

# The Italian market potential for coffee

Italy is the second-largest importer of green coffee beans in Europe, after Germany. Coffee is an integral part of Italian culture. In addition to its own domestic market, Italy is also an important supplier of roasted coffee to other European countries. Italian espresso blends are famous around the world, and Italian coffee brands are appreciated by consumers worldwide.

## Contents of this page

1. [Product description](#)
2. [What makes Italy an interesting market for coffee?](#)
3. [Which trends offer opportunities in the Italian market?](#)

## 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 Italy an interesting market for coffee?

### Italy is Europe's second-largest green coffee importer

Italian coffee imports accounted for 17% of total European imports in 2018, totalling 606 thousand tonnes, which makes Italy the second-largest importer of green coffee beans in Europe. An estimated 97% of all Italian coffee imports are sourced directly from producing countries. Import volumes increased at an average annual

rate of 3.2% between 2014 and 2018. Most green coffee beans enter Italy via the [Port of Genoa](#) or via the [Port of Trieste](#). Italy imported 62% Arabica and 38% Robusta coffee in 2016.

## Italy has a strong coffee roasting industry

Italy's large roasting industry consumes 98% of the country's green coffee imports, the other 2% being re-exported. Examples of large coffee roasters in Italy are [Kimbo](#), [Illycaffè](#), [Massimo Zanetti](#) and [Lavazza](#). Italy is Europe's second-largest roasted coffee exporter at 221 thousand tonnes in 2018, making up 22% of the entire European market. Only Germany is a larger exporter, with a 23% market share. Italy's main export destinations are Germany (20% of export shares), France (9.5%) and the United Kingdom (5.9%).

Between 2014 and 2018, Italy's roasted coffee exports grew by an average annual growth rate of 7.4%. Italian coffee exports to Eastern Europe especially have increased significantly between 2014 and 2018. The largest export markets in Eastern Europe are Russia (9.1 thousand tonnes in 2018, growing at an average annual rate of 16% between 2014 and 2018), Poland (6.9 thousand tonnes, 22% growth rate), Romania (5.8 thousand tonnes, 9% growth rate), Bulgaria (5.6 thousand tonnes, 13% growth rate) and Czech Republic (4.2 thousand tonnes, 18% growth rate).

Italy produces dark roasts, which allow for the use of low grades of green coffee in blends, as darker roasts camouflage defects. This way Italian roasters can offer their products at competitive prices, which makes Italian blends popular in price sensitive coffee bars domestically as well as internationally. However, [the rise of the third wave of coffee consumption](#) in Italy, which emphasises quality coffee, diverse roasting and brewing techniques, and special origins, may also reshape the sector towards cleaner and milder Arabicas.

## Italy is among Europe's largest coffee consuming countries

Italy is the third largest coffee consuming country in Europe. In 2017, the country [accounted for 11% of the total European coffee consumption](#) at 151 thousand tonnes of green and instant coffee. Italy's per capita coffee consumption in 2018 was [5.9 kg per year](#), an increase of 5.3% compared to the previous year. Although not among Europe's highest, Italy's per capita consumption is still above the European Union's average of [5.2 kg per year](#). Independent cafés [account for more than 90% of the Italian market](#), with a very small share of international chains.

### Tips:

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

Look up the websites of the [Port of Genoa](#) and the [Port of Trieste](#) to learn more about the ports themselves and potential trade partners based there.

Refer to the websites of the [Italian Coffee Committee](#) and the [Italian Coffee Roaster Group](#) to learn more about the coffee industry in Italy.

Access the [EU Trade Helpdesk](#) to analyse European and Italian trade dynamics and to build your export strategy. By selecting Italy 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 Italian market?

Coffee is an integral part of Italian culture. Traditional independent coffee bars make up the largest share of the market. The market for specialty coffees remains small but increasingly brings interesting opportunities. At home and at work, single-serve coffee machines have become the most popular way to make coffee.

#### Coffee bars remain important in Italian coffee culture, but coffee chains gain ground

Coffee plays an important role in Italian culture. [Italians prefer dark and intense coffee blends](#). The country is especially known for its espresso: [approximately 70% of Italian coffee consumers drink espresso](#). [Most coffee is consumed at home \(87%\)](#), but [73% of coffee consumers also drink coffee out of home](#). Overall, [coffee bars are the preferred place for out-of-home consumption among Italians \(72%\)](#), followed by the workplace (48%).

[Independent coffee bars still make up approximately 90% of the Italian coffee market](#), but large coffee chains are gaining ground in Italy. The overall number of large coffee chain outlets in Italy reached 677 stores in 2017, [showing a growth rate of 6.3% from the year before](#). The Italian coffee chain market is expected to grow by an average annual of 6.3% between 2017 and 2022.

The largest coffee chain is [McCafé](#), with 280 locations throughout Italy. Other operators include [Bottega del Caffè](#) and [Caffè Vergnano](#). In 2018, [Starbucks opened its first outlet in Italy](#), which is expected to stimulate growth in the entire Italian coffee market.

#### Italy remains a traditional market, but opportunities arise for specialty coffee

Together with an increasing number of coffee chains, Italy is also slowly welcoming more specialised coffee roasters and shops. In 2018, [Italy had an estimated one hundred specialised coffee shops](#). This is a very tiny market, especially if you consider that the [overall coffee bar market in Italy counts almost 150 thousand establishments](#). In spite of being a very small niche market, it might bring interesting opportunities for high-quality coffees from special origins and with unique stories. Examples of specialty coffee roasters in Italy include [Nero Scuro](#), [Pierre Café](#) and [Cafezal Specialty Coffee](#).

#### Single-serve coffees fastest growing segment in the Italian market

Italians increasingly use single-serve machines to make coffees. These machines use pre-packaged coffee dispensers, such as pods and capsules. Due to its popularity, single-serve coffee increasingly dictates the quality and taste perception of Italian consumers. Most retailers in Italy meet this demand by offering a wide range of coffee capsules in their assortments, including some that try to offset the reputation of pods and capsules as not environmentally friendly. The Italian food packaging manufacturer Flo, for example, [developed the Gea compostable pod](#).

Sales volume of coffee capsules in Italy [grew by 14% between 2017 and 2018](#). About [37% of Italian coffee consumers prefer pods or capsules](#) when making coffee at home, and an estimated 50% said to prefer the single-serve coffee at their workplace.

#### Italian organic coffee market is growing

Italy is the [fifth-largest organic market by value in the world](#) at €1.6 billion in 2018. The [organic market in Italy is estimated to have grown by 5.8% between 2017 and 2018](#). Organic ground coffee follows this trend, [reaching a turnover of €6 million in 2018](#), registering a steep 18% increase in value and 15% in volume between 2017 and 2018. Despite the growth rates, beware the organic coffee market remains a small niche. Italians spent approximately €26 on organic products per capita in 2017, placing Italy 14th in per capita spending in the world. Within Europe, the largest organic markets are in Germany and France. An example of a cooperative producing organic coffees is [COMSA](#) (Honduras).

## Tips:

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

See the website of the [Italian Specialty Coffee Association](#) for more information about the specialty coffee industry in Italy.

Want to get specialty coffee on the Italian market? Try to establish direct trade relationships with small traders and roasters. See the section on market segments and trade channels below for more information.

Check the website of the Italian umbrella organisation for the organic sector in Italy, the [Italian Federation of Organic and Biodynamic Agriculture](#), to learn more about opportunities in the Italian organic market.

Find potential organic business partners in Italy by checking [this list of Italian organic coffee importers](#).

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

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