

# Entering the United Kingdom's coffee market

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The United Kingdom has a very diverse coffee market, with importers and roasters of various sizes and profiles. The growing importance of the specialty market brings interesting opportunities for exporters of high-quality coffees, particularly single origin. Given the importance of sustainability in the British coffee market and the widespread availability of certified coffees, certification will be a key entry requirement for coffee exporters in most market segments.

## Contents of this page

1. [Which requirements and certification must coffee comply with to enter the British market?](#)
2. [Through what channels can you get coffee on the British market?](#)
3. [Through what channels can you get coffee on the British market?](#)
4. [What competition do you face on the British coffee market?](#)

## 1. Which requirements and certification must coffee comply with to enter the British market?

You can only export green coffee to the United Kingdom (UK) if you comply with British import requirements. As of 1 January 2021, European Union (EU) trade agreements no longer apply to the UK. However, to ensure continuity for non-European suppliers and UK businesses, the UK has established new trade agreements with countries, largely retaining the trading agreements that previously applied. A [complete overview of these trade agreements and their status](#) can be found online.

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 British 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, namely:

- Pesticides (maximum residue levels (MRLs) for each pesticide are still regulated in the UK under EU [Regulation \(EC\) No 396/2005](#); for an overview of all MRLs consult the [UK pesticide database](#))
- 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’;

- Salmonella (although coffee is considered low-risk).
- Mineral Oil Aromatic Hydrocarbons (MOAHs): Green coffee can get contaminated with MOAHs at any stage of the supply chain. Officially, no maximum MOAH levels have yet been set in Europe.

## Quality requirements

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

### Assessment 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.

British buyers will also perform a green coffee assessment. This includes a screen-size assessment, 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 assess 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 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 \(SCA\)](#) 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 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 the United Kingdom 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 kilogrammes;
- For certified coffee: name and code of the inspection body and the 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 materials 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 the United Kingdom 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 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 packaging: 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 the website of the [Food Standards Agency of the United Kingdom](#) for more information about British import regulations.

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 maximize success in the market

### Additional food safety requirements

Expect buyers in the United Kingdom to request extra food safety guarantees from you. Regarding production and handling processes, you should consider:

- 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 the Rainforest Alliance/UTZ, often incorporate GAPs 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 at least 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), polyaromatic 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 a European-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.

## Additional sustainability requirements

Corporate responsibility and sustainability practices are growing in importance in the entire European coffee sector. Leading companies in the British coffee market, such as trader [ED&F Man](#), have sustainability policies highlighting their relationship with farmers, the transparency of their operations, as well as their social and environmental impact at origin. An example of a corporate sustainability scheme is [Olam's AtSource](#). This is a sustainability insights platform which helps customers to meet multiple social and environmental goals and guarantees traceability in agricultural supply chains.

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 on the mainstream coffee market and are usually part of the sustainability strategy of traders, coffee roasters and retailers. British players along the coffee supply chain handle a wide range of certified coffees. Examples include roaster [Lincoln & York](#) and retailer [Tesco](#), which all handle at least three of the four main certification schemes for coffee (Fairtrade, Rainforest Alliance/UTZ, organic and 4C) as part of their sustainability policy.

In addition, the UK government is working on how to implement the [due diligence laws on forest risk commodities](#), which are part of the [Environment Act](#). These laws will make it illegal for larger businesses operating in the UK to use commodities (such as coffee) that have been produced on land illegally occupied or associated with large-scale forest loss. Once it is operational, buyers may forward some of the consequences of these regulations onto coffee suppliers and/or exporters.

### 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.

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.

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

Find out which standards or certifications are preferred by potential buyers 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 the United Kingdom](#) to identify potential partners. 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

### Organic

To market your coffee as organic in the British market, it must comply with the relevant regulations of the UK. The following regulations apply: [Retained Council Regulation \(EC\) 834/2007](#), [Retained Commission Regulation \(EC\) 889/2008](#), [Retained Commission Regulation \(EC\) 1235/2008](#) and [The Organics Products Regulations 2009](#).

Before you can market your green coffee as organic, an accredited certifier must audit your growing and processing facilities. Refer to this [list of control bodies and control authorities](#) that are recognised in the United Kingdom, to ensure that you are always working with an accredited certifier. To become certified as an organic producer, you can expect a yearly inspection and audit which aims to ensure that you comply with the rules on organic production.

All organic products that are imported into Great Britain (consisting of England, Scotland and Wales and their associated islands) must have the appropriate electronic [GB Certificate of Inspection](#) (COI). If you want to export to [Northern Ireland](#), you will need an EU electronic COI, which can be completed by using the European Commission's electronic [Trade Control and Expert System](#) (TRACES). All 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 UK and will be sold as a conventional product.

Please note that on the British market, private labels such as [Soil Association](#) are very popular. You can find the specific [standards](#) for this label on their website.

Figure 3: Soil Association Organic Symbol



Source: Soil Association Web Page

### Fair trade

Fair trade-certified coffee also finds a large market in the United Kingdom. The most common fair trade standard in the United Kingdom is [Fairtrade](#). The accredited certifier for Fairtrade is [FLOCERT](#). Another, less common, standard on the British market is [Fair for Life](#) and [SPP](#) (Small Producers' Symbol).



## 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 relationships, and high transparency and traceability from source to consumer. This means that buyers of these coffees impose 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 the cup, from variety to processing, from external suppliers to farmers, and you must be willing to share these honestly. Other than that, direct trade may result in more frequent coffee farm visits and product assessments by your buyers, as well as long-term business relations.

### Tips:

Learn more about the rules for trading organic food on the [UK's government website](#) and the [Organic Export Info website](#).

Refer to these [explanatory notes](#) for help to fill out a COI.

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 programs 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. Visit 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 British buyer who is familiar with sustainable or fair trade products, for instance using the [FLOCERT customer database](#). The [website of Fairtrade UK](#) also lists its British partners.

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 if you have more than one certification, to save time and money. Also, investigate the option of group certification with other producers and exporters in your region.

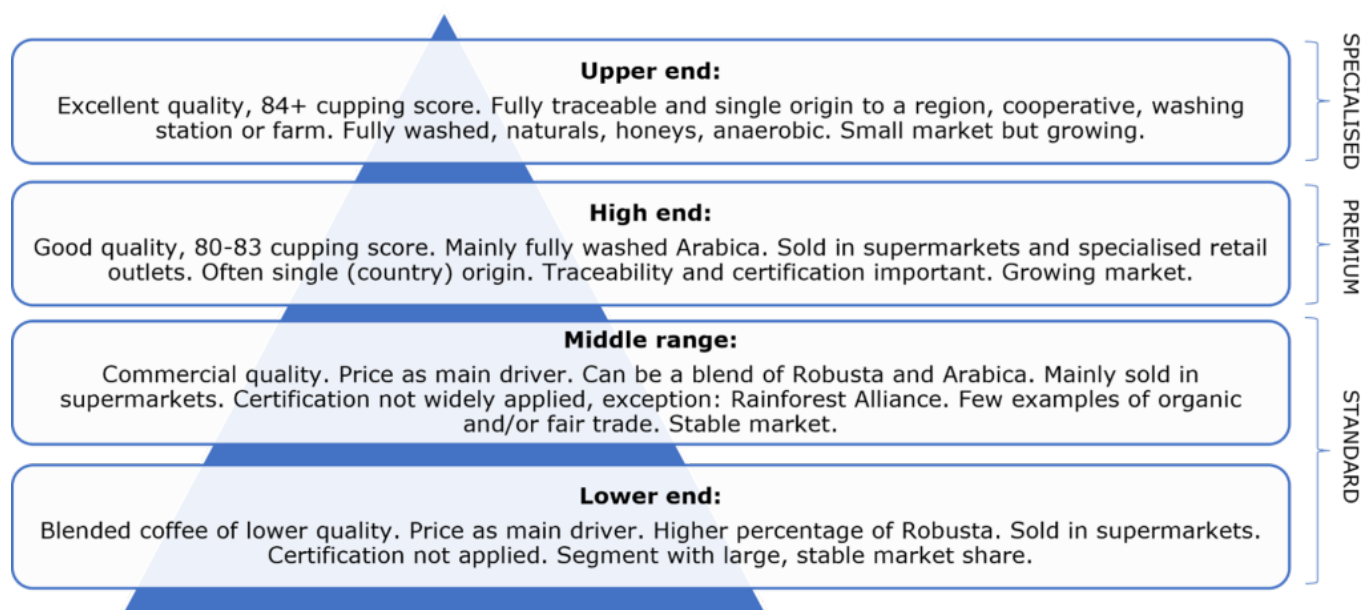
## 2. Through what channels can you get coffee on the British market?

The British end market for coffee 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 British market through an importer, but there has been an increase in direct trade between coffee roasters and producers.

### How is the end market segmented?

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

Figure 4: Coffee end market segmentation by quality



Source: ProFound

In the United Kingdom, supermarkets are the main sales channel for coffee. They mainly sell standard quality 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 British retail reached over **53%** in 2022.

The **largest retailers by sales value in the United Kingdom** are:



- [Tesco](#)
- [Sainsbury's](#)
- [Asda](#)
- [Amazon](#)
- [Morrisons](#)
- [Aldi](#)
- [Marks and Spencer](#)

**Low end:** The coffees in the low-end segment are mainstream, low-quality and mainly blended coffees. These blends are characterised by high shares 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 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 examples in the low-end segment, based on [Tesco's retail prices](#) in 2022, include:

	Product	Image*	Price (€/kg)





Low-end	Tesco Espresso Ground Coffee (Rainforest Alliance-certified, package size: 227 gram)		12.0
	Tchibo Family roasted ground coffee (package size: 250 gram)		9.40

\*Source of pictures: <https://www.tesco.com/groceries/en-GB/shop/drinks/coffee/all>

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 coffee market, in which Rainforest Alliance certification is important, increasingly as a minimum requirement. Mid-range coffees are often sold in supermarkets and by the food service industry.

Examples of mid-range products and prices, based on [Tesco's retail prices](#) in 2022, include:

	Product	Image*	Price (€/kg)
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	Tesco Finest (Fairtrade-certified, Colombia, whole beans, 227 g package)		17.97
	Lavazza (Qualita Rossa, whole beans, 250 g package)		20.87

\*Source of pictures: <https://www.tesco.com/groceries/en-GB/shop/drinks/coffee/all>

High end: These are high-quality coffees, and mainly consist of Arabica beans. These coffees typically have cupping scores between 80 and 83. They coffees 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. Coffee events in the United Kingdom include the coffee festivals of [Manchester](#), [Edinburgh](#), [Glasgow](#), [Birmingham](#), [Kent](#) and [London](#). There is also a nation-wide coffee festival: the [UK Coffee Week](#). For examples of British specialty roasters and cafés, see the website of the [European Coffee Trip](#) or check out [this list of specialty coffee roasters](#) throughout the United Kingdom (and Ireland).

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

	Product	Image*	Price (€/kg)
High-end and upper-end	Variety: Caturra/Castillo Process: Washed Origin: Central Huila, Colombia Altitude: 1600 – 1900m Flavour: red currant, milk chocolate and almond Roaster: <a href="#">Maude Coffee</a> Package size: 1kg		34.78
	Variety: Red Bourbon Process: Washed Origin: Kayanza, Northern Burundi Altitude: 1500 – 1700m Flavour: cranberry, lemonade, butter Roaster: <a href="#">North Star Coffee Roasters</a> Package size: 250g		44.05

	Variety: Caturra/Bourbon Process: Honey Origin: Finca La Providencia, El Salvador Altitude: 1100 – 1300m Flavour: plummy jam and chocolate Roaster: <a href="#">Craft House Coffee</a> Package size: 250g		44.05
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\*Source of pictures: [North Star Coffee Roasters](#), [Craft House Coffee](#) and [Maude Coffee](#)

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 5 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 relate 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 speciality 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 speciality coffee. This guide quantifies anonymous contract and pricing data of importers and roasters, based on quality, quantity, and origin of the coffee purchased.

### Tips:

Learn more about the way in which mainstream British supermarkets', such as [Tesco](#), [Sainsbury's](#) and [Asda](#), promote standard-quality and high-quality coffees. Compare their product assortment and price levels with specialist shops and roasters, such as the ones listed on [this map of Irish and British coffee roasters](#).

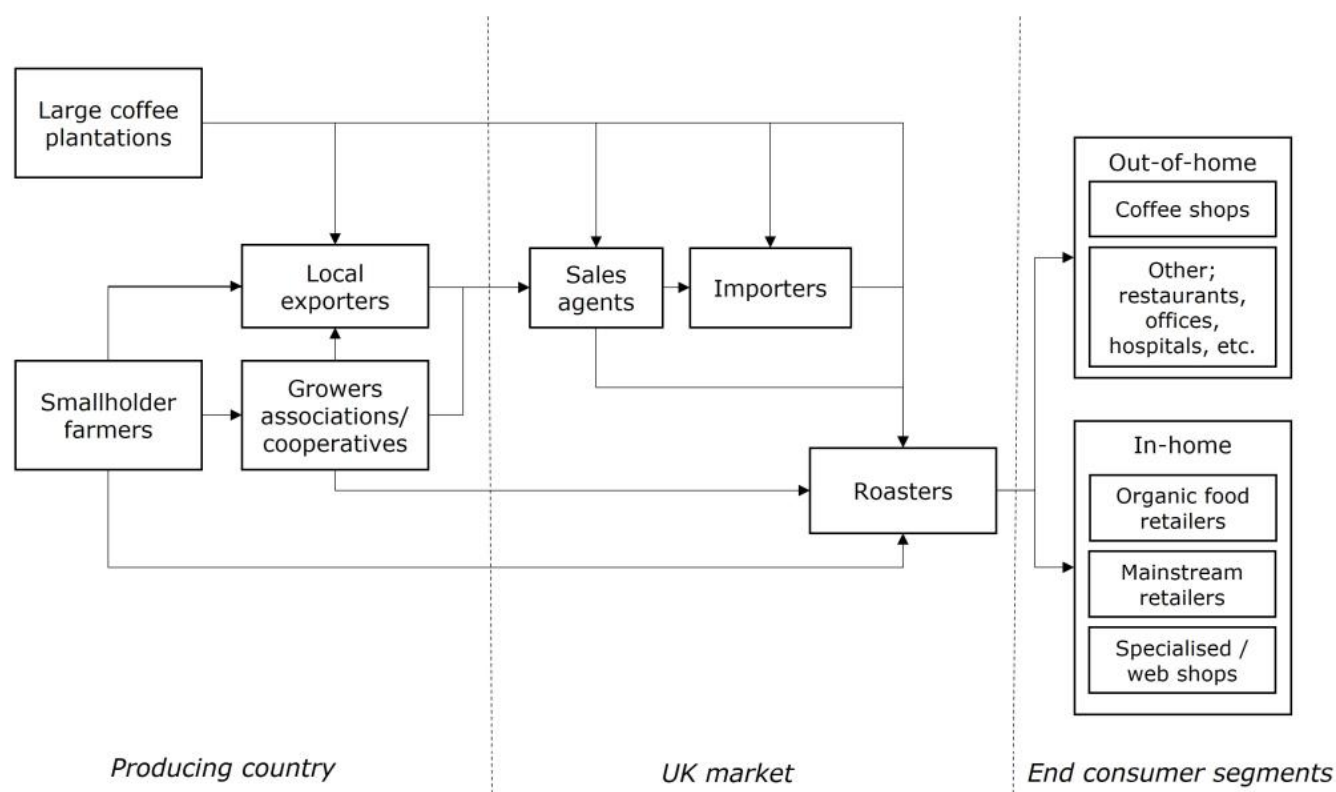
Check [the website of the Specialty Coffee Association \(SCA\)](#) to learn more about the high-end and upper-end coffee segments, market trends and main players in the whole sector.

## 3. Through what channels can you get coffee on the British market?

As an exporter, you can use different channels to bring your coffee to the British market, depending on 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 retailers and coffee roasting companies are increasingly sourcing their green coffee directly from origin. The figure below shows the most important market entry channels for your green coffee beans into the United Kingdom.

Figure 6: Market channels for green coffee in the United Kingdom



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 connect producers with roasters. In most cases, importers have long-standing relationships with their suppliers and customers.

Green coffee beans mainly enter the United Kingdom via the [Port of Tilbury](#) and the [Port of Liverpool](#). 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 with logistics, marketing and financial operations. Examples of large-scale importers in the United Kingdom include [CTCS: Green Coffee](#), [ED&F Man Volcafe](#), [Olam Food Ingredients](#) and [ECOM](#).

Specialised importers usually 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.

Quite a number of specialised importers are active on the British market, examples of which are [Mercanta The Coffee Hunters](#), [Olam Specialty Coffee](#) (Schluter), [DR Wakefield](#), [Coffee Bird](#), [Falcon Coffees](#) and [Freeman Trading](#). All these companies focus on the import of fine specialty coffee and mainly sell their coffees to specialty coffee roasters. [Equal Exchange](#) is an example of a specialised importer focused on ethically produced coffees.

For whom is this an interesting 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 you can offer high volumes (10 containers or more), you should look into entering the British 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. Bear in mind that many specialist importers prefer to work directly with producers or cooperatives.

## Medium-sized and large roasters

Most large roasters buy their coffee beans at the country of origin, although they might also source through importers. Roasters usually perform an 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 labels. An example of a roaster operating under its own brands in the United Kingdom is multinational [Jacobs Douwe Egberts](#). Examples of private label roasters on the British market include [UCC Coffee](#), [Masteroast](#) and [Lincoln & York](#).

Examples of medium-sized roasters focused on specialty coffees in the United Kingdom are [Taylors of Harrogate](#) and [Union Hand-Roasted Coffee](#).

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

Supplying to medium-sized roasters may also be an attractive option if you have consistent and reliable quality and volume. Most medium-sized roasters will also require one or more certifications for sustainable production.

## 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 the United Kingdom that import coffee directly from origin include [Cafédirect](#), [Hasbean](#), [Capital Coffee](#), [Rounton Coffee Roasters](#) and [Artisan Roast](#). For more examples of small coffee roasters in the United Kingdom, refer to the lists by [Good at Coffee](#) and by [Coffee Roasters](#).

For whom is this an interesting entry channel? Supplying to small roasters is interesting 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 vast 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, while others are hired to make purchases on behalf of a company. Examples of agents in the United Kingdom include [Marex](#) and [Coffee AG](#).

For whom is this an interesting entry channel? If you have limited experience exporting to European countries, agents can play a very important role. Agents are also interesting if you have limited quantities of coffee or if you lack the financial and logistical resources to engage in 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 to meet potential British buyers. Interesting trade fairs in Europe include SCA's [World of Coffee](#) (every year in a different European city), [Biofach](#) (organic) and [COTECA](#) (both in Germany), and the several coffee festivals around the United Kingdom (including [Manchester](#), [Edinburgh](#), [Glasgow](#), [Birmingham](#), [Kent](#), [London](#) and the [UK Coffee Week](#)). Attending such events can provide you with additional insight into the preferences of British buyers with regard to origin, flavour and sustainability certification.

Refer to the member list of the [British Coffee Association](#). Also check the lists of [Coffee Roasters](#) and [Good at Coffee](#), which highlight several coffee roasters in the United Kingdom. This will help you find potential partners and learn more about the British coffee 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.

## 4. What competition do you face on the British coffee market?

In general, competition is higher for mainstream coffee 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, for example those which only export a few containers per year, 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 coffee exporters that are already successful, especially

due to 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 skills to enable you 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 the United Kingdom's largest direct 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 the largest supplier of the United Kingdom. In 2021, Brazil supplied 43,000 tonnes of green coffee to the United Kingdom. Between 2017 and 2021, green coffee supplies from Brazil to the UK grew at an average annual rate of 5.6%.

Brazil's coffee-producing areas are relatively flat, which has intensified the use of mechanical pickers. This has led to reduced labour costs in Brazil's coffee sector, but also to lower coffee quality (as machines do not distinguish between ripe and unripe berries). Coffee prices in Brazil are lower, 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 the United Kingdom**

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

Since the United Kingdom is still a large consumer of instant coffee, the country imports large volumes of Robusta from Vietnam. With over 32,000 tonnes imported, Vietnam was the second-largest supplier of coffee to the United Kingdom in 2021.

In 2020, the UK-Vietnam Free Trade Agreement (UKVFTA) came into effect. This agreement gives Vietnamese agricultural products competitive advantages in the UK market. However, Vietnamese coffee export volumes to the United Kingdom decreased slightly by 0.7% per year between 2017 and 2021, on average. This may be due to the fact that Vietnam's coffee exports are believed not to meet the stricter quality requirements and consumption trends of the British. Also, Vietnam's Robusta exports have faced fierce competition from the Brazilian Conilon and Robusta beans from other countries.

For some years now, the Vietnamese government has been working to improve the quality of coffee beans. Increasing interest in specialty Robusta coffee within consumer markets has encouraged Vietnam to produce and export specialty coffee. Recently, a project to develop Vietnam's specialty coffee in 8 provinces was approved. Vietnam is also working towards greater sustainability as climate change poses a serious threat to the country's coffee sector, while poor farming practices cause environmental degradation. To date, sustainable coffee makes up an estimated 55% of Vietnam's coffee exports.

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

## **Colombian premium quality and certified coffee stands out in the British market**

Colombia is the world's third-largest green coffee exporter and the world's largest producer of washed Arabica. In 2021, Colombia supplied over 16,000 tonnes of green coffee to the United Kingdom, representing an average annual decrease of 4.5% since 2017. This drop could be explained by Colombia's [lower coffee production and exports in 2020-2021, as a consequence of supply chain disruption and adverse weather conditions](#).

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 which export coffee to the international market include [InConexus](#), [Red Ecolsierra](#), [La Maseta](#), [Cadefihuila](#). [Café Jaramillo](#) is a direct distributor of Colombian coffee in the United Kingdom.

## **Indonesia supplies Robusta and specialty Arabica to the British market**

Another large supplier of Robusta to the United Kingdom is Indonesia. Indonesia is the world's second-largest exporter of Robusta, after Vietnam. However, Indonesia only [exports an estimated 46% of its green coffee production](#), because domestic consumption is growing rapidly. An estimated [11% of Indonesia's coffee exports are certified or verified as sustainably produced](#).

In 2021, Indonesia supplied 13,000 tonnes of green coffee to the United Kingdom. Between 2017 and 2021, direct coffee imports from Indonesia decreased at an annual average rate of 14%. [Indonesian coffee exports have been steadily declining since 2013](#) due to adverse weather conditions, farmers switching to other crops, increasing local consumption and rising costs.

Compared to Vietnam, it has generally been more [difficult for Indonesia to ensure stable production volumes and consistent quality](#). This is because coffee in Indonesia is grown almost entirely by smallholder farmers, whereas Vietnam also has larger coffee plantations which can more easily guarantee consistency.

Indonesia is a large and diverse country, with many islands and microclimates. This has brought opportunities, such as [coffees with distinctive flavour profiles](#). Indonesia is tapping into this opportunity and it produces and exports highly-valued specialty Arabicas, such as Kopi Luwak, Gayo 1 and Toraja coffee. However, size and diversity also pose challenges throughout the industry, particularly when it comes to logistics and communication (about 750 different languages are spoken in the country). [The value chain in the country itself is very complex](#), and there can be up to four different intermediaries between farmer and exporter.

Examples of Indonesian exporters are [Tanamera Coffee](#), [Ketiar Cooperative](#), [Coffee Arks](#) and [Indonesia Coffee Exporters Association](#).

## **Increasing supplies from Honduras to the United Kingdom**

Honduras is Central America's largest coffee producer. In 2021, Honduras exported about 12,000 tonnes of coffee to the United Kingdom. Between 2017 and 2021, green coffee supplies by Honduras to the UK registered an average annual increase of 8.1%.

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 [Asoprostan](#), [Cafico](#), [Capiro Coffee Export](#) and [Aruco](#).

## Peru bets on organic and sustainable coffee production

Coffee supplies from Peru to the United Kingdom reached 6,000 tonnes in 2021. Peruvian coffee imports decreased at an annual average rate of 3.3% between 2017 and 2021.

The government of Peru has prioritised the international promotion of its coffees. Key focus areas for this are its unique origin, the sustainability of production and the high-quality of coffees. Peru even has a [national coffee strategy \(2018-2030\) relating to sustainability and competitiveness](#). Peru is regarded as a large producer of coffees with sustainability certification. [Small coffee farmers can access certifications such as Fairtrade, Rainforest Alliance/UTZ and Café Practice](#). Peruvian coffee is promoted by the Peruvian export promotion agency [PromPeru](#). As part of this international promotion strategy, Peru recently introduced its own national coffee brand to the international market: [Cafés del Peru](#).

A large proportion of Peruvian coffee is already organically produced; in 2020, Peru had the world's second-largest organic area dedicated to coffee production, after Ethiopia. Some 168,000 hectares are used to grow organic coffee in Peru, about 47% of all the land used to cultivate coffee in the country. In 2020, Peru was the largest organic coffee supplier to the EU, with imports amounting to [43,000 tonnes](#). The production of organic coffees is actively promoted by local government agencies and non-governmental organisations, mainly as a strategy to increase farmers' incomes.

Examples of Peruvian exporters reaching the European market include [EcoAndino](#) and [Cooperativa Norandino](#).

### 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 international markets and from which you can learn include [DAKMAN](#) (Vietnam), [Aicasa](#) (Peru), [Unitrade Coffee](#) (Guatemala), [Arisarina](#) (Indonesia), [Cocafelol](#) (Honduras), [Bourbon Specialty Coffees](#) (Brazil) and [Cedro Alto](#) (Colombia). Another interesting exporting company to learn from is [Caravela Coffee](#), which has a wide portfolio of specialty coffees from Latin America, facilitates contacts between roasters and has set up representative offices in destination markets, such as London.

Identify and promote your unique selling points. Give detailed information about your coffee-growing region or origin and 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 at trade fairs. Flavour quality competitions also provide good opportunities to share your story. For instance, refer to [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, which implies that you must comply with agreed-upon requirements. This will give you a competitive advantage, more knowledge and stability in the British market. See our [tips for doing business with European coffee](#) buyers for more information.

[ProFound – Advisers In Development](#) carried out this study on behalf of CBI.

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