

What is the demand for coffee on the European market?

Europe has a large market for coffee and offers interesting opportunities. To know which market is most suitable for you, assess your offer in terms of quality and volume capacities. Unique, high-quality coffees are best suited for the specialty market. Producers of larger volumes of good-quality coffees may find the most interesting opportunities in middle-range markets, where certification plays an important role. Bear in mind that a diversified range of products for different markets and buyers may also be an interesting proposition for you as a coffee exporter, depending on the scale of your operations and business model.

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1. What makes Europe an interesting market for coffee?

Europe is a large coffee market, accounting for about one-third of global consumption. Although consumption is expected to stabilise in the long term, Europe will remain attractive to coffee exporters. Especially the growing specialty coffee market in Europe offers interesting opportunities. In this segment, you can compete by focusing on quality and establishing long-term relationships, rather than on price. The statistical analysis in this document relates to green coffee beans and is based on HS codes 090111 (Coffee, not roasted, not decaffeinated) and 090112 (Coffee, not roasted, decaffeinated).

Europe is the world's largest coffee market

Europe accounted for [34%](#) of the global coffee consumption in 2019, amounting to 3,356 thousand tonnes of coffee. This makes Europe the largest coffee market in the world. Asia and Oceania rank second with a market share of 22%, followed by Latin America and North America, both with a market share of 19%.

Within Europe, Germany accounted for approximately [26%](#) of total European consumption in 2018, followed by France (12%) and Italy (11%). Other large consuming markets in Europe include Poland (6.7%), Spain (5.8%) and the Netherlands (5.6%).

Demand in Europe is expected to remain stable in the long term, as the European coffee market is saturated. Between 2015 and 2019, Europe's coffee market only slightly increased at an average annual rate of [1.8%](#) in volume. Although the International Coffee Organisation (ICO) has forecasted a decline in consumption in 2020, it highlights that [coffee demand is not severely affected by changes in consumer income](#). This means that coffee consumption on the long term is not expected to be strongly affected by the global crisis.

However, the short-term consequences of COVID-19 have been drastic, especially for out-of-home consumption. Lockdowns and social distancing measures have [caused a sharp reduction in out-of-home consumption](#), which has particularly affected coffee shops and (micro) roasters that supply the out-of-home segment with higher quality coffees.

Nevertheless, consumer [demand for quality coffee and café experiences shows no signs of disappearing](#): at the global level, the coffee market is still expected to grow at an average annual rate of [5.5%](#) between 2020 and 2025. Due to the growth of the middle and upper classes in local and regional markets, growing opportunities for coffee suppliers might be found in emerging markets, such as Brazil, China, Russia and South Korea. Asia and Oceania are expected to show the [highest coffee market growth rates during 2020-2025](#).

Europe is the main global destination for green coffee suppliers

As the world's largest coffee market, Europe is also the largest green coffee importer. Total European imports of green coffee amounted to over 3.7 million tonnes in 2019, showing a stable average annual increase of 2.3% between 2015 and 2019. The value of green coffee imports decreased at a year-to-year decline of 3.6% during the same period, reaching €8.0 billion in 2019. This drop in value reflects the fluctuation of coffee prices due to world market supply and demand, volatility in currency markets, investments in coffee commodities by the hedge and pension funds, ultimately affecting the New York and London coffee futures markets, to which most coffee traded is still connected. The exception to this is specialty coffee, traded with a differential above futures market prices, thus avoiding the volatilities of the bulk market.

In 2018, about [one-third of European green coffee imports were of the Robusta variety](#), while about two-thirds were Arabicas. Within the Arabicas, the share of Brazilian naturals reached 33%, Colombian Milds made up 7.2%, while 20% were other Milds. To see which coffee producing country mostly produces which type of coffee, refer to [this list of the International Coffee Organization](#).

European importers sourced approximately 86% of their green coffee beans directly from producing countries in 2019, corresponding to 3.2 million tonnes at a value of €6.8 billion. The largest direct importers from producing countries are Germany (34% of total European imports) and Italy (19%). Belgium (9.3%) and Spain (8.4%) follow as the third and fourth largest direct importers in 2019. Intra-European trade accounted for 14% of European supplies in 2019, amounting to 520 thousand tonnes, reaching a value of €1.2 billion.

Europe has the highest per capita coffee consumption worldwide

The European Union (EU) has one of the world's highest average annual per capita consumption at just above 5 kg of coffee per person a year. The leading country in per capita consumption in the world is Finland, where the average annual coffee consumption is [12 kg per capita](#). Scandinavian countries also have high coffee consumption rates: Norway at 9.9 kg, Denmark at 8.7 kg and Sweden at 8.2 kg per capita per year. Other relatively large per capita coffee consuming countries in Europe are the Netherlands (8.4 kg), Switzerland (7.9 kg) and Belgium (6.8 kg).

The average per capita consumption in Nordic countries is [unlikely to grow significantly](#), just as in other Western European countries. Nevertheless, these countries still provide interesting opportunities for exporters in producing countries as consumers are increasingly drinking high-quality coffees. This is largely led by a [strong growth in consumption at specialised coffee shops in Western Europe](#), where mostly high-quality coffees are served. Between 2010 and 2018, sales of consumption at coffee shops serving specialty coffee in Western Europe increased by 140%.

Europe is a major market for specialty coffees

Europe is the largest and most important market for specialty coffees, together with the United States of America. This is reflected in the [large and still rising number of specialty roasters, coffee shops and local coffee brands in Europe](#), as well as more knowledgeable and demanding European coffee consumers. In general, coffee shops and small and medium-sized coffee roasters lead the way for the introduction of high-quality coffees.

Prior to the COVID-19 pandemic, it was estimated that the European coffee shop market would continue to grow at an average annual rate of [3.9%](#) from 2020 to 2025. At the time of writing it is difficult to give a more current growth perspective of the different markets. However, the specialty coffee demand in 2020 will definitely be lower than usual across all of Europe. Although [online sales showed](#) growth, the effects of the continuous social distancing measures and health concerns of consumers have resulted in a decline of out-of-home consumption. Nevertheless, in general, the interest for high-quality coffees throughout the different European markets is expected to remain stable in the long term, thus outliving the crisis. Hence, [demand for specialty coffees will most likely increase again after the strict COVID-19-related measures are lifted](#).

The growing interest in specialty coffees in Europe, for both Arabica and Robusta, brings growing opportunities on the European market. These opportunities are especially interesting for exporters which manage to offer consistent supplies of high-quality coffees that meet the [Q Arabica \(Specialty Grade\)](#) and [Q Robusta \(Fine Robusta Grade\)](#) standards. Read more about the specialty market in the market segment section below, and in our study about [specialty coffee in the European coffee sector](#).

Europe has a large coffee-roasting industry

Europe is home to many coffee roasters of all sizes and types. However, the European market is mainly dominated by a few large roasting and grinding companies, namely [Nestlé](#), [Jacobs Douwe Egberts](#) (of JAB Holding Company) and [Lavazza](#). The top-10 roasters in the world are responsible for roasting [35%](#) of the world's coffee. Acquisitions by these three companies have accelerated in the last 10 years; from [2012 to 2018](#), [JAB Holding Company acquired over 30 brands](#).

According to [PRODCOM figures](#), Germany has the largest coffee-roasting industry in Europe, with a sold production volume of 551 thousand tonnes of roasted coffee in 2018. Italy has the second-largest coffee-roasting industry in Europe, with a sold roasted coffee production volume of 414 thousand tonnes.

Europe is the world's largest exporter of roasted and ground coffee. According to data from the [International Trade Centre](#), Europe accounted for about 84% of the total roasted export volume in 2018, amounting to an estimated 964 thousand tonnes.

Between 2014 and 2018, European exports of roasted coffee grew at an average annual rate of 4.1% in volume and 5.1% in value. In 2018, the largest roasted coffee exporting countries in Europe were Germany and Italy, which had volume market shares of 23% and 22% respectively. Smaller but significant exporters of roasted coffee beans include the Netherlands (10% of volume market share), Switzerland (7.6%) and Poland (4.9%).

Wide variety of suppliers serves the European coffee market

According to data from Eurostat, Brazil and Vietnam are the largest suppliers of green coffee to the European market. These two countries account for almost half of Europe's imports: Brazil supplies 27% of total European imports, and Vietnam 20%. Other significant suppliers of green coffee to Europe include Honduras (6.5%), Colombia (5.5%), India (4.1%) and Uganda (3.9%).

Each supplying country plays a different role, targeting certain segments of the European coffee sector. Brazil is a large supplier of both Robusta and Arabica varieties. In the 2019/20 coffee year, an estimated [69%](#) of Brazil's production was Arabica. Between the 2015/16 and 2019/20 coffee years, the total Brazilian coffee production volumes increased at an average annual rate of 4.7%, reaching nearly 3.6 million tonnes of green coffee in 2019. Brazil's coffee exports to Europe only increased slightly in those years, at an average annual increase of 0.5% between 2015/16 and 2019/20.

Vietnam, India and Uganda have a strong focus on Robusta production. Vietnam's production volume consisted of 96% Robusta in 2019/20, Uganda's 82% and India's 73%. Between 2015 and 2019, the exports to Europe by these countries grew at an average annual growth rate of 4% each.

Colombia and Honduras are known for their large and exclusively Arabica production volumes. Colombia is the world's third largest coffee producer, amounting to 828 thousand tonnes in 2019/20. Colombia's production decreased slightly between 2015/16 and 2019/20, at a rate of 0.4%. Supplies to Europe also decreased slightly, at a rate of 1.3% yearly, reaching 206 thousand tonnes in 2019.

In Honduras, Arabica production increased at an average annual growth rate of 1.4% between 2015/16 and 2019/20. This is thanks to the introduction of varieties that are more resistant to coffee pests and diseases. Honduras' green coffee exports to Europe grew at an annual growth rate of 7.7% between 2015 and 2019. Honduras is Europe's second-largest supplier of organic coffee beans (after Peru), with supplies amounting to [37 thousand tonnes](#) in 2019.

Ethiopia is also a well-known supplier of Arabica coffee and organic-certified coffees. Ethiopia's exports are mostly directed to Saudi Arabia, Germany, and Japan. Total Ethiopian supplies accounted for 2.5% of all European coffee imports in 2019, growing at an average annual rate of 3.5% between 2015 and 2019. Ethiopia benefits from its unique origin, as the country is considered to be the birthplace of coffee. Therefore, coffees from Ethiopia have high potential on the specialty market. Read more about specialty coffee in [our study on exporting specialty coffee to Europe](#).

Peru's production of Arabica varieties and organic-certified coffees also provides potential for specialty and niche markets in Europe. Coffee imports from Peru into Europe showed a year-to-year growth of 2.6% between 2014 and 2018, reaching a share of 3.3% of total European coffee imports. Peru is the largest supplier of organic coffee to Europe, with amounts reaching [46 thousand tonnes](#) in 2019. As such, a large share of Peruvian coffee supplies is directed to Germany, the main organic market in Europe.

Nicaragua's coffee exports to Europe showed a steady increase between 2015 and 2019, at a rate of 13% per year, amounting to 50 thousand tonnes in 2019. Nicaragua is known for its Arabica production, but also [produces Robusta coffee mainly for its domestic market](#).

Tips:

Read our study to learn more about [how to respond to COVID-19 in the coffee sector](#).

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

Refer to the [biannual coffee market and trade reports of USDA Foreign Agricultural Service](#). Here you can find information about developments related global trade, production, consumption and stocks.

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.

Refer to [our market intelligence page](#) to learn more about trends on the European coffee market, as well as promising European markets.

See the website of the [Specialty Coffee Association](#) to find news, events and resources related to specialty coffee in Europe and North America.

Access the pages of [Daily Coffee News](#) and [Perfect Daily Grind](#) to read more about current developments on the coffee market.

2. Which European markets offer most opportunities for coffee?

Europe offers many opportunities to coffee exporters. The countries that offer most opportunities show a mix of positive characteristics, including import volumes, of which a large share is sourced directly from producing countries, different suppliers, their role as distributor of green coffee beans and a growing market for specialty coffees. Germany, Italy and Belgium stand out as the most interesting markets for green coffee exporters. But markets such as France, Spain and the United Kingdom are also very attractive. Eastern European markets are smaller and show fewer direct links to producing countries but are growing fast.

Germany is Europe's all-round most important coffee player

Germany is the largest importer of green coffee beans in Europe. In 2019, Germany imported over 1.1 million tonnes at a €2.3 billion value. Germany accounted for 34% of all European coffee imports sourced directly from producing countries. With 34% of total imports, Brazil is the largest supplier of green coffee to Germany, followed by Vietnam (22% of supplies) and Honduras (9.2%). On average, German green coffee import volumes increased slightly at a rate of 1.3% per year between 2015 and 2019, while import value shrank by 4.9% in the same period, influenced by low prices.

Most green coffee beans enter Germany via the [Port of Hamburg](#). The [ports of Bremen and Bremerhaven](#) are also important entry points for coffee. As the largest importer in Europe, Germany is a potential destination for exporters of various qualities and origins, which will either be roasted locally or re-exported to other markets.

Germany plays a major role in coffee re-exports in Europe, giving it an important role as a key coffee trade hub in Europe. Over 50% of the total European intra-trade exports were re-exported by Germany alone, amounting to 356 thousand tonnes in 2019. German total coffee exports increased on average by 3.3% between 2015 and 2019. The main destinations for Germany's green coffee re-exports were Poland (26%) and the United States (23%).

Germany is also the largest coffee consuming country in Europe in absolute volume. In 2018, Germany's market corresponded to [26%](#) of the total European coffee consumption, amounting to 367 thousand tonnes of green coffee and instant coffee. German per capita coffee consumption is not among Europe's highest, but at an average [5.5 kg per year](#) it still sits above the European average of 5.1 kg.

The market for specialty and high-quality coffee in Germany also provides interesting opportunities for exporters that fit into this segment. In 2019, Germany had [the second-largest coffee-shop market in Europe](#), only after the United Kingdom. Besides, [Germany is Europe's largest market for organic produce](#), providing interesting opportunities for the export of organic-certified coffees. Note, however, that in Germany you will also find the most competitive organic coffee market in Europe.

Italy has a strong coffee-roasting industry

Italy is the second-largest importer of green coffee beans in Europe, only surpassed by Germany. In 2019, Italian green coffee bean imports reached a volume of 616 thousand tonnes at €1.2 billion in value, after growing at an average annual rate of 3.7% in volume between 2015 and 2019.

The main suppliers of green coffee to Italy are Brazil (34% of total supplies), followed by Vietnam (21%) and India (11%). In general, Italy imports a relatively large share of Robusta varieties, which are used as a basis for espresso blends. Green coffee beans are mainly imported into Italy via the [Port of Trieste](#) and the [Ports of Genoa](#).

Almost all of Italy's green coffee imports remain in the country, and are used by the very strong Italian coffee-roasting industry. Large Italian roasters, such as [Lavazza](#), [Segafredo](#) and [Illy](#), export substantial amounts of Italian coffee blends to destinations all over Europe and the United States. This creates an important demand for green coffee from coffee producers worldwide.

Italy is Europe's second-largest roasted coffee exporter, behind Germany. Italy's roasted coffee exports in 2019 amounted to 258 thousand tonnes at a value of €1.5 billion. The country's roasted coffee export volumes increased at an average annual rate of 10% between 2015 and 2019.

Italy is also a large consumer market, comprising [11%](#) of the total European coffee consumption. This makes Italy the third-largest coffee consumer market in Europe, with 151 thousand tonnes of green coffee and instant coffee in 2018. Coffee is an integral part of culture in Italy, where [each person consumes an average of 5.9 kg of coffee a year](#).

In 2018, [Italy had an estimated one hundred specialised coffee shops](#), serving high-quality and unique coffees.

Note, however, that the specialty coffee market in Italy is relatively small, especially when you consider that the overall coffee bar market in Italy counts almost [150 thousand](#) establishments. Despite being a small niche market, the fact that Italy is slowly welcoming more specialised coffee roasters and shops, might bring interesting opportunities for high-quality coffees from special origins and with unique stories.

Belgium as a trade hub for coffee in Europe

Belgium is Europe's third-largest green coffee importer. It accounted for 9.3% of all direct green coffee imports in Europe in 2019. A 97% share of the country's green coffee imports was sourced directly from producing countries in 2019, amounting to 299 thousand tonnes in 2019. Brazil was the largest supplier of green coffee to Belgium, with 77 thousand tonnes in 2019. Vietnam ranked as the second largest supplier with supplies reaching 63 thousand tonnes, followed by Honduras with 33 thousand tonnes of green coffee. Overall green coffee imports by Belgium increased at an average annual rate of 2.4% in volume between 2015 and 2019.

Belgium is one of the main trade hubs for coffee in Europe. Over 75% of its imports are re-exported, amounting to 232 thousand tonnes of green coffee re-exports in 2019. This makes Belgium the second largest re-exporter of Europe, with a share of 33% of total European green coffee re-exports, only after Germany.

The main export destinations of Belgium are its direct neighbours, with the Netherlands accounting for about 54% of re-exports in 2019. Large-scale and specialised Dutch coffee importers often use Belgian ports for their operations. Other re-exports were directed to France (26%) and Germany (5.0%).

Belgium's important role as an importer and re-exporter of coffee is largely due to the storage capacity of the [Port of Antwerp](#). It is the [largest storage site for coffee in the world](#), allowing for more than 250 thousand tonnes of coffee to be stored at a time. The [port of Zeebrugge](#) is another entry point for coffee, offering large temperature-controlled storage facilities and a distribution platform for green coffee throughout Europe by rail, road and sea.

Eastern Europe gaining importance as green coffee destination

Eastern European countries show significant potential as markets for coffee exporters. Consumption in Eastern Europe is still well below Western Europe, but a shift in coffee consumption is noticeable. This is particularly the case in Poland, where the [number of specialty coffee shops is on the rise](#). Specialty coffee is also gaining traction in other markets in the region, such as Russia, [Romania](#) and [Bulgaria](#), which illustrates the growing interest of Eastern European consumers in coffee quality and variety.

The region represents a relatively small share of total European coffee imports but import volumes from all the region's largest coffee importers grew between 2015 and 2019. The largest coffee importer in the region is Russia, with import volumes growing at an average annual growth rate of 8.1% in that period, amounting to 186 thousand tonnes in 2019. Poland is the region's second largest importer, where imports grew at an average annual growth rate of 4.3% between 2015 and 2019, amounting to 123 thousand tonnes of green coffee imports in 2019. The countries following Russia and Poland in import volume are Bulgaria and Slovenia, which grew at average annual rates of 2.6% and 27% respectively.

Note that, compared to Western Europe, several countries in Eastern Europe import proportionally less green coffee directly from producing countries. Poland, for instance, imported 77% of its green coffee from other European countries, mostly Germany. This is mainly so because of the strong infrastructure and importing facility in neighbouring ports, such as the Port of Hamburg. For small and medium-sized roasters in Eastern Europe, it is often less risky and more cost-effective to source from specialised importers that use these ports. In addition, the main players on the Eastern European market are large multinationals that usually import through one point, roast in large-scale facilities and distribute coffee throughout Europe.

However, as roasters in Eastern Europe gain scale, it is expected that they may also gain autonomy in terms of sourcing directly from producing countries. In the long term, these countries may also develop further and upscale their infrastructure to be able to import directly.

Eastern European countries that do source most of their green coffee imports directly from origin include Bulgaria (77% of total imports), Slovenia (94%) and Romania (80%). Vietnam is the main supplier to both Bulgaria and Romania, illustrating these markets' focus on Robusta imports to serve the country's large demand for instant coffee. Most supplies to Slovenia were sourced from Brazil with approximately a 40% share in 2018, followed by India with an estimated 26% of supplies.

Other interesting European destinations

Spain, the United Kingdom and France are other interesting markets for exporters in Europe. They combine a large consumer market with a high share of Europe's direct imports from producing countries: Spain has a share of 8.4% of total European direct imports in 2019, followed by the United Kingdom with 5.6% and France with 5.2%. Among these countries, France accounted for 12% of total European consumption in 2018, followed by the United Kingdom (6.7%) and Spain (5.7%). Vietnam is the largest green coffee supplier to both Spain and the United Kingdom, while France imports its largest share from Brazil.

In terms of per capita consumption, Finland, Sweden, Norway, Iceland and Denmark also have interesting potential, since they have the highest per capita consumption in Europe. In terms of quality, North-Western markets have more penetration of high-quality coffee than Eastern and Southern Europe, where volumes are higher, but coffee quality is usually lower.

Tips:

Refer to our country studies for more specific information about a certain market. For instance, access our factsheets on [Germany](#), [Italy](#), [Belgium](#), [Eastern Europe](#), [Scandinavia](#) and the [United Kingdom](#).

See the websites of the national coffee associations for more information about the coffee (roasting/trading) industry in these specific countries. For instance, have a look at the sector association of [Germany](#), the [United Kingdom](#), [France](#), or [Italy](#).

In your target market, check out the websites of big and small coffee roasters and importers. Their company websites will provide some initial information on where they buy their coffee and what kind of quality they look for. For instance, see the website of the Dutch trading company [This Side Up](#) and French importer [Belco](#) to read more about their coffee suppliers' profiles.

Visit European trade fairs to find potential business partners. Important coffee trade fairs in Europe include [SCA World of Coffee](#) (focus on specialty coffee, once a year in a different European city) and [COTECA](#) (fair for coffee, tea and cocoa in Germany, held every two years). Other important trade fairs include [Anuga](#) (every two years in Germany), [SIAL](#) (every two years in France), [PLMA](#) (every year in the Netherlands, for private label manufacturing), and [Biofach](#) (once a year in Germany, only for organic produce).

Check the [European Coffee Trip](#) website to find examples of specialised coffee shops and small-scale roasters active in the specialty niche market in Europe.

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 coffee market.

3. Which market segments in the European market have most potential for suppliers in developing countries?

The coffee market is highly competitive, especially in the mainstream segment. However, opportunities in the specialty market are growing, as an increasing number of European consumers is prepared to pay higher prices for high-quality coffees. Consumers in Europe are also increasingly demanding sustainably-produced coffee. The

industry has tried to meet this market demand by adopting various sustainability standards, in part through certification schemes. As such, especially in the mainstream market, certification has become a market entry requirement. Do note, however that its importance is also growing in smaller markets, such as specialty coffee.

The European market for specialty coffee is growing

While the mainstream market grows with tighter margins and cheaper products, the consumption of high-quality and specialty coffees is also growing at a fast pace in Europe. The European market for specialty coffee offers opportunities for suppliers offering high-quality coffees. This specialty segment is a small niche, which commands high quality and high value.

As written above, the increasing interest in specialty coffee is reflected in the growing number of coffee bars and chains, small roasters, small local brands, and baristas. The European branded coffee shop market grew by [3.4%](#) in 2019, reaching a total of nearly 38 thousand outlets. Some coffee shops, after growing large enough, start sourcing their green beans directly from producers, sometimes still leaning on their former supplier (usually an importer) for logistics.

The specialty coffee segment is most pronounced in North-West Europe, which is marked by high income levels and consumer awareness, as well as a more developed coffee culture. In Nordic countries, where there has been strong [growth in out-of-home consumption](#), consumers increasingly look for unique, high-quality coffee in coffee shops, including new specialty coffees. Some examples of specialised coffee shops in the Nordic countries include [Drop Coffee Roasters](#) (Sweden), [Sonny](#) (Denmark) and [Fuglen](#) (Norway).

The United Kingdom is the largest coffee shop market in Europe. After growing continuously for 18 years, the coffee shop market continues to grow in the United Kingdom, but at lower growth rates. In 2019, the coffee shop market in the United Kingdom registered a growth rate of [1.6%](#) in 2019. The market for specialty coffees in the United Kingdom multiplied over the years, opening up the market for high-quality coffees and suppliers from emerging origins offering unique products.

France is also an important market for specialty coffees, although it took long for it to take off. In 2019, the estimated market share of specialty coffees in France reached [2% to 3%](#) of its total coffee market, and is growing quickly. The share of specialty coffee in France is expected to rise to about [10%](#) of the total French coffee market by 2025. The [specialised coffee shop market has grown significantly in France](#), mainly in larger cities such as Paris. This increase allows shop owners and specialty roasters to provide customers with legitimate marketing stories behind their coffees. As in other countries with a dynamic specialty sector, coffee exporters are increasingly required to highlight the uniqueness of their coffees in terms of quality and origin.

The Eastern European market for specialty coffee is smaller, but is also experiencing growth. This is mainly led by the coffee culture in cities such as Krakow (Poland), Prague (Czech Republic) and Vilnius (Lithuania). For instance, [the specialty coffee market in Poland is marked by an increasing number of specialty coffee roasters](#), from [as little as 1 in 2010](#) to over a hundred in 2019. An example of a specialty coffee roaster active in Poland is [Java Coffee Roasters](#). The expansion of educational institutions and coffee festivals, such as the [Prague Coffee Festival](#) (Czech Republic), [Warsaw Coffee Festival](#) (Poland) and the [Bucharest Coffee Festival](#) (Romania) also suggest that these markets have potential for growth.

Specific Europe-wide data on the consumption of specialty coffee is not available, partly because there is no industry consensus on a clear-cut definition of specialty coffee.

Europe is the world's largest market for certified coffees

Europe is the most important market for certified coffee in the world. Certification schemes play a very important role as they mirror the growing consumer awareness and changing industry profile towards sustainability. The main certification schemes in the coffee market are [Fairtrade](#), organic, [4C](#), [Rainforest Alliance/UTZ](#), and the private company certification standards of Starbucks: [C.A.F.E. Practices](#) and Nestlé: [AAA](#). Note that the importance of each certification scheme in Europe varies significantly from country to country.

Rainforest Alliance/UTZ markets

In 2017, approximately 15% of all coffee in the world was Rainforest Alliance/UTZ certified. The integration of UTZ and Rainforest Alliance under a single organisation has resulted in very large market coverage in Europe. Rainforest Alliance/UTZ certified coffee is mainly sold in high volumes to mainstream markets in Europe.

Although Rainforest Alliance and UTZ merged in 2018, [mutual recognition for coffee was only formalised in July 2020](#). As such, certification data for both schemes are given separately. In 2019, about 55% of the total UTZ-certified coffee production was sold as certified, amounting to [590 thousand tonnes](#). About 85% of the sold volume consisted of the Arabica variety. Most sales came from Brazil, Vietnam, and Honduras. Between 2015 and 2019, UTZ-certified coffee sales increased by 14%, mainly as a result of increasing demand by European retailers and specialty brands in Europe and North America. Italy and Finland showed the highest increase of certified coffee supply chain actors.

UTZ-certified coffee products are most widely available in the Netherlands, Germany, Italy, Switzerland, and the Nordic markets. In these countries, most retailers, such as Ahold, Aldi, Ikea, Jumbo, Kaufland and Lidl, as well as coffee roasters and brands, such as Jacobs Douwe Egberts, Lavazza, Paulig and Tchibo, offer [UTZ-certified coffees](#).

With regard to Rainforest Alliance-certified coffee, about 59% of the total certified coffee production was sold as such, amounting to [394 thousand tonnes](#) in 2019. About 94% of sold Rainforest Alliance coffee was of the Arabica variety. Most sales came from Brazil, Colombia and Guatemala. Between 2015 and 2019, UTZ-certified coffee sales increased by 20%, mainly as a result of increasing demand from Latin America and Europe. The largest markets for Rainforest Alliance-certified coffee products in Europe can be found in the [United Kingdom](#), [Germany](#), [the Netherlands](#) and [France](#).

Fairtrade-certified coffee

The global volume of [Fairtrade](#)-certified coffee reached [207 thousand tonnes](#) in 2018. Between 2015 and 2018, sales volumes increased at an average annual rate of 5.0%. The largest suppliers of Fairtrade-certified coffee are Peru (26% of total sales in 2018), Honduras (17%) and Colombia (15%). An estimated 28% of the total Fairtrade-certified coffee production is sold under the label.

The United Kingdom is the largest Fairtrade market, with overall Fairtrade retail sales of over [€1.8 billion](#) in 2018. In fact, the UK is the [leading market for Fairtrade-certified coffee](#). [Sainsbury's](#), [Waitrose](#) and [Marks & Spencer](#) are examples of British retailers that converted their entire private label coffee lines to 100% Fairtrade. [Greggs](#), the largest bakery chain in the United Kingdom, drove up [growth Fairtrade coffee sales in the out-of-home segment](#).

Germany is also a major Fairtrade market in Europe. About [5%](#) of total German coffee sales were Fairtrade-certified in 2019. The total number of Fairtrade coffee products sold through retail channels and by the out-of-home segment in Germany reached about 350 products in 2019.

Switzerland is also a relatively large market for fair-trade products, with retail sales reaching [€817 million](#) in 2018. Overall fair-trade sales in Switzerland grew by 13% between 2017 and 2018. The Fairtrade share of coffee products in Switzerland reached an estimated [11%](#) of the total market, amounting to the use of 7.6 thousand tonnes of Fairtrade-certified green coffee in 2019. Switzerland also registered Europe's highest per capita consumption of fair-trade products, with over [€95](#) per person spent in 2018.

The [fastest growing markets for Fairtrade coffee are Ireland, Finland and Denmark](#), which grew at average annual rates of 36%, 35% and 25% respectively between 2016 and 2017. In Ireland, for instance, [the growth of Fairtrade coffee sales is driven](#) by the fact that the country's leading coffee and tea company [Bewley's](#) has committed to only sell Fairtrade-sourced coffee beans since 2017. Also, large coffee chains [Insomnia](#) and [Starbucks](#) are important contributors to the growing Fairtrade sales in the country.

European markets for organic coffee

The organic market in Europe is the [second-largest single organic market](#), only after the United States of America, with organic retail sales nearly reaching €41 billion in 2018. Between 2014 and 2018, European organic retail sales registered an average annual increase of [12%](#). The popularity of organic certification for coffee follows the general market for organic products in Europe. The largest European markets for organic products are Germany ([27%](#) of the European market in 2018), France (22%) and Italy (8.6%)

In Germany, organic retail sales reached almost [€11 billion](#) in 2018. Organic coffee is widely available in Germany, and consumed on a large scale. In 2019, sales of organic coffee increased by [14%](#) in volume, at a significantly higher rate than mainstream coffee. The organic market share in coffee sales reached about 4.3% in 2019, and the [demand is expected to continue to grow](#).

Given that Germany is Europe's largest organic market and largest coffee importer, coffee exporters will find some of the best opportunities for organic coffee in Germany. However, exporters will also encounter a competitive market, as Germany is known as the prime destination for producers of organic-certified coffee. Examples of German traders handling organic coffees include [Bernhard Rothfos](#), [InterAmerican Coffees](#), [List + Beisler](#) and [Rehm & Co](#).

France, as the second-largest market for organic foods in Europe, also provides interesting opportunities for organic coffee exporters. In 2018, the share of organic food in the total French food market was [4.8%](#), and organic retail sales amounted to €9.1 billion. Globally, France registered the largest organic market growth with over 15% between 2017 and 2018. Regarding roasted coffee, sales volumes reached [185 thousand tonnes](#) in 2018, of which about [3%](#) was organic. There is a [large growth potential for organic coffee in France](#), as tea and infusions hold much larger organic shares, with 12% and 33% respectively.

Belgium also ranks among one the most important organic coffee markets in Europe. Of all coffee products on sale, an estimated [52%](#) had an organic label in 2019. Other interesting markets for organic coffee include Denmark and Sweden. In these countries, [coffee ranks among the top organic products in retail](#).

Total organic coffee imports by the European Union reached an estimated [130 thousand tonnes](#) in 2019, marking an increase of 12% compared to 2018. The main suppliers of organic green coffee in 2019 were Peru with almost 35% of total EU supplies, Honduras (28% of supplies) and Mexico (8.0%).

Growing market for Fairtrade and organic certified coffees in Europe

Particularly in coffee, European consumers are looking for products that are ethically sourced, both from a social and ecological point of view. As a result, the combination of Fairtrade and organic is gaining popularity in consumer markets across Europe. Between 2014 and 2018, the global sales volume of green coffee that was certified by both standards marked a year-to-year growth of 30%, amounting to [114 thousand tonnes](#) in 2018. The popularity of this double certification is expected to continue to grow.

In Germany an estimated [23 thousand tonnes](#) of Fairtrade coffee was sold in 2018, of which approximately 75% was certified as organic. To compare, in 2014, sales of Fairtrade-certified coffee reached almost [17 thousand tonnes](#), of which about 66% was organic-certified. Popular German brands with a line of Fairtrade and organic coffees include [GEPA](#), Kaffa from [Original Food](#) and [Rapunzel](#).

European retailers also increasingly offer private label coffees which are both organic and Fairtrade certified. Examples include ALDI's [Barissimo line](#) and [Waitrose's No.1 line coffees](#). Swiss retailers also increasingly offer private label products which are both organic and Fairtrade-certified. Leading Swiss retailer [Coop](#) has about 25 private label brands, of which [Naturaplan](#) is the most relevant for organic coffees. Coop's [Naturaplan coffee capsules](#) are an example of a Swiss private label product holding both organic and Fairtrade certification.

Tips:

Access our studies to learn more about the [specialty coffee sector in Europe](#) and the organic coffee potential on the European market.

Find importers from specific European markets that specialise in organic products on the [website of Organic-bio](#).

If you produce coffee according to a Fairtrade scheme, find specialised European buyers who are familiar with sustainable and/or fair-trade products, for instance by using the [FLOCERT customer database](#).

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

Before engaging in a certification scheme, verify with your potential buyers whether certification is required and whether it provides you with a competitive advantage over other suppliers to the European market. This is important, as a relatively large share of certified coffee worldwide is not sold as such. In 2017, only **43%** of organic-certified produced coffee was exported as such.

Inform yourself about the costs involved to certify your company. Direct costs include those necessary to comply with the certification standard, as well as the fee paid to a certifying body to obtain the certificate for your farm or company. If you are new to certification, get price quotations from different control bodies in your region and negotiate with these (private) companies to get the best deal.


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-grader or R-grader certificate](#) to be able to cup and score your Arabica and/or Robusta coffee according to international standards.


Investigate whether you qualify for industry awards, such as the [Cup of Excellence](#) programme. This can be an interesting way to profile yourself and your coffee origin in the European market for high-quality coffee. The Cup of Excellence is an annual competition among the highest-quality coffees, which takes place in several countries.


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

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