

Entering the German coffee market

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In 2022, Germany sourced 97% of its coffee directly from producing countries. The three main countries supplying green coffee to Germany were Brazil, Vietnam and Honduras, which accounted for 67% of all German imports. Given that sustainability has become a widespread concern in the German coffee market, certification will often be a minimum entry requirement for coffee exports in many market segment. However, the market is competitive, as Germany is a prime destination for many producers worldwide.

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1. Which requirements and certification must coffee comply with to be enter the German market?

You can only export coffee to Germany if you comply with strict European Union (EU) requirements. Buyer requirements can be divided into:

1. Legal and non-legal requirements.
2. Additional requirements to maximise success in the market.
3. Requirements for niche markets.

The highlights for these requirements are given below, specified for the German market where relevant.

Legal and non-legal requirements

Legal requirements

You must follow the European Union legal requirements applicable to coffee. These rules mainly deal with food safety, where traceability and hygiene are the most important themes. Special attention should be given to specific sources of contamination, of which the most common are:

- Pesticides — consult the [EU pesticide database](#) for an overview of the maximum residue levels (MRLs) for each pesticide;
- Mycotoxins/mould, particularly Ochratoxin-A (OTA) - although no maximum OTA limits have been set for green coffee, green coffees / sources with high OTA levels may be characterised as 'high risk';
- Mineral Oil Aromatic Hydrocarbons (MOAHs): Green coffee can get contaminated with MOAHs at any stage in the supply chain. Officially, no maximum MOAH levels have yet been set in Europe.

Germany applies the same legal requirements as other European Union countries, but industry sources indicate that import controls for factors such as pesticides and moulds are very strict in the country.

Quality requirements

In general, to determine the quality of coffee, green and roasted coffee undergoes a physical evaluationassessment, and the roasted coffee undergoes a sensory evaluationassessment.

EvaluationAssessment of green coffee

Green coffee is first graded and classified for quality before export. There is no universal grading and classification system for coffee. The Specialty Coffee Association's [standards for green coffee grading](#) are often used as a point of reference. However, most producing countries have and use their own [grading systems](#).

Grading and classification is usually based on the following criteria:

- Altitude and region;
- Botanical variety;
- Processing method — wet/washed, dry/natural, honey, pulped naturals;
- Screen size (Note: screen size is important to ensure uniform roasting which improves the quality of the final product);
- Number of defects or imperfections;
- Bean density;
- Cup quality.

German buyers will also perform a green coffee assessment. This includes a screen-size evaluationassessment, defect count, and an assessment of bean colour, appearance and smell. This is followed by a moisture check and water activity analysis. Sample roasting is then performed to evaluateassess the quality and uniformity of the green coffee.

Sensory assessment: coffee cupping

Coffee is also assessed and scored by a method called cupping. Buyers will use different protocols and standards to conduct a sensory assessment. However, the SCA recommends [specific guidelines and protocols for cupping coffee](#). The most widely used cupping tool is [the SCA's Coffee Taster's Flavour Wheel](#). Some of the quality attributes assessed are: flavour, fragrance/aroma, aftertaste, acidity, body, uniformity, balance, cleanliness, sweetness and off-notes.

Note that there is no exact definition of specialty coffee within the coffee industry. The [Coffee Quality Institute](#) and the cupping protocols of the [Specialty Coffee Association](#) consider that coffees graded and cupped with scores below 80 are considered standard quality and not specialty. Nevertheless, the exact minimum scores defining specialty coffee differ per country and per buyer. Some buyers consider 80 too low and demand a cupping score of 85 or higher.

If you sell specialty coffee, it is important for buyers to know what the cupping score of your coffee. Although not mandatory, adding this information to the documentation of the coffee that you are exporting can add value. It is very important to be aware of the quality of your coffees, either through local cupping experts or by becoming a cupping expert yourself.

Labelling requirements

Labels of green coffee exported to Germany should be written in English and should include the following information to ensure traceability of individual batches:

- Product name;
- [International Coffee Organisation \(ICO\) identification code](#);
- Country of origin;
- Grade;

- Net weight in kilograms;
- For certified coffee: name and code of the inspection body and certification number.

Figure 1: Example of green coffee labelling



Source: Escoffee

Packaging requirements

Green coffee beans are traditionally shipped in woven bags made from jute or hessian natural fibre. Jute bags are strong and robust. Other materials, such as [GrainPro](#) or other innovative material like [Videplast](#) liners, are often used to pack specialty coffees inside jute bags. These materials have added value over traditional packaging, as they [preserve grain quality](#), [prevent post-harvest loss](#), [reduce solid waste](#), [reduce farmer's net carbon footprint](#), and [facilitate chemical-free storage](#).

Most green coffee beans of standard quality imported into Germany are packed in container-sized bulk flexi-bags that hold roughly 20 tonnes of green coffee beans each. The rest of the green coffee is transported in traditional 60 kg or 70 kg jute sacks, each with a net volume of 17 tonnes to 19 tonnes of coffee. Although the 60kg bag is the most common, some countries use bags weighing holding 46kg, 50kg, 69kg or 70kg.

Other packaging used in transporting coffee includes polypropylene super sacks for 1 tonne of coffee, polyethylene liners for 21.6 tonnes and vacuum-packed coffee. These techniques provide two advantages in the coffee trade, namely increasing efficiency and maintaining or preserving quality.

Figure 2: Examples of coffee packing: jute bag, container-sized flexi bag, GrainPro and Videplast liner



Sources: [raadtradingco.com](#), [bls-bulk.com](#) and [GrainPro](#)

Tips:

Activate the “Translation” function of your browser to make the studies available in your native language.

For the full buyer requirements, read the CBI study on [buyer requirements](#) for coffee in Europe or consult the specific requirements for coffee on the European Commission’s website [Access2Markets](#).

Check [EUR-Lex](#) for more information on limits for different contaminants. For specific information on the prevention and reduction of Ochratoxin A contamination, refer to the [Codex Alimentarius CXC 69-2009](#). Use the search tool to find the Codes containing information on Ochratoxin A and select your preferred language.

For information on safe storage and transport of coffee, refer to [the website of the Transport Information Service](#).

Read more about quality requirements for coffee on [the website of the Coffee Quality Institute](#).

Find out more about delivery and payment terms for your green coffee exports by reading our study [Organising your coffee bean exports to Europe](#).

Additional requirements to maximise success in the market

Additional food safety requirements

Expect buyers in Germany to request extra food safety guarantees from you. Regarding production and handling processes, you should think of:

- Implementation of good agricultural practices (GAP): The main standard for good agricultural practices is [GLOBALG.A.P.](#), a voluntary standard for certification of agricultural production processes that provide safe and traceable products. Certification organisations, such as Rainforest Alliance-UTZ, often incorporate GAP in their standards.
- Implementation of [good manufacturing practices](#) (GMP): These general principles provide guidance on post-harvest processes such as washed or natural processing, manufacturing, testing and quality assurance to ensure that products are safe for human consumption. Your GMP plan should include guidelines about your processing facility and equipment as well as your warehouse and transportation.
- Implementation of a quality management system (QMS): Buyers increasingly require a system based on [Hazard Analysis and Critical Control Points](#) (HACCP) as a minimum standard for green coffee production, storage and handling. Regular checks on residue levels in your green (and roasted) coffee are an example of a measure that could be part of this system. It is particularly important to check for (and aim to prevent) Ochratoxin-A (OTA), polycyclic aromatic hydrocarbons (PAHs) and contamination from pesticides such as glyphosate contamination. It is advisable to proactively obtain certificates of analysis periodically for the coffee that you produce and export, preferably from an EU-accredited laboratory such as [Eurofins](#) or [Tüv](#). You may also decide to obtain [ISO 9001](#)-certification for your quality-management system.
- For roasted coffee, HACCP might be required, and this must sometimes be accompanied by certification from the Global Food Safety Initiative (GFSI) such as [BRC Global Standard Food Safety](#), [FSSC 22000](#), [IFS Food](#) or [SQF](#) Institute. Read our study on [coffee roasted-at-origin](#) to find out more about specific requirements for roasted coffee.

It is good to keep in mind that your German importer might re-export large quantities of green coffee to other destinations in Europe. Those other buyers push their requirements forward to other players in the supply chain, which might increase the need for you to adopt other specific certifications or standards.

Additional sustainability requirements

Corporate responsibility and sustainability are growing in importance in the European coffee sector. Coffee industry players, especially the leading companies in the German coffee market such as [Tchibo](#) and [Jacobs](#), have sustainability policies which reflect their relationship with farmers, operational transparency, and social and environmental impact at origin.

As an exporter, adopting codes of conduct or sustainability policies relating to your company's environmental and social impact may give you a competitive advantage. In general, buyers will likely require you to comply with their code of conduct, and/or fill out supplier questionnaires regarding your sustainability practices.

Certification standards like [Rainforest Alliance-UTZ](#) are important in the mainstream coffee market and are often part of the sustainability strategy of traders, coffee roasters and retailers. Large German importers, such as the [Neumann Kaffee Gruppe](#) and [List + Beisler](#), handle a wide range of coffees of various origins and certifications. Roaster [Tchibo](#) also cooperates with all main certification schemes for coffee (Fairtrade, Rainforest Alliance and organic) to achieve its sustainability mission. Large German retailers, such as [Lidl](#), [Aldi](#) and [Edeka](#), also have roasted coffee certified by the main certification schemes in their assortments.

Apart from these sustainability requirements, it is important to be aware that the EU is implementing the [European Green Deal](#), aimed at making Europe sustainable and climate-neutral by 2050. To achieve this goal, the EU is working on legislation [that requires companies to address human rights and environmental standards in their value chains](#), including companies that trade in coffee. As with the corporate codes of conduct, companies will require you to comply with these additional requirements. The EU is also working on a [European due diligence solution to stop EU-driven deforestation](#), which also pertains to coffee cultivation.

In addition, in mid-2021, the [Supply Chain Due Diligence Act](#) was adopted by the German government. This Act will enter into force in 2023. It sets standards in relation to human-rights and environmental standards for large German companies and their supply chains. German buyers will implement stricter buyer requirements and increase supply chain monitoring to comply with these standards.

Tips:

Refer to the [International Trade Centre Standards Map](#) or the [Global Food Safety Initiative website](#) to learn about the different food safety management systems, hygiene standards and certification schemes.

Read CBI's article on "[The EU Green Deal – How will it impact my business?](#)" to find out more about this regulation and how to comply with it.

Refer to the [ITC Coffee Guide – 4th Edition](#). This guide contains plenty of information, including on the practical aspects of coffee trade. Check the content table to decide what you want to learn about.

Draw up a written plan for your food safety controls. Review and update your plan whenever changes occur in your business operations, or at least every couple of years.

Find out which standards or certifications potential buyers prefer in your target segment. Buyers may have preferences for a certain food safety management system or sustainability label depending on their end clients and distribution channels.

Carry out a self-assessment to measure how sustainable your production practices are. You can fill out this [Excel form by the Sustainable Agriculture Initiative \(SAI\) Platform](#) to assess your farm's sustainability performance.

See the [list of Rainforest Alliance-UTZ registered coffee actors in Germany](#) to identify interesting players. Learn which ones are certified to buy your Rainforest Alliance-UTZ certified coffee.

See [our study on certified coffee](#) for more information about the demand on the European market,

trends and specific trade channels.

Niche requirements

EU Organic

In order to market your coffee as organic in the European market, it must comply with [the regulations of the European Union for organic production and labelling](#). [Regulation \(EC\) 2018/848](#) sets down rules on organic production and labelling. [Regulation \(EC\) 1235/2008](#) describes the implementing rules of the EU legislation for imports of organic products from third countries.

Obtaining the [EU organic label](#) is the minimum legislative requirement for marketing organic coffee in the European Union. In addition, other organic certification schemes in Germany are [Biosiegel](#), [Bioland](#) and [Naturland](#). Each scheme has its own requirements and may be required by specific buyers. For instance, check the differences between [Naturland and the EU organic regulation](#), and note that Naturland sets higher standards.

Before you can market your coffee as organic, an accredited certifier must audit your growing and processing facilities. Refer to [this list of recognised control bodies and control authorities](#) issued by the EU to ensure that you always work with an officially recognised accredited certifier. If you wish to become certified as organic, you can expect a yearly inspection and audit which aims to ensure that you are complying with the rules on organic production.

Note that all organic products imported into the EU must have the appropriate electronic [Certificate of Inspection](#) (COI). These COIs must be issued by control authorities prior to the departure of a shipment. If this is not done, your product cannot be sold as organic in the European Union and will be sold as a conventional product. COIs can be completed by using the European Commission's electronic [Trade Control and Expert System](#) (TRACES).

Fair trade

The most common fair trade standards in the German market are [Fairtrade](#) and [GEPA](#). The [Naturland Fair](#) logo certifies products that are both organic and fair trade.

As with organic products, an accredited certifier must audit your growing and processing facilities before you can market your cocoa beans as Fairtrade. Examples of accredited certifiers are [Control Union](#), [Ecocert](#), [FLOCERT](#) (only for Fairtrade) [ProCert](#) and [SGS](#).

High-end specialty coffee

The high-end specialty coffee segment is characterised by high cupping scores (usually 84+), innovative processes (such as natural and honey-processing), direct trade relations, and high transparency and traceability from source to consumer. This means that buyers of these coffees ask for requirements that go beyond certification.

Besides high-quality, these buyers are interested in your stories about the origin of the product, such as your coffee farm, the coffee growers and your processing facilities. This means that you should know the specifics of your coffee, from soil management to cup, from variety to processing, from external suppliers to farmers, and you must be willing to share these honestly. Other than that, direct trade can result in more frequent coffee farm visits and product assessments by your buyers, as well as long-term business relationships.

Tips:

Learn more about organic farming and European organic guidelines on the [European Commission website](#) and the [Organic Export Info website](#).

Familiarise yourself with the range of organisations and initiatives that can offer technical support to help you convert to organic farming. Start your search by learning about the organic movement in your own country and inquire about support programmes or existing initiatives. Refer to the database of [affiliates of IFOAM Organics](#) to search for organic organisations in your country.

Find importers that specialise in organic products on the [website Organic-bio](#).

Try to visit trade fairs for organic products, like [Biofach](#) in Germany. Check out their website for a list of exhibitors, seminars and other events at this trade fair.

If you produce coffee according to a fair trade scheme, find a specialised German buyer that is familiar with sustainable or fair trade products, for instance via the [FLOCERT customer database](#).

Use this [cost calculator](#) to estimate what costs would be involved for your organisation to become Fairtrade-certified.

Ask for quotations from different certifiers before you decide which one you want to work with. Ask for timelines and an estimate of how many days would be charged.

Try to combine audits in case you have more than one certification, saving time and money. Also investigate the possibilities for group certification with other producers and exporters in your region.

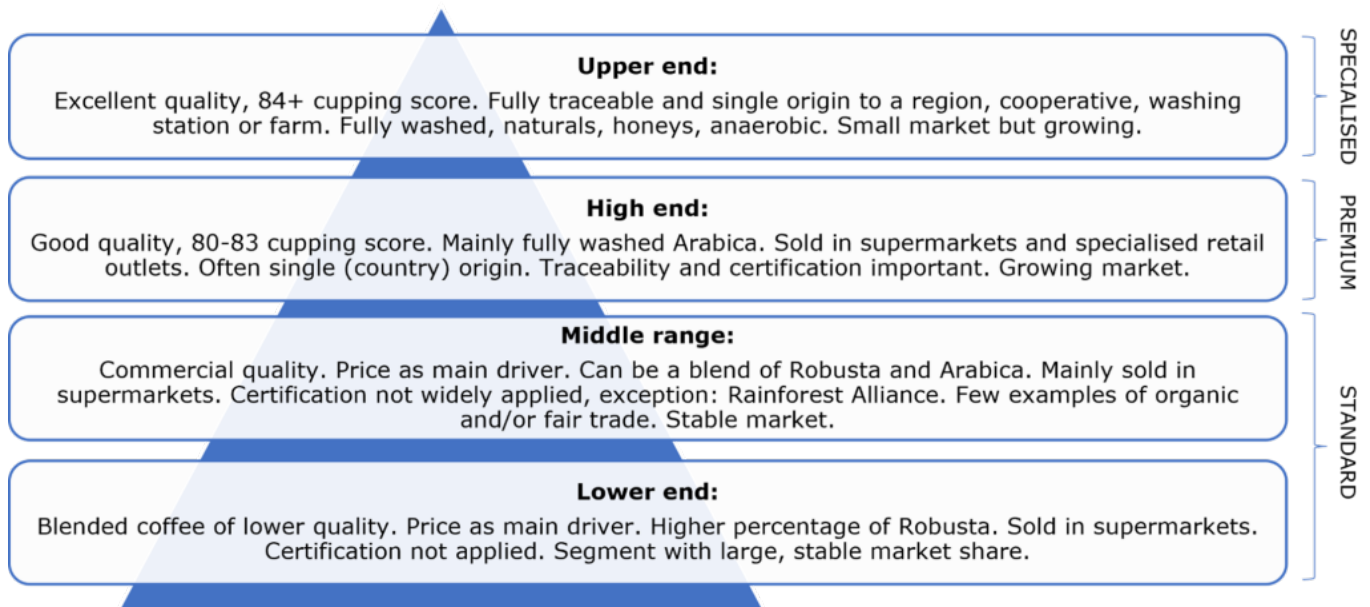
2. Through what channels can you get coffee on the German market?

Germany's coffee end market can be segmented by quality. The high-end and upper-end segments represent a small but growing niche market. Suppliers in producing countries mainly enter the German market through an importer, but there has been an increase in direct trade between coffee roasters and producers/exporters.

How is the end market segmented?

The German end market for coffee can be segmented as follows:

Figure 3: Coffee end market segmentation by quality



Source: ProFound

In Germany, supermarkets are the main sales channel for coffee. They mainly sell standard-quality coffee products, comprising the lower-end and middle-range segments. These segments also include a wide range of retailer's own private label coffee products. These products are popular as they offer the same characteristics as branded products, but usually at more affordable prices. The total share of private label products in German retail reached **38%** in 2022.

The largest retailer groups in Germany are:

- Edeka Group, which includes supermarkets [Edeka](#) and [Netto](#);
- REWE Group ([REWE](#) and [Penny](#));
- Schwarz Gruppe ([Lidl](#) and [Kaufland](#));
- Aldi, with [Aldi Süd](#) and [Aldi Nord](#).

Low end: The coffees in this segment are mainstream low-quality, mainly blended coffees. These blends are characterised by a high proportion of Robusta beans. Besides some mainstream brands, the lower-quality private label products from supermarkets also belong to the low-end segment. Most coffee pads, ground coffee and instant coffee belong to this low-end segment. Coffees at the low end of the market are mainly sold in supermarkets.


Product and price example in the low-end segment, based on [REWE's retail prices](#) in 2022, include:




	Product	Image*	Price (€/kg)
Low-end	Dallmayr (Classic, ground coffee, 500 g package)	 A rectangular package of Dallmayr Classic coffee. The top is green with the Dallmayr crest and the word 'Kaffee'. Below that, it says 'MIT QUALITÄTSGARANTIE'. The main part of the package is black with 'Dallmayr Classic' in large white letters. At the bottom, it says 'Kaffeegenuss mit vollem Aroma'.	13.98

*Source of pictures: https://shop.rewe.de/c/kaffee-tee-kakao-kaffee/?sorting=PRICE_ASC

Mid-range: Mid-range coffees are commercial coffees with a consistent quality profile. This segment typically consists of blends with a higher proportion of Arabica compared to coffees in the low-end segment. The mid-range segment represents a stable market, in which Rainforest Alliance certification is important, often as a minimum. Mid-range coffees are often sold in supermarkets and by the food service industry.

Examples of products and prices in this segment, based on REWE's retail prices in 2022, are:

	Product	Image*	Price (€/kg)
Mid-range	REWE Bio (Caffé crema, organic and Fairtrade-certified, whole bean, 1kg package)	 A package of REWE Bio Caffé Crema coffee. The top is green with 'REWE Bio' in white. Below that, it says 'CAFFÈ CREMA ganze Bohnen'. There is a small image of a coffee cup and some coffee beans. At the bottom, it says '1000 g'. There are also 'BIO' and 'Fairtrade' logos.	11.99

Product	Image*	Price (€/kg)
Lavazza (Qualita Rossa, whole bean, 1 kg package)		17.99
JJ Darboven Café Intención (organic, Fairtrade certified, ground coffee, 500 g package)		16.98
GEPA (organic, ground coffee, 250 g package)		21.16

*Source of pictures: https://shop.rewe.de/c/kaffee-tee-kakao-kaffee/?sorting=PRICE_ASC

High end: These are high-quality coffees, and mainly consist of Arabica beans. These coffees typically have cupping scores between 80 and 83. They are often single origin, and can be traced back to the country level. Story-telling is important in this segment, especially for branding and marketing purposes.

Usually, the origin of the product is stated clearly on the packaging of these premium coffees, as well as other features that represent an added value for the product, such as social/environmental impact. Certification is also important. Most coffees will be certified according to Fairtrade, organic and/or other certification standards.

High-end coffees can be found in some retail shops, although most coffees will be sold directly by specialty roasters, at their physical or web shop.



Upper end: The upper end segment consists of specialty coffees of excellent quality, often from micro or nano-lots that undergo processing methods such as naturals and honeys. These are fully traceable and single-origin beans that can be traced back to cooperatives, washing stations or estates. The cupping score is often 84 and above.

Sustainability certification is much less common among these upper-end specialty coffees. This is because sustainability practices are often commonplace among buyers active in this segment of the market. After all, the upper-end segment is characterised by long-term contracts between suppliers and buyers and higher prices. Still, the upper-end segment is seeing growth in organic-certified coffees. This is the case as organic farming and trading addresses aspects which are complementary to high quality, such as the prohibition of synthetic inputs and ethical trade practices.

Upper-end coffees are sold directly by specialty roasters at their specialty cafés or through their web shops. Some of these coffees may also be sold at coffee events. To find examples of German specialty roasters and cafés, refer to the [European Coffee Trip](#) website. Examples of events in Germany include the [Berlin Coffee Festival](#) and the [Hamburg Coffee Festival](#). An example of a specialised German coffee web shop where you can find high and upper-end coffees is [Roast Market](#).

Examples of coffees in the high-end and upper-end segments include (prices from 2022):

	Product	Image*	Retail price (€/kg)
High-end and upper-end	Variety: Mixed Heirloom Process: Natural Origin: dimtuDimtu, Guji, Odo Shakiso Woreda, Ethiopia Altitude: 1050 - 1100m Certification: Organic Roaster: Roestbar Package size: 500g package		36.80

Product	Image*	Retail price (€/kg)
Variety: Pacamara Process: Washed Origin: Ataco, Apaneca Iamatepec, El Salvador Altitude: 1600m Flavour: tangerine, sweet lime, toffee Roaster: District Five Coffee Roasters Package size: 1kg		53.00
Variety: Red Bourbon Process: Natural Origin: Nyagishiru, Burundi Flavour: raspberry, elderflower and lemon verbena Roaster: Bonanza Coffee Roasters Package size: 250g		59.60

*Source of pictures: [Roestbar](#), [Bonanza Coffee Roasters](#) and [District Five Coffee Roasters](#)

Value distribution: As shown by the above examples, end market prices for coffee vary depending on the targeted market segment. Green coffee export prices typically amount to only 5% to 25% of the end market prices, depending on the coffee quality, the size of the lot and the supplier's relationship with the buyer. Figure 4 below shows the value distribution of wholesale mainstream coffee (standard quality). Roasters often end up taking more than 80% of the wholesale coffee price. A coffee farmer takes about 10%.

Value distribution for specialty coffees in the high-end and upper-end segments acts differently. These prices may have referencerelate to the international London and New York market prices, but much of the coffee trade takes place on a price differential basis or outright basis. In the specialty segment, the share of added value for farmers tends to be much higher than in the mainstream coffee market, although producing and processing specialty coffee requires substantial effort and work.

The Specialty Coffee Association provides an illustrative example of how exporters should evaluate their [value chain, in terms of different costs and margins](#). You should also refer to the [Specialty Coffee Transaction Guide](#) to get an idea of the current market prices for specialty coffee. This guide quantifies anonymous contract and pricing data of importers and roasters, based on quality, quantity, and the origin of the coffee purchased.

Tips:

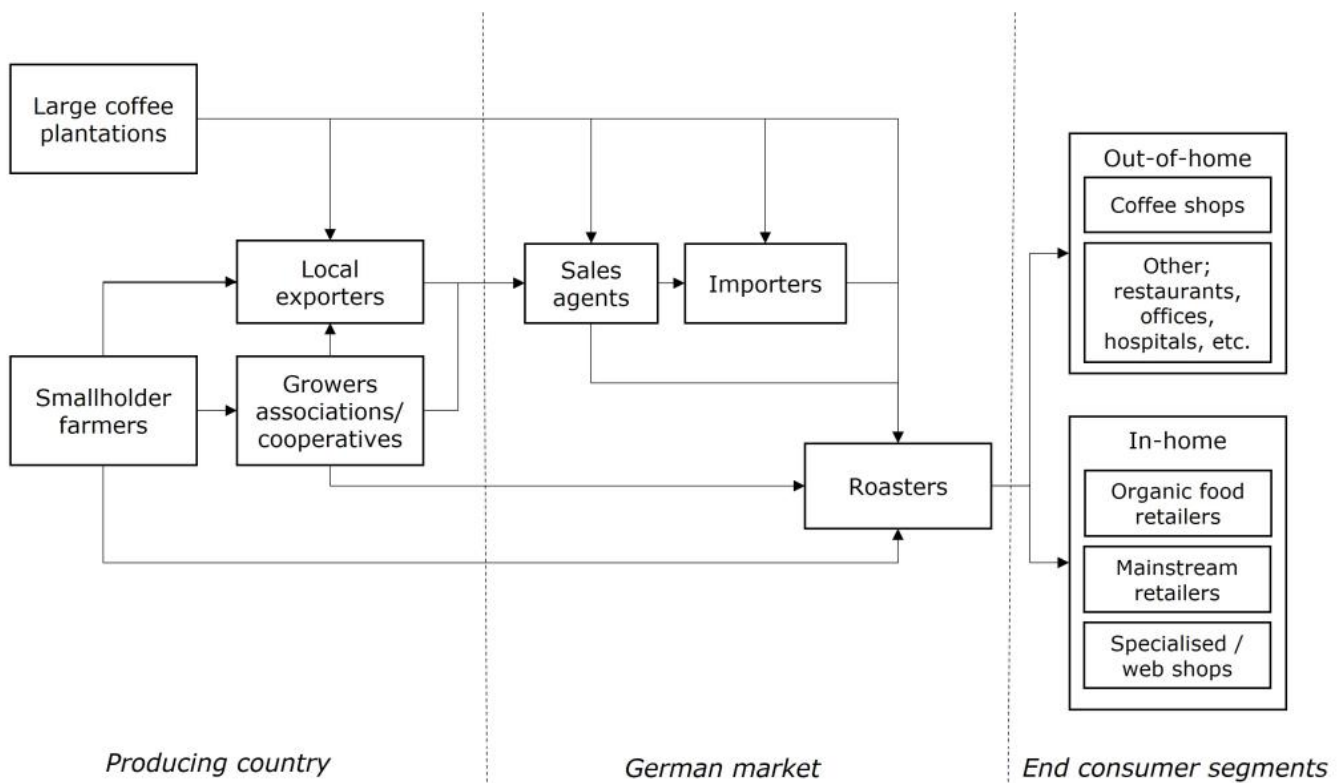
Learn more about mainstream German supermarkets, such as [REWE](#) and [Lidl](#), promoting of standard quality and high-quality coffees. Compare their product assortment and price levels with specialised stores, such as the German web shop [Kaffee Zentrale](#).

Check the website of the [Specialty Coffee Association \(SCA\)](#) to learn more about the high-end and upper-end coffee segments, market trends and main players in the whole sector. Refer to the [German SCA website](#) for more specific information about Germany.

Through what channels can you sell coffee on the German market?

As an exporter, you can use different channels to bring your coffee to the German market. Entering the market will vary according to the quality of your coffee and your supplying capacity. Bear in mind that shortened supply chains are a general trend in Europe. This means that large-scale retailers and coffee roasting companies are increasingly sourcing their green coffee directly from origin. The figure below shows the most important market channels for green coffee beans entering Germany.

Figure 5: Market channels for green coffee in Germany



Source: ProFound

Importers

Importers play a vital role in the coffee market, functioning as supply chain managers. They maintain wide portfolios from various origins, pre finance operations, perform quality control, manage price fluctuations and establish contact between producers and roasters. In most cases, importers have long-standing relationships with their suppliers and customers.

Green coffee beans mainly enter Germany via the [Port of Hamburg](#) and the [ports of Bremen and Bremerhaven](#). Most green coffee traders in Germany are located near these ports. In general, importers either sell the green beans to roasting companies in Germany or re-export them to other European buyers.

Large-scale importers usually have minimum volume requirements starting at around 10 containers, covering a wide range of qualities, varieties and certifications. At the same time, they provide strong support on logistics, marketing and financial operations. Examples of large-scale importers in Germany include: [Neumann Kaffee Gruppe](#), [Benecke Coffee](#) and [List + Beisler](#).

Specialised importers are able to buy small and medium-sized volumes of high-quality and single origin coffees, from micro-lots to full container loads (FCL). These players can also provide marketing expertise, financial support and other green coffee related services, such as logistics, insurance and warehousing. Examples of specialised importers in Germany are: [Rehm & Co](#) (specialty coffee), [Touton Specialties Coffee](#) (specialty coffee), [Interamerican](#) (specialty coffee), [GEPA](#) (fair trade), [Rapunzel](#) (organic and fair trade), [El Puente](#) (fair trade) and [Slokoffie](#) (organic sustainable coffee).

Which companies are likely to be interested in this entry channel? The most interesting channel for you will depend on the quality of your coffee and your supply capacity in terms of volume. If you are an exporter of green coffee beans and can you offer high volumes (10 containers or more), you should look into entering the German market through large importing companies. These companies usually have agents or representative offices in producing countries, which can be your first point of contact.

Specialised traders can be interesting if you have evidence of high cupping scores of at least 80, although some buyers may require scores higher than 84, plus a high degree of transparency and traceability. Keep in mind that many specialised importers prefer to work directly with producers or cooperatives.

Large roasters

Most large roasters buy their coffee beans at the country of origin, although they might also source through importers. Roasters usually perform analysis and cup testing to check the evenness of the roast and to identify any defects that can occur in post-harvest processes, such as fermentation, drying and storage. Large roasters usually blend different qualities of green coffees to safeguard quality consistency. The final product is distributed to retailers and the food service industry.

Roasters can operate under their own brands or private label. Examples of large roasters operating under their own brands in Germany include: [Jacobs](#), [Tchibo](#), [Dallmayr](#), [Melitta](#) and [J.J. Darboven](#). Examples of private label coffee roasters in Germany are: [Wertform](#), [Schirmer Kaffee](#) and [Miko](#).

Which companies are likely to be interested in this entry channel? Supplying directly to large-scale roasters is only interesting if you are able to supply large volumes at consistent quality. If you work with bulk coffees, discuss minimum quality and other requirements, such as certification, with your potential buyer.

Small roasters

Although a growing number of small roasters import green coffee directly from the place of origin, most smaller roasters continue to buy their coffee from importers. This is because not all roasters can take on the additional responsibilities and risks involved in importing directly from the source. Importers help roasters with financial services, quality control and logistics. Nevertheless, small roasters often maintain a direct relationship with their producers because they need detailed information for storytelling in order to market the coffee to their clients (brands or consumers). Small roasters often specialise in single origins and the finest specialty coffees.

Examples of small roasters in Germany directly importing coffee include: [Benslips Kaffee](#), [Flying Roasters](#), [Röstfrisch](#) and [Supremo](#).

Which companies are likely to be interested in this entry channel? Supplying to small roasters may be attractive for producers and exporters that offer high-quality coffees, have micro lots, can guarantee traceability, and are willing to engage in long-term partnerships. Assess whether small or medium-sized roasters are interested in establishing direct trade relationships, and whether you have sufficient resources to organise your exports.

Agents

Dealing directly with different green coffee buyers located in several markets is not always practical. For this reason, many exporters still use agents. Agents act as intermediaries between you, coffee importers and roasters. They have significant market knowledge and know their buyers. Agents can help you assess and select interesting buyers, while they may help buyers to find interesting suppliers in different countries. Some agents are independent, others are hired to make purchases on behalf of a company. [Eugen Atté](#) is an example of a German agent.

Which companies are likely to be interested in this entry channel? If you have limited experience exporting to European countries, agents can be a big help. Agents are also interesting if you have limited quantities of coffee or if you lack financial and logistical resources to carry out trade activities. Working with an agent is also useful if you need a trusted and reputable partner within the coffee sector. Be prepared to pay an extra commission for their work.

Tips:

Find buyers that match your business philosophy and export capacities in terms of quality, volume and certifications. For more tips on finding the right buyer for you, see our study on [finding buyers in Europe](#).

Attend trade fairs and other events to meet potential German buyers. Interesting events include SCA's [World of Coffee](#) (every year in a different European city), [Biofach](#) (organic), [Anuga](#) and [COTECA](#) (all in Germany), the [Berlin Coffee Festival](#) and the [Hamburg Coffee Festival](#). Attending such events can provide you with additional insight into the preferences of German buyers with regard to origin, flavour and sustainability certification.

Check out the [Coffee Business Platform](#) from the website of the [German Coffee Association](#), highlighting several coffee roasters in Germany. It will help you find potential partners and learn more about the German market.

Invest in long-term relationships. Whether you are working through importers or roasters, it is important to establish strategic and sustainable relationships with them. This will help you manage market risks, improve the quality of your product and reach a fair quality-price balance.

See our study on [buyer requirements for coffee](#) to learn about which European market standards and requirements you need to comply with when supplying to Europe.

See our study on [how to do business with European buyers](#) for more information about complying with buyer requirements, how to send samples and how to draw up contracts.

3. What competition do you face on the German coffee market?

In general, competition is higher in the mainstream coffee market, with low added value. This segment is mainly dominated by major suppliers and cooperatives which are able to deliver large quantities so they can compete on price. It is difficult for small and medium-sized companies to compete in this segment.

In the specialty coffee market, the focus is more on quality, origin and sustainability. However, since the volumes required are smaller and more and more producers are focusing on this segment, competition can also be quite high. There are several competitions that aim to identify the highest quality coffees produced worldwide, such as the [Cup of Excellence](#). These competitions might be an interesting entry point for this segment, but entering the segment is likely to require a considerable investment.

New entrants to the market may face competition from already successful coffee exporters, especially because of their already established long-term relationships with buyers. Entering the market as a newcomer requires you to have extensive knowledge of your product assortment, stable quality and volumes, and good communication to start building your own new relationships with buyers. If the potential buyer is not yet operating in your country of origin, it can be more difficult to establish initial contact. You may be required to supply more extensive information about the producing regions, the producing communities and traceability, for example.

Brazil is Germany's main green coffee supplier

Brazil is the world's largest coffee producer and exporter, producing both Arabica (74%) and Robusta (26%), although almost 80% of exports consist of Arabica. Brazil is also Germany's largest supplier. Brazilian exports to Germany reached 442,000 tonnes in 2021, registering an average annual increase of 6.7% since 2017.

Brazil's coffee producing areas are relatively flat, which has [intensified the use of mechanical pickers](#). This has reduced labour costs in Brazil's coffee production, but also has lower quality, as machines do not distinguish between ripe and unripe cherries. Coffee prices in Brazil went down, especially in relation to other coffee producing countries. Brazil mainly produces natural and pulped natural coffees. Low-grade Brazilian Arabica is mostly used in blends.

Although the country is known mainly for [exporting large volumes of standard quality](#), the country also has a strong reputation as a producer of speciality coffees. The sector receives considerable institutional support from the [Brazil Specialty Coffee Association](#), which aims to elevate the quality standards and enhance value in the production and marketing of Brazilian coffees.

Examples of exporters of speciality coffees in Brazil are [Burgeon](#) and [Bourbon Specialty Coffees](#). Large Brazilian exporter [Costa Café](#) has also started exporting speciality coffees in addition to its regular mainstream coffee exports.

Vietnam is the second-largest coffee supplier to Germany

Vietnam is the world's second-largest coffee producer. Over 96% of Vietnamese coffee production consisted of Robusta coffees in 2021. Vietnam's coffee production is strongly focused on creating large volumes of standard quality coffees mostly directed to the instant coffee market.

[Germany is the largest market for Vietnamese coffee](#). Vietnam's total coffee exports to Germany reached approximately 206,000 tonnes in 2021. Vietnamese exports to Germany decreased by 5.1% per year on average between 2017 and 2021.

The lower export volumes can be explained by the COVID-19 pandemic and the fact that [Vietnam's Robusta exports faced fierce competition](#) from the Brazilian Conilon and Robusta beans from other countries. However, trade between both countries is [expected to be boosted by the European Union-Vietnam Free Trade Agreement \(EVFTA\)](#) which [entered into force in August 2020](#). This agreement removed tariffs on all green, roasted and processed coffee from Vietnam.

Examples of large Vietnamese coffee exporter groups include [Simexco Daklak](#), [Intimex Group](#), [Tin Nghia Corporation](#) and [Mascopex](#).

Honduras: largest Central American coffee supplier to Germany

Honduras is the third-largest supplier of green coffee to Germany, supplying 90,000 tonnes in 2021. Honduran coffee exports to Germany decreased by 3.5% per year on average between 2017 and 2021. The fall in exports may be related to [decreasing yields and lower production output in the country](#).

The Honduran Coffee Institute [IHCAFE](#) has been promoting the production of value-added coffees, either through certification or by actively improving quality. The country has grouped [coffee production and quality specifications into six different regions](#) according to differences in microclimates and soil composition.

In addition to the growing reputation as a high-quality coffee supplier, a relatively large share of the coffee that Honduras supplies is organic. According to [FiBL & IFOAM The World of Organic Agriculture 2022](#), about 24,000 hectares were dedicated to organic coffee farming in Honduras, approximately 5.7% of the total planted coffee area in the country. Honduras is one of the largest organic coffee suppliers to Europe. In 2021, exports of specialty and certified coffee amounted to [54%](#) of total exports.

Examples of successful exporters in Honduras are [Asoprofan](#), [Cafico](#), [Capiro Coffee Export](#) and [Aruco](#).

Uganda's coffee exports to Germany have been increasing steadily

Another major coffee supplier to Germany is Uganda. In 2021, Germany imported 55,000 tonnes from Uganda. Between 2017 and 2021, green coffee imports from Uganda registered an average annual growth rate of 7.9%.

Coffee in Uganda is mainly grown by smallholder farmers, who are organised in the [NUCAFE](#), the national umbrella coffee farmers' organisation. NUCAFE's has more than 213 farmer cooperatives and associations as are NUCAFE members. Approximately [89%](#) of total Ugandan production is Robusta variety.

The [Uganda Coffee Development Authority](#) (UCDA) helps to promote and guide the development of the Ugandan coffee industry through quality assurance, research and improved marketing techniques. UCDA has also encouraged the production and marketing of high-quality Arabica coffees. In addition, [private companies have also invested in Uganda, focusing on sustainable production approaches](#).

The fact that Uganda is the [only African country where green coffee is available throughout the year](#) gives the country a strong competitive advantage. However, disruptions in weather and participation patterns, due to climate change, are leading to increased supply chain difficulties.

Examples of Ugandan exporters are [ACPU](#) and [Great Lakes Coffee](#).

Colombia is a large supplier of certified coffees

Colombia is the fifth-largest supplier of green coffee to Germany. In 2021, Colombia supplied over 54,000 tonnes to Germany, representing an annual average decrease of 2.4% in the period 2017-2021 period. This drop is explained by Colombia's [lower coffee production and exports in 2020-2021, as a consequence of supply chain disruption and adverse weather conditions](#).

Colombia is the world's largest producer of washed Arabica. The [Colombian Coffee Growers Federation](#) strategically promotes and markets Colombian coffee, consolidating the country's established image and brand for high-quality coffees. The Café de Colombia trademark is a [registered protected geographical indication \(PGI\)](#) in Europe. Colombia is unique in this regard, as it is the only coffee-producing country to have obtained this designation.

[Colombia is also committed to sustainability](#) and it is an important producer of certified coffees. Colombia is the [second-largest producer of Rainforest Alliance-certified coffees and the largest producer of Fairtrade-certified coffees](#). The wide availability of certified coffees has allowed green coffee exporters to access various markets

and segments in Europe.

Examples of successful Colombian cooperatives or private organisations exporting coffee to the international market include [InConexus](#), [Red Ecolsierra](#), [La Maseta](#) and [Cadefihuila](#).

Ethiopia: producer of high-value organic Arabica coffees

Ethiopia is the world's fifth-largest coffee producer and Germany is its largest coffee export destination. German imports from Ethiopia amounted to 47,000 tonnes in 2021. Between 2017 and 2021, Germany's green coffee imports from Ethiopia grew at an average annual rate of 3.7%.

Ethiopian producers rely on Ethiopia's unique reputation as a coffee-growing country, since it is considered by many to be the birthplace of coffee. Ethiopia produces Arabica coffees only. The country's coffees have high potential in the specialty market. A large share of its coffees are also organic. In fact, according to [FiBL & IFOAM The World of Organic Agriculture 2022](#), Ethiopia has the world's largest organic coffee area at over 182,000 hectares in 2021.

Almost all coffee in Ethiopia is traded on the [Ethiopian Commodities Exchange \(ECX\)](#). However, since 2017 exporters have also been allowed to sell directly to international buyers, due to recurring issues relating to the [lack of traceability of farm-specific or organic certified coffees sold through ECX](#). The [enactment of the Coffee sector reform in 2018/19 has addressed traceability and the other main challenges facing the sector](#), such as improved services by ECX and strengthened research and development to breed high-producing coffee varieties.

Examples of Ethiopian exporters include [Yirgacheffe Coffee Farmers' Cooperative Union](#) and [EthioGabana](#).

Tips:

Identify your potential competitors. To be successful as an exporter, it is important to learn from them too. Look into their marketing strategies, the product characteristics they highlight and their value addition approaches. Successful companies that already export to the European market from which you can learn include, for example, [ACPCU](#) (Uganda), [O'Coffee](#) (Brazil), [Bourbon Specialty Coffees](#) (Brazil) and [La Meseta](#) (Colombia). Another interesting exporting company to learn from is [Caravela Coffee](#), which has a wide portfolio of specialty coffees from Latin America, facilitates contact between roasters and producers, and has set up representative offices in destination markets.

Identify and promote your unique selling points. Give detailed information about your coffee-growing region or origin, the varieties, qualities, post-harvesting techniques and certification of the coffee you offer. You can also tell the history of your organisation, your coffee growing farm and the passion and dedication of the people working there. These are all elements that make your company unique.

Actively promote your company on your website and trade fairs. Quality competitions also provide good opportunities to share your story, such as [the auctions organised by the Cup of Excellence](#).

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 Arabica](#) or [Q Robusta Grader certificate](#) to be able to cup and score your coffee through smell and taste according to international standards.

Learn more about developments in the organic sector. For specific information about coffee, refer to pages 99-101 in the [2022 edition of The World of Organic Agriculture](#).

Work with other coffee producers and exporters in your region if your company size or product volume are too small. As a group, you can promote good-quality coffee from your region and be more attractive and more competitive in the European market.

Develop long-term partnerships with your buyers, including always complying with their requirements and keeping your promises. This will give you a competitive advantage, more knowledge and stability in the German market. See our [tips on doing business with European coffee buyers](#) for more information.

Gustavo Ferro and Lisanne Groothuis of [ProFound – Advisers In Development](#) carried out this study on behalf of CBI.

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