

# What is the demand for coffee on the European market?

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Europe is home to the world's largest market for green coffee. Within Europe, Germany is the leading buyer, followed by Italy and Belgium. In addition to high-volume commercial grades, the market offers special opportunities for specialty, certified and decaffeinated coffee.

## Contents of this page

1. [What makes Europe an interesting market for coffee?](#)
2. [Which European markets offer most opportunities for coffee?](#)
3. [Which products from developing countries have most potential on the European market?](#)

## 1. What makes Europe an interesting market for coffee?

Europe has a large coffee market, accounting for about one-third of all global consumption. The consumed volume is expected to stay at the same level in the coming years.

### Europe is the world's largest coffee-consumption market

[Europe accounted for 30.4% of all global coffee consumption](#) in 2023/2024. With a volume of 3.2 million tonnes, Europe is the world's largest coffee-consumption market. The Asia-Pacific region is the second-largest consumption market, with a share of 25.8%, followed by North America (17.5%) and South America (15.8%).

The volume of coffee consumption in Europe is expected to stay the same. Almost all Europeans can afford coffee, and economic growth is not likely to increase consumption. However, the [demand for higher-quality coffees is expected to increase](#).

European coffee consumption is expected to decline relative to other regions. This is due mainly to increasing consumption levels in Asia. The consumer markets in Vietnam and Indonesia growing especially fast.

Source: [International Coffee Organization Monthly Coffee Market Report, August 2024](#)

In 2023, Europeans drank an average of 5.7 kilograms of coffee per person per year. This is relatively high compared to other regions. For example, in the United States, annual coffee consumption was 4.8 kilograms per person.

Brazilians led the world, with an average consumption of 6.4 kilograms per person per year.

### Europe offers opportunities mainly for green coffee

Europe has a very large coffee-processing industry. More than 95% of all coffee imports are green coffee.

Source: [European Coffee Report 2023/2024](#)

There are several reasons why Europe imports mainly green coffee instead of roasted or soluble coffee:

- One important reason has to do with trade duties on roasted coffee. Importers must pay these duties when importing roasted coffee. The standard third-country duty for roasted coffee imports is 7.5%. The standard third-country duty for decaffeinated roasted coffee is 9%, unless stated otherwise in a trade agreement. Due to trade agreements, tariffs can differ from one country to another. There is no third-country duty for green coffee. Many of these trade duties have been lifted in recent years, especially for poorer countries. However, trade duties still apply to some countries, such as Brazil. You can read more information on trade duties in our study on [entering the European market for roasted coffee](#).
- Another reason that European buyers purchase mainly green coffee is that it has a longer shelf life. Green coffee beans generally stay fresh for 6–12 months. This gives buyers more flexibility in customising their supply to current demand.
- A third reason is that roasters make coffee with specific taste profiles. These taste profiles differ across European markets. Roasting close to the consumption market therefore offers advantages.
- Finally, the European market for roasted coffee is very competitive, which makes it very hard to enter.

#### Tips:

Find the trade tariff for your country [through the Taric Consultation website](#) or [Access2Markets](#) provided by the European Commission. Use the HS codes to find your product: 090121 for roasted coffee, not decaffeinated and 090122 for roasted coffee, decaffeinated.

Read our study [Exporting roasted coffee to Europe](#), for more information on how to enter the European market for roasted coffee.

## Europe is the world's largest importer of green coffee

As the world's largest coffee-consumption market, Europe is also the world's largest importer of green coffee. Although European imports experienced a sharp drop in 2020 due to the global COVID-19 pandemic, coffee imports recovered in 2021 to pre-pandemic levels. In 2022, green coffee imported directly from producing countries increased by 6.4%. European imports declined by 9.7% in 2023. You can read more about this in the section on [Decline in European Imports in 2023](#).

Total European imports of green coffee amounted to 3.6 million tonnes in 2023, including coffee re-exported from European countries. Excluding European re-exports, practically all green coffee comes from producing countries.

Source: Eurostat and Trade Map

## Decline in European green-coffee imports in 2023

In 2023, European imports of green coffee declined significantly, by 9.7%, due largely to a decrease in global production. The downturn in Europe's imports [could also be due to other factors](#) as well, including economic challenges in Europe and coffee-exporting countries. In addition, post-pandemic efficiencies in larger ports have

led smaller European countries to shift their direct imports to major hubs. The conflict in Ukraine has also influenced Europe's coffee imports.

## The impact of global shortages on the European coffee market

A unique trend occurred in 2022 and 2023, in which global [coffee consumption exceeded production](#). Specifically, in 2023, production in Asia and Oceania fell by 4.7%, and Africa's production decreased by 7.2%, due to adverse weather conditions. Conversely, Brazil's coffee production increased by 8.4%, partially mitigating the global shortfall.

The production shortage led many European companies to exhaust their inventories, depleting coffee stockpiles in European warehouses. As a result, importers will have to buy more green coffee in the future to maintain coffee production in Europe.

## Short-term projection

The [USDA's positive forecast](#) for the upcoming year anticipates a 4.4% increase in EU imports of green coffee. This is due to expected higher yields in Brazil and Indonesia. The International Coffee Organization predicts a [0.5% production surplus over consumption](#) in 2024. High coffee prices are making it less attractive to restock inventories, however, and market predictions are therefore uncertain. Overall, this means that it is likely — but not certain — that suppliers will be able to export more green coffee to Europe in the coming years.

## Long-term projection

Long-term expectations indicate that demand will surpass production. This is partly driven [by emerging markets in Asia](#). Another main driver is related to the [effects of climate change on coffee cultivation](#), particularly Arabica beans. These changes suggest price increases, volume reductions and decreased coffee quality over time. As a result, there might be a shift towards Robusta coffee, which is known for its resilience, but is considered a lower-quality option.

## Europe's decreasing coffee consumption

In 2023, European coffee consumption experienced a notable downturn, with a [3.7% reduction](#) — from 3,312 million tonnes to 3,186 million tonnes. This was the most significant drop since the 2008 financial crisis. The EU27 experienced a significant decrease of 5.6%. This is in sharp contrast to the substantial rise in consumption the previous year. Although non-EU27 countries saw slight increases, they could not offset the steep EU27 decline.

This downturn was due to several factors. The most important causes are the increasing cost of living and the decline in disposable income across Europe. In 2022, inflation rose to [10.4%](#), but fell to [3.4%](#) in 2023.

The reduction in European coffee consumption only slightly made up for the supply shortage. The 9.7% reduction in imports was much larger than the 3.7% reduction in consumption.

## Germany is the largest coffee trade hub, followed by Belgium

In 2023, 99.5% of all coffee was imported from producing countries. Of these imports, 15% was re-distributed to other European countries. Some European countries re-distribute much more than other countries. These countries are known as 'trade hubs'.

Germany is the largest European importer of and trade hub for green coffee. In 2023, Germany re-exported 194

thousand tonnes of green coffee. The country re-exports most green coffee to neighbouring countries: Poland (86 thousand tonnes), Spain (32 thousand tonnes), the Netherlands (17 thousand tonnes) and the Czech Republic (16 thousand tonnes).

Belgium is the second-largest trade hub. The total amount of green coffee re-exported through Belgium was 176 thousand tonnes in 2023. Most of this volume was re-exported to France (65 thousand tonnes) and the Netherlands (39 thousand tonnes). Other important trade hubs include the Netherlands (69 thousand tonnes), Spain (29 thousand tonnes) and Italy (13 thousand tonnes).

Figure 4 shows the largest trade flows for green coffee within Europe. Broader arrows indicate larger trade flows. The pink side indicates the origin, and the blue side indicates the destination.

Figure 4: The 20 largest intra-European trade flows for green coffee in 2022



Source: [Resource Trade](#)

## **Brazilian Naturals represent the largest imports**

In 2023, the EU27 imported 2.6 million tonnes of green coffee. The ratio of Arabica to Robusta remained relatively stable, at approximately two-thirds Arabica and one-third Robusta. More specifically, Arabica coffees made up 63.8% of all green-coffee imports (1.7 million tonnes), and Robusta coffees comprised 35.6% (941 thousand tonnes).

Within the Arabica category, Brazilian Naturals comprised the largest portion (37%), followed by Other Milds (19.9%) and Colombian Milds (6.9%). The increase in the share of Arabica coffees was partially offset by a substantial reduction in the category of 'Others'. This highlights the dominance of Brazilian Naturals, Other Milds and Colombian Milds in the Arabica market.

The main driver of the growth in Robusta imports was an increase in imports from Vietnam.

Source: various European coffee reports

## **Europe is the world's largest market for certified coffee**

Europe has the world's largest market for certified coffee, including Fairtrade, Rainforest Alliance and Organic certified coffee. However, the market for certified coffee is stagnating. You can read more about this under the heading 'The European market for certified coffee is stagnating'.

## **2. Which European markets offer most opportunities for coffee?**

Germany is Europe's largest importer of green coffee sourcing directly from producing countries, followed by Italy, Belgium, Spain, Switzerland and the United Kingdom. These countries account for 79% of all European imports of green coffee from producing countries.

Source: Eurostat and Trade Data

**Germany is the most important player on the European coffee market**

Germany is the largest importer of green coffee beans in Europe. In 2023, Germany imported 986 thousand tonnes of green coffee. Between 2018 and 2022, the market remained stable, with a minor yearly growth rate of 0.5% since 2018.

In 2023, Germany’s imports declined by 17%, far more than the European average of 9.7%. Because of the global coffee shortage, European companies used their enormous stocks to fulfil the demand. Because Germany is an important trade hub, Germany supplied less coffee to other European countries.

The expectation is that imports from Germany will grow in the following years. With European companies having very low stocks, imports will have to grow to meet demand. As Europe’s most important trade hub, we assume this will be reflected in the import levels.

Almost all (91%) of Germany’s green-coffee imports were sourced directly from producing countries. Brazil (341 thousand tonnes) was by far the largest supplier, followed by Vietnam (207 thousand tonnes), Honduras (76 thousand tonnes), Uganda (53 thousand tonnes), Colombia (40 thousand tonnes) and India (34 thousand tonnes).

To see the exports from your country to Germany, hover your mouse cursor or pointer over the countries in displayed blue in Figure 7.

Source: Eurostat

Most green coffee beans enter Germany through the [Port of Hamburg](#). Neumann Kaffee Gruppe, the world's largest coffee trader, has its headquarters in Hamburg. The [ports of Bremen and Bremerhaven](#) are also important entry points for coffee. As Europe’s largest importer, Germany is a potential destination for exporters of coffee of various quality levels and origins, which are either roasted locally or re-exported to other markets. [Ecom](#) and [Rehm & Co.](#) are two of Germany’s largest coffee traders.

The German coffee market has strong price competition between discounters. Examples include ALDI, Lidl and REWE. ALDI Nord [even has its own roasting facility](#). German retail prices for ground coffee and coffee beans [have risen by an average of 10%](#) since 2022.

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 an [increase in the number of smaller roasters](#).

Table 1: List of larger potential German buyers

Name	Location
<a href="#">Dallmayr</a>	Munich

Jacobs	Bremen
Lavazza	Hamburg
J.J. Darboven	Hamburg
Diedrich Coffee	Cologne
Segafredo Zanetti	Hamburg

## Germany has a large consumer market

Germany's yearly per capita coffee consumption averages 5.4 kilograms. Although this is not the highest in Europe, it is still above the European average (5 kilograms). Germany is home to Europe's second-largest market for branded coffee shops and its [second-largest market for shops specifically focused on coffee](#) (after the United Kingdom). [Germany is also the largest European market for organic products](#). This creates interesting opportunities for coffee exporters with organic certification. At the same time, however, Germany is also the most competitive market for organic coffee in Europe.

## Specialty coffee and whole-bean coffee are on the rise

[Demand for high-quality coffee is growing](#) in Germany. More consumers prefer specialty coffees over mass-produced options, for reasons of taste and sustainability. Specialty coffee shops are flourishing in Berlin, Munich and other cities, with a focus on ethical sourcing. Many Germans are willing to spend more for sustainable coffee.

Sales of whole-bean coffee in Germany [are expected to surpass ground coffee in 2023](#). Whole beans comprise 46.6% of the market, as compared to 43.3% for ground coffee. In the past five years, whole-bean sales have surged by 69%. At the same time, ground coffee and single-serve options have declined by 20.2% and 24.7%. This shift suggests that consumers are seeking freshness and a personalised coffee experience at home.

## Germany has a large market for certified coffee

Germany offers a large market for coffees with Rainforest Alliance, Fairtrade, Organic and multiple certifications.

Germany is [the world's second-largest importer of Rainforest Alliance-certified coffee](#). In 2023, Germany imported 132 thousand tonnes, a decrease of 7% since 2022. Germany is surpassed only by Switzerland, which imported 249 thousand tonnes in 2023.

According to Fairtrade Germany, 24,057 MT of all coffee consumed in Germany in 2022 was Fairtrade-certified. This amounts to about 5% of the country's total coffee consumption. Germany is [one of the world's five leading countries in terms of Fairtrade consumption](#).

Based on TRACES data, Germany is Europe's largest market for organic-certified coffee. In 2023, Germany imported more than 58 thousand tonnes of organic green coffee. The country's main suppliers were Honduras (24 thousand tonnes) and Peru (17 thousand tonnes).

Exporters of organic coffee face a competitive market. Germany is known as the prime destination for producers of organic-certified coffee. Examples of German traders of organic coffees include [Bernhard Rothfos](#), [InterAmerican Coffee](#), [List + Beisler](#) and [Rehm & Co](#).

Germany also has a large market for coffee with dual certification. According to Statista, about 72% of all Fairtrade-certified coffee [was also organic-certified](#). This percentage has been stable since 2011, fluctuating between 68% and 78%. Given that 5% of all German coffee is Fairtrade certified, approximately 4% of all coffee sold in Germany has Fairtrade Organic certification. The largest German retailers sell Fairtrade Organic coffee as part of their range of products. [ALDI](#) sells Fairtrade Organic coffee under its brand Simply Nature. [Lidl](#) sells Fairtrade Organic coffee under its brand Café del Mundo. [REWE](#) also sells Fairtrade Organic coffee.

#### Tips:

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

For more information on exporting to Germany, consult the [German Import Promotion Desk](#).

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

## Italy has a strong coffee-roasting industry

Italy is Europe's second-largest importer of green coffee beans. In 2023, Italian imports of green coffee beans reached 646 thousand tonnes. Italian imports increased at an average yearly rate of 1.5% between 2019 and 2023.

More than 96% of all Italian imports are sourced directly from coffee-producing countries. The main supplier of green coffee to Italy is Brazil (198 thousand tonnes), followed by Vietnam (150 thousand tonnes) and Uganda (98 thousand tonnes).

To see the exports from your country to Italy, hover your mouse cursor or pointer over the countries displayed in blue in Figure 8.

Source: Eurostat

Italy generally imports a relatively large share of Robusta varieties, which are used as a base for espresso blends. In the Italian market, price is more important than it is in many other European markets. Italians also favour a darker roast. Quality is thus less important in the Italian market.

## Italy has the third-largest consumer market in Europe

With almost 60 million citizens, Italy has a large consumer market. In 2022, [Italians consumed a total of 327 thousand tonnes of coffee](#). This makes Italy one of the leading coffee-consuming countries within the EU27, along with Germany and France.

## Italy has one of the largest coffee-roasting industries in Europe

Italy is home to many small-scale roasters. Some of them are family-owned businesses. The country also hosts some of the world's largest roasters, including [Lavazza](#), [Massimo Zanetti BG](#) and [illycaffè](#). Most of the

production of Italian roasters is for the domestic market. Italian roasters also export substantial amounts of coffee blends to destinations throughout Europe and the United States.

## The forecast for the Italian coffee market is positive

Italy's import volume is expected to [remain relatively stable](#) in the coming years.

## The Italian demand for certification is still small but growing

Third-party certification is very limited in Italy. The demand for organic coffee in Italy is about 1.0% of the total market volume. However, it is a growing market. [Imports of organic coffee were growing](#) a few years ago, until reaching a peak of 8,774 tonnes in 2020. Between 2021 and 2023, organic imports showed a yearly average decline of almost 10%, [based on TRACES data](#).

In 2022, only 759 tonnes (0.32% of the total market) of all coffee sold had Fairtrade certification. Rainforest Alliance certification is more common, accounting for [6.5 thousand tonnes in 2023](#).

Some Italian buyers are leading the way in the Italian coffee market. [Kimbo](#) sources only coffees with Rainforest Alliance certification. [Coop](#), a large retailer, sells roasted coffee products certified by the main certification standards (such as Fairtrade). [Alce Nero](#) is another brand that sells mostly Fairtrade-certified coffee. The company is also a leading brand in organic coffee. With about 550 shops, [IN's](#) is a large discount retailer. The company has increased its share of Fairtrade coffee in recent years, and it is currently selling large volumes. The [illycaffè](#) company is B Corp certified.

## The Italian market for specialty coffee is expected to slowly take off

Like other Mediterranean markets, the Italian specialty coffee market is still small. In 2021, Italy [was home to only 79 specialty coffee cafés](#), out of more than 50 thousand cafés. This was less than 0.2% of all cafés.

In 2021, the Specialty Coffee Association in Italy launched the [Coffee Boom event](#) to promote specialty coffee and boost end-consumer recognition and appreciation of its quality. Despite being a small niche market, the gradual spread of specialised coffee roasters and shops may create interesting opportunities for high-quality coffees with special origins and unique stories.

The Italian demand for specialty coffee [is expected to rise in the near future](#), following Western European countries. This predicted increase is driven partly by large roasters launching their own specialty coffee brands. One example is Lavazza, which [founded a specialty brand known as 1895](#). Examples of specialty coffee roasters in Italy include [Nero Scuro](#), [Pierre Café](#) and [Cafezal Specialty Coffee](#).

For more information, read our [study on the European market for specialty coffee](#).

### Tips:

Focus on the Italian market if you produce large quantities of commercial Robusta coffee or cheaply produced Arabicas.

Invest in the Italian specialty-coffee market to lay a foundation for the future. By investing now, you could step into a growing market at an early stage.



## Belgium is a trade hub for coffee in Europe

Belgium is one of the main coffee-trade hubs in Europe. More than 64% of its imports are re-exported to other European countries. In 2023, this amounted to re-exports of 176 thousand tonnes of green coffee. This makes Belgium the largest re-exporter in Europe.

Belgium is Europe's third-largest importer of green coffee. Between 2018 and 2022, the country's imports grew at a yearly rate of 6.4%. In 2023, however, imports decreased by 25%, which is far more than the European average decrease of 9.7%. Due to high coffee prices, European companies have used their enormous stocks to fulfil the demand. Because Belgium is an important trade hub, the Belgian trade strongly reflects the drop in European demand, resulting in lower imports by Belgian traders.

The expectation is that Belgian imports will grow in the following years. With European companies having very low stocks, imports will have to grow to meet demand. As one of Europe's most important trade hubs, we assume this will be reflected in the import levels.

Belgium's primary export destinations are its direct neighbours. France was the main destination, with 65 thousand tonnes, steadily increasing in recent years, followed by the Netherlands, with 39 thousand tonnes in 2023. In that year, exports to the Netherlands were almost 60% less than they had been in 2022, when they amounted to 96 thousand tonnes.

The largest share (94%) of Belgium's green-coffee imports were sourced directly from producing countries in 2023, amounting to 274 thousand tonnes. Brazil was the largest supplier of green coffee to Belgium, with 79 thousand tonnes in 2023. This was a 41% decline from 2022. Vietnam ranked second, supplying 58 thousand tonnes of green coffee (a 14% decline). Belgium's third-largest export partner is Honduras, with 28 thousand tonnes (only 3% less than in 2022).

To see the exports from your country to Belgium, hover your mouse cursor or pointer over the countries displayed in blue in Figure 9.

Source: Eurostat

## Belgium is home to a few very large ports

Belgium's important role as an importer and re-exporter of coffee is due largely to storage capacity at the [Port of Antwerp](#). This is the largest storage site for coffee in the world, with space for more than 250 thousand tonnes of coffee at a time. The [Port of Zeebrugge](#) is another important entry point for coffee. It offers large temperature-controlled storage facilities. It is also a distribution platform for green coffee throughout Europe, with transports by rail, road and sea.

## Supermarkets lead the way to certification in the Belgian consumer market

People are increasingly wanting to buy coffee from companies that treat farmers fairly, take care of the environment and help farmers make a good living. Certifications like Rainforest Alliance and Fairtrade help

people find these kinds of companies. Rainforest Alliance/UTZ is the leading sustainability label in major Belgian supermarkets. [Lidl, Delhaize and ALDI all carry UTZ-certified coffees](#). Supermarket chains are increasingly committing to certification, including for their own private label brands.

The higher demand for ethical sourcing is also an important driver of the growing Belgian retail market. Other drivers include the increasing demand for single-serve coffee and premium and specialty coffees.

**Tip:**

Consider shipping your exports through Belgium if you have buyers in Western Europe. Belgium is an excellent hub for reaching the Netherlands, Germany and France.

## **Spain hosts a large out-of-home coffee market**

In 2023, Spain's imports of green coffee beans reached 306 thousand tonnes. The country's imports increased at an average yearly rate of 4.2% between 2018 and 2022. In 2023, however, it declined by 11.8%.

More than 81% of all Spanish imports are sourced directly from coffee-producing countries. The main supplier of green coffee to Spain is Vietnam (124 thousand tonnes), followed by Brazil (55 thousand tonnes). Spain also sources a large amount of green coffee from Germany (32 thousand tonnes) and Belgium (17 thousand tonnes).

To see the exports from your country to Spain, hover your mouse cursor or pointer over the countries in displayed blue in Figure 10.

[Supracafé](#) is one of the largest Spanish buyers. About one quarter of the company's coffee is certified.

Source: Eurostat

## **Spanish consumers are social consumers**

Spanish consumers drink [an average of three kilograms of coffee each year](#). Given their preference for espresso-based coffees, Spain has a relatively large market for Robusta beans. With 260,000 coffee houses, Spain has [the largest coffee-house density per citizen](#). For most Spanish consumers, drinking coffee is more about the social experience than it is about consuming high-caffeine Robusta coffees. The specialty coffee market is still very small, but growing.

## **Spain has a very high demand for decaffeinated coffee**

Spain is the largest European market for decaffeinated coffee. In 2023, imports amounted to 28 thousand tonnes. This far exceeded the second-largest importer, Switzerland (10 thousand tonnes). Spaniards tend to dine late at night. The increased consciousness of caffeine's effects on sleep quality is fostering the demand for decaffeinated coffee.

Of all decaffeinated coffee imported into Spain, 61% (17 thousand tonnes) is sourced from Vietnam. Other large suppliers include re-exporters, such as Germany (9 thousand tonnes) and the Netherlands (1.4 thousand tonnes). The extent to which these re-exported coffees also originate from Vietnam is unclear.

Spain imported 28.5 thousand tonnes of decaffeinated green coffee in 2023. This amounts to 10% of all green-coffee imports.

#### Tips:

Sell your Brazilian Arabicas and Robustas to Spain. Like Italy, Spain focuses on espresso-based coffees. For this reason, they have a high demand for Robustas and affordable Arabicas.

Focus on the Spanish market if you sell decaffeinated coffee. Spain has a very high demand for decaffeinated coffee.

## The Swiss love specialty coffee and source from producing countries

In 2023, imports of green coffee beans to Switzerland reached a volume of 192 thousand tonnes. Swiss imports increased at an average yearly rate of 4.7% between 2018 and 2022. In 2023, imports declined by 8.8%.

Most (98.5%) of all Swiss imports are sourced directly from coffee-producing countries. The main suppliers of green coffee to Switzerland are Brazil (52 thousand tonnes), followed by Colombia (32 thousand tonnes) and Vietnam (17 thousand tonnes). Nestlé, the world's largest coffee company, has [very large production facilities in Switzerland](#).

To see the exports from your country to Switzerland, hover your mouse cursor or pointer over the countries displayed in blue in Figure 11.

Source: ITC Trademap

## Greater demand for specialty coffee is driving growth

Swiss consumers drink an average of [3.2 kilograms of coffee each year](#). Domestic [demand for mainstream quality coffees has stagnated](#), whilst the demand for high-quality coffees has grown. Swiss consumers also have a high demand for decaffeinated coffee and espressos.

If you aim to broaden your network in the Swiss specialty-coffee sector, there are many opportunities:

- [Specialty Coffee Association Switzerland](#) (SCAS) organises specific coffee events, seminars and courses.
- The [Swiss Coffee Festival](#) is an example of one such event. It is aimed specifically at Swiss-German speakers.
- The [Swiss Coffee Connection](#) is the main event for the French-speaking Swiss. There are also several private coffee academies authorised by SCAS to promote knowledge about specialty coffees. One example is the [Académie du Café](#).

One important Swiss organisation is the [Swiss Coffee Trade Association \(SCTA\)](#). Its members handle a large share of the global coffee trade. This includes both commercial and specialty coffee.

The higher demand for specialty coffee and increased demand for ethical sourcing are drivers of the growth in Switzerland's coffee market. The Swiss coffee market is expected to grow slowly in value, but not in volume.

**Tips:**

Diversify from the competition if you target the Swiss specialty-coffee market. This is a mature and highly competitive market.

Be aware that the Swiss speak different languages. The preferred language differs by region. German and French are the most common, followed by Italian. See [the On The World Map website](#) for a map of the preferred language in each region.

Learn about the Swiss coffee market. Visit the websites of the [Swiss Roaster Guild](#), the [Swiss association for the promotion of coffee consumption](#) and the [Swiss Coffee Trade Association](#) for more information. You can also use these websites to find potential buyers.

## **The United Kingdom is Europe's largest specialty-coffee market**

In 2023, the United Kingdom imported more than 163 thousand tonnes of green coffee from producing countries.

This was a decline of 8% compared to the previous year. British imports from producing countries

are more volatile than those from other European countries. In previous years, imports from producing

countries fluctuated between 150 thousand tonnes (2020) and 180 thousand tonnes (2019). This is due largely to [the United Kingdom leaving the European Union in 2020](#) (Brexit).

The United Kingdom imports most of its coffee from Brazil (70 thousand tonnes), followed by Vietnam (40 thousand tonnes) and Colombia (11 thousand tonnes).

Source: ITC Trademap

## **The United Kingdom has a large specialty-coffee market**

According to experts, the United Kingdom is Europe's largest market for specialty coffees. It has grown significantly in recent years, as reflected in the growing number of coffee shops. Of all coffee served in coffee shops, only 23% [is specialty coffee](#).

The rising demand for specialty coffee extends beyond coffee shops to offices and homes. This is driven by a consumer preference for quality over quantity, as well as by the rise of remote work. Offering specialty coffee in the workplace is seen as a valuable employee benefit, which could potentially boost productivity and retention.

**Tips:**

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

If you are a farmer, find the right market for your product, and not the right product for your intended market. Characteristics of your area (for example, soil and altitude) determine which varieties grow best.

Consider approaching roasters directly. Some [websites contain lists of European \(or other\) roasters](#).

Learn more about the main European markets by reading our studies. These include the [Belgian market](#), the [French market](#), the [Italian market](#), the [Swiss market](#) and many other markets.

### 3. Which products from developing countries have most potential on the European market?

The coffee market is highly competitive, and it is transforming slowly. Opportunities in the high-end market are growing, as European consumers are increasingly willing to pay more for high-quality coffees. Although the market for certified coffee is no longer growing, it still offers opportunities for many exporters. Rising coffee prices and expected shortages are leading producers to seek solutions to keep their coffee affordable.

#### Growing demand for specialty coffee

Specialty coffee is coffee of very high quality. According to the most common definition, used by the [Specialty Coffee Association](#) (SCA), specialty coffees are those with cupping scores of 80 and higher.

Europe has the highest demand for specialty coffee globally, with a [global market share](#) of 46%. The global market is expected to grow. Drivers of this trend include increased spending power and the willingness of consumers to engage with their products. Many European consumers want to know the origin story of their coffee, as well as where it comes from and how it was produced.

Although demand for specialty coffee is growing in all European markets, this segment is the largest in Northwestern Europe. Young consumers (18–24 years) are especially interested in specialty coffee, and interest in the age group 25–39 years is expanding rapidly. This age group tends to have higher income levels and greater awareness about sustainable consumption. The increasing interest in specialty coffee is visible in the growing number of coffee bars and chains, small roasters, local brands and an increasing number of well-trained baristas.

No official statistics available about how much specialty coffee is imported. The number of branded coffee chain outlets is an important indicator, however, as most branded coffee chains sell specialty coffee. In 2024, [the market for branded coffee shops grew by 3.3%](#), despite the overall decline in imports of green coffee. Europe's leading brands are McCafé (3,326 stores), Starbucks (3,321 stores) and Costa Coffee (3,102 stores). Other examples include [Caffè Nero](#), [Pret a Manger](#), [illycaffè](#), and [Espresso House](#). Most of these brands sell high-quality coffees, although they are generally not rated by the SCA. In 2024, Europe was home to 45,008 outlets, as compared to 40,675 in 2021. The United Kingdom (10,199) and Germany (6,533) have the most outlets.

Another indicator of interest is the popularity of 'specialty coffee' as a search term on Google. Figure 13 shows the growing use of the keyword 'specialty coffee' in the six European countries that import the most green coffee. Although Spain has most search queries, expert interviews indicate that the United Kingdom is still the main market. One explanation for this difference could be that specialty coffee has become normalised within the British coffee sector.

Source: [Google Trends](#)

#### Tips:

Read our [studies on exporting specialty coffee](#) to Europe for more information on opportunities in this market.

Target specialty-coffee roasters directly, as many of these companies prefer to have direct trade with producers.

Consult the website of the [Specialty Coffee Association \(SCA\)](#) and the [Coffee Quality Institute \(CQI\)](#). They provide news, events and resources related to specialty coffee in Europe and North America. Equivalent organisations in other regions include the [African Fine Coffees Association \(AFCA\)](#), the [Specialty Coffee Association of India \(SCAI\)](#) and the [Brazil Specialty Coffee Association \(BSCA\)](#).

Find out whether you qualify for industry awards, like the [Cup of Excellence](#) programme. This can be an interesting way to promote yourself and your coffee origin in the European market for high-quality coffee.

## The European market for certified coffee is stagnating

Europe is the largest market for certified coffee in the world. Sustainability certification schemes are important to consumers and, therefore, to roasters and traders. The main independent certification schemes in the coffee consumer market are [Fairtrade](#), [Organic](#) and [Rainforest Alliance](#).

Globally, the amount of certified coffee produced is much higher than the amount of certified coffee sold. This means that a large share of all certified coffee is sold without the premiums for certification.

The gap between the percentage sold and produced differs widely by certificate. The gap is the largest for Fairtrade-certified coffee, [where less than one third of the coffee produced with the certification is sold as such](#). Experts have also found wide regional variations in this gap. For example, it is narrower in Latin American countries and wider in African countries. The gap is the smallest for C.A.F.E. Practices verification (the Starbucks corporate certification programme). About two thirds of all C.A.F.E.-certified production is sold as such, as compared to about half for Rainforest Alliance. You should therefore check carefully with your buyers to learn whether they are willing to buy your certified produce.

Source: based on [Coffee Barometer 2023](#)

## Rainforest Alliance-certified coffee is stagnating

Between 2017 and 2021, [Rainforest Alliance-certified Arabica sales increased by an average of 11% a year](#). Currently, however, Rainforest Alliance sales are stagnating. In 2023, European [imports of Rainforest Alliance-certified coffee decreased by 11.4%](#). This is comparable to the overall decline in Rainforest Alliance sales (-11%) and in European green-coffee imports (-9.7%). Europe's largest importers of Rainforest Alliance-certified coffee are Switzerland (249 thousand tonnes), Germany (132 thousand tonnes) and the Netherlands (95 thousand tonnes).

Nespresso is one popular, well-known European coffee brand that carries the Rainforest Alliance certification label. Other large European retailers that sell Rainforest Alliance-certified coffees include the

German [Kaufland](#), [Lidl](#) and [REWE](#) chains, the British [ASDA](#), and other large roasters (such as [Lavazza](#)).

## **Demand for organic-certified coffee has stagnated**

Between 2019 and 2021, demand for organic-certified coffee increased by 5.4% per year. Between 2021 and 2023, however, demand decreased by 1%. In 2023, organic imports declined by 9%. This is comparable to the overall European trend for green-coffee imports (-9.7%).

Europe's main markets for organic coffee are Germany (58 thousand tonnes), Belgium (30 thousand tonnes), Sweden (13 thousand tonnes) and France (13 thousand tonnes).

## **Germany, the United Kingdom and France are important Fairtrade markets**

No statistics are available on Fairtrade-certified coffee imports by Europe as a region. It is clear, however, that the [global production of Fairtrade-certified coffee has declined](#), from 923 thousand tonnes in 2021 to 707 thousand tonnes in 2022. This was partly due to a reduction in global production. The amount of land used to produce Fairtrade-certified coffee has decreased as well, from 1153 thousand hectares in 2021 to 1019 hectares in 2022.

Germany is the [largest market](#) for Fairtrade-certified coffee, followed by the United Kingdom, the United States, Canada and France. In 2021, [more than 24 thousand tonnes of Fairtrade coffee were sold in Germany](#), representing [5% of the total German coffee market](#). Fairtrade coffee sales increased at an average yearly rate of 7.4% in volume between 2017 and 2021, reaching a value of almost €541 million in 2021. In 2023, [Fairtrade coffee sales decreased by 3.6%](#). In the United Kingdom, [7% of all coffee is sold as Fairtrade](#). In France, Fairtrade coffee sales increased by an average of 12% per year between 2019 and 2023. During the same period, however, the market value decreased by 3% (as compared to the growth of 10% in overall market value).

### **Tips:**

Before joining a certification scheme, learn more about the costs of certification. This includes the costs of complying with the certification standard and the fees charged by certifying bodies. If you are new to certification, request price quotations from different regional audit organisations and negotiate with them. These organisations tend to be private companies.

Check with your buyers to learn whether certification will give you a competitive advantage before getting certified. This will depend strongly on the region. For instance, the supply of and demand for Rainforest Alliance certification are similar in Latin America. In Africa, there is an oversupply of certified coffee. You can [check this by region and country for Rainforest Alliance](#). For a global overview of the gaps between certified coffee produced and certified coffee sold, read [the Coffee Barometer 2023](#).

Learn more about the market for certified coffee. Read our studies on [organic coffee](#), [certified coffee](#) and [multi-certified coffee](#).

Find importers that specialise in organic products in specific European markets on the [website of Organic-bio](#). If you produce coffee under a Fairtrade scheme, you can also search the [FLOCERT customer database](#) for specialised European buyers experienced with sustainable and/or Fairtrade products.

## Higher quality Robusta coffee is likely to become more important

In 2023, Europe imported 942 thousand tonnes of green Robusta coffee. This accounted for 35.6% of the European market for green coffee. The demand varies widely by country. For example, in Spain, [59% of all coffee-bean imports were Robusta in 2021](#). The demand for Robusta is [much smaller in Scandinavian countries](#).

Due to global shortages, the prices for Arabica and Robusta coffees are expected to increase. You can read more about this in the section on [Global shortages shape the European coffee market](#). Prices for Robusta are lower than they are for Arabica. Robusta coffees are used primarily in lower-quality blends and soluble coffee. The demand for higher-quality Robustas is likely to increase as fewer Arabica beans become available. Coffee producers will want to keep their quality consistent, despite the unavailability of higher-quality Arabica beans.

The quality of coffee [is determined partly by the post-harvest processing method](#). Dry processing is the [most common method for Robusta beans](#). Currently, the post-harvest [processing methods for Robusta beans are less developed](#). This is because they are generally used for the lower market segments, where quality is less important. For this reason, the demand for Robusta — which is processed by more advanced methods — is likely to increase. One example of a high-quality Robusta is [India Craigmere Kattimuttu](#), which is sold for €21 per kilogram.

### Tips:

- Learn about [the concept of Fine Robusta](#) and the [Fine Robusta Standards and Protocols](#).
- Invest in post-harvest processing methods. This can offer a competitive advantage in the coming years.

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

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