

Entering the European market for organic coffee

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Europe is a large market for organic coffees, but it has strict regulations for organic products. Entering this market may require you to match European trends surrounding sustainable awareness, health consciousness and a demand for premium coffees. Peru and Honduras are the market leaders in the production of organic coffee.

Contents of this page

1. [What requirements and certifications must organic coffee meet to be allowed in the European market?](#)
2. [Through which channels can you bring organic coffee to the European market?](#)
3. [What competition do you face in the European market for organic coffee?](#)

1. What requirements and certifications must organic coffee meet to be allowed in the European market?

Coffee exported to Europe must comply with strict European requirements. For a complete overview of these standards, refer to our study on [buyer requirements for coffee](#). The requirements below apply specifically to organic-certified coffee.

Becoming organic is a major step and requires a demanding certification process. Before deciding to pursue this, it is very important to know whether you will be able to sell your coffee as organic. Usually, organic coffee sells for a higher price. In 2021, only [61% of all organically produced coffee was sold as such](#). This means that 39% was sold as regular coffee. It could be devastating to invest in organic certification and not receive any premium on your price.

What are the mandatory requirements?

To export organic coffee into the EU, you must comply with many requirements. [In addition to the requirements for regular coffee](#), you must obtain organic certification, and you need to communicate about the Certificate of Inspection.

Obtaining organic certification

Organic certification is not a legal requirement for coffee. To sell organic coffee on the European market, it must be certified as such. Certification requires you to have an accredited certifier, who 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 are always working with an accredited certifier. After passing the audit and receiving an organic certificate, you will be able to use the [EU organic logo](#) on your products.

Since 1 January 2022, the [new organic EU Regulation 2018/848](#) has applied. The new regulation entails several

[changes](#). For example, production rules have been simplified, the control system has been strengthened and producers in third countries must now comply with the same rules as those producing within the EU. Following a transition phase until 31 December 2024, the new legislation took full effect on 1 January 2025.

Communicate with your buyer about the Certificate of Inspection

Organic regulation also includes rules for shipping. This entails the issuing of [electronic Certificates of Inspection \(e-COIs\)](#) by control authorities before the departure of a shipment (Article 13 (2) [EU 2020/25](#)). If this is not done, it will be impossible to sell your product as organic in the EU. You can complete E-COIs using the European Commission's electronic [Trade Control and Expert System \(TRACES\)](#).

The importer is responsible for requesting the e-COI through TRACES. It is important for you to communicate with your buyer about this, however, to prevent your shipment from leaving before the importer has the e-COI.

Organic labelling for green coffee

When you export green coffee as organic, it is mandatory to label the batch with the name and number of the organic control body and the certification number. The labels should be written in English. Using the EU organic logo is mandatory for pre-packaged foods (such as roasted coffee).

Tips:

Read our [tips on complying with the EUDR in the coffee sector](#), or watch our [webinar on EUDR in the coffee sector](#). These sources will help you understand how to comply with the EUDR.

Read our [tips on how to organise your exports](#) and our study on [buyer requirements for the coffee sector](#) about how to comply with other mandatory requirements.

Be aware that the transition phase for the 2018/848 Organic Regulation ended on 31 December 2024. The new regulation [will especially affect farmer groups](#). Many farmer groups will need to adjust their legal identities to continue complying with the new regulation.

Study the EU Regulation on organic production and labelling, as described in [EU Regulation 2018/848](#).

Read our [tips to go green](#) and our [tips on how to become more socially responsible](#) to further boost your sustainability.

What additional requirements and certifications do buyers often have?

Some companies have [multiple certifications](#). Having one certification makes it easier to comply with other certification requirements, as the requirements partly overlap.

The most common combination is Fairtrade and Organic. Whereas Organic focuses on environmental sustainability, Fairtrade focuses on social and economic sustainability. Multiple certification provides the best access to the market.

What are the requirements for niche markets?

Although organic coffee is already a niche market, you can further distinguish yourself by gaining a private organic label. Many of these private standards are country-specific.

The following are several examples:

- [Demeter](#). Recognised for certifying biodynamic agriculture. This is a holistic approach that exceeds standard organic farming practices. Demeter standards are notably more stringent, focusing on sustainability and the ecosystem.
- [Naturland](#). A global certification body that covers organic and biodynamic farming, in addition to integrating environmental protection, social responsibility and fair trade into its criteria.
- [Bio Suisse](#). This organisation sets high standards that go beyond the Swiss government's organic regulations. Although it is a national label, it is popular in international markets for its reputation for quality and sustainability.

Most private standards demand additional requirements. These are in addition to the EU organic legislation. You should therefore always consult the official website of the standard to know what the requirements are.

Tips:

Read our study on the [European demand for coffee](#), the [European market potential for certified coffee](#) and on how the [EU Green Deal will impact your business](#) to get a good overview of the European market for coffee.

Visit the [Access2Market](#) (formerly known as the 'EU Trade Helpdesk') website to learn more about legal requirements concerning importing to Europe.

Visit [IFOAM's Group Certification Training Kit](#) to learn about group certification schemes to meet EU organic label requirements at lower costs.

Visit the [ePing](#) website for an overview of country-specific measures that affect trade and differ from the international standards.

Learn about preferential arrangements, technical product requirements and trade procedures and documentation through the [Open Trade Gate Sweden](#) website.

Read our [study on multi-certified coffee](#) if you are interested in adding a second label to your organic products.

Talk to other exporters or producers in your country that have experience in exporting organic coffee to Europe, and learn from their journeys.

2. Through which channels can you bring organic coffee to the European market?

Exporters can use a variety of channels to bring their product to the European market. These channels depend on the coffee's quality and supplying capacity. The market for organic products in Europe is quite developed. As high-end coffee becomes increasingly popular among European consumers, various channels are offering more market opportunities.

How is the end market segmented?

Organic coffee beans belong to the middle-range, high-end and upper-end segments. As organic certification is

very demanding, organic coffee is hardly ever found in the low-end.

Middle-range organic coffee

The middle-range market offers coffee of decent quality. Sharing details about where the coffee comes from and how it is produced [can help build customer loyalty](#).

The middle-range organic market is stable. It is growing, as more consumers are caring about sustainability and are becoming more health conscious. Supermarkets — like [Sainsbury's](#) (UK), [Carrefour](#) (France), [Denn's Biomarkt](#) and [EDEKA](#) (Germany) — sell organic coffee in this segment. Exporters must meet organic and ethical certifications. They must also build strong ties with European importers and retailers. Fairs like [BIOFACH](#) and [Natexpocan](#) help connect you with the European market.

High-end organic coffee

The high-end market serves premium coffee buyers. They seek single-origin coffee made from high-quality Arabica beans with cupping scores of 80–83. This makes it specialty coffee, with a focus on quality, flavour and sustainability. High-end coffee requires a strong brand story and traceability. The high-end includes private-label and established brands, like [Café Direct](#) and [Simon Lévelt](#).

Although it is smaller, the [high-end market is growing](#). Consumers buying coffee in this segment desire [coffee of higher quality that is sourced ethically](#). These beans are typically traceable to individual farms. Small businesses can enter this segment by offering direct trade. This boosts transparency and traceability. Building a product story is key to attracting high-end buyers.

Examples in this segment include brands like [Johan & Nyström](#), and [Square Mile Coffee](#). These companies source directly from farmers and offer organic coffee that meets higher standards for quality and sustainability.

Upper-end organic coffee

The upper-end market is for ultra-premium coffee, with cupping scores above 83. This type of coffee is single-origin and fully traceable. It often uses special processing methods. These coffees are usually sold in small amounts through specialty shops and online. It is the smallest segment, but it is growing.

Sustainability is key in this market. Long-term contracts between buyers and suppliers are common. These deals often involve community projects and fair payments to farmers. This is a key part of social-impact certifications.

This market attracts a small group of consumers who are willing to pay more for rare, high-quality coffee. In addition to being organic, upper-end coffee is often certified as [Direct Trade](#) or micro-lot, highlighting its unique origin and quality. These certifications also show that the coffee has been produced in a sustainable way.

Companies like [Blue Bottle Coffee](#) and [Taf Coffee](#) focus on this niche. They sell directly to consumers through e-commerce or boutique coffee shops. Cities like [Berlin](#), [London](#), [Amsterdam](#), [Milan](#), [Warsaw](#), [Barcelona](#) and [Paris](#) hold specialty coffee festivals. Such festivals can help you connect with buyers and learn about consumer demands. To find examples of European specialty roasters and cafés, refer to the city guides on the [European Coffee Trip](#) website.

Tip:

Build your brand by telling a story using photos, videos and clear messaging. Attract European customers by sharing this on your website and social media. Highlight the farmers, location, vision

and methods behind your coffee. Share your core values as well. A part of the consumer base that buys organic coffees, likes to know where their coffee comes from and how it is made. This helps them feel more connected to the product.

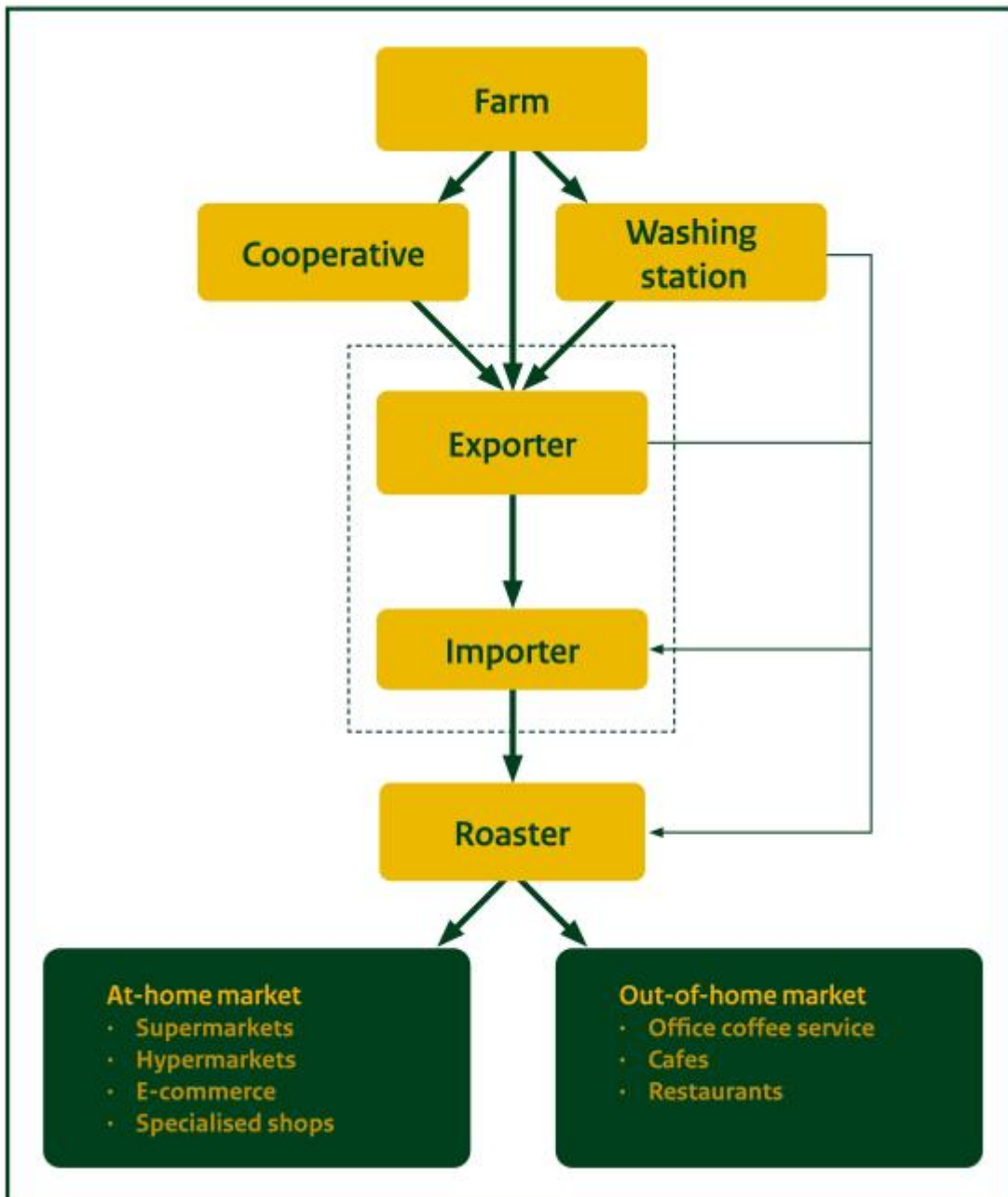
Through which channels does organic coffee reach the end market?

Organic coffee usually reaches the consumption market from local cooperatives, through exporters, European importers and roasters.

Through which channels does coffee reach the end market?

Figure 4 provides a list of actors in the organic supply chain. Although most coffee flows through all actors of the chain, options for penetrating the European market more directly are emerging.

Figure 1: The organic-coffee supply chain



Source: based on [Counter Culture Coffee](#)

Importers facilitate the trade between exporters and roasters

Importers play a vital role in the coffee market. They function as supply-chain managers, maintaining wide portfolios from various origins, pre-financing operations, performing quality control, managing price fluctuations and establishing contact between producers and end buyers (such as roasters).

Importers handle the complexities of international trade. These include organic certification and phytosanitary standards. Importers must store and transport the coffee to preserve its organic certification. They have a large network of European buyers.

In most cases, the importers and the exporters are the same companies. For example, Neumann Kafé Gruppe (NKG) has many warehouses in producing countries. Farmers and cooperatives can transport their coffee to a

local NKG warehouse, after which it is exported to another NKG warehouse in Europe. As a supplier of a local warehouse, you normally do not know what the destination is.

[The Olam Group](#) and [Café Imports Europe](#) are large-scale importers of organic coffee. They distribute the coffee further to wholesalers and large roasteries. In addition to these large importers, other importers specialise in organic coffee. One example of a trader with a large share of organic coffee is [Belco](#).

When is trade through importers the most interesting channel for you?

Most organic coffees enter the European markets through importers. This makes them a relevant channel for bringing your coffee to the market. Producers trading through importers receive lower margins compared to those trading directly with roasters. At the same time, however, importers free producers and cooperatives from logistics and can provide a vast overseas network. Importers are large buyers, making them an interesting channel for producers of average quality, who have less access to the European market directly.

[The Asociación de Productores Agrarios Rodríguez](#) in Peru is one example of an exporter that trades through importers (such as [Rehm & Co](#)).

Europe is home to a wide range of organic roasters

Europe is home to many large and small roasters. Examples of large roasters on the European market that also trade in organic coffee include [Jacobs Douwe Egberts](#), [Nestlé](#) and [Lavazza](#). Examples of private-label roasters include [Lincoln & York](#) (United Kingdom) and [Beyers](#) (Belgium).

Most coffee flows to the roasters through trading companies (importers). In some cases, it is possible to trade directly with roasters. Direct trade means that coffee roasters buy from producers or cooperatives. This bypasses traditional intermediaries (like agents and importers).

Tips:

Read our study on [organising your coffee exports to Europe](#) to learn about packaging, export documentation and European customs.

Participate in coffee events to connect with potential buyers. For example, the [London Coffee Festival](#) and the [World of Coffee](#) could help build a network in the organic market. If you offer specialty coffee, becoming a member of the [Specialty Coffee Association](#) could provide valuable network opportunities.

Some producing countries also have trade shows, including the [AFCA Conference](#) in Africa or [SINTERCAFE](#) in Latin America.

It is good to be aware of the online platforms (sometimes known as 'marketplaces') that facilitate trade and that can enhance more direct trade. Using marketplaces allows farmers or cooperatives to cut out parts of the chain. It might allow you to get better prices for your products. The following are examples of these marketplaces:

- [Algrano](#)
- [Raw Material](#)
- [Beyco](#)
- [Transparent Trade Coffee](#)

When is direct trade with roasters the most interesting channel for you?

Direct trade can be more lucrative if your focus is on very high quality, or if you supply very large volumes. Direct trade is used mostly by producers offering coffees in the high-end and upper-end segments. With direct trading, producers sell directly to specialty roasters. This channel matches the organic-coffee market's focus on quality and sustainability. It also gives producers more control over their product's journey to consumers.

Direct trade allows producers to build close ties with buyers. They can get better prices and market their products as premium, ethical options. Specialty roasters often pursue unique, high-quality organic coffees. Producers enjoy closer relationships, better prices and longer-term contracts with roasters. These roasters are usually in higher-income countries. Examples include the United Kingdom, Germany and Sweden.

- [Finca Orlanda](#) in Mexico is an example of a family-run coffee farmer. The company produces according to the EU organic requirements and trade directly with European roasters.
- [Cooperativa Agraria Cafetalera Pangoa](#) is a cooperative of coffee producers. The company has Fairtrade and organic certification. It directly supplies roasters in Europe. In addition to coffee, the company sells several products (such as cocoa and honey) to diversify its income.
- [Union Hand-Roasted Coffee](#) in the United Kingdom is an example of direct trading in organic coffee. This roaster sources coffee directly from farmers. It maintains strong relationships with them to ensure high quality and organic certification.

Although direct trade can offer higher rewards, there are also good reasons to trade through importers. Traders, shippers and intermediaries are experts in their specific parts of the value chain. They usually add their value for a reasonable fee. It sometimes makes sense to contact European roasters directly, but outsource the logistics to a trading company.

Tips:

Read our [tips on how to organise your exports](#) if you aim to export directly.

Contact interesting roasters by visiting European coffee festivals. The [International Federation of Organic Agriculture Movements](#) (IFOAM) and [BIOFACH](#) organise annual events dedicated to the European organic market.

Target the at-home market directly

Very few companies roast their coffee at origin and sell it directly to European (or other) consumers. Moyee is one example of a producing-country roaster that supplies supermarkets and consumers directly. Part of their coffee [is organic](#). You can read more about this in our study on [exporting coffees roasted at origin to Europe](#).

Tip:

Invest in long-term relationships. When working with importers or roasters, build strong, sustainable relationships with them. This will help you manage market risks and improve your product. It will also help you find a fair balance between price and quality.

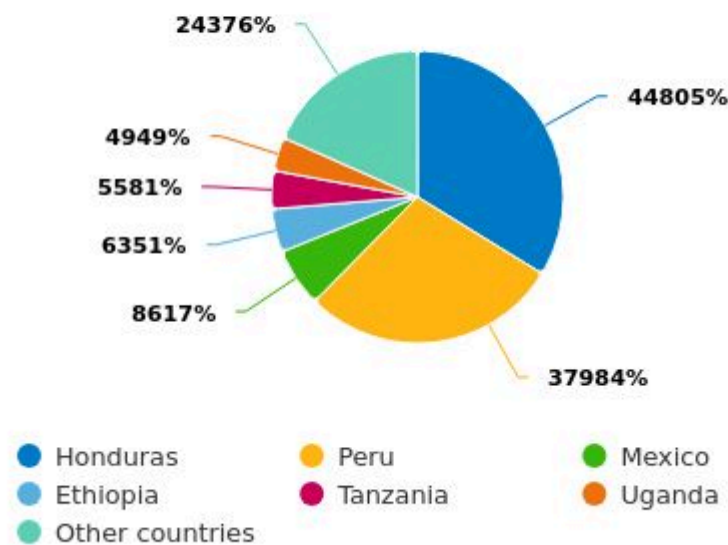
3. What competition do you face in the European market for organic coffee?

As a supplier of organic coffee, you operate within a global, competitive landscape. For both producers and exporters, it is important to understand the market segments in which they operate in and the scale at which they work. By identifying these factors, you can determine which other countries you are competing with. Understanding the quality level, volume and positioning of your products improves your ability to assess your competition and develop strategies to differentiate yourself in the global market. This knowledge is essential for effectively positioning yourself and competing successfully.

With which countries are you competing?

Honduras and Peru are by far the largest suppliers of organic green coffee to Europe. Mexico and Ethiopia follow at a distance. The competition in the organic-coffee market is quite different from that in the conventional coffee market. The largest coffee-producing countries — Brazil, Vietnam and Colombia — are not amongst the four leading suppliers of organic coffee.

Figure 2: Green organic coffee imports from producing countries by the European Union in 2023
in tonnes



Financial Times 2019

Honduras is Europe's largest supplier of organic green coffee

Honduras was Europe's leading supplier of organic coffee in 2023 and 2021. In 2022, 2020 and 2019, Peru held this leading position. These two countries have similar and very high production of organic coffee. The leading position shifts according to variations in production. In 2023, organic-coffee exports from Honduras to the EU amounted to 44,805 thousand tonnes. These exports have grown significantly in the past five years. The average yearly growth rate is 7.2%.

Honduras has taken great steps in its coffee production, as the coffee quality has improved in recent years. Honduras is the sixth-largest coffee-producing country, and it is a growing player in the organic market. Specialty and certified coffee has reached [54% of the country's total coffee exports](#). The [Honduran coffee flavour profile](#) is rich, ranging from fruity to chocolatey.

Honduras has worked hard to develop its organic-coffee sector. Government programmes and NGOs support this by promoting general sustainability and specific organic practices. As it grows, Honduras faces a number of sector-specific challenges. Smallholder farmers are economically vulnerable and have limited infrastructure. They depend mainly on support from the government and NGOs. Its strong reputation for sustainably produced coffee and quality gives it an edge in the European market for organic coffee. Specialty coffee buyers favour Honduran varieties like Catuai, Bourbon and Pacas. The country is known for its dedication to empowering women in coffee production. This makes it especially attractive for Europeans to support coffee producers from Honduras.

The [Cooperativa Regional de Agricultores Orgánicos de la Sierra \(ROAS\)](#) is one of Honduras' largest organic-coffee cooperatives. A major exporter to Europe, ROAS focuses on the EU Organic and Fairtrade certifications. The cooperative empowers women in the coffee industry, fighting gender-based legal issues in obtaining credit and pre-harvest loans. The ROAS website details the cooperative's values and stakeholder engagement, illustrated by photos. The RAOS cooperative supplies organic coffee to European buyers through partners (like [Café Imports Europe](#)).

Table 1: Competitive country profile of Honduras

Strengths	Weaknesses	Image on the coffee market
<ul style="list-style-type: none"> • Main producer of organic coffee 	<ul style="list-style-type: none"> • High production volatility due to weather conditions (for example, causing coffee-leaf rust) 	<ul style="list-style-type: none"> • Well-known for high-quality and organic coffee

Source: diverse

Peru is one of the largest exporters of organic coffee

Peru is a major player in the organic-coffee market. It is also a key supplier of organic coffee to Europe. In 2023, exports of organic green coffee to Europe amounted to 37,984 tonnes. The exact amount differs from year to year. Export volumes were about the same in 2018 and 2021. In 2019, 2020 and 2022, they exceeded 40,000 tonnes.

In 2002, Peru had [34.4% of the world's organic coffee area](#), making it the country with the largest share of organic-coffee area. That year, Peru exported 95,000 metric tonnes of organic-certified coffee, with the EU as its main destination.

Peru has a strong image in the European market for organic coffee. It is known for smallholder farming, which makes it a popular origin for specialty and organic coffee. The country's high-altitude farms and climate allow for growing premium, specialty-grade organic coffees. Europeans know Peru as a [sustainable](#) origin. The country's high-quality coffee include Typica, Caturra, Bourbon and Geisha.

Peru's agricultural policies now focus on supporting smallholder farmers, who make up a large part of the organic-coffee sector. At present, however, frequent changes in government leadership and social unrest can have negative effects on Peru's organic coffee market.

The flavour profile of Peruvian coffees is usually nutty, chocolatey and mildly citrusy. The country's varieties

include Catimor, Pache, Bourbon, Typica and a small amount of Pacamara. The main processing method is wet processing.

[The Cooperativa Agraria Cafetalera Pangoa](#) in Peru is a large cooperative that produces high-quality, certified organic coffee. It supplies both conventional organic coffee and premium specialty coffee directly to European markets. The cooperative also has Fairtrade certification and promotes the protection of local indigenous communities. It helps farmers to raise their standard of living through fair income. In return, they use practices passed down through generations in the indigenous communities. The nature-based approaches help them meet the EU certification requirements more easily.

Table 2: Competitive country profile of Peru

Strengths	Weaknesses	Image on the coffee market
<ul style="list-style-type: none"> • Strong focus on high-quality and organic coffees • Many different landscapes at high altitude, leading to a wide variety of high-quality coffees 	<ul style="list-style-type: none"> • Limited infrastructure • Changing weather conditions leading to inconsistent quality • Unstable political climate 	<ul style="list-style-type: none"> • Getting well-known as a source for ethically produced and high-quality coffee.

Source: diverse

Mexico’s coffee production has received much governmental support

Mexico follows Honduras and Peru at a large distance in terms of organic-coffee exports to Europe. Its exports of green organic coffee to Europe amounted 8,617 tonnes in 2023. This is about the same as the exports in 2018. Mexican exports of green organic coffee to Europe peaked in 2021 with 11,363 tonnes.

In Mexico, most of the coffee grown is of the Arabica variety, but they have also started growing Robusta in certain areas. The most common types of Arabica coffee grown are Typica, Caturra, and Bourbon. New and improved varieties have been introduced in recent years. Mexico is working to build a national programme aiming to renew its coffee plantations, with a focus on making them more productive and resilient. The programme also encourages the adoption of better technologies.

Various programmes support coffee production in Mexico. The Replanting Programme includes the planting of improved varieties. As of 2022, Mexico has renovated 150,000 hectares of land and planted 550 million new coffee trees that are resistant to diseases and that have been selected for their good quality. [The Sowing Life Programme](#) encourages farmers to implement agroforestry. About 6,000 farmers across Mexico are part of this programme, which is not specifically linked to organic coffee production.

[Maya Vinic](#) is a Mexican organic-coffee producer. The company aims to produce coffee according to the culture of its ancestors. In addition to coffee, the company sells cocoa, sugar and honey.

Table 3: Competitive country profile of Mexico

Strengths	Weaknesses	Image on the coffee market
<ul style="list-style-type: none"> • Many farms in Mexico use organic and sustainable farming methods. They often grow coffee in the shade. This helps protect the environment and supports the quality of coffee. • Mexico grows different types of Arabica coffee, including Typica and Bourbon. These offer a range of flavours. • A lot of Mexican coffee is certified as Fairtrade or Organic. 	<ul style="list-style-type: none"> • Shortage of skilled labour 	<ul style="list-style-type: none"> • Mexico is not very well-known in the European coffee market. It is nevertheless gaining ground in the specialty-coffee market.

Source: diverse

Ethiopia has a great reputation as the birthplace of coffee

Ethiopian exports of Organic-certified coffee to Europe amounted to 6,351 tonnes in 2023. This is about the same as its exports in 2019. Ethiopian exports of green organic coffee to Europe were slightly higher in 2021 and 2022, with more than 8,000 tonnes.

Ethiopia has the world's second-highest [share of organic-coffee areas \(25.5% in 2022\)](#). It is an important and well-known supplier of organic coffee to Europe. The country exports 10% of the world's organic coffee. Europe is a main importer. The country is known for its natural growing methods. Their use of forest-grown coffee beans with natural shading enhances biodiversity. More shade also results in a slower maturing process of the berries. Although slower-maturing berries lead to lower production, they increase the density of the beans, which enhances quality. More shade also extends the lifespan of the coffee plant. You can read more about forest-grown production in our [tips to go green in the coffee sector](#).

Ethiopia is known as the birthplace of Arabica coffee. The country has a good reputation amongst European consumers. The country's coffee is known for its varieties, which include Heirloom, Bourbon and Typica. The high-altitude areas (and especially Sidamo and Yirgacheffe) are famous throughout the world for their specialty-grade coffee.

[The Yirgacheffe Coffee Farmers Cooperative Union \(YCFCU\)](#) is one of Ethiopia's largest organic-coffee cooperatives. It is known for its high-quality organic Arabica beans. All of the cooperative's coffees are also Fairtrade-certified, making their coffee multi-certified. The German [Café du Jour](#) roaster works with coffee beans from the YCFCU.

Table 4: Competitive country profile of Ethiopia

Strengths	Weaknesses	Image on the coffee market
<ul style="list-style-type: none"> • High focus on organic coffee production 	<ul style="list-style-type: none"> • Unstable political situation • Low productivity at farm-level, due to the lack of resources 	<ul style="list-style-type: none"> • Good reputation of the origin of coffee

Tips:

Promote your unique local varieties. European consumers, particularly in the specialty-coffee sector, appreciate unique flavour profiles and characteristics.

Invest in a strong digital presence, including an informative website highlighting your journey of producing organic-certified coffee and traceability.

Invest in projects that are important to you. These projects can focus on local, social, environmental or governance sustainability. Such investments could give you a competitive advantage and a way to connect with your European customers. The [Kopokama Cooperative](#) is one example of a Rwandan company that has started many sustainability projects. For an extensive explanation of their activities, see our [webinar on meeting sustainability requirements](#).

See the [United Nations Sustainable Development Goals website](#) to understand more about sustainability and how you can contribute. Visit the [International Coffee Partners website](#) for inspiration from projects that they carry out to help the coffee industry become more sustainable.

[Molgo Research](#) carried out this study in partnership with [Ethos Agriculture](#) on behalf of CBI.

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