

The European market potential for Robusta coffee

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Robusta coffee is often seen as lower quality. However, this is changing slowly. High-end coffee shops now sell single-origin Robusta espressos. Speciality roasters offer quality Robusta beans. The causes of this change include growing global demand, rising coffee prices and more focus on coffee quality. Europe has a large Robusta market. Germany, Italy and Spain are the three largest countries in the market.

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1. Product description: Robusta coffee

Robusta coffee is also called 'Coffee Canephora'. [About 40% of coffee produced globally is Robusta](#). The other 60% is almost all Arabica. There are different kinds, such as Liberica and Excelsa coffee. However, they have a very small market share.

There are many different varieties of Robusta coffee. Common ones include [Conillon, Nganda and Robusta 2](#). In 2023, World Coffee Research (WCR) published [a catalogue that describes 47 different Robusta varieties](#).

Definition of Robusta coffee

We base our definition of Robusta on the scientific description. Robusta coffee beans [are the seeds of the Coffea Canephora plant](#). There are very important differences between Arabica and Robusta coffee for growers, traders, importers and roasters.

Publicly available trade statistics do not separate Robusta, Arabica or any other varieties. So, to analyse trade statistics, we talk about coffee Robusta if the statistics come from a country that mainly grows Robusta. See Box 1 for a list of these countries. By doing so, we align our data with [the European Coffee Federation](#), based on the grouping of countries by [the International Coffee Organization](#).

HS codes that may apply to Robusta are:

- 090111 (non-decaffeinated green coffee);
- 090112 (decaffeinated green coffee);
- 090121 (non-decaffeinated roasted coffee);

- 090122 (caffeinated roasted coffee);
- 090190 (coffee husks and skins);
- 210111 (soluble coffee);
- 210112 (coffee extracts, essences and concentrates).

Coffee imported directly from producing countries is almost always green coffee. For this reason, our study focuses on green coffee.

Box 1: Calculation of green Robusta imports

We base data on green Robusta imports with HS code 090111 or HS code 090112, sourced from one of the following countries: Angola, Benin, Cameroon, Central African Republic, Congo, Congo Democratic Republic, Côte d'Ivoire, Equatorial Guinea, Gabon, Ghana, Guinea, Indonesia, Liberia, Madagascar, Nigeria, Philippines, Sierra Leone, Sri Lanka, Thailand, Togo, Trinidad and Tobago, Uganda and Vietnam.

It is important to note that this data should be considered a simpler version of reality for several reasons. First, many countries grow Arabica and Robusta coffee. For example, Brazil was expected to produce over [1.3 million tonnes in 2024/2025](#). However, all coffee from Brazil is considered Arabica in trade statistics because it produces more Arabica than Robusta.

Second, not all coffee imported from a producing country is grown in that country. For example, some coffee grown in Latin American countries is exported to Honduras before being re-exported to Europe. Honduras mainly grows Arabica, so all re-exported coffee from Honduras is considered Arabica. However, some of this coffee is Robusta.

Green coffee imported from other producing countries is considered Arabica coffee in this study.

How Robusta coffee differs from Arabica coffee

There are several differences between Robusta and Arabica coffee:

1. Caffeine: Robusta has nearly twice as much caffeine, making it more bitter;
2. Taste: Arabica tastes smoother and fruitier, Robusta tastes more earthy;
3. Growing conditions: Arabica needs to grow higher up (1,200 to 2,000 m). Robusta grows best lower down (600 to 1,200 m);
4. Disease resistance: Robusta plants have less of a problem with diseases and pests than Arabica;
5. Price: Arabica costs more due to growing and harvesting challenges, marketing and consumer preferences.

Arabica coffee usually tastes better, so Robustas are mostly used in coffee blends, instant coffee and strong, dark-roasted espresso-based drinks.

Figure 1: Robusta berries in India



Source: [Timothy A. Gonsalves](#) via [Wikimedia Commons](#)

Tips:

Use your browser's translation option to read this study in your language.

Read about the different qualities of Robusta varieties before you decide which trees to plant. Robusta trees live for 20–30 years. So, your decision will be long term. There are a lot of differences in terms of yield, disease resistance and taste. Start by reading the [World Coffee Research Robusta Catalogue](#).

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

Europe has a very large roasting industry. It is also an important Robusta importer. Robusta made up about 35% of green coffee imports between 2020 and 2023. In 2024, this went down slightly because less Robusta was produced globally.

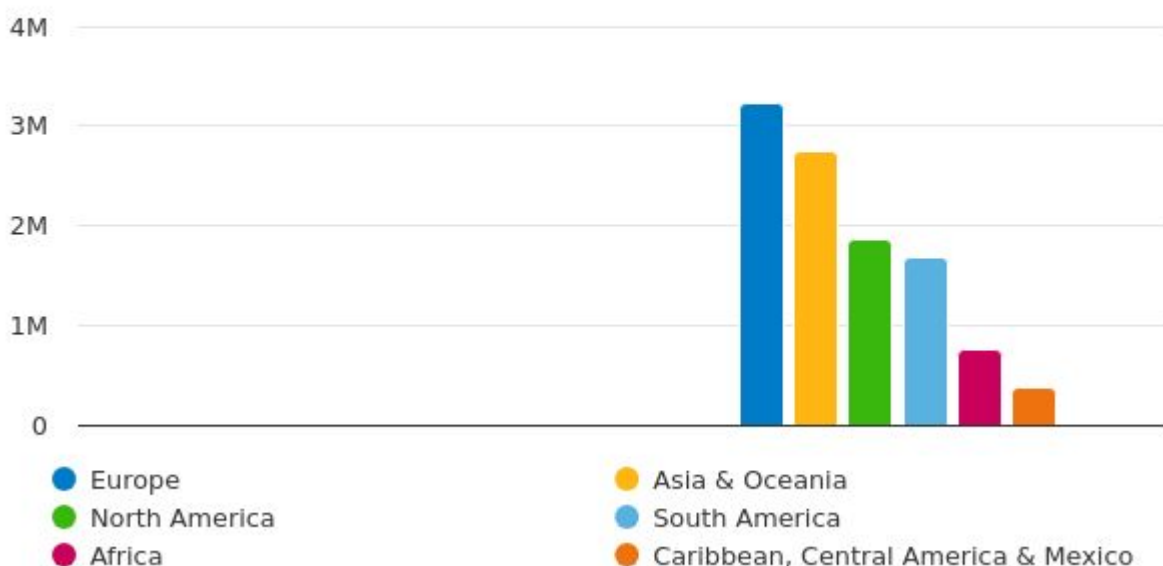
Europe: The world's largest coffee consumption market

Europe made up 30.4% of global coffee consumption in 2023/2024. This is about 3.2 million tonnes. Europe is the world's largest coffee consumption market. Asia-Pacific is the second-largest market, with a 25.8% share. North America (17.5%) and South America (15.8%) follow. Africa only makes up 7.1% of the market.

Almost all Europeans can afford coffee, and economic growth will not lead to much more consumption. However, [demand for higher-quality coffees is expected to increase](#). In comparison to the rest of the world, European coffee consumption is expected to go down. This is because coffee drinking is growing faster in Asia. Vietnam and Indonesia are especially fast-growing markets.

Figure 2: Distribution of global coffee consumption by region, 1 October 2023-30 September 2024

in tonnes



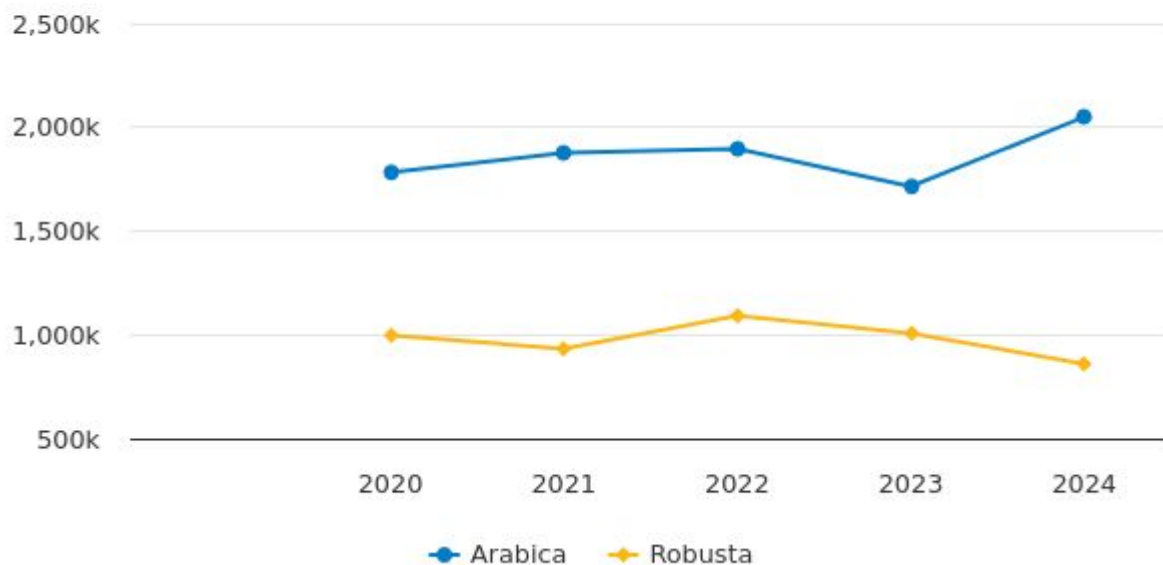
Source: [International Coffee Organization market report, March 2025](#)

Europe offers a large market for Robusta coffee

Europe imports a lot of green Robusta coffee. It imported 860,000 tonnes in 2024. This was less than in 2023, when it imported 1,007,000 tonnes. The drop was caused by a smaller global Robusta harvest, down [19% from 2023](#). [Dry weather in the top Robusta-producing country Vietnam](#) was the main cause.

In 2024, Europe made up for 2023's low Robusta crop by importing more Arabica beans. Between 2020 and 2023, Robusta made up 33.2–37% of Europe's total coffee imports. In 2024, 29.6% of imports were Robusta. Figure 3 shows how Arabica and Robusta imports have changed.

Figure 3: Direct green Arabica and Robusta imports from producing countries, 2020-2024
in tonnes



Source: Eurostat and ITC Trade Map

European Robusta imports are expected to go back up in 2025. [Global Robusta exports were up 10.7%](#) in February 2025 compared to February 2024. This was because of better harvests in [Vietnam](#) and Indonesia, two very important Robusta-producing countries.

Tips:

Read [our study on the demand for coffee on the European market](#) to learn more about European coffee habits.

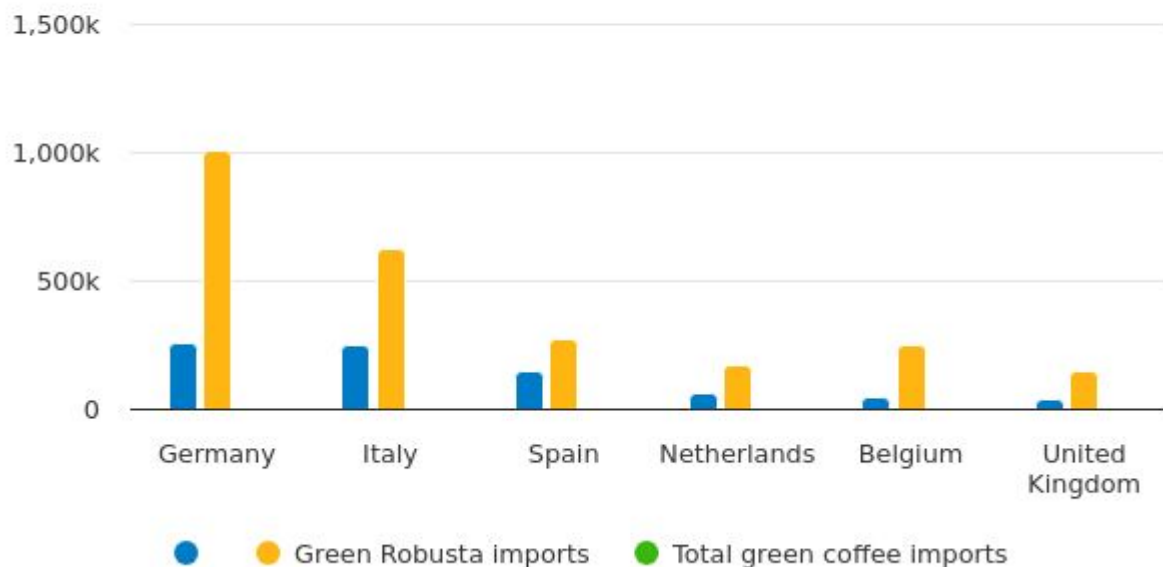
Read the [International Coffee Organization's market reports](#) (ICO) for up-to-date information about Robusta production and exports. The ICO publishes a market report every month.

Take part in coffee events to meet possible buyers. For example, the [London Coffee Festival](#) and [World of Coffee](#) can help you meet others in the Robusta market. If you offer Fine Robusta, you could become a member of the [Specialty Coffee Association](#). There are also trade shows in producing countries, including the [AFCA Conference](#) in Africa and [SINTERCAFE](#) in Latin America.

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

Germany and Italy are the largest Robusta-importing countries by far. In 2024, Germany imported 251,000 tonnes of green robusta directly from producing countries, and Italy imported 243,000 tonnes. Spain came next with 142,000 tonnes. They were followed by the Netherlands (55,000 tonnes), Belgium (46,000 tonnes) and the United Kingdom (35,000 tonnes).

Figure 4: Green Robusta and total green coffee imports for the top six Robusta importers, 2024
in tonnes



Source: Eurostat

Germany: Europe's largest coffee hub with a strong certified market

Germany is Europe's largest coffee-importing market. In 2024, it imported 1 million tonnes of green coffee directly from producing countries. German imports have been very stable over the past five years. The only year they were not stable was 2023, when they dropped to 859,000 tonnes.

Robusta imports accounted for around 30% of Germany's total imports between 2020 and 2023. In tonnes, imports were between 278,000 tonnes and 326,000 tonnes. In 2024, Germany imported 251,000 tonnes of Robusta. This made for 25% of its total green coffee imports. In 2024, most of Germany's Robusta came from Vietnam (182,000 tonnes), Uganda (51,000 tonnes) and Indonesia (17,000 tonnes).

Most green coffee beans enter Germany through the [Port of Hamburg](#). Neumann Kaffee Gruppe is the world's largest coffee trader. It has its headquarters in Hamburg. The [ports of Bremen and Bremerhaven](#) are also key ports. As the largest coffee market in Europe, Germany is a very good destination for exporters.

The German coffee market is known to have a lot of competition between discounters. Discounters include ALDI, [Lidl](#) and REWE. ALDI Nord [has its own roasting facility](#). However, Germany also has a very large speciality coffee market. [Cumpa](#) is one of the only speciality coffee traders that focuses on Robusta coffee.

Table 1 lists other larger German buyers. Note that this is only a short list of larger companies. One trend in the German market is the [increase in smaller roasters](#).

Table 1: Large potential German buyers

Company name	Location
Dallmayr	Munich
Jacobs	Bremen
Lavazza	Hamburg
J.J. Darboven	Hamburg
Diedrich Coffee	Cologne
Segafredo Zanetti	Hamburg

Germany has a large market for certified coffee

A lot of German green coffee imports are third-party certified. Arabica and Robusta can be certified. It is unclear how much of certified coffee imports is Robusta. Germany is [the second-largest Rainforest Alliance-certified coffee importer](#) in the world. In 2023, Germany imported 132,000 tonnes, 7% less than 2022. Only Switzerland imports more, importing 249,000 tonnes in 2023.

According to Fairtrade Germany, 24,057 tonnes of German coffee was Fairtrade-certified in 2022. This is about 5% of total coffee consumption. Germany is one of the top five Fairtrade-consuming countries.

Based on Traces data, Germany is Europe's largest market for organic-certified coffee. In 2023, Germany imported over 58,000 tonnes of organic green coffee. Germany's main suppliers were Honduras (24,000 tonnes) and Peru (17,000 tonnes).

Tips:

If you sell organic coffee, target Germany. Germany is the main European market for organic coffee. Find German buyers on the [Deutscher Kaffeeverband website](#). If you want to sell to roasters directly, you can find many of them on the [European Coffee Trip website](#).

Look at the [German Import Promotion Desk](#) for more information on exporting to Germany.

Learn more about the German coffee market by [reading our studies on exporting coffee to Germany](#).

Visit [BIOFACH](#) to meet potential business partners. It is the world's largest yearly trade fair for organic food.

Italy is famous for its Robusta-based espressos

Italy is Europe's second-largest coffee importer. In 2024, it directly imported 621,000 tonnes of green coffee from producing countries. Italian imports have grown by 14% in the past five years. They have grown from 544,000 tonnes in 2020.

Between 2020 and 2023, Robusta made up about 45% of its total coffee imports. In tonnes, imports varied between 247,000 and 291,000 tonnes. In 2024, Italy imported 243,000 tonnes of Robusta. This was 39% of total green coffee imports.

Italy's share of Robusta is much higher than Germany's. This is because of Italy's espresso-based coffee culture. In 2024, Italy sourced most of its Robusta from Vietnam (133,000 tonnes), Uganda (38,000 tonnes) and Indonesia (8,000 tonnes).

The top five Italian coffee companies [account for more than half of the total market](#). According to Beverfood, the five largest companies are Lavazza, Illy, Nestlé Italia, Nespresso Italia (a Swiss company active in Italy) and [Caffè Borbone](#). [Segafredo Zanetti](#) is part of [Massimo Zanetti](#). It is another very large Italian roaster with an international focus.

Other large coffee roasters based in Italy are:

- [Kimbo](#);
- [Caffitaly](#);
- [Casa del Caffè Vergnano](#);
- [Pellini Caffè](#);
- [Coind](#);
- [Jacobs Douwe Egberts Italia](#);
- [Hausbrandt Trieste](#);
- [Caffè Trombetta](#);
- [Covim](#);
- [Caffè Carraro](#);
- [Ekaf Cellini](#);
- [Esse Caffè](#);
- [Procaffè](#);
- [Lollo Caffè](#);
- [Quarta Caffè](#);
- [Caffè Diemme](#).

The amount of Robusta these companies roast is unclear, but they are thought to buy large amounts.

Tips:

Focus on the Italian market if you produce a lot of commercial Robusta coffee.

Find more opportunities and information in [our study on exporting coffee to Italy](#).

Spain: over 50% of their imports consist of Robusta

Spain is Europe's third-largest coffee importing market. In 2024, Spain directly imported 273,000 tonnes of green coffee from producing countries. Spanish imports have remained stable over the past five years. In 2020, Spanish imports from producing countries came to 266,000 tonnes.

Spain is Europe's third-largest Robusta coffee importing market. Between 2020 and 2023, Robusta imports made up around 62% of total imports. In tonnes, imports were between 144,000 tonnes and 165,000 tonnes. In 2024, Spain imported 142,000 tonnes of Robusta, equal to 52% of total green coffee imports. Spain has one of the highest shares of Robusta of all European markets. This is largely because of Spanish coffee culture and the popularity of Robusta-based espresso.

In 2024, Spain sourced most Robusta from Vietnam (110,000 tonnes), Uganda (18,000 tonnes), Côte d'Ivoire (8,000 tonnes) and Indonesia (6,000 tonnes).

Some of the leading Spanish importers are:

- [Icona Café](#) (Madrid);
- [Coprocáfé Ibérica](#) (part of Neumann Kaffee Gruppe, Madrid);
- [Volcafé Iberia](#) (Madrid);
- [Louis Dreyfus Company España](#) (Madrid);
- Guzmán Coffee & Nuts (part of Guzman Minerals, Valencia);
- [Tostadores Reunidos](#) (Madrid).

Spain has a small market for Fairtrade and Rainforest Alliance-certified coffee. In 2023, Spain imported 8,000 tonnes of Rainforest Alliance-certified coffee. It is not clear how much was Robusta. However, Spain imports a fair amount of organic coffee. It imported 3,945 tonnes of organic coffee, making it the sixth-largest organic coffee importer. Spain ranks far above the Netherlands, which imported 2,569 tonnes in 2023. It is unclear how much of these organic imports were Robusta.

Organic imports are increasing. In 2023, 1.3% of green coffee imports were organic. For comparison, this was 5.9% in Germany. Imports of organic coffee grew by 34% in 2023. Organic coffee imports have increased by 134% since 2018.

Tips:

Find more opportunities and information in [our study on exporting coffee to Spain](#).

Visit the [Spanish Coffee Association website](#) (AECafé). It publishes sector news and national events.

The Netherlands offers a competitive market for sustainable initiatives

The Netherlands is Europe's fifth-largest coffee importing market. It is Europe's fourth-largest Robusta importing market. In 2024, the Netherlands imported 166,000 tonnes of green coffee from producing countries directly, nearly three times the 58,000 tonnes imported in 2020.

Between 2020 and 2023, the share of Robusta imports grew from 19% to 34%. In 2024, Robusta imports from producing countries grew in volume, but remained 33% of the total. This is noteworthy because Robusta rates went down in almost all other countries. Imports of Robusta from producing countries grew by about 400%, from 11,000 tonnes in 2020 to 55,000 tonnes in 2024.

There has been a shift in trade partners, which is why more was imported from producing countries. A lot of green coffee was imported from Belgium and Germany, but these trade flows have almost stopped. Dutch traders started sourcing more from producing countries. In 2024, the Netherlands sourced most of its Robusta from Vietnam (46,000 tonnes), followed by Indonesia (5,000 tonnes) and Uganda (5,000 tonnes).

The Netherlands is an interesting country for companies that focus on sustainability. Consumers are very aware of sustainability and can afford it. However, there is a lot of competition from other coffee suppliers that focus on sustainability. The Netherlands also has two companies that roast at origin: [Moyee](#) and [Guzo](#). This keeps more of the supply chain in the producing country.

The Dutch drink a lot of coffee. The average Dutch person drinks four cups of coffee per day. Even though it only has 18 million inhabitants, it ranks sixth in Europe in terms of coffee consumption. You can find more information in the [CBI study on exporting coffee to the Netherlands](#).

Belgium offers a growing market for certified coffee

Belgium is Europe's fourth-largest coffee importing market. It is Europe's fifth-largest Robusta coffee importing market. In 2024, Belgium imported 248,000 tonnes of green coffee from producing countries directly. Its imports from producing countries declined slightly, from 282,000 tonnes in 2020.

Between 2020 and 2023, Robusta imports varied between 23% and 33%. In 2024, Robusta imports from producing countries went down to 18%. Most imports came from Vietnam (27,000 tonnes), Uganda (8,000 tonnes) and Indonesia (4,000 tonnes).

The Belgian market for certified coffee is growing. In 2023, Belgium imported 30,000 tonnes of Rainforest Alliance-certified coffee. This is up 3% from 2022, despite a 25% overall drop in green coffee imports. Belgium imported 30,000 tonnes of organic green coffee in 2023. This is 22% of all European organic green coffee imports. It is unclear how much were Robusta.

Belgium is one of the main coffee trade hubs in Europe. Over 64% of its green coffee imports were re-exported to other European countries in 2023. This was equal to 176,000 tonnes of green coffee re-exports. It is unclear how much of these re-exports was Robusta.

Tips:

Think about shipping through Belgium if you have other buyers in Western Europe. Belgium is a great hub for accessing the Netherlands, Germany and France.

Find more information in the [CBI study on exporting coffee to Belgium](#).

The United Kingdom has a huge speciality coffee market

The United Kingdom is Europe's sixth-largest green coffee importing market. It is Europe's sixth-largest Robusta coffee importing market. In 2024, the United Kingdom imported 143,000 tonnes of green coffee from producing

countries directly. British imports went down from 174,000 tonnes in 2022. In 2024, British imports were the same as in 2020 (147,000 tonnes).

Between 2020 and 2023, between 31% and 44% of its coffee imports were Robusta coffee. In 2024, this percentage was 24%. In 2024, the United Kingdom imported most Robusta from Vietnam (29,000 tonnes), Indonesia (4,000 tonnes) and Uganda (1,000 tonnes).

According to experts, the United Kingdom is Europe's largest speciality coffee market. It has grown a lot in recent years. You can see this in the growing number of cafés. 23% of all coffee served in cafés [is considered speciality coffee](#). High-quality Robustas are used in the speciality coffee market more, although the share is still very limited.

The growing demand for speciality coffee also reaches offices and homes, driven by the demand for quality over quantity and the growth of remote work. Offering speciality coffee in the workplace is seen as an employee perk, possibly boosting productivity and retention.

Tips:

Visit the [British Coffee Association](#) website for more information about the coffee industry in the United Kingdom.

Consider approaching roasters directly. Some [websites have lists of roasters](#).

Find more opportunities and information in the [CBI study on exporting coffee to the United Kingdom](#).

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

Robusta is largely thought of as lower quality than Arabica. However, Robusta is slowly being seen differently. High prices, climate change and high global demand are changing the market. At the same time, there is slightly more focus on the quality of production.

High prices drive the demand for (high-quality) Robusta

Europeans love coffee that they can afford. Robusta costs less than Arabica. Roasters often mix Arabica with Robusta to lower the production price. This affects the coffee market. Although Robustas are mostly used in the lower ends of the market, speciality coffee roasters sometimes mix their coffees with high-quality Robustas so their coffee is easier to afford. When they do, they try to use a 'clean' Robusta with a mild taste. In the speciality sector, [a screen size of 17/18](#) is thought to be best. This needs berries that are picked when they are ripe.

The [Futureproof Coffee Uganda project](#) offers high-quality Robusta. It was set up by the [Coffee Quest](#), a British trader. Its aim is to promote sustainable coffee production. The project focuses on soil rehabilitation, climate resilience, economic empowerment, income diversification and gender equality. [Great Cherry Robusta](#) is a Vietnamese company that focuses on Fine Robusta. Besides good farming and processing, they claim that volcanic soil gives their coffee a special flavour. Great Cherry Robusta exports to Germany and other countries.

Prices change a lot and are hard to predict. As climate change affects coffee production and global demand for

coffee grows, it is likely that prices will only increase. It is important to think about this. Although the public view of Robusta is changing, Arabica is still mostly thought of as better quality.

Tips:

Only pick your berries when they are ripe. This makes your coffee better quality.

Read the CBI study on [trends in the coffee market](#).

Climate change affects Robusta production

Climate change [is a problem for coffee production](#). It means less coffee is available and the quality is lower. Coffee plants need specific temperatures and rainfall conditions. These are increasingly changing because of climate change. As temperatures rise, so does the risk of pests and diseases. This could cause a lot of problems with crops. It will also change how your coffee beans taste.

If less coffee is grown and quality is not stable, then coffee prices may increase. It is unclear how much producers and exporters will profit from higher prices, but it is important for exporters to have access to multiple buyers. Better market access, however, does not always mean better prices.

Climate change will likely halve [the amount of land that Arabica coffee](#) can be grown on. Robusta coffee can grow in [higher temperatures than Arabica](#), but if temperature changes, drought and pests still present problems. Climate change is likely to strengthen these factors. Extreme dry weather in Vietnam [cut Vietnamese Robusta production](#) by 20% in the 2023/2024 production year.

[ROBUST](#) is a project in East-Africa that addresses climate resilience and sustainable production. The European Union funds it. The project aims to help farmers deal with climate change, produce more and work on creating healthy soil. The project encourages growing different kinds of trees.

Tips:

Grow your Robusta in the shade. This will make your harvests smaller in the short term. However, it will help your trees live longer, deal better with climate change and improve quality.

Take other steps to prepare for climate change, such as growing different kinds of crops, improving your water system and implementing integrated pest management. One example of this [is to start producing honey](#). Bee hives generate extra income and improve the health of your coffee farm.

Inform yourself on how to prepare for climate change. You can start by reading the [Fairtrade Climate Academy Guide for coffee producers](#).

Increased interest in Robusta drives quality and price

[Interest in higher-quality Robustas is growing](#). World Coffee Research recently published a new catalogue [with a lot of information on different varieties](#). It also created a [Robusta Grading Scale](#). With climate change causing problems for production and demand rising, increased interest is likely to continue.

Robusta used to be considered an affordable alternative to higher-quality Arabica. In general, this is still true. Arabica is still seen as 'higher quality', which is not likely to change. However, the way people think about Robusta is slowly changing. High prices and climate change create demand for Robusta. This also leads roasters to market Robusta as a high-quality alternative.

As Robusta is seen as an alternative to Arabica, growing conditions and processing are also being improved. Nguyen Coffee Supply, for instance, [aims to treat Robusta coffee the same way as Arabica](#). Quality is improved in several ways, for example through farmer education, harvesting ripe berries and checking for defects. Although many growers are putting more effort into the quality of Robusta, there is still a long way to go.

Greater focus on Robusta's quality has also led to 'high-quality' or 'Fine Robusta'. This [is becoming more popular](#). Some speciality roasters, such as [Blue Bottle Coffee](#) and [Black Sheep Coffee](#), have already added Fine Robusta to their product range.

Arabica coffee tastes more fruity, while Robusta tastes bitter. So, many producers in the speciality sector infuse their Robusta with fruit. Fermentation (natural [anaerobic](#)) [can improve flavour](#), which is especially important in the speciality coffee sector.

Tips:

Work on the quality of your product. Demand for higher-quality Robusta is growing.

Try out different kinds of processing. Read [this blog on Freshcup](#) for ideas.

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

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