

What is the demand for cocoa on the European market?

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Europe is a very diverse and therefore interesting market for cocoa. Its chocolate processing and manufacturing industry is strong, requiring high volumes of cocoa beans. The industry processes large amounts of bulk cocoa, but demand for speciality cocoa is growing strongly. Sustainability is an important subject for the European cocoa industry and for European chocolate consumers.

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1. What makes Europe an interesting market for cocoa?

Europe is the world's largest chocolate manufacturer and exporter market. The European cocoa market is very diverse, as European buyers source cocoa beans from different origins and of different qualities to cater for the broad demand of a diverse cocoa and chocolate industry. Consequently, Europe offers opportunities for suppliers of both mainstream and speciality cocoa.

The countries with the highest per-capita chocolate consumption are in Europe

The world's average chocolate consumption amounts to an estimated [0.9 kilogrammes per capita per year](#). European countries show significantly higher averages. The largest chocolate consumers in the world are the Germans with a per-capita consumption of [11 kilogrammes](#) in 2018. Switzerland ranked as the second-largest with 9.7 kilogrammes per capita in 2018, followed by Estonia with 8.8 kilogrammes. The average per-capita chocolate consumption in Europe reached 5.0 kilogrammes in 2018.

The European chocolate market was valued at an estimated [€53 billion](#) in 2019. The market is expected to grow at an average annual rate of around 5% between 2020 and 2024. However, the COVID-19 pandemic has disrupted the cocoa value chain, and [European chocolate demand has changed in the first half of 2020](#).

Sales of speciality chocolates suffered the most; they were halted for months in Europe due to [the closing of specialised stores and other sales channels](#). Although the pandemic brought a focus on sales of commercial chocolate qualities via supermarkets, European consumers are still increasingly seeking higher quality and higher cocoa content in their chocolate. As such, the long-term market prospects in Europe still provide good opportunities for exporters in producing countries. Refer to [our study on trends on the European cocoa market](#) to read more about this.

Europe is the world's largest chocolate producer

Europe houses many chocolate manufacturers of all sizes, which work with different cocoa qualities. Globally, seven multinational companies represent the bulk of the market for final chocolate products: [Mars](#), [Ferrero](#), [Mondelēz](#), [Meiji](#), [Hershey](#), [Nestlé](#) and [Lindt & Sprüngli](#). The net sales value of all companies combined reached a staggering [US\\$73 billion](#) in 2019. The multinationals used an estimated [1.8 million tonnes](#) of imported cocoa beans in 2017. Except for Meiji (Japan) and Hershey (United States), all other multinationals have chocolate confectionery production plants in Europe.

According to [Prodcom data](#), the European Union produced an estimated 6.5 million tonnes of chocolate products in 2018, at a value of over €17 billion. Germany is the leading producer of chocolate as a consumer product,

followed by Italy and France. In the second quarter of 2020, the [German Confectionery Industry](#) (BDSI) reported a slowdown in the cocoa and chocolate industry as a result of the COVID-19 pandemic; cocoa grindings by 11 of the most important confectionery companies in Germany [declined by over 16% compared to 2019](#). However, given the expected future growth of the global chocolate market in the long term, production figures are expected to pick up again.

Europe is also the world's largest chocolate export region, accounting for more than [74%](#) of global chocolate sales. Germany is the world's largest exporter of chocolate, with a global market share of 17%, followed by Belgium with 11%, Italy with 7.3%, the Netherlands with 7% and Poland with 6.3%. Italy, Poland and the Netherlands are among the fastest-growing chocolate exporters since 2015, with growth rates of 34%, 26% and 20% respectively.

Europe also accounted for an estimated [44%](#) of the global industrial chocolate market. Industrial chocolate, such as chocolate couverture, is sold as an intermediary product to food manufacturers of all sizes in the mainstream and gourmet food segments. [Barry Callebaut](#) is the world's largest player in the industrial chocolate market, with 62 factories worldwide and a product sales volume of [2.1 million tonnes](#) in 2019. Other large players in the industrial chocolate market are [Cargill](#), [Fuji Oil](#), [Puratos](#) and [Cémoi](#).

Europe has world's highest industrial demand for cocoa beans

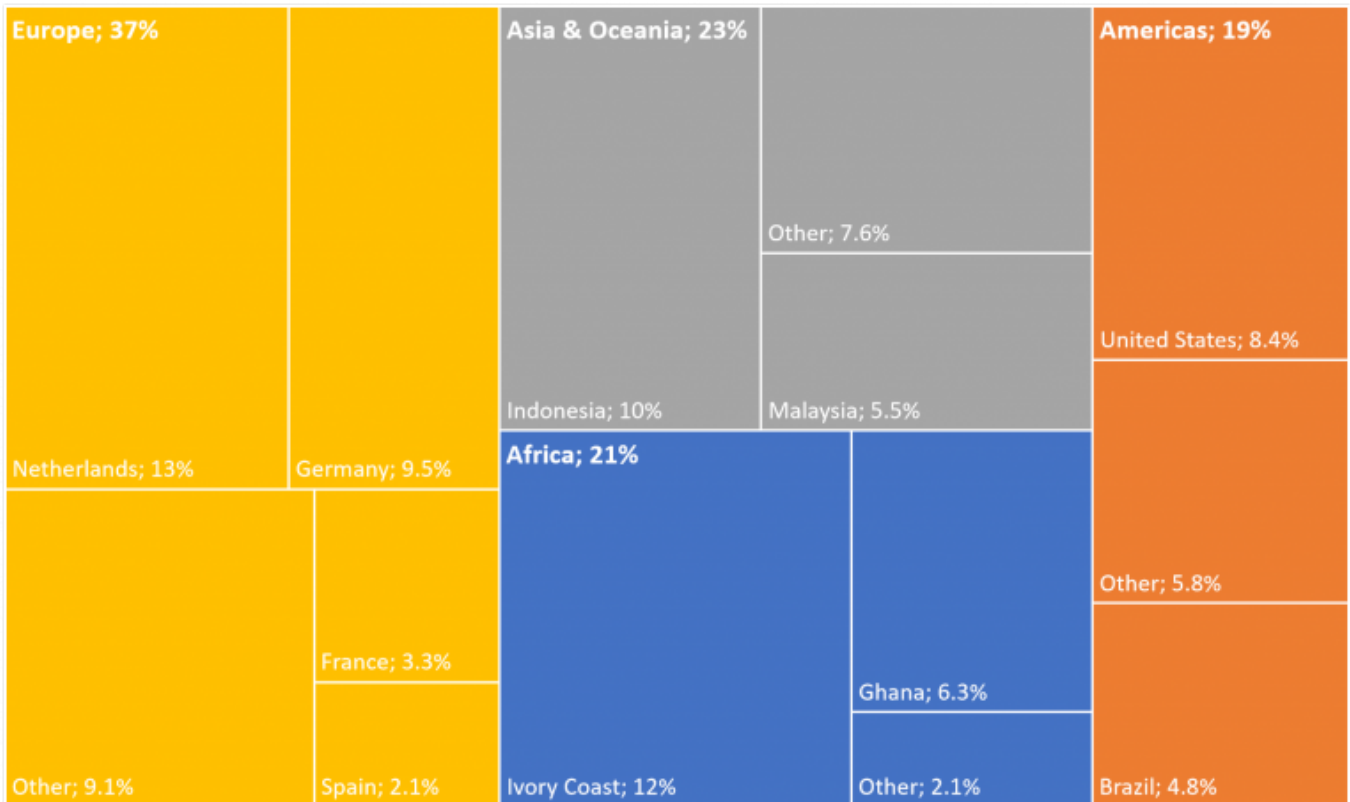
Cocoa bean grindings serve as a proxy for market demand. Given Europe's important role in chocolate manufacturing, exports and consumption, the demand for cocoa beans is high in Europe. Globally, cocoa bean grinding activities increased by [8%](#) from the cocoa year 2016/2017 to 2018/2019, reaching a total of 4,750 thousand tonnes. This increase is fuelled by a [growing demand for chocolates with higher cocoa content](#) by the chocolate and food industry. However, [the revised forecasts for the cocoa year 2019/2020](#) show a small decline, possibly due to the effects of the COVID-19 pandemic.

Europe accounts for the largest cocoa grinding activities in the world, with [37%](#) of global grindings in 2018/2019, amounting to an estimated 1,748 thousand tonnes of cocoa beans. European grindings registered an increase of 2.2% compared to the year before. The Netherlands was the world's largest cocoa bean grinder in 2018/2019, with a cocoa demand of 605 thousand tonnes, or 13% of global grindings. Although cocoa bean grindings in Europe remained stable in the first quarter of 2020, [they declined in the second quarter by almost 9% compared to 2019 figures](#). Cocoa grinding statistics can be checked [on the website of the European Cocoa Association \(ECA\)](#).

The share of European grindings is expected to decrease in the future, as there is an increase of cocoa grinding in producing countries. In 2018/2019, cocoa grinding at origin accounted for around [48%](#) of all grinding activities worldwide. For comparison, in 2015/2016, the share of grinding at origin was 43%. Grinding at origin has been used as a strategy by large multinationals such as Cargill, Olam and Barry Callebaut to lower production costs as well as to target regional markets. [Asia-Pacific is the fastest-growing market for chocolate](#), thanks to the fast-growing economies of China, India and Japan. Given [recent investments of multinationals](#), cocoa grindings at origin are expected to grow even more in the future.

In cocoa year 2018/2019, Ivory Coast was the world's second-largest cocoa grinder with an estimated [585 thousand tonnes](#), or 12% of global grindings. Cocoa grindings in Ivory Coast are expected to increase in the coming years, as the country has set the [goal to grind 1 million tonnes of cocoa beans by 2022](#), almost doubling its current output. In December 2019, [Cargill invested US\\$100 million in its processing site](#) in Ivory Coast to increase production capacity. In Ivory Coast, the growth in grinding activities is aimed at [increasing the value of exports and protecting the economy from fluctuations of the global cocoa market](#).

Table 1: Estimated cocoa bean grinding by region and country in % of the world's total, 2018/2019



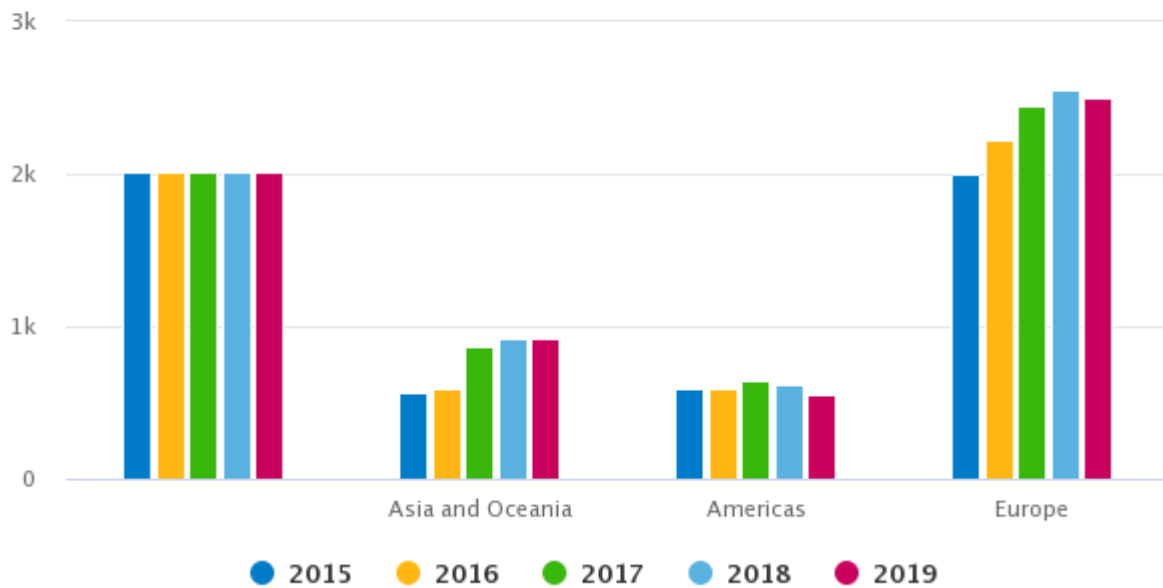
Source: International Cocoa Organization (ICCO), 2020

Europe is the main global destination for cocoa bean exporters

Total imports of cocoa beans (HS-code 1801) by Europe amounted to nearly 2.5 million tonnes in 2019. Between 2015 and 2019, the import volume increased by an average 6.4% per year. Of total European imports, 82% of cocoa beans were sourced directly from producing countries in 2019, amounting to 2 million tonnes in volume, at a value of €4.2 billion. Intra-European trade of cocoa beans accounted for 18% of supplies, amounting to 434 thousand tonnes in 2019, at a value of more than €1 billion.

Figure 1: Global imports of cocoa beans per region

in 1,000 tonnes



Source: International Trade Centre (ITC), 2020

Europe is an interesting outlet for both bulk and speciality cocoa

About 74% of European cocoa imports are supplied by West Africa. These imports mainly consist of bulk cocoa of the *Forastero* variety. The main supplying countries are Ivory Coast with 992 thousand tonnes in 2019, Ghana with 310 thousand tonnes, Nigeria with 225 thousand tonnes and Cameroon with 213 thousand tonnes. Cocoa supplies from these countries are essential to produce standard-quality chocolates and are used by most large companies worldwide.

Supplies from Ivory Coast increased at an average annual rate of 10% between 2015 and 2019, while supplies from Ghana fluctuated during the same period, but Ghana kept its significant market share. Supplies by Nigeria and Cameroon also increased significantly during the same period, with average annual growth rates of 13% and 8.8% respectively.

Speciality cocoa, including fine flavour cocoa, is mainly sourced from Latin America. With 6.8% of total European imports in 2019, Latin American suppliers only accounted for a small share of total imports. European imports of speciality and fine flavour cocoa generally happen at a small scale and within a niche market. The overall imports from Latin American countries increased at an average annual rate of 4.5% between 2015 and 2019 and follow the trend for a higher consumer interest in sustainable and higher-quality chocolate.

The region's main exporting countries are Ecuador with 86 thousand tonnes in 2019, the Dominican Republic with 34 thousand tonnes and Peru with 33 thousand tonnes. Supplies from Ecuador increased at an average annual rate of 10% between 2015 and 2019, while the Dominican Republic and Peru saw their exports to Europe decrease by an average annual rate of 4.5% and 6.3% respectively.

Trade figures for 2020 are not yet available but are expected to reflect the effects of COVID-19 on demand, especially on supplies of speciality cocoa.

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Europe also offers an interesting market for smaller cocoa bean suppliers

European cocoa bean imports show an interesting dynamic for smaller suppliers in producing countries. For instance, supplies from Sierra Leone, an emerging supplier of organic cocoa to the European market, increased by 18% between 2015 and 2019, amounting to 16 thousand tonnes in 2019. In 2019, **70%** of European cocoa bean imports from Sierra Leone were organic.

Imports from DR Congo also increased, at an average annual rate of 5.2% between 2015 and 2019, amounting to 7.2 thousand tonnes in 2019. DR Congo is also an important supplier of organic cocoa, with organic exports reaching 5.7 thousand tonnes in 2019.

Central American countries also registered growing export volumes to Europe. Nicaragua was the region's largest cocoa supplier in 2019, with 1,567 tonnes of cocoa beans. Between 2015 and 2019, supply volumes increased at an average annual rate of 7.5%. During the same period, Mexico, Honduras, Costa Rica, Belize and Guatemala also registered growth rates of 16%, 65%, 24%, 9% and 29% respectively.

Tips:

Regularly check the website of the International Cocoa Organisation and read its [monthly review of the cocoa market](#). Here, you can read about the latest developments in the supply of and demand for cocoa beans and about the international cocoa futures markets.

Access the [EU Trade Helpdesk](#) to analyse European trade dynamics yourself and to build your export strategy. By selecting a country as your reporting country, you will be able to follow developments such as the emergence of new suppliers and the decline of established ones.

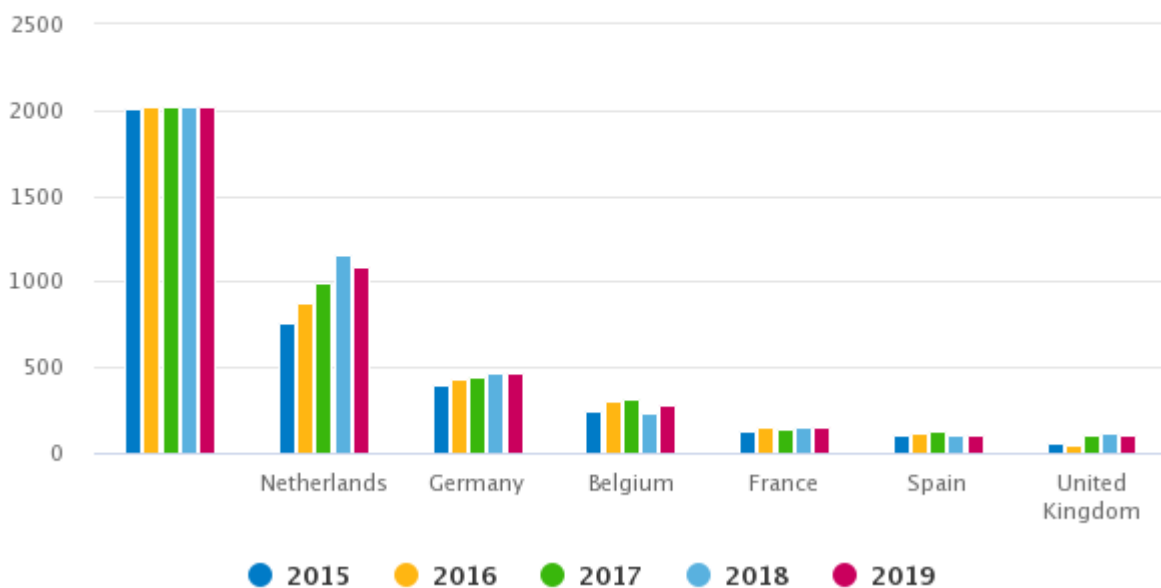
Check the website of the [European Cocoa Association](#) to access the latest data on grinding activities.

Refer to [our study on trends in the European cocoa market](#) to learn more about which trends offer opportunities in the market.

2. Which European markets offer most opportunities for cocoa?

Given its diverse nature, Europe offers many opportunities to cocoa bean exporters. The European countries that offer the most opportunities show a mix of positive characteristics, namely high and/or growing import volumes, mostly sourced directly from producing countries, from a wide diversity of supplying countries. Also, a country's role as distributor of cocoa beans to other European countries provides interesting opportunities to cocoa bean exporters. The Netherlands, Belgium and Germany stand out as the most interesting markets for cocoa exporters. But other markets, such as France, Italy, Spain, the United Kingdom and Switzerland, are also very attractive. Nordic and Eastern European markets are smaller and show fewer direct links to producing countries but are growing at fast rates.

Figure 3: The largest European cocoa bean importers
in 1.000 tonnes



Source: Eurostat, 2020

The Netherlands is an important trade hub within Europe

The Netherlands is the largest importer of cocoa beans in the world. In 2019, the Netherlands' total imports amounted to 1,081 thousand tonnes of cocoa beans, at a value of €2.2 billion. Almost 99% of these imports were sourced directly from producing countries, mainly from Ivory Coast, followed by Cameroon, Nigeria and Ghana. Between 2015 and 2019, imports from the Netherlands showed an average annual increase of 10% in volume.

Cocoa beans enter the Netherlands via [the port of Amsterdam](#) — the largest cocoa port in the world. The large cocoa-processing industry of the Netherlands is located near the port of Amsterdam, housing multinationals such as [Olam](#) and [Cargill](#), as well as Dutch companies such as [Dutch Cocoa](#), [Daarnhouwer](#) and [Theobroma](#).

The Netherlands has the world's largest cocoa grinding industry. In cocoa year 2018/2019, the Netherlands consumed an estimated [605 thousand tonnes](#) of cocoa beans. Ivory Coast, the second-largest cocoa grinder, is likely to become the world's largest cocoa grinder, with origin grindings increasing steadily.

The Netherlands is also the largest exporter of cocoa beans in Europe. Dutch exports increased at an average annual rate of 2.8% in volume between 2015 and 2019. The country has a market share of 53% in total European re-exports. Germany is the most important destination of Dutch re-exports, with a market share of 63% in 2019. Re-exports to Germany decreased at an annual average rate of 3.6% in volume between 2015 and 2019, because of the growth in Germany's direct imports from producing countries.

Germany has a massive cocoa and chocolate industry

In 2019, German imports amounted to 469 thousand tonnes at a value of €1.1 billion. An estimated 49% of its imports were directly sourced from producing countries, equivalent to 227 thousand tonnes at a value of €495 million. Between 2015 and 2019, the total volume of cocoa beans directly imported from producing countries increased by an average annual rate of 4.8%. In 2019, the largest cocoa bean suppliers to Germany were Ivory Coast and Nigeria.

Most cocoa beans enter Germany via [the port of Hamburg](#), mainly to meet the needs of the production industry for chocolates and other cocoa products. Germany houses Europe's second-largest cocoa processing industry, dominated by multinational companies such as [Cargill](#) and [Barry Callebaut](#). In 2018/2019, the cocoa processing industry consumed [450 thousand tonnes](#) of cocoa beans. Cocoa grinding activities in Germany increased at an average annual rate of 3.2% between 2016/2017 and 2018/2019 but, as mentioned above, showed a decline in the second quarter of 2020. Germany has a limited role in trading cocoa beans, with only 2% of its cocoa bean imports in 2019 being re-exported again.

Germany houses Europe's largest chocolate manufacturing industry. According to PRODCOM figures, the production value of chocolate products in Germany reached about €5.5 billion in 2018. A large share of the chocolate produced in Germany is exported again, which makes Germany the world's largest exporter of chocolate. Main destination markets for German chocolate products are other European countries, mainly France, the United Kingdom and Poland. In 2019, German chocolate exports reached an estimated export value of [€4.3 billion](#), equivalent to 17% of global chocolate exports.

Belgium interesting for European cocoa bean distribution and chocolate exports

With a 12% share of European cocoa bean imports in 2019, Belgium is the third-largest overall cocoa bean importer in Europe and the second-largest direct importer. Belgium imports around 98% of its cocoa beans directly from producing countries, mainly from Ivory Coast, followed by Ghana and Nigeria. In 2019, imports amounted to 281 thousand tonnes, reaching a value of €643 million.

Cocoa beans enter Belgium via the second-largest cocoa port in Europe, [the port of Antwerp](#). A large share of these imports is then re-exported to other European countries. The main destinations are Germany (47%), France (26%) and the Netherlands (12%). This trade role makes Belgium an important entry point for suppliers in producing countries, just like the Netherlands.

Belgium is also a large manufacturer and exporter of chocolate products. Belgian chocolate is famous around the world. In 2019, Belgium accounted for [11%](#) of global chocolate exports, valued at €2.8 billion, making it the second-largest chocolate exporter in the world.

France, Spain, Italy, United Kingdom and Switzerland also interesting markets

France, Spain and Italy each accounted for around 5% of direct European imports from producing countries in 2019. Ivory Coast was the largest supplier of cocoa beans to each of these markets, followed by Ghana. These countries share similar characteristics in terms of market development, with considerable domestic consumption and a significant chocolate industry that pays growing attention to speciality chocolates. Large cocoa and chocolate value chain actors from these countries include chocolate processors and manufacturers [Ibercacao](#), [Indcresa](#) and [Nederland SA](#) (Spain), chocolate manufacturers [ICAM](#) and [Ferrero](#) (Italy) and importer [Touton](#), as well as chocolate producers [Cémoi](#) and [Valrhona](#) (France).

The United Kingdom is one of the main chocolate consuming countries in Europe, with a per-capita consumption of [8.1 kilogrammes per year](#). The United Kingdom is the seventh-largest importer of cocoa beans directly from producing countries, with direct imports amounting to 61 thousand tonnes in 2019. The British chocolate market is also becoming more specialised; the increase in artisanal chocolate makers and high-end shops serves more

demanding and educated consumers. The United Kingdom also has the largest market for fair trade chocolate.

Switzerland is also home to a strong chocolate manufacturing industry, which produces many famous international brands. Swiss chocolate has a worldwide reputation for high quality, and global demand for it keeps growing. Switzerland is the world's tenth-largest chocolate exporter, at a value of [€733 million](#) in 2019. Swiss consumers have the second-highest per-capita rate of chocolate consumption worldwide at [9.7 kilogrammes](#) in 2018. In addition, the opportunities in premium products have been growing significantly. The market [for fair trade cocoa is large](#) in Switzerland, as is the market for organic products.

Nordic countries and Eastern Europe show strong growth in direct imports from producing countries

Eastern European countries registered the highest annual growth rates in direct cocoa bean imports from producing countries between 2015 and 2019. Direct imports from Bulgaria increased strongly: from 8 tonnes in 2015 to nearly 18 thousand tonnes in 2019. Bulgaria is the region's largest cocoa bean importer and mainly imports from Ivory Coast. Note, however, that numbers are still relatively low compared to other European countries. Over 99.7% of total Bulgarian imports were directly sourced from producing countries in 2019. Direct imports from Estonia also showed a steep increase; from 69 tonnes in 2015 to 3,462 tonnes in 2019.

Sweden and Iceland also showed high annual growth rates in direct cocoa bean imports. In general, however, most cocoa beans imported by the Nordic countries come from other European countries. Regarding direct imports, Sweden increased its direct imports from 3 tonnes in 2015 to 13 tonnes in 2019, amounting to 26% of its total imports. Iceland increased imports from 3 tonnes to 7 tonnes over the same period, reaching 43% of its total imports. Denmark is the region's largest importer, with total imports of 3,189 thousand tonnes in 2019. However, Denmark only sourced 1.3% of its total cocoa bean imports directly from cocoa producing countries.

Tips:

Refer to our country studies for more specific information about a certain market. For instance, access our fact sheets on [Belgium](#), [France](#), [Germany](#), [Italy](#), [Switzerland](#) and the [United Kingdom](#).

See the websites of the national chocolate confectionery associations for more information about the chocolate industry in these specific countries. For instance, have a look at the sector association of [Germany](#), [the Netherlands](#) or [Belgium](#).

In your target market, check out the websites of big and small chocolate makers, importers and cocoa processors. Their company websites will provide some initial information on where they buy their cocoa and what kind of cocoa they use. For instance, see the website of the Dutch trading company [Cocoanect](#) to read more about their cocoa suppliers' profiles.

Visit European trade fairs to find potential business partners. Important cocoa trade fairs in Europe include [Salon du Chocolat](#) (the main event is in Paris, but there are related events in Belgium, Italy and the United Kingdom) and [Chocoa](#) (Amsterdam, the Netherlands). Other important trade fairs include [Anuga](#) (Germany), [PLMA](#) (the Netherlands, for private label manufacturing) and [Biofach](#) (Germany, only for organic produce).

Have a look at our study with [Tips for Finding Buyers](#) for more practical recommendations on how to increase your chances of finding buyers on the European cocoa market.

3. Which market segments in the European market have most

potential for suppliers in developing countries?

The European cocoa market is vast and diverse, offering opportunities for suppliers of different sizes and profiles. As such, the most interesting market segments for different suppliers will depend highly on your product quality, whether you provide bulk or speciality cocoa, for example, and volume capacities, as well as your willingness or ability to subscribe to certification schemes.

Bulk and speciality cocoa in the European market

In general, the bulk market for commodity cocoa beans, which makes up more than 90% of the total chocolate market, is highly price-oriented, following international prices and offering limited possibilities for value addition. The bulk market suits exporters that can supply large volumes at standard product qualities. Certification is increasingly used in this market as an entry requirement, mostly Rainforest Alliance/UTZ, because of stricter sustainability protocols of manufacturers and retailers in Europe.

The speciality market, which is smaller than 10% of the total chocolate market, offers higher prices for exporters handling higher-quality cocoa beans, such as the fine flavour *Trinitario* and *Criollo* varieties. The European speciality market is growing strongly. This market is also associated with niche segments for organic and fair trade cocoa beans, because of the smaller scale, price premiums and social and environmental impact goals. Read more about the speciality segment [in our study on trends in the European cocoa market](#).

Certification grows in both bulk and speciality market

The World Cocoa Foundation estimates that [approximately 22% of all the cocoa traded globally is certified](#), but not all certified cocoa is purchased as certified. As an exporter, it is important to certify your cocoa according to market demand and buyer requirements, making sure that certification is economically viable and that it ensures long-term relationships with buyers.

Rainforest Alliance is the main certification scheme for the bulk market for commodity cocoa beans. In this market, certification is mainly used as an entry requirement, making it increasingly difficult for non-certified suppliers to access the European market. In 2019, about [1.8 million tonnes](#) of cocoa beans were Rainforest Alliance certified. That year, cocoa farmers sold about 64% of their cocoa beans production as Rainforest Alliance certified.

Organic and Fairtrade-certified cocoa beans particularly see a growing demand in the speciality market, as these certification schemes are increasingly associated with quality. Organic is growing in high-quality markets in particular. The global cultivation area of organic cocoa reached [2.7%](#) in 2018. The demand for organic cocoa is expected to increase, as the organic chocolate market is expected to grow at an average annual rate of almost [3%](#) between 2020 and 2024. European chocolate maker [Lindt & Sprüngli indicated that their organic sales in Europe are growing much faster than overall chocolate sales](#); the company's organic sales have even endured [the impact of the COVID-19 pandemic](#).

The market for Fairtrade cocoa also continues to grow. In 2018, [retailers Aldi and Lidl entered into agreements with Fairtrade](#) to increase the use of Fairtrade cocoa in their confectionery category across the United Kingdom and Europe. Other retailers also use Fairtrade certification for their own private label chocolate brands, such as the retailers [Coop](#) (Switzerland), [REWE](#) (Germany) and [Waitrose](#) (the United Kingdom).

The Fairtrade standard saw major revisions that came into effect in 2019. First, Fairtrade developed [a new version of its main standard for small-scale farmers](#) to ensure that farmers are able to respond to market prices and climate change. Second, the Fairtrade minimum price [for conventional cocoa has increase by 20% as of October 2019, reaching US\\$2,400 per metric tonne](#). The price of Fairtrade-certified organic cocoa will be US\$300 above the market price or the Fairtrade minimum price, depending on which price is higher at the time of sale. These changes are expected to provide an extra incentive for producers and cooperatives to certify their products under the Fairtrade standard.

There has been a steep increase in sales of cocoa beans that are both organic and Fairtrade-certified. Between 2014 and 2018, cocoa beans that were certified by both standards increased by 39% globally, amounting to almost **34 thousand tonnes** in 2018.

Read more about certified cocoa and interesting European markets in [our study on certified cocoa](#).

Largest markets for certified cocoa and chocolate can be found in western Europe

Europe is the most important market for certified cocoa in the world. Certification schemes play a very important role as they mirror the growing consumer awareness and changing industry profile towards sustainability. Read the [study on trends in the European cocoa market](#) to learn more about it. The importance of each certification scheme in Europe varies significantly from country to country:

- Rainforest Alliance/UTZ-certified cocoa has its largest market in Europe, which accounted for over **80%** of its licensed supply chain actors. Most [Rainforest Alliance-certified cocoa actors](#) are found in Germany, followed by the Netherlands, Italy, Belgium and the United Kingdom. The latter three countries showed the **highest growth in numbers of newly certified supply chain actors in 2018**. France is also a relatively large market for Rainforest Alliance. Most certified operators located in these countries are chocolate confectionery manufacturers, such as [Barry Callebaut](#) and [Nestlé](#), and traders, like [August Töpfer & Co.](#), [Daarnhouwer](#) and [Dutch Cocoa](#). You can consult the [guide for farmers on how to get Rainforest Alliance certified here](#).
- Fairtrade cocoa finds its largest market in the United Kingdom, with general Fairtrade retail sales of over **€1.8 billion** in 2018. Other important markets for Fairtrade cocoa are Germany, the Netherlands, Ireland and Switzerland. The market for Fairtrade cocoa is expected to remain large, driven by [long-term commitments of retailers](#) and chocolate brands to label their products under the Fairtrade standard. Refer to this [full guidance to learn more on how to become a Fairtrade producer](#).
- Organic: overall retail sales in Europe reached about **€41 billion** in 2018, making it the world's second-largest region when it comes to organic retail sales (after North America). The popularity of organic certification for cocoa in specific countries follows the general market for organic products in Europe. The largest national markets for organic foods are Germany (27% of the European market in 2018), France (22%) and Italy (8.6%). For organic chocolate specifically, [France plays an important role in the European market](#). In France, an estimated **53%** of all chocolate products were certified as organic in 2019. Access [this guide to learn more about the principles of organic cocoa production](#).

Ivory Coast and Ghana are the largest suppliers of certified bulk cocoa beans

The largest suppliers of certified cocoa beans to Europe are Ivory Coast and Ghana. These two countries produce mainly bulk cocoa. They are the [leading countries in Rainforest Alliance and Fairtrade certifications](#) in the world. Sales of Rainforest Alliance-certified cocoa beans from Ivory Coast increased at an average annual rate of around **4%** between 2018 and 2019. Ghana's sales of Rainforest Alliance cocoa increased by **114%** during the same period. The increase in sales by Ghana is explained by the combination of new producers and new buyers in the certification programme.

Ivory Coast and Ghana also account for the largest areas of Fairtrade-certified cocoa in the world. About **81%** of cocoa sold under the Fairtrade label was supplied by Ivory Coast (70%) and Ghana (11%). They are followed by Latin American suppliers Peru (9.6% of total Fairtrade cocoa sales), the Dominican Republic (6.8%) and Ecuador (1.7%).

When it comes to organic cocoa production, however, Ivory Coast and Ghana play a much smaller role. The [Dominican Republic has the largest organic cocoa production](#), with over a quarter of the total organic area in the world. In 2019, the Dominican Republic was the largest supplier of organic cocoa to the European Union, with **24 thousand tonnes**. Peru was the second-largest supplier with nearly 13 thousand tonnes. Africa also has some well-established organic cocoa suppliers, mainly Sierra Leone, DR Congo and Uganda. Sierra Leone supplied an estimated 11 thousand tonnes of organic cocoa to the EU in 2019, followed by DR Congo with 5.7

thousand tonnes and Uganda with 3.2 thousand tonnes.

Fine flavour flourishes in the European speciality market

There is an increasing demand for speciality and premium chocolate products worldwide. These products are made with high-quality cocoas, often defined as [fine flavour cocoa](#). Fine flavour cocoa accounts for [roughly 6% of the world's cocoa production](#), equivalent to approximately 315 thousand tonnes in 2018. Despite its small size, it is the fastest-growing segment in the chocolate market. Hence, it offers opportunities for suppliers offering high-quality cocoas.

There is a growing demand for speciality chocolate in traditional European consuming countries, such as [Belgium, France, Germany, Italy, Switzerland](#) and the [United Kingdom](#). Consumption in this segment is associated with high incomes but also with consumer awareness and market exposure. [Mainstream chocolate companies such as Ferrero, Mars and Mondelez have been increasingly investing in premium lines](#), while retailers have also been developing high-end private label products. This makes speciality chocolates accessible to all types of consumers, at different price levels.

No specific European import data are available for fine flavour cocoa beans, but the International Cocoa Organization has published [a list of the 23 producing countries and the share of their exports that can be classified as fine flavour cocoa](#).

Note that the [speciality cocoa and chocolate markets suffered the most immediate effects of the COVID-19 pandemic](#), since speciality shops, restaurants and other service channels using high-quality chocolate remained closed during lockdowns. Chocolate makers and specialised shops found distribution alternatives in e-commerce, online tastings and other promotional tools. With the re-opening of establishments in Europe, the market is expected to recover gradually and to keep on growing in the long term.

Tips:

Read our studies on [certified cocoa](#) and [speciality cocoa](#) to learn more about specific market dynamics and opportunities in these segments in Europe.

Promote sustainable and ethical aspects of your production process. Support these claims with certification. Always, before engaging in a certification programme, make sure to check (in consultation with your potential buyer) that this label has sufficient demand in your target market and whether it will be cost-beneficial for your product.

If possible, focus on the premium, speciality and fine flavour cocoa market in Europe. You can only access this market segment if you offer high-quality cocoa. See [our study on buyer requirements](#) to learn more about market requirements.


Want to put speciality cocoa on the European market? Try to establish direct trade relationships with smaller traders and chocolate makers. See our study on our [How to do business on the European cocoa market](#) to learn more.

See [our study on trends for cocoa](#) to learn more about current trends on the European market.


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