, superior to the common beverages offered. This beverage consists of coffee beans which have grown at a designated location and have been processed under the highest quality standards for raw processing, roasting, storing, and finally the preparation to a beverage.
<table>
<thead>
<tr>
<th>HS Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>090111</td>
<td>Coffee, not roasted, not decaffeinated</td>
</tr>
<tr>
<td>090112</td>
<td>Coffee, not roasted, decaffeinated</td>
</tr>
</tbody>
</table>

2. What makes Germany an interesting market for coffee?

German consumption is one of the largest in Europe

Germany is the largest coffee-consuming country in Europe. The country represented 21% of the total European consumption in 2015. It consumed around 534 thousand tonnes of green coffee (8.9 million 60 kg bags).

Germany’s per capita coffee consumption is above the European average of 5.41 kg per year. Germans consumed 6.5 kg of coffee per person in 2015 (see figure 1). Germany lies behind Nordic countries such as Sweden (7.0 kg / year) and Finland (12 kg / year).

Germans prefer to consume Arabica coffee and prefer lightly roasted coffee. In line with this preference, there has been a shift towards Brazilian Naturals and other Mild flavours within the Arabica group. In 2016, 24.6% of Germans claimed to consume coffee daily, with filter coffee being the favoured type of coffee among consumers.

**Figure 1: Per capita coffee consumption in selected European countries (average consumption in Europe: 5.41 kg per capita / year)**

<table>
<thead>
<tr>
<th>Country</th>
<th>Per Capita Consumption (kg)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finland</td>
<td>12</td>
</tr>
<tr>
<td>Sweden</td>
<td>10</td>
</tr>
<tr>
<td>Norway</td>
<td>8</td>
</tr>
<tr>
<td>Switzerland</td>
<td>7</td>
</tr>
<tr>
<td>Germany</td>
<td>6.5</td>
</tr>
<tr>
<td>Italy</td>
<td>4.5</td>
</tr>
</tbody>
</table>

Source: International Coffee Organization and own calculations (2016)

**Tips:**

- Learn about the profile and importance of Germany’s coffee market. It will help you understand how you can sell or promote your coffee best.

- This list of the leading companies on the German coffee market can give you a good idea of dominant brands and tastes operating within the mainstream segment.
Germany is a main importer of coffee beans in Europe

Germany is the largest importer of green coffee beans in Europe, with a share of 32% in 2017. Its total imports reached 1.1 million tonnes in 2017. On average, imports between 2013 and 2017 remained stable.

![Figure 2: Imports of green coffee beans to Germany in 1.000 tonnes](image)

**Tip:** Check the website of the [German Coffee Association (Deutscher Kaffeeverband)](https://www.deutsche-kaffeeverband.de) for a list of coffee roasters, importers and other German coffee players, as well as publications about the German coffee market.

German is a consolidated hub for coffee re-exports in Europe

Germany is an important trade hub in Europe and plays a major role in coffee re-exports. Germany was the largest re-exporter of green coffee beans in Europe in 2017, with a share of 53%. Total re-exports of green coffee beans in 2017 reached 348 thousand tonnes. Overall, German exports were stable in the last five years. In terms of value, exports increased by 3.3% annually, amounting to €987 million in 2017.

In 2017, the main destinations for Germany’s green coffee re-exports were Poland (91 thousand tonnes) and the United States (78 thousand tonnes). Since 2013, re-exports to Poland increased both in volume (+3.2% annually) and value (+8.1% annually). In the same time frame, the volume of re-exports to the United States decreased by 3.4%, while the value was stable.

**Tip:**
- See our study on [trade statistics for coffee](https://www.iwoc.org/trade_statistics) for more information on Europe’s coffee trade.
Increasing interest in specialty coffee as Germans discover coffee shops

While German consumers are interested in incorporating quality and variety in their coffee-drinking experience, the demand for specialty coffee is not growing as fast as in other western European countries, such as the Netherlands and the United Kingdom.

The specialty coffee market in Germany is marked by the expansion in small-scale roasters such as Berlin-based Flying Roasters and Hamburg-based Public Coffee Roasters. These roasters cater for niche markets and bring concepts such as direct trade to light (as discussed in our study on trends for coffee).

Tips:
- Are you interested in exporting high quality coffee? Learn more about cupping scores at the website of the Specialty Coffee Association (SCA). You can also consider getting a Q-grader certificate to be able to cup and score your Arabica coffee through small and taste according to international standards. If you also produce and/or export Robusta coffees, it’s also possible to become an R-grader.
- See Germany’s national chapter of the Speciality Coffee Association (SCA) for more information about the German specialty coffee market. On this website, you can also find a list of German member companies, including importers and roasters. Note that the Specialty Coffee Association of America and the Speciality Coffee Association of Europe have merged into a single organisation, the Specialty Coffee Association (SCA).
- Check the association of specialty coffee roasters Deutsche Röstergilde (German Roasters Guild), where you can find a members list (potential buyers).
- See our study on trends for coffee and trade statistics for coffee for more information about the specialty coffee trend and its demand in Europe.

The organic market is shifting from niche to mainstream

Germany is the market leader of organic food sales and consumption in Europe. In Germany, the organic food and beverage sector is no longer considered part of the niche market and has instead become part of the mainstream market. In 2017, the organic market in Germany reached a turnover of €10 billion, following an 6% growth compared to the year before. In 2016, Germans spent around €116 per person on organic food and beverages.

This growing trend for organic products among German consumers has resulted in a strong interest in organic coffee. The organic sector is expected to register the strongest growth of all coffee product groups.

The popularity of organic foods in Germany is driven largely by consumers’ interest in health and ecological impact. In addition, German consumers have a relatively high disposable income compared to other countries in Europe. This makes them willing to spend extra money on everyday products such as coffee.
Sustainable coffee certifications are on the rise

Sales of coffee with other sustainability certifications show a continuous growth rate in Germany. Sustainably-certified coffees (including organic) represented about 8% of the German coffee market in 2015.

The main reason for this growing interest is that German consumers increasingly request social and environmentally sound conditions under which their coffee is produced.

Germany was the second largest European market for coffee certified by Fairtrade, and UTZ/Rainforest Alliance (now merged into one organisation):

- Germany is one of the largest markets for Fairtrade-certified coffee worldwide, selling more than 18 thousand tonnes in 2017. 75% of the Fairtrade-certified coffee sold in Germany was certified as organic as well. Important origins for Germany’s supplies of Fairtrade-certified coffees are Honduras, Peru, Mexico and Tanzania.
- Almost 50 Germany-based coffee supply chain actors were certified by UTZ in 2018. Some of the players on the list certified by UTZ are importers such as Bernhard Rothfos GmbH and InterAmerican Coffee (Members of Neumann Kaffee Gruppe), and List & Beisler. Examples of roasters: Tchibo and Melitta.
- Around 30 Germany-based retailers, traders, coffee shops and brands were certified by Rainforest Alliance in 2017. Some of the players on the list certified by Rainforest Alliance are: roasters such as Roestfein and Tchibo; retailers such as Lidl and Kaufland.

Tips:

- See our study on buyer requirements for the coffee sector to learn more about certification schemes.
- Try to combine audits in case you have more than one certification. In this way, you can save time and money. Also investigate the possibilities for group certification with other producers and exporters in your region.
- Promote sustainable and ethical aspects of your production process. Support claims with certification. See our study on doing business with European buyers of coffee for more tips on marketing and promotional aspects of your coffee.
3. What requirements should coffee comply with to be allowed on the German market?

Buyers in Germany have strict requirements for coffee, just like other European Union buyers. You can only export your product to Europe Union countries if you comply with these requirements. In our study on buyer requirements for coffee you can find a detailed analysis of these requirements.

Legal requirements

You must follow the European Union legal requirements applicable to coffee. These mainly deal with food safety. Traceability and hygiene are the most important themes. Special attention should be given to specific sources of contamination. Pesticides, mycotoxins and Salmonella (though coffee is considered low-risk) are the most common for green coffee beans. 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 criteria for coffee

Green coffee beans can be classified using two methods:

- the Specialty Coffee Association (SCA) green coffee grading protocols
- the Brazilian/New York green coffee classification (applicable to Brazilian coffee only)

Grading is usually based on the following criteria:

- Altitude and/or region
- Botanical variety
- Preparation (wet or dry process, washed or natural)
- Bean size (screen size), sometimes also bean shape and colour
- Number of defects (imperfections)
- Roast appearance and cup quality (flavour, characteristics, cleanliness)
- Density of the beans

Higher quality coffee (specialty coffee) is graded according to a cupping score. Fragrance, flavour, aftertaste, balance, acidity, sweetness, uniformity and cleanliness are important topics in the grading process (see below for more information).

The definition of specialty coffee has not been formally established within the coffee industry. A cupping score below 80 is considered standard quality and not specialty. This is in line with the Coffee Quality Institute, which states that coffees graded and cupped with scores above 80 are considered specialty coffees. The cupping protocols of the Specialty Coffee Association also consider a score of 80 as being below specialty quality. However, the exact minimum scores defining specialty coffee differ per country and buyer. Some buyers consider 80 as too low and demand a cupping score of 85 or higher.

Tip:
- See the website of the United Nations Food and Agriculture Organisation (FAO) for more information about grading coffee.

Roasting

Coffee can be roasted in several ways. In general, lighter roasts are less heavy, more acidic. They have more flavour than the darker roasts. Darker roasts have more body.

The degree or darkness of roast, as well as its duration, has a direct impact on the flavour profile of
coffee.

There are other important variables which affect the flavour or can develop the potential of the coffee. Some of them are:

- Roasting time
- Charge temperature
- Rate of rise
- Drum speed or air flow & cooling speed
- First and second crack timing
- Sensory experience of the roaster.

**Labelling requirements**

Labelling of coffee exported to Germany should be written in English. Labels should contain the following topics to ensure traceability of individual batches:

- Product name
- International Coffee Organisation (ICO) identification code
- Country of origin
- Grade
- Net weight in kg
- Certified coffee: name/code of the inspection body and certification number.

**Tip:**
- Do you sell specialty coffee? It is important for buyers to know what the cupping score of your coffee is. It is not obliged, but it could be relevant to add to the documentation for the coffee you are exporting.

**Packaging requirements**

Green coffee beans are sensitive to water absorption. They are therefore transported in woven bags made from natural fibre (jute or hessian). These allow free circulation of air.

Most green coffee beans of standard quality imported into Germany are packed in container-sized bulk flexi-bags. These hold roughly 20 tonnes of green coffee beans. The rest of the green coffee is transported in traditional 60-kilo jute sacks, which will have a net volume of around 17-19 tonnes of coffee.

Materials such as Grainpro or other innovative materials can be used to pack specialty coffees

**Tips:**
- Check the website of the International Jute Study Group (IJSG) for manufacturing specifications of jute bags for the food industry (IJO Standard 98/01). Take these specifications into account when exporting to Europe.
- Learn how to calculate the cupping score of your coffee at the website of the Specialty Coffee Association (SCA).
- Ensure preservation of the coffee quality. Thoroughly clean and fumigate containers before loading the beans. Protect the cargo from moisture during loading, to avoid mould. Ensure appropriate temperature, humidity/moisture and ventilation conditions during processing and transportation. Protect the cargo from pests such as beetles and moths. Prevent contamination of beans by foreign materials (such as dust) by keeping facilities...
Additional requirements

Quality management system certification may be required by buyers. A system based on Hazard analysis and critical control points (HACCP) is often a minimum standard required, but some buyers will also expect you to have certificates such as International Featured Standards: Food (IFS) or British Retail Consortium (BRC).

Corporate responsibility and sustainability is growing in importance in the coffee sector and adopting codes of conduct or sustainability policies related to environmental and social impacts of your company can provide you with a competitive advantage. See for example the corporate responsibility websites of Tchibo or Jacobs, both important players in the German coffee market.

Germany is one of the largest markets for UTZ and Rainforest Alliance. In 2017, these two certification bodies announced they would be merging, operating under the same umbrella in 2019 as the Rainforest Alliance.

UTZ and Rainforest Alliance are usually part of the sustainability strategy of traders, roasters and retailers. Importers such as Neumann 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 to achieve its sustainability mission. Large mainstream retailers, such as Lidl, Aldi and Edeka, offer coffees certified with both sustainability standards (in addition to niche certifications like organic and Fairtrade).

The Coffee Platform is expected to play an important role sustainability within the German coffee industry. The platform also cooperates with the German Federal Ministry for Economic Cooperation and Development.

Requirements for niche markets

Organic certification is expected to grow strongly in Germany over the coming years. Every major coffee company as well as smaller roasters offers a range of organic coffees to cater for consumer demand in Germany.

The combination of organic certification and fair trade certification for coffee is popular amongst German consumers. Over 70% of Fairtrade-certified coffees in Germany also hold an organic certification.

Tips:

- See the list of UTZ registered coffee actors in Germany to identify interesting players learn who is certified and thus qualified to buy your UTZ-certified coffee.

- Search for a certification body whose standards are recognised by the European Union. This will make sure your organic certification is recognized. The European Commission’s Agriculture and Rural Development website provides a thorough explanation of import regulations and other related issues.

4. What competition do you face on the German coffee market?

Germany sourced 96% of its imports in 2017 directly from developing countries, mainly through the
The main suppliers in 2017 were:

- Brazil (31% of total German imports)
- Vietnam (23%)
- Honduras (9.3%)
- Colombia (5.4%)
- Peru (4.9%)
- Indonesia (4.5%).

After a peak in German imports from Brazil in 2014, Brazilian supplies in 2017 (336 thousand tonnes) decreased to just over supply levels in 2013. However, the value of imports increased in that same period at an annual rate of 4.6%.

Supplies from Vietnam increased slightly in terms of volume, at an annual rate of 3.2% between 2013 and 2017, and they increased even more in terms of value (+8.7% annually). Supplies from Honduras increased at an annual rate of 4.5% in volume in that same period, while value increased by over 8% annually.

Colombian supplies increased significantly, at an annual rate of 8.5% in volume and 13% in value between 2013 and 2017. The increase can be linked to an increase in coffee production and exports from Colombia, as well as to incentives given to farmers to boost the industry.

Supplies from Peru decreased at an average rate of 12% in volume and 7.8% in value, associated with production problems such as leaf rust. This issue has affected about 30–40% of the country’s coffee production since 2013. After years of struggling with these outbreaks, Peruvian production has recovered lately, although it is not yet back at its original capacity.

Indonesian green coffee exports to Germany fluctuated strongly in the last five years. Overall, the country’s supplies to Germany decreased by 7.7% in volume and 2.9% in value, annually.

### Figure 3: Main developing country suppliers of green coffee beans to Germany

![Figure 3: Main developing country suppliers of green coffee beans to Germany](image)

**Source:** Eurostat, 2019

**Tip:**
- Identify your potential competitors and learn from them in terms of: Marketing (website, social media, trade fair participation), product characteristics (origin, quality) and value addition (certifications and processing techniques). Well-structured websites where you...
5. Through what channels can you get coffee on the German market?

The German coffee sector can be divided into two segments:

- **In-home consumption** - Most of coffee consumption in Germany takes place at home. Home consumption is becoming increasingly diverse as a result of new, innovative methods such as coffee pods and capsules. The most popular category, with over 60% of the market, is filter coffee (ground beans). However, **Germany is experiencing increasing consumer interest in whole beans (around 22% market share in 2015)**. Capsules have a market share of over 5%. In 2016, 68% of German consumers drank their coffee at home.

- **Out-of-home consumption** - This market segment is growing. **More and more Germans are consuming coffee out of their homes**, mainly at coffee shops and cafes. Traditional German bakeries are also large drivers of this growth, increasingly focusing on their coffee sales. **In 2016, around 32% of coffee consumption in Germany occurred outside of the own household**, in for example classic cafés (10.5%), at work (7.7%), at friends/family (6.9%) and in coffee bars, restaurants, hotels and bars (all under 2%).

The mainstream market for coffee is dominated by companies such as **Jacobs Douwe Egberts, Aldi (private label coffee), Dallmayr, Melitta and Tchibo**. Large retailers in Germany are:

- **Aldi**
- **REWE**
- **Lidl**
- **Coop**

Important coffee players in the food service industry are companies such as **Melitta** and **Illy** (Italian brand). The **changing profile of coffee consumption in Germany** has opened up space for an increase in high-quality coffees with specific flavours and aromas.

The coffee market can also be segmented according to quality (for example, the percentage of high quality Arabica coffees in blends, single origins, micro-lots, marketing aspects, etc.) and related prices (see the section on prices below). The German market reflects the segments found on the European market (see our study on **channels and segments in the European coffee sector**): upper-end, middle range and lower-end segments. Both in-home and out-of-home consumption of coffee incorporate these segments.

Figure 4: Market channels for coffee in Germany
Germany has a very traditional coffee market. The trading structure is well established with clear roles at each step of the chain. Imports of green coffee beans into Germany mainly enter via the port of Hamburg. That is where most importers, agents and some roasters are located. Bremen is also an important port for coffee imports. **Jacobs** has its plant here. The expansion of the specialty coffee market has opened possibilities to more specialised players operating in niche markets.

As an exporter, entering the German market will depend on the quality of your coffee, your volume capacities (for example, more or less than 10 containers per year) and the strategy of your company (for example, supplying the market through intermediaries or directly to end-users).

Are you an exporter of green coffee beans? And can you offer higher volumes (10 containers or more)? You should look into entering the German market through large importing companies. Germany has some of the largest coffee importers in the world, such as:

- **Neumann Kaffee Groupe**
- **InterAmerican Coffee**
- **Benecke, List & Beisler**
- **Hacofco**
- **Rehm Coffee**

These importers cover a wide range of qualities, varieties and certifications. Some focusing exclusively on specialty green coffee beans (thus requiring high-quality beans).

Germany also has importers which specialise in ethical products, including coffee. Normally these focusing on specific organic and fair-trade markets. Examples of specialised German importers are:

- **CARE Naturkost**
- **Rapunzel**
- **Gepa**
- **El Puente**.

If you offer bulk green coffee beans of standard quality you can also explore supplying large roasting companies directly. The largest coffee roaster is **Tchibo**, followed by **Jacobs**. Other large roasters are:
Targeting smaller roasters directly is also a possibility. Germany sees an increase in specialty roasters which import directly from producing countries. Smaller specialty roasters normally focus on higher quality green coffee beans. They give special attention to long-term partnerships. Examples of specialised German roasters that import directly are:

- **Supremo**
- **Wannenmacher's röstfrisch Kaffee in Baden-Baden**
- **Flying Roasters.**

Is your experience with entering new markets limited? You have the option to sell your coffee beans to an agent. Such agents function as an intermediary between you and the importer or roaster. In Germany, a few agents (and brokers) operate on the coffee market, traditionally located around the Hamburg port; for example: [Eugen Atté](#), [Euroca](#).

**Tips:**

- Target specific market segments depending on the quality of your green coffee and your volume capacities. If you have very high-quality micro-lots and are working through an importer, for example, discuss the possibilities to link up with high-end small roasters. You can also explore direct trade possibilities and connect with specialised roasters. If you work with bulk coffees, discuss certification trajectories and linkages to larger roasters operating on the mainstream market.
- Be consistent, punctual and reliable. This is essential when doing business in Germany. Reply in time to enquiries by possible buyers (within 48 hours). Be open and realistic and do not make promises that you can’t keep. See our [tips on doing business with European coffee buyers](#) for more information.
- Use our study on [how to find buyers on the European coffee market](#) and the list of importers on the website of the German Coffee Association to get into contact with German buyers.
- Check out the map [highlighting several coffee roasters in Germany, per region](#). It will help you find potential partners and learn more about the Germany market.

6. What are the end market prices for coffee?

The end-market prices for coffee vary depending on which segment of the market is targeted. Our study on [channels and segments in the European coffee sector](#) provides an overview of the upper-end, middle range and lower-end in the coffee retail market and their main characteristics. Typically, export prices of green coffee only account for around 5-25% of the end-market prices, depending on the coffee quality, the size of the lot and the supplier’s relationship with the buyer.

These are price ranges for the German coffee market:

- **Upper-end:** € 91.60 per kg (Mykona Hawaii Paradise Meadows – 250 gram packaging); € 71.60 per kg (Claudio José Costa Rica – Public Coffee Roasters – 250 gram packaging)
- **Middle range:** €18.99 per kg (Origo Coffee Barista Espresso – organic certification – 1 kg packaging); €13.49 per kg (REWE Feine Welt Incahuasi kaffee – Fairtrade and organic certified – 1 kg packaging); €11.98 per kg (Jacobs Krönung Aroma – 500 gram packaging)
Lower-end: €7.58 per kg (Bellarom Kaffee Mild – 500 gram packaging).

Sources: Lidl, REWE, Kaffee Zentrale, Public Coffee Roasters

Tip:
- Monitor end consumer prices of coffee to get an idea on price ranges. Good sources for price information are the websites of supermarket chains (such as REWE) and specialty coffee web shops (such as Kaffee Zentrale).

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