

European market potential for speciality coffee

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The European market for specialty coffees is rapidly growing. This growth is partly driven by out-of-home consumption. Coffee shops in European cities lead the way in introducing new varieties to consumers. The growing demand for specialty coffee follows the growing consumer interest in taste profiles and the coffee's origin. Consumers want to know how and where coffee is brewed and how and by whom the coffee is grown. It has become essential for specialty coffee producers to tell the story behind their coffee. Examples of trends are different processing techniques and the increase of organic coffees. These trends offer various opportunities to diversify in the European specialty coffee market.

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1. Product description

The global coffee trade recognises two main markets for coffee beans, the commodity market and the specialty market. The commodity market provides large quantities of coffee, usually of standard quality. The commodity market focuses on price, following the international C-market price.

The specialty market remains a smaller market segment, offering higher margins for exporters. It produces lower volumes with higher quality coffee beans. Specialty coffee is usually made from Arabica beans. These beans are more flavourful, aromatic and smoother than Robusta beans. Typica and Bourbon are the most well-known varieties of Arabica beans used for specialty coffee. For more information on the different varieties, we refer to [the World Research Coffee catalogue](#).

Robusta beans are less popular than their Arabica counterparts. They have a bitter taste and high caffeine content. For this reason, their availability in the specialty market is limited.

The CQI and SCA standards have set the standards for specialty coffee in recent years. The Specialty Coffee Association (SCA) sets the most accepted definition. It defines specialty coffee as coffee with a cupping score of 80 points or more on a 0-100 scale. Cupping scores are the scores coffee receives based on its taste and aroma. Flavours are often categorised according to the flavour wheel. You can read more about this [on the SCA website](#).

[The Coffee Quality Institute](#) (CQI) sets the standards for certification and verification. It is the only specialty coffee certification that is globally recognised. When coffee is labeled as "Q Certified," it means that it has gone

through a special grading system. It ensures that it has no major flaws and tastes good. The grading system also provides information about the coffee's flavour profile. This can be shared with the coffee farmer and potential buyers.

Figure 1: Coffee being rated by Q Graders



Source: [Ethos Agriculture](#)

Even though CQI and SCA have set the standards for the sector, the term 'specialty coffee' is not protected. Some retailers may sell coffee as specialty coffee, although it has not been graded as such.

Many European countries have seen an increase in the number of small independent specialty coffee roasters, shops and cafés. Mainstream coffee retailers are also expanding their offer to include specialty coffee. Costa Coffee is [the largest coffee chain in Europe, with 3,112 outlets](#), followed by Starbucks (3.075) and McCafé (2.923). Leading roasters, such as Nestlé, JDE Peet's and Lavazza are increasingly tapping into the specialty segment. They do so by merging and acquiring smaller businesses. They are also focusing more on ethically sourcing coffee beans for specific segments of their brand portfolios.

In general, several key points stand out in the specialty coffee value chain:

- High quality. Some consider specialty coffees to have a cupping score of 80 and above. Others consider coffee with a cupping score of 85 or higher to be specialty coffee. The buyer defines the standard for specialty coffee. Different protocols are used to rate coffee. An example is [the protocol used by the SCA](#).
- Traceability and transparency. Specialty coffee often comes with detailed information about its origin, including the specific farm or co-operative where it was grown. Other information is also sometimes provided. Examples are how the coffee is grown, the soil type, and more personal stories. This information is often provided using storytelling. You can find some examples on [the website of This Side Up](#).

- Ethical and sustainable production practices. Many specialty coffee producers and roasters prioritise ethical and sustainable practices. This includes fair compensation for coffee farmers, long-term trade relationships, environmentally friendly cultivation methods, and support for community development in coffee-producing regions.

By integrating blockchain technology into the coffee value chain, stakeholders can enhance trust, reduce fraud, ensure fair compensation for farmers, and provide consumers with detailed information about their coffee. [Segafredo Storia, IBM and Farmer Connect allow for full traceability of the coffee up until the producing farmer.](#)

Geographical indicators are very important in the specialty segment. They include altitude and climate, which influence the coffee's flavour and aroma. Such characteristics can help producers to differentiate themselves, making the coffee exclusive for consumers.

Geographical indicators come in different forms, including:

- Single-origin. Buyers and consumers are paying more attention to the origin of coffee. Single-origin specialty coffee is coffee that comes from a particular region or country. It is associated with uniqueness and quality. Examples of single-origin coffees include [Blue Mountain Coffee](#) (Jamaica), [Hawaii Kona Coffee](#) (Hawaii), [Kenya AA \(Kenya\)](#), and [Antigua](#) (Guatemala).
- Single farm or estate. Coffee produced from a particular farm is called single farm or single estate. These coffees have detailed information about harvesting and the farm's history. Examples include Tanzanian [Kifaru Coffee](#) and Panamanian [Hacienda La Esmeralda](#).
- Micro lots and nano lots. The specialty coffee market has led to an [increase in micro and nano lots](#). These lots sometimes produce extremely high-quality coffee beans for a much higher price. Micro lots usually consist of 10–75 60-kilogram bags. Nano lots are even smaller, consisting of five or fewer 60-kilogram bags of coffee. Micro and nano lot sales are usually not the farmer's main income. They can, however, contribute to your income, with premium prices sometimes being paid for these micro and nano lots. They can also be used as a marketing tool, to provide proof of the quality of the product to new customers.

Harmonised system (HS) codes are used to classify products and also assess international trade statistics, such as imports and exports. This study focuses on green coffee beans under HS codes 090111 (coffee, not roasted, not decaffeinated) and 090112 (coffee, not roasted, decaffeinated). The available data does not distinguish between conventional and specialty coffees.

Tip:

Find out about coffee varieties via [the World Coffee Research catalogue](#). It provides a good overview of the varieties including advantages and disadvantages per variety.

2. What makes Europe an interesting market for speciality coffee?

Europe is the [world's largest specialty coffee market](#). Specialty coffee shops, as well as online retailers, are thriving. Europeans are increasingly copying the coffee experience at home after COVID-19. Sustainable and

ethical coffee production is gaining in popularity.

European consumer's interest in specialty coffee is steadily growing

Europeans are avid specialty coffee drinkers. The European specialty market is valued at \$20.6 billion, accounting for 30% of the global specialty market. Europe is the largest specialty coffee market in the world.

According to WhaTech, the European specialty coffee market is expected to [grow at an annual average CAGR rate of 13%](#) over the period 2022-2030. Although these growth numbers may be too positive, the outlook for the specialty coffee market seems very positive.

The demand for specialty coffee has increased in all market channels. Many European countries have seen a sharp increase in small independent specialty coffee roasters, shops and cafés. Moreover, mainstream coffee retailers are expanding their offer to include specialty coffee. The COVID-19 pandemic accelerated the at-home specialty market. Online coffee retailers experienced growth during the pandemic, because Europeans wanted to [replicate the coffee shop experience at home](#).

The European market for specialty coffee offers opportunities for suppliers offering high-quality coffees. This specialty segment is a niche that commands high quality and high value. Coffee roasters either buy specialty coffee beans from an importer or directly from their origin. This depends on their resources and preferences. A specialty coffee importer handles logistics, ensures quality and omits financial risk. Direct trade with the producer often improves transparency and the buyer-seller relationship. This is why direct trade in the coffee industry is sometimes called relationship coffee.

There is a growing number of specialty coffee outlets in Europe

Europeans are increasingly visiting specialty coffee outlets. This shows that more Europeans are prepared to pay more for high-quality coffee. Note that this depends considerably on country and generation. In general, consumers in the North-Western parts of Europe have a higher spending power. They are also more willing to pay for high-quality and ethical sourcing. Younger generations [are also more willing to do so](#). Generation Z consumers, in particular, have a higher interest in sustainability issues and are more interested in the origin of their products. Sustainability and traceability are important aspects of specialty coffee.

Specific Europe-wide data on specialty coffee consumption are not available. This is partly because there is no industry consensus on a clear-cut definition of specialty coffee. Specific European import data for out-of-home specialty coffee consumption is also not available.

The number of coffee bars and chains, small roasters and small local brands and baristas is growing in Europe.

The European branded coffee shop market [grew by 3.2% in 2022](#), reaching a total of over 40 thousand outlets. Most of these outlets sell premium or specialty coffee.

Figure 2: Starbucks is one of the largest coffee chains in Europe



Source: Photo by [TR](#) on [Unsplash](#)

Sustainable and ethical trade is becoming popular in the European market

Europeans are [becoming increasingly aware](#) of the importance of sustainability. Both consumers and coffee outlets care about ethical and sustainable coffee production. Good working conditions, fair economic shares and avoiding ecologically harmful practices are important. Specialty coffee is characterised by the same sustainability values. This is why more and more Europeans are buying specialty coffee at cafés or to make at home.

Coffee producers can certify their coffee to showcase that they meet sustainability requirements. By obtaining certification they can also set themselves apart from competitors. The most common certifications include [Rainforest Alliance](#), [Fairtrade](#) and [Organic](#).

Some specialty coffee importers and small roasters consider certification to be counterproductive. Certification can be expensive, making trading more difficult. This is why some buyers prefer to check good agricultural practices (GAP) and social responsibility through direct relationships with producers.

Some roasters might also believe that labelling their coffee makes it less special. The main exception to this is organic certification. Organic specialty coffee is a growing niche market within the specialty segment. Overall, the European organic retail value has [grown from €37.6 billion in 2017 to €54.5 billion in 2021](#).

Tips:

Expand your market channels by selling to exporters and roasters directly. Importers usually buy higher volumes, while roasters generally provide better margins. This depends considerably on the situation, however, and on factors such as the volumes requested. Diversifying your market channels

reduces your dependency on a single buyer or market chain.

Consider certifying your product. The expectation is that the demand for certification will increase. This is [due to stricter European sustainability regulations](#). An example is the Corporate Sustainability Due Diligence Directive, which will affect buyers and their supply chain from 2026 onwards. Certification itself is not sufficient to prove compliance to this new regulation. However, it creates a basis that helps companies to comply with new regulations. Remember that many importers and small roasters working with specialty coffee consider certifications counterproductive. You therefore need to discuss this issue with your buyers before deciding.

Read our [tips to go green](#) in the coffee sector and [tips to become more socially responsible](#) in the coffee sector, to learn to keep up with ever-growing European sustainability demands.

Check out the website of the [Specialty Coffee Association](#) (SCA) and the [Coffee Quality Institute](#) (CQI). You can find news, events and resources related to specialty coffee in Europe and North America. Equivalent organisations in other regions are the [African Fine Coffees Association](#) (AFCA), the [Specialty Coffee Association of India](#) (SCAI) and the [Brazil Specialty Coffee Association](#) (BSCA).

Read [our study on the European market potential for certified coffee](#) for more information about certification in the European coffee market. Or read [our study on the demand for coffee on the European market](#) for more detailed information about the European trade in green coffee beans.

Look up the [World Coffee Research](#), [Global Coffee Platform](#) (GCP) and [Sustainable Coffee Challenge](#) websites. Here, you can learn more about sustainability initiatives and research.

3. Which European countries offer most opportunities for speciality coffee?

Europeans increasingly drink specialty coffee. This especially applies to the United Kingdom, Scandinavian countries and Germany. These countries have an established coffee culture. France and Eastern European countries provide a newer and less saturated market in the specialty segment.

European specialty coffee drinkers are interested in the background of their coffee. For example, they are interested in the community and culture of their coffee producer and the roasting process. Their interest drives this desire for background knowledge, to know about the sustainability of their coffee. Europeans also feel more connected with the coffee when they know about its source. Europeans especially care about fair wages, organic production and local community empowerment.

This section gives insights into the countries with the largest specialty coffee market potential. You can also take a look at the countries' official coffee associations. For example, the UK has the [British Coffee Association](#) (BCA). In Germany, there is the [German Coffee Association](#) (Deutscher Kaffeverband). In Sweden, there is the [Swedish Coffee Association](#) (Svenska Kaffeemästerskapen).

The United Kingdom offers the largest specialty coffee market

The United Kingdom is best known for its instant coffee market. The United Kingdom is, however, also the largest specialty coffee market in Europe. British out-of-home [specialty coffee consumption amounted to 23%](#) of all out-of-home consumption. But British consumers also show increased interest in brewing great coffee at home. The average weekly household [spending on coffee at home equals €7.75](#). Coffee machine sales rose by 3.5% in 2022.

Now that people are more often working remotely, coffee shops have become a good alternative to offices. This has increased coffee consumption in shops. Additionally, the sales for at-home use are also increasing. This is because COVID-19 stimulated people [to bring the coffee experience into their homes](#). Consumers buy specialty beans and brewing equipment. British coffee consumption has steadily grown over the years and has shown an average growth rate of 3% per year.

The expansion of specialty coffee chains is shaping the British specialty market. An example is [GAIL's](#). The involvement of established chains, such as [Starbucks](#), [Costa Coffee](#) and [Caffè Nero](#) are also drivers of this growth.

The United Kingdom has the largest coffee shop market in Europe. The total number of coffee shops in the United Kingdom totalled 9,540 outlets across the branded segments in 2022. Examples of these shops include:

- [Small Batch Coffee Roasters](#)
- [Union Brew Lab](#)
- [Caravan Coffee Roasters](#)
- [Wood St Coffee Roasters](#)
- [Redemption Roasters](#)

The largest coffee chain in the United Kingdom is [Costa Coffee](#), with around 2,500 locations in the United Kingdom alone. Starbucks is the second largest chain, with around 1,100 locations in the country. These large chains ignited growth of local specialty roasters and coffee shops. The United Kingdom also hosts many specialty coffee events. Examples are [Manchester Coffee Festival](#), [Edinburgh Coffee Festival](#) and The [London Coffee Festival](#).

There is a growing interest in both high-quality and sustainable coffees in the United Kingdom. The country also represents a very established market for certified coffees. [Fairtrade and Rainforest Alliance have their largest markets in the United Kingdom](#). Around 25% of all coffee sold in the United Kingdom in 2018 had the Fairtrade trademark. Organic coffee saw a 50% increase in value between 2016 and 2021. In addition, the United Kingdom has [the largest number of Rainforest Alliance-certified retailers](#) in Europe.

The United Kingdom has a relatively formal business culture. Consider this when communicating with British traders and roasters.

Tips:

Read our [Tips for doing business with European coffee buyers](#). This offers more information on how to communicate with European buyers, and how to take cultural differences into account.

Watch the Specialty Coffee Association's [introduction to the United Kingdom Coffee market](#) via YouTube.

Specialty coffee consumption is ingrained in Swedish culture

There are no numbers on the share of specialty coffee sold in Sweden. According to experts, however, the specialty coffee market has a strong base there. Swedish people drink around 7.6 kg of coffee per capita per year, with [61% drinking more than one cup a day](#). It is Swedish custom to drink coffee with friends or family twice a day, once in the morning and once in the afternoon.

The Swedes are known to [value high-quality coffee more than the citizens of other European countries](#). This makes the specialty segment popular. Light roasting is ideally suited to bringing out the distinctive aromas and taste of coffee. Every year, around 10 new small coffee roasteries start in Sweden.

The Swedes also care considerably about sustainable purchasing. Around 90% of all [coffee sold in retail in Sweden is certified](#). Note that Sweden offers only a small market compared to some other European markets. Sweden imported 105 thousand tonnes of green coffee in 2022. This is less than 10% of the level of German imports.

Norway and Denmark also show promise on the specialty coffee market

Scandinavian countries have seen the highest growth in coffee shops since 2010 in all of Europe. Norway established the first-ever [World Barista Championship](#). This is a prestigious annual competition in the specialty industry. Norway and Denmark's populations drink around 8.6 and 6.6 kg of coffee per capita per year, respectively. This makes them rank fifth and eighth on the list of European coffee-consuming countries.

Because of this, more and more coffee places are opening in Scandinavia. In Denmark, new coffee shops are growing very fast, with 14.5% more each year. 65% of coffee shops in Scandinavia state they have seen [an increase in sales over the past year](#).

Scandinavia is a frontrunner in sustainability in Europe. Northern European countries especially value traceability. They want to know where their coffee comes from and who produced it. Coffees with sustainability certifications have [continuously grown in sales in these countries](#). Scandinavians also show a high willingness to pay more for high-quality coffee. Denmark and Sweden are spending the most on organic produce globally. [Over one-third of Danish food sales are organic fruit and vegetables](#). For coffee, [this figure is 16.6%](#). The organic retail market in Norway is much smaller. Only [2% of the Norwegian total food retail sales](#) are organic.

Although the share of specialty coffee is large in Norway and Denmark, both countries offer relatively small markets. In 2022, Norway and Denmark imported 31 thousand tonnes and 16 thousand tonnes respectively.

Small independent specialty roasters are entering the German market

The specialty coffee market is the fastest-growing segment in Germany. Germany is also the largest coffee importer in Europe, with 34% of green coffee beans directly traded from producing countries. The country has many independent specialty roasters with diverse offerings. A minor trend among German roasters is offering semi-wild or wild forest coffee. This product can offer opportunities but is very small. It promotes values such as environmental conservation and exclusivity. Both of these values are important to European specialty coffee drinkers. Ethiopia is the [most important producer of wild forest coffee](#).

Germany is Europe's largest importer of green coffee. In 2022, it imported 1.1 million tonnes of green coffee

(not just specialty coffee). Germany also has a high consumption level per capita. Germans consume around 5.4 kg of coffee per capita per year. The country's out-of-home coffee consumption is increasing fast after COVID-19. [Germany has the second-largest coffee shop market in Europe](#), only after the United Kingdom. The number of shops focused on coffee has grown by [2.1% with 2,343 outlets in 2022](#). The out-of-home consumption trend in Germany brings opportunities for high-quality coffee exporters.

Germans are buying more coffee beans for at-home consumption as well. The sales of whole coffee beans are almost equal to the sales of grounded coffee. It is becoming more accessible to grind at home. Despite inflation, the country's specialty coffee market is growing.

12% of coffee consumed in Germany is certified. Germans buy more and more organic coffee, [78% of German coffee drinkers are willing to pay more for organic coffee](#). Moreover, Germans are also frontrunners in Fairtrade consumption. They are the second largest for Fairtrade sales. 34% of Germans say their daily coffee is either Fairtrade, organic or both.

More and more German small-scale roasters are entering the market. Examples are Berlin's [Supremo Coffee](#), [The Barn](#) and [Flying Roasters](#). They buy small volumes of high-quality single-origin or Fairtrade coffee. Examples of German specialty coffee importers are:

- [Rehm & Co](#) (high-quality coffees)
- [Touton Specialties Coffee](#) (high-quality coffees)
- [GEPA](#) (fair trade)
- [Rapunzel](#) (Organic and fair trade)
- [El Puente](#) (fair trade)
- [Slokoffie](#) (Organic sustainable coffee)

Another example is [Five Elephant](#) in Berlin. The company has developed a video about their company. This gives you an example of what is important to European small-scale specialty roasters.

Source: Five Elephant

The French specialty coffee market is taking off

France is also an important market for specialty coffees, although it has taken a long time for it to take off. The number of coffee outlets reached over 4,000 outlets in 2022. This was a [7.2% increase compared to the previous year](#). The [share of specialty coffee in France is expected to rise to about 10% of the total French coffee market by 2025](#).

The growing demand for specialty coffee has mainly affected larger cities such as Paris. Examples of specialty coffee shops in France are [Le Café Cerise](#) and [Matamata Coffee Bar](#). Other coffee chains focussing on specialty coffee include [alter eco](#). They import fair trade and responsible coffee. Trader [Belco focuses on high-quality coffees](#). The French specialty coffee drinker values their coffee's unique origin and qualities. For a coffee exporter, this underlines the importance of emphasising the coffee's characteristics.

In the French HoReCa (hotels, restaurants, catering) market, there is relatively little competition. A few large roasters dominate this market. These large roasters all focus on their own region. The French at-home market is much more competitive, with many players in the market. The French market is also known for its high focus on certification.

France has a relatively large import market, with green coffee imports reaching 213 thousand tonnes in 2022 (not just specialty coffee). This equals about one-fifth of the German market, which is the largest market in Europe.

The Eastern European specialty coffee market is consistently growing

The Eastern European market for specialty coffee is smaller than the North-Western markets. Interest in specialty coffee is, however, gaining ground. This is especially the case in Romania, where the coffee market is [expected to grow by 5% each year until 2028](#). One of its most popular chains, [5 to go](#), has reached 500 outlets after only having 150 outlets in 2021. It is planning to [double the number of outlets within four years](#). This showcases the expected growth of the Romanian coffee market. The country hosted their sixth coffee festival in 2023 in Bucharest, where [40 retailers exhibited their coffee offer](#).

Coffee consumption and the number of coffee outlets is growing in other Eastern European countries as well. The number of coffee shops in Hungary reached 1218 cafés in 2023 and is [expecting a yearly growth rate of 4.2% until 2027](#). The Czech market is expected to [demonstrate an annual growth rate of 2.36% until 2028](#). The Czech Republic is also home to the [Coffee Embassy](#) in Prague. Their mission is to educate and promote coffee culture in the country.

Examples of specialised independent coffee shops in Eastern Europe include:

- [Rebel Bean](#), and bistro [PLATO Café](#)
- [The Urbanist](#) (Romania), [Black Sheep](#) and [The Goat Herder](#) (Hungary)
- [JAVA Coffee Roasters](#) (Poland)

Eastern European countries also organise coffee festivals. Examples are:

- [Prague Coffee Festival](#) (Czech Republic)
- [Warsaw Coffee Festival](#) (Poland)
- [Bucharest Coffee Festival](#) (Romania)
- [Sofia Coffee Festival](#) (Bulgaria)
- [Tallinn Coffee Festival](#) (Estonia)

Tips:

Diversify your portfolio. Sell your specialty coffee in main markets to sell enough volume. But also invest in promising markets such as Italy and Eastern Europe. There is still little competition in these countries, and their growth potential is huge.

Get more knowledge of your target country's business culture to better understand how to approach them. Read our country studies to learn about the specialty markets and coffee opportunities. Our country studies include [Eastern Europe](#), [France](#), [Italy](#), [Germany](#), [Scandinavia](#) and the [United Kingdom](#).

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

Refer to the national coffee association of your target market to be informed about recent developments in that market. These include the [British Coffee Association \(BCA\)](#), the [German Coffee Association \(Deutscher Kaffeeverband\)](#), [Swedish Coffee Association](#) (Svenska Kaffegemenskapen), [Norwegian Coffee Association \(Norsk Kaffeinformasjon\)](#), [SCA Denmark](#), [SCA France](#) and [SCA Italy](#). Also follow the news on the [Allegra World Coffee Portal](#) to stay up to date on the developments in the European coffee chain market.

Investigate if 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. It takes place in several countries.

4. Which trends offer opportunities in the European speciality coffee market?

Specialty coffee is gaining ground in the European market. A trend in this segment is that more mainstream coffee outlets include specialty coffees in their offer. In addition, there is an opening market for high-quality Robusta coffees in Europe. More and more consumers also care about Organic certification. Lastly, producers are experimenting with fermentation processing. This enables them to create different flavour profiles to differentiate themselves from the competition.

Mainstream coffee actors increasingly engage in specialty market

Large trading companies are expanding their specialty coffee portfolio. An example is [InterAmerican Coffee](#) (owned by [Neumann Kaffee Gruppe](#)). It was the first to set up a division dedicated to sourcing specialty coffees. More recently, other large coffee companies set up a division for specialty coffee. They do so to increase their revenue. While large markets such as the United States and Europe hardly grow in total volume, [the demand for higher quality coffee grows](#). Examples of large brands entering the specialty market are:

- [Covoya Specialty Coffee](#) (previously Olam)

- [Volcafe Specialty](#)
- [Rehm & Co](#) (owned by [Benecke Coffee](#))
- [Sucafina Specialty](#)

Mainstream companies sometimes work together with small, specialised roasters to enter the market. For example, the German [Neumann Kaffee Gruppe announced a majority share in the Nordic Approach Group in 2023](#).

Mainstream companies adopt common specialty coffee terms to attract customers. They use terms like single origin and premium quality to appeal to customers.

Growing interest in new varieties

There is a growing interest in new coffee varieties in the specialty market. In the specialty coffee market, trying out different tastes is important. This includes trying new coffee varieties. Health concerns also drive this trend. Some varieties are chosen because they are low in caffeine. For example, [Laurina and Aramosa are the lowest in caffeine](#).

From a supply side, however, it also makes sense to diversify. New varieties are developed. These can be more resistant to climate change or diseases or result in higher yields. Climate change [mostly affects Arabica production](#). One of the main reasons is that Arabica is less tolerant to high temperatures. To adapt, there is a greater focus on Robusta varieties. Fine Robusta varieties have also found their way into the specialty segment.

Sector-wide efforts are underway to [improve production and reach Fine Robusta quality](#). In Ghana, for example, the government and coffee brands have started [exploring production methods to produce Fine Robusta](#). If Robusta is used, it is mostly used for espresso or espresso-based drinks. Countries such as Italy and other southern European countries prefer espresso to filter coffee. Filter coffee is more popular in northern countries. Fine Robusta coffee may be more interesting for the southern European market.

Some coffee shops and roasters already focus on specialty Robusta coffees. For instance, the Swiss micro-roaster [Röstlabor](#) offers single-origin Robusta alongside specialty Arabicas. [Black Sheep Coffee](#) in the United Kingdom serves single estate specialty grade Robusta. It sources from the world's first specialty grade Robusta farm: [Kaapi Royale Coffee in India](#). Another example of a Fine Robusta producer that is already exporting is Guinea's [Macenta Beans](#).

The growing interest in Robusta coffees offers opportunities for exporters. Fine Robusta exporters must consistently supply and meet the [Q Fine Robusta Standards and Protocols](#) of CQI. Note that although the demand for high-quality Robustas is growing, the market is still very small. The focus in the specialty coffee market is still on Arabicas.

Organic-certified specialty coffee is a growing niche within the specialty segment

Europe's organic coffee market was valued at €2.2 billion in 2020. It is thereby the second-largest organic coffee consumer in the world. Europeans' shift towards organic coffee consumption is driven by increased sustainable awareness and their choice to consume healthier products.

The country spending the most on organic food per capita is Switzerland. Swiss residents [spent €425 per capita per month in 2021 on average](#). This is followed by Denmark (€384) and Austria (€268). These three countries also had the [highest organic food sales in 2020](#). Sweden (€266), Germany (€191) and France (€187) are also important organic food consumers in Europe. Although this does not say anything about the consumption of Organic coffee, it indicates a willingness to buy Organic.

Certified organic coffee is an especially important niche market in Europe. Many buyers and end-consumers demand organic certification. Examples of companies exporting organic coffees to the European market are:

- [RainForest Trading](#) (Peru)
- [Mayorga Coffee](#) (Honduras)
- [Café Orgánico Marcala](#) (Honduras)
- [Kawa Kabuya](#) (DRC Congo)
- [Rwashoscco](#) (Rwanda)

Experimental fermentation processing techniques are becoming important diversifiers

An example of experimental processing is prolonging fermentation. Experimental techniques are [a growing trend within the specialty segment](#). This way, producers can diversify themselves by bringing out more complex and unique coffee flavours. Traditional ways of processing include dry processing, wet processing and honey processing.

The main experimental fermented coffee techniques are aerobic and anaerobic fermentation. With aerobic fermentation, oxygen is included, and with anaerobic fermentation, oxygen is eliminated. An example of anaerobic fermented coffee is the [Finca San Antonio Anaerobic Natural](#) from Nicaragua. The [Finca Santuario](#) is an example of aerobic fermented coffee. Other experimental fermentation techniques include carbonic maceration, lactic fermentation and double fermentation. Some examples of companies offering these experimental fermentation techniques are listed below.

- [Ethiopian Jabanto coffee](#) is an example of carbonic maceration coffee
- [Guava Banana Lactic](#) is an example of lactic fermented coffee
- [La Loma Colombia](#) is an example of double-fermented coffee

Coffee buyers looking to diversify may be interested in these new fermentation techniques. Some traditional buyers are against experimenting with fermentation processes. They believe it takes away from the innate characteristics of coffee.

Another way roasters diversify is to offer specialty blends. Coffee blends allow for carefully balanced flavours. These can be customised to various customer demands. The popularity of blended coffees is increasing. Various competitors [competed with blended roasts in championships in 2021 and 2022](#).

Tips:

To learn more about the organic coffee potential on the European market, refer to [our study on the European market potential for organic coffee](#). Also, read [our study on the coffee trends that offer opportunities or risks on the European market](#).

Learn more about coffee cupping and cupping scores on the [SCA website](#). Consider [obtaining a Q Grader certificate](#). This enables you to cup and score your Arabica coffee according to international standards. If you are working with Robusta beans, explore the opportunities to [become an R Grader or Q Robusta Grader](#).

Consult with your potential buyer about entering a certification programme. Find out if there is enough demand for the certification label to achieve cost benefits.

Explore the opportunities to propagate more varieties and different processing techniques. This may increase income. More importantly, it will increase your reputation as a coffee producer. If buyers are interested in your micro and nano lots, they will usually also buy the other specialty coffees you offer.

Refer to the [Alliance for Coffee Excellence](#) to connect with other specialty coffee industry players and potential buyers.

[Molgo Research](#) carried out this study in partnership with [Long Run Sustainability](#), [Amonarmah Consults](#) and [Ethos Agriculture](#) on behalf of CBI.

Please review our [market information disclaimer](#).