European market potential for organic coffee

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The European market for organic coffee is gaining momentum after a short dip in organic imports following the COVID-19 pandemic and various economic challenges. A political shift in Europe and a rise in demand for sustainable products are boosting sales of organic coffee. Importers, retailers and roasters (both large and small) are key to the organic-coffee value chain. They provide a variety of trading opportunities. Germany, Belgium and Sweden are the market leaders.

Contents of this page

1. Product description

Organic production aims to sustain the health of people, soils and ecosystems. It excludes synthetic fertilisers, pesticides and genetically modified products. In addition, organic products require specific practices for plant protection and soil conservation.

Certified organic coffee is defined as coffee that has undergone an organic-certification process. This means coffee that is ‘organic by default’ (without certification) cannot be sold as organic on the European market. The organic-certification process includes standards for farming, shipping, labelling and more. The website of the European Commission provides an overview of what organic production entails. If coffee is certified as organic, it may carry the EU organic logo.

Figure 1: The EU organic logo

Source: European Commission

In Europe, coffee can have any of a number of different organic labels. The main label that consumers should be aware of is the official EU organic logo. In addition, there are various national and private certification labels. Examples of national organic labels include the German Bio-Siegel and the French AB mark. Private sector labels include Naturland, Demeter, Bird Friendly and Slow Food Presidia. In general, the national labels require you to obtain organic certification, and private sector labels have additional requirements. You can read more about the requirements of these labels in our study on entering the European market for organic coffee.

Almost all coffee that is imported into Europe is green coffee. This also applies to organic coffee. For this reason, this document focuses on green coffee beans. This corresponds to the HS codes 090111 (coffee, not roasted, not decaffeinated) and 090112 (coffee, not roasted, decaffeinated). There is no specific code for organic (green) coffee.

Tip:

Activate your browser's translation function to read this study in your native language.

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

Europe is the world's largest coffee-consumption market

Europe accounted for 30.4% of all global coffee consumption in 2023/2024. This share amounts 3.2 million tonnes of coffee. Asia-Pacific is the second-largest consumption market, with a share of 25.8%, followed by North America (17.5%) and South America (15.8%). In 2023, European imports declined slightly (by 9.7%), mainly due to a reduction in global production.

Tip:

Read our study on the demand for coffee on the European market to learn more about coffee consumption in Europe.

Europe offers a large, but declining market for organic products

The EU is a major importer of organic products, including coffee, bananas and cocoa. In 2023, the EU imported 2.7 million metric tonnes of organic products, as compared to 1.8 million metric tonnes imported by the United States.

Despite its large volume of imports, the European demand for organic products is in decline. Total imports of organic agri-food products in the EU have decreased from 2.73 million tonnes in 2022 to 2.48 million tonnes in 2023. Organic imports have reached the lowest rates since 2018. Organic consumption has dropped by 5% in the EU. The decreased imports are due mainly to increasing prices. High inflation rates are driving consumers towards cheaper (non-organic) products. The organic market is now competing with 'premium' labels (such as 'local', 'fresh' and 'sustainable'). These labels may attract consumers, as they align with values relating to health and sustainability, and they are often cheaper.

Source: Traces

The European market offers a stable market for organic coffee

In 2023, European imports of organic green coffee amounted to 133 thousand tonnes. This figure does not include re-exports within the EU. Whereas imports of organic coffee increased by an average of 5.4% each year from 2019 to 2021, they declined by 1.1% each year between 2021 and 2023. Figure 3 presents an overview of the European demand for organic coffee.

Source: Traces and Eurostat

While green-coffee imports have shown major fluctuations, organic-coffee imports have remained very stable in recent years. You can read more about the fluctuating imports in our study on the demand for coffee on the European market.

The main entry points for organic coffee in Europe are Hamburg, Antwerp and Rotterdam. These are all key European ports. They regulate the distribution of coffee, including organic coffee.

Tips:

- Read our study on the market potential for certified coffee and the market potential for multi-certified coffee to learn about various sustainability schemes.
- Read our study on the EU Green Deal and how it will impact your business to learn about the European sustainability standards and their expected development.
- Learn more about global organic developments in the European Commission's report on EU imports of organic agri-food products.
- Look for coffee festivals, trade shows or other coffee events in Europe or online.

3. Which European countries offer the most opportunities for organic coffee?

The EU's six largest importers of organic green coffee in 2023 were Germany (58 thousand tonnes), Belgium (30 thousand tonnes), Sweden (13 thousand tonnes), France (13 thousand tonnes), Italy (6 thousand tonnes) and Spain (4 thousand tonnes). Hover your mouse over the countries in Figure 4 to see how many tonnes of green organic coffee were imported by EU countries in 2023.

Source: Traces

Germany as the primary organic and coffee-consumption market

Germany is the largest importer of green coffee beans in Europe. In 2023, Germany imported 986 thousand tonnes of green coffee (organic and non-organic combined). Between 2018 and 2022, the market remained stable, with a minor yearly growth rate of 0.5% since 2018. In 2023, however, imports declined by 17%.

Certified organic is no longer a niche in Germany. The country is the largest importer of organic products in Europe. In 2022, its organic retail sales reached approximately €15.3 billion. Germany has a relatively high net disposable income: €35,234 per household per year. This is higher than the EU average of €27,566 per household. This greater financial flexibility allows Germans to afford premium-priced goods. This includes organic products, which tend to be more expensive.

Germany is Europe's main importer of organic coffee. In 2023, it accounted for 44% of all European organic green coffee imports. Between 2019 and 2023, the country's imports of organic green coffee grew by an average rate of 3.7% each year. Although it declined by 4.8% in 2023, this was far less than the overall 17% decline of green-coffee imports. Of all German imports of green coffee, 6.5% is organic.

The German coffee association, Deutscher Kaffeeverband, is the country's association for coffee trade. Germany hosts a variety of coffee-related events. This includes the Berlin Coffee Festival, Fair Friends in Dortmund, and the Heldenmarkt. The latter two are events for organic and sustainable products. Coffee is a key part of these events. These festivals could be good places to explore opportunities in the German market.

In the coming years, imports of organic coffee are expected to recover. Given that Germany is Europe's largest organic market and largest coffee importer, coffee exporters will find some of the best opportunities for organic coffee in that country. At the same time, however, exporters will also encounter a competitive market, as Germany is known as the prime destination for producers of organic-certified coffee.

Tips:

- Visit German trade fairs to meet potential buyers. BIOFACH, a German trade organisation, organises well-known fairs for the organic-food sector.
- Target small German organic roasters directly. Popular organic-coffee roasters in Germany include GEPA, Kaffekapslen, and Gunter Coffee. These smaller roasters trade their organic coffee directly with producers, without intermediaries.

Belgium is one of Europe's largest re-exporters of organic coffee

In 2023, Belgian imports of organic green coffee amounted to 30 thousand tonnes. This accounted for 22% of all European imports of organic green coffee. Belgian imports grew by an average yearly rate of 3.7% between 2019 and 2023. Demand grew strongly in 2022/2023, with a growth rate of 13.8%. Belgian organic imports account for 10.8% of all green-coffee imports.

Belgium's retail landscape is diverse. Both large chains and small stores sell organic coffee. Demand has pushed large retailers (like Delhaize, Colruyt and Carrefour) to expand their organic lines. They often feature organic coffee brands at competitive prices. In 2023, the retail coffee market was worth about €600 million. Organic coffee made up about 6–8% of this market.

Belgium has a vibrant market for specialty coffee. Small-scale roasters and cafés are popular, especially in the larger cities. Specialty coffee roasters are especially numerous in cities like Brussels, Antwerp and Ghent. Local roasters (like OR Coffee Roasters, Caffènation and Mok Specialty Coffee) are known for directly sourcing coffee from producers.

Belgium is home to a competitive coffee market. Both local and foreign companies compete for market share. Key players in the Belgian market for organic coffee include Beyers Coffee and the Java Coffee Company. Beyers is one of the largest roasters in Belgium, producing mainly private-label coffee. Java is known for its organic, fair-trade offerings. A growing number of small, artisanal roasters are joining these companies. They focus exclusively on organic or specialty coffees.

The BioXpo-Vitasana is Belgium's largest trade fair for organic and sustainable products. It attracts many industry professionals, including coffee importers, roasters and retailers. In addition, the Specialty Coffee Association Belgium is vital for the specialty and organic coffee sectors. Events like Belgian Coffee Week and the Brussels Coffee Festival are excellent for networking. They showcase products to an engaged audience.

In 2023, Belgium suffered a very large drop of 25% in all imports of green coffee (organic and non-organic combined). This was caused mainly by a global production shortage. This had a major impact on Belgium, as a major re-exporter. Belgian imports of organic coffee are expected to increase in the coming years, as European import levels recover.

Sweden as a leader in sustainability

Swedish imports of organic green coffee amounted 13 thousand tonnes in 2023. Between 2019 and 2023, the country's imports declined at an average rate of 7.2% per year. This was caused mainly by a decline in general coffee imports (organic and non-organic combined). Coffee imports declined from 96 thousand tonnes in 2019 to 83 thousand tonnes in 2023. In 2023, 15.9% of all green-coffee imports to Belgium were organic. This was the highest share for all European countries.

Swedish consumers have one of the highest levels of coffee consumption per capita, averaging around 7.7 kilograms per person per year. The net disposable household income —about €34,000 per year — is above the European average. This allows Swedish consumers to buy higher-priced organic products. In combination with high coffee consumption, Sweden is highly relevant as a destination for organic coffees.

The major roasters in Sweden are Arvid Nordquist, Gevalia, Zoégas and Löfbergs. These companies ship all their green coffee beans to one of the country's ports: Gothenburg, Helsingborg or Gävle. These roasters also account for a large share of the organic-coffee segment. Smaller-scale roasters (like Johan & Nyström and Drop Coffee) are also noteworthy, focusing on high-quality, organic and direct-trade coffees. Note that Drop Coffee is an organic-certified specialty-coffee roaster.

Like all large roasters, the main Swedish roasters buy most of their green coffee beans from coffee traders. Examples include the German Neumann Kaffee Gruppe, ECOM and the British Volcafe. The Swedish Coffee Association and events like the Stockholm Coffee Festival are important for promoting the coffee culture.

Despite the relatively small coffee market, Sweden offers many opportunities for exporters of organic coffee. In 2023, the Swedish imports of green coffee (organic and non-organic combined) decreased by 9.7%. As imports recover, organic imports are expected to grow as well.

France values its sustainability-focused cuisine

Imports of organic green coffee to France amounted to 13 thousand tonnes in 2023. Imports of organic coffee increased by 32% in 2019 and by 57% in 2020. With a yearly average increase of 0.7%, demand remained relatively stable between 2021 and 2023 in absolute value. Between 2021 and 2023, organic-certified imports as a share of all green-coffee imports remained between 8 and 9%.

The average French person drinks an average of 5.5 kilograms of coffee each year. French consumers are thus amongst the world's leading coffee drinkers in the world. In France, the net disposable household income is approximately €31,000 per year.

Malongo and Café Michel are well-known importers of organic and Fairtrade coffee in France. Retailers (like Leclerc and Intermarché) are increasingly offering organic coffee options at competitive prices. This is making it more accessible to a broader consumer base. Roasters (such as Les Cafés Dagobert, Lomi and Brûlerie de Belleville) are also significant players. They offer high-quality, organic coffee sourced directly from producers.

France does not have an overarching coffee association. The Specialty Coffee Association France focuses on high-end coffee, which sometimes includes organic certification. Natexpo and SIAL Paris are major exhibitions of organic products. The Paris Coffee Show is a significant event in the French coffee industry. It attracts coffee professionals from across Europe. The event focuses on organic coffee. It includes tastings and discussions on trends in the organic-coffee market.

The French market offers a large and relatively stable market for organic coffee. We do not expect any major shifts in the coming years. The French market for organic coffee can thus be a stable market for planning your exports.

Italy is a major coffee importer

Italian imports of organic coffee are about half the level of France. Imports of organic green coffee amounted to 6.4 thousand tonnes in 2023. They increased by 15% in 2019 and by 73% in 2020. As an immature organic market, decisions by large roasters can have a major influence. Between 2021 and 2023, organic imports decreased by an average of 10% per year. Italian organic imports account for 1.0% of the country's total green-coffee imports.

Italy is Europe's second-largest importer of green coffee beans. It is also a key player in the roasted and ground-coffee sectors. It exports much of its production, with key exporters including Lavazza and illy. Both of these companies export coffee to other European countries. They also export some organic coffees.

Italian households have an average net disposable income of € 26,000 per year. Although this is slightly below the European average, however, household income is significantly higher in major urban centres (like Milan and Rome). Organic products, including coffee, are usually more expensive than conventional products are. This tends to limit their appeal, especially amongst low-income consumers. In contrast, urban middle-class and affluent consumers prefer organic and specialty coffee. This reflects a shift towards high-quality, premium products. Younger consumers — especially millennials and Gen Z — are the main drivers of this shift.

Café-rich cities (like Milan, Rome and Florence) are the main drivers of the organic trend in Italy. In the specialty-coffee segment, small artisanal roasters are gaining popularity. Examples include Ditta Artigianale and Caffè Vergnano. Supermarkets (like Coop and Esselunga) have expanded their organic offerings to meet rising demand. This includes organic coffee. These retailers often work with wholesalers to source organic coffee. Meanwhile, the discount retailer Eurospinis now selling organic coffee, thus making it accessible to more consumers.

The Italian coffee industry has a variety of trade groups and events. They promote both conventional and organic coffee. The Istituto Nazionale Espresso Italiano (INEI) is a key coffee-trade group. It advocates for high standards in Italian espresso and promotes Italian coffee worldwide. Slow Food is another movement whose goal is to ensure that everyone across the globe has access to food that is good, clean and fair.

The Trieste Coffee Expo and the Milan Coffee Festival are key national coffee events. They now focus more on organic and specialty coffee. These events attract industry professionals, from roasters to retailers, importers, and distributors. Organic and sustainable product fairs (like the SANA fair in Bologna) help organic-coffee producers and brands reach a wider audience.

The Italian market offers some opportunities for organic exporters, mainly due to its size. No large shifts are expected to occur in the coming years.

The Spanish market for organic coffee is highly volatile

Spain’s imports of organic green coffee amounted to four thousand tonnes in 2023. The country’s imports of organic coffee have been highly volatile. They surged by 47% in 2019, dropped by 21% in 2020 and rebounded with an increase of 34% in 2021. In 2022 and 2023, they grew by 34% and 14%, respectively. Despite this volatility, organic-coffee imports have increased by 134% since 2018. In 2023, the organic coffee accounted for 3.0% of all green-coffee imports.

The average net disposable income per household in Spain is €24,287 per year. This is lower than the EU average. This means that consumers in the upper-middle and upper classes are the most likely to be able to afford organic coffees. Spain is one of Europe’s key importers of green coffee, importing 248 thousand tonnes from producing countries in 2023.

Large Spanish roasters include Cafés Candelas and Cafés La Mexicana. Both of these companies have launched organic lines to meet rising consumer demand. These brands dominate both the supermarket and the hospitality sectors. They supply coffee to cafés, restaurants and hotels across Spain. Smaller roasters (like SlowMov in Barcelona and Hola Coffee in Madrid) are also gaining popularity. Spain’s specialty-coffee sector is growing. Small, independent roasters focus on organic, ethically sourced beans. For example, roasters such as Toma Café in Madrid, Nomad Coffee in Barcelona and Cafés El Magnífico in Barcelona source their coffee directly from producers.

Spain has a number of industry groups and trade events that support both coffee markets. They focus on both conventional and organic coffee. The Spanish Coffee Federation represents Spain’s coffee importers, roasters and retailers. In recent years, the organisation has increasingly focused on promoting sustainability and organic certifications within the industry.

Trade events like Alimentaria(in Barcelona and BioCultura(Spain’s leading organic fair) are great platforms for producers and distributors of organic coffee to showcase their products. These events attract key industry players, like retailers and wholesalers. They offer chances for networking and connecting with potential buyers. Other industry events include the Madrid and Barcelona coffee festivals, which highlight Spain's growing specialty-coffee landscape. These festivals celebrate artisanal and organic coffee. They also attract coffee professionals and consumers seeking high-quality, ethical products.

Tips:

- Read our tips on how to find buyers in the European coffee market to learn how to find buyers in the European market.
- Read our studies on the country-specific coffee markets in Europe (like the German, French, British, Dutch and Scandinavian markets) to understand more about your target audience.
- Refer to the website of the Research Institute of Organic Agriculture (FiBL) to learn more about the organic markets in Europe.
- Before engaging in an organic-certification scheme, verify with your potential buyers whether they require certification and whether it will offer you a competitive advantage over other suppliers to the European market. This is important, as a relatively large share of certified coffee worldwide is not sold as such. Organic certification is extremely demanding — much more so than the other labels.

4. Which trends offer opportunities or pose threats in the European organic coffee market?

The European organic-coffee market is evolving. After years of growth, the demand for organic coffee is stagnating. Consumer interest remains high, however, and health is a main driver of organic consumption.

Increasing interest in healthy consumption

According to a 2023 study, 60% of European consumers are now more focused on healthier food and drink consumption. Health and wellness align with the trend towards sustainability. Personal health and environmental sustainability overlap for Europeans. Pesticides and non-eco-friendly practices are both considered unhealthy and are having a negative impact on the environment. Organic coffee is free of synthetic pesticides and fertilizers. This makes it interesting to health-conscious Europeans. This health trend has grown since the COVID-19 pandemic, and it is strongest among adults between the ages of 18 and 34 years. This group is consuming less processed food and prioritising sustainability and ethics in their purchases. Organic coffee is thus a perfect fit.

The growing health awareness in Europe also poses several challenges. For example, it has raised concerns about caffeine intake. Younger Europeans are more aware of the health risks of high levels of caffeine, including anxiety and sleep issues. These concerns have made decaffeinated coffee more popular. The demand for decaffeinated coffee has increased by 98% since 2019. Exporters could have an opportunity to cater to this growing market.

The biohacking movement is another trend affecting the European market for organic coffee. It seeks to optimise health and performance through diet and lifestyle changes. Younger consumers want coffee products that do more than energise. Some organic coffee brands are adding adaptogens and nootropics to meet this demand. They are also adding mushroom extracts. These ingredients reportedly boost mental clarity, reduce stress and increase energy. They thus align with the biohacking trend.

Brands like Four Sigmatic and RYZE have launched functional coffee blends in Europe. These brands target health-conscious consumers who want more than just a caffeine boost. Producers looking to export to Europe could benefit from the biohacking trend. It might help them differentiate their products by emphasising health benefits of their beans (such as low-caffeine). Another example of a roaster tapping into this trend is Exhale. Based in the United Kingdom, this company focuses on offering healthy coffee. It refrains from dark roasts, to keep nutrition values high. Exhale's coffee is organic and processed without chemicals.

Fincamigos (part of Cafexport) is a Colombian farm that taps into the biohacking trend. The company supplies low-caffeine Laurina coffee to Sucafina. Fincamigos and Sucafina have a close relationship, as the farm serves to cultivate exotic varieties.

European legislation is becoming stricter

The European Green Deal is making legislation much stricter. Although most legislation applies to European buyers, they also have indirect effect on suppliers worldwide. The European Deforestation Regulation is one example that is having a major influence on the sector.

Specific legislation for organic coffee is also becoming stricter. The new 2018/848 Organic Regulation came into force on 1 January 2022. A transition period applied until 31 December 2024, allowing suppliers to continue following the old rules. Beginning in 2025, this will no longer be an option.

The new 2018/848 regulation will have a major impact on suppliers of organic coffee, and especially smallholder farmer groups. They will need to comply with the same rules as European farmers, which are very strict. A very large share of organic farmers will have to set up new legal identities. Stricter control is expected as well.

Tips:

- Read more about these stricter regulations in our report on entering the European market for organic coffee, study on what requirements coffee must meet and tips on how to become EUDR compliant.
- If you produce organic coffee, target roasters aiming to sell healthy coffee directly.
- Read our study on trends that offer opportunities or pose threats in the European coffee market for a more comprehensive understanding of developments in the European coffee industry.
- Communicate your sustainable practices. Some (mostly small-scale) buyers will be interested in your stories. This will further highlight the sustainability of your organic products.

Molgo Research carried out this study in partnership with Ethos Agriculture on behalf of CBI.