

The Belgian market potential for coffee

Belgium is one of the main points of entry and trade hubs for coffee in Europe. It is also an increasingly interesting market for certified coffees, following a consumer trend towards sustainable, traceable and high-quality products. The specialty coffee market in Belgium is also growing, while maintaining the country's tradition for smaller coffee houses and cafés.

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1. Product description

Approximately 124 coffee species exist in the wild, of which only a few are commercially relevant. The two most important species on the market are:

- *Coffea Arabica* (Arabica): Referred to as a highland coffee, because it grows best at altitudes between 600 and 2,000 metres, Arabica is the most dominant species in the coffee market, representing about 75% of global coffee production. Each coffee tree yields an average of two to four kilos of cherries. Arabica beans are fairly flat and elongated. Arabica coffee beans have a smoother, more aromatic and more flavourful taste compared to Robusta. Arabica beans have a caffeine content of approximately 1.5%.

The main sub-varieties of Arabica are the Yemeni coffees ([Typica](#) and [Bourbon](#)), the Ethiopian and the Sudanese coffees. Examples of Typica cultivars are [Java](#) and [Maragogipe](#) (known for its large bean size). Coffees related to Typica are the Hawaiian Kona and the Jamaican Blue Mountain.

Examples of Bourbon cultivars are [Caturra](#), [Villa Sarchi](#), [Pacas](#) and [Pacamara](#) in Latin America, and [Batian](#), [SL28](#) and [SL34](#) in East Africa. [Jackson](#) is a coffee related to Bourbon which grows mostly in Burundi and Rwanda.

Examples of the Ethiopian and Sudanese coffee line are [Geisha](#), Sudan Rume and Tafari-kela.

- *Coffea Canephora* (Robusta): Robusta coffee can be considered a lowland coffee, as it grows best at altitudes below 600 metres. Robusta accounts for around 20% of global coffee production. Its beans have a caffeine content of approximately 2.7%. Robusta is less susceptible to pests and diseases than Arabica. Its beans are smaller and rounder than Arabica beans. When roasted, Robusta beans generally have a stronger and harsher taste than Arabica, which is often described as bitter. Robusta beans are often used in coffee blends.

Examples of crossbreeds of the Arabica and Robusta species are [Catimor](#), [Castillo](#) (the most commonly coffee plant grown in Colombia), Colombia, Rairu 11 and Sarchimor.

Harmonised System (HS) codes are used to classify products and to calculate international trade statistics, such as imports and exports. The focus in this study is on green coffee beans, which are classified in HS codes 090111 (coffee, not roasted, not decaffeinated) and 090112 (coffee, not roasted, decaffeinated). The available data do not distinguish between conventional and specialty coffees.

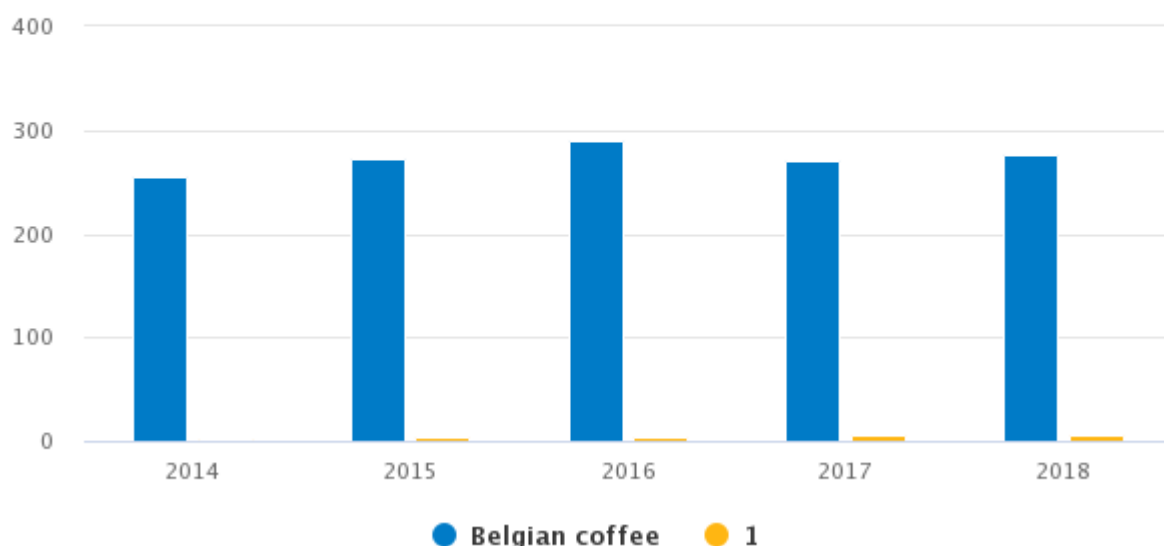
2. What makes Belgium an interesting market for coffee?

Belgium is Europe's third largest importer of green coffee

Belgium is Europe's third largest green coffee importer, after Germany and Italy. In 2018, Belgium accounted for 8.7% of total European green coffee imports sourced directly from producing countries. Belgian buyers sourced 98% of their coffee beans directly from producing countries in 2018, totalling 276 thousand tonnes of green

coffee at a value of €606 million. Between 2014 and 2018, Belgian import volumes increased at an average annual rate of 2.0%.

Figure 1: Total Belgian coffee imports from producing countries,
in 1.000 tonnes



Source: Eurostat, 2019

Belgium is Europe's second largest coffee re-exporter

Belgium is Europe's second largest re-exporter of green coffee beans, after Germany. With 216 thousand tonnes of coffee re-exported in 2018, Belgium accounted for 32% of total European green coffee re-exports. Belgian export volumes increased on average by 7.8% between 2014 and 2018. In terms of value, exports increased by 6.8% annually, amounting to €497 million in 2018.

Belgium mainly re-exports to its direct neighbours: the Netherlands accounted for 60% of Belgian green coffee re-exports in 2018. Large-scale and specialised Dutch coffee importers often use Belgian ports for their operations. Other Belgium re-exports were directed to France (22%) and Germany (5.5%).

Belgium is a key international coffee hub

A large share of all coffee traded in the world arrives at the Port of Antwerp, which is used for transit purposes (35%), but most often for its storage capacity. 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 Antwerp accounts for approximately 50% of Europe's coffee logistics business. Specialised logistic companies dominate such business, working directly with importers. These logistic companies also cooperate directly with large traders and roasters. The most important logistic companies active in Antwerp are [Molenbergnatie](#), [Vollers](#), [Pacorini](#) and [Steinweg](#).

The Port of Zeebrugge is another important entry point for coffee in Belgium. This port offers a modern temperature-controlled storage facility and a distribution platform of green coffee for the rest of Europe by rail, road and sea. [Efico](#), a large coffee importer, is also active in coffee storage in Zeebrugge.

Tips:

If you use Chrome as a web browser, read [here](#) how to translate this study into another language.

Have a look at the websites of the [Port of Antwerp](#) and the [Port of Zeebrugge](#) to learn more about the ports themselves and potential trade partners based there.

See the website of the [Royal Union of Coffee Roasters](#) for more information about the coffee industry in Belgium, and to find potential buyers in Belgium. The [Belgian member associations](#) of the [European Coffee Federation](#) should be able to provide listings of possible trade partners.

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

See our study of [trade statistics for coffee](#) for more detailed information about the European trade in green coffee beans.

3. Which trends offer opportunities in the Belgian market?

Growing sustainability certification

Sustainability, traceability and product quality are growing in importance for Belgian consumers. As a result, sustainability labels such as Rainforest Alliance-UTZ, Fairtrade and organic labels are gaining importance in the Belgian market. Certified coffee in Belgium accounted for [23% of total retail coffee volume sales](#) in 2016, creating opportunities for exporters and growers of certified coffees around the world.

[Fairtrade Belgium](#) is the most widely known label among Belgian consumers: in 2018, 75% of Belgian consumers recognised the label. [Approximately 2,035 tonnes of Fairtrade-certified coffee were imported by Belgium in 2018](#), growing 27% in volume from 2017. Fairtrade-certified coffee is still a niche market in Belgium, [comprising just 3.9% of the total Belgian coffee market in 2018](#). The [Sidama Coffee Farmers Cooperative Union](#) (Ethiopia) is an example of a coffee cooperative successfully exporting Fairtrade-certified coffee to the Belgian market.

Rainforest Alliance-UTZ is the leading sustainability label in major Belgian supermarkets; [Lidl, Delhaize and Aldi all have UTZ-certified coffees](#). Most Belgian supermarkets offer coffees from [Jacobs Douwe Egberts \(JDE\)](#), for example, L'OR capsules, which has an agreement with Rainforest Alliance. It is important to note that [supermarket chains are increasingly developing their own sustainable labels for coffee](#), for example, [Boni Bio](#) from retailer Colruyt.

Demand for high-quality coffee on the rise in Belgium

Consumers in Belgium drink [an estimated 6.8 kg of coffee per capita annually](#), while consumers across the border in the Netherlands drink an estimated 8.4 kg per capita, and France less with 5.5 kg per capita. [Demand for high-quality coffees](#) has been growing in Belgium, where the [number of small coffee houses and cafés has increased significantly in the past few years](#), especially in the large cities, such as Antwerp and Brussels. The number of roasters and micro roaster in Belgium is recovering again, after the 2008 financial crisis dip: [from 125 roasters in 2003 to 94 in 2010, to 112 roasters in 2017](#).

Specialty coffee shops like [Parlor Coffee](#), [MOK Specialty Coffee Roastery](#) and [Café Labath](#) all roast and serve their own specialty coffees, mostly sourcing from coffee producers directly. They communicate their quality requirements along the chain and contribute to the development of the specialty coffee branch in Belgium. These developments underline the importance of coffee origins and social impact, which make storytelling and increasingly important aspect in the coffee trade.

Tips:

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

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 coffee.

Before engaging in a certification programme, make sure to check that a label has sufficient demand in your target market and whether it will be costbeneficial for your product, always in consultation with your potential buyer.

Find potential business partners in Belgium by checking the lists of [Fairtradecertified operators](#), [Rainforest AllianceUTZ certified coffee supply chain actors](#) and [Belgian organic coffee importers](#).

Are you interested in exporting highquality coffee? Learn more about cupping scores on the website of the [Specialty Coffee Association](#) (SCA). You can also consider getting a [Qgrader certificate](#) to be able to cup and score your Arabica coffee according to international standards. If you produce or export Robusta coffees, [it is also possible to become an Rgrader](#).

Look for sector or joint company initiatives to increase your understanding of the sustainability strategies in Belgium. Search for initiatives that match your own core strategy and values. [The website of the Trade for Development Centre can be a good point of departure](#) to search for such initiatives in Belgium.

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

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