

What is the demand for coffee from producing countries on the European market?

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Europe is the largest market for green coffee in the world. Within Europe, Germany is the largest player, followed by Italy and Belgium. Besides high-volume commercial grades, the market offers special opportunities for single-serve coffee, specialty coffee, certified coffee and 'low and decaffeinated coffee'.

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1. What makes Europe an interesting market for coffee?

Europe has a large coffee market, accounting for about one-third of global consumption. The total volume of coffee consumption is expected to stay at the same level over the coming years. The European retail market value, however, is expected to grow, due to a higher demand for more expensive coffee. Examples are certified coffee, premium and specialty coffee, and single-serve coffee. Exporters can profit from the market growth by tapping into these growth segments.

Europe is the world's largest coffee market

Europe accounted for 31% of global coffee consumption in 2022. [The total amount of coffee consumed](#) was 55 thousand bags of coffee. Asia-Pacific is the second-largest market, with a market share of 25%, followed by North America (18%) and South America (15%).

Overall, the European demand for coffee is expected to stay at the same level. This is because almost all Europeans can afford coffee, and economic growth will hardly lead to more coffee consumption. However, specific demand for higher-quality coffees is expected to increase at more significant rates.



Source: [International Coffee Organisation](#)

Europe offers mainly opportunities for green coffee

Europe has a very large coffee processing industry. In fact, 95% of all coffee imports are green coffee.

Source: [European Coffee Report 2022/2023](#)

One important reason Europe imports mainly green coffee is due to duties on processed coffee. The standard third-country duty applicable to roasted coffee imports is 7.5%. The 'standard' third-country duty for

decaffeinated roasted coffee is 9%, if not agreed otherwise in a trade agreement. Due to trade agreements, tariffs can differ from country to country. There is no third-country duty for green coffee.

Another reason that European buyers mainly purchase green coffee is that it has a longer shelf-life. Green beans generally stay fresh for 6-12 months. This gives buyers more flexibility in customising their supply to the current demand.

Source: Eurostat and Trade Map

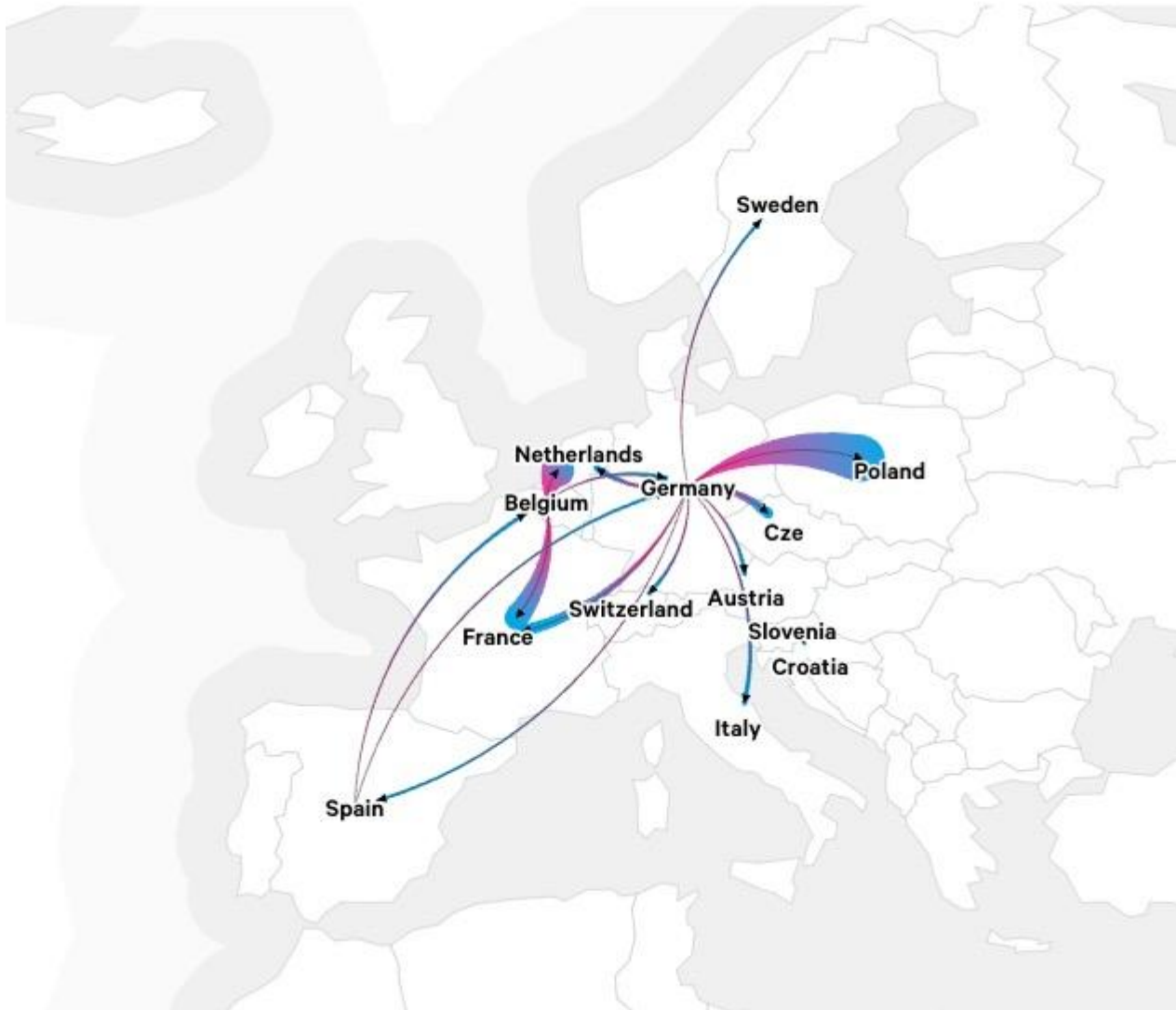
Germany is the largest coffee trade hub, followed by Belgium

Germany is the largest European importer, and the largest trade hub for green coffee. 168,000 tonnes are re-exported yearly. Green coffee is mostly re-exported to neighbouring countries. Germany re-exports mainly to Poland (63,300 tonnes per year), France (16,500 tonnes per year) and the Czech Republic (14,600 tonnes per year).

Belgium is the second largest trade hub. The total amount of re-exported green coffee equals 97,700 tonnes. It mainly exports to the Netherlands (44,700 tonnes per year) and France (33,100 tonnes per year). Spain, (20,700 tonnes), the Netherlands (19,800 tonnes) and Slovenia (11,000 tonnes) are important trade hubs as well.

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

Figure 4: The top 15 largest intra-European trade flows of Green Coffee



Source: [Resource Trade](#)

Brazilian Naturals represent the largest imports

Europe imports more Arabicas (60.9%) than Robustas (35.2%). This is in line with global coffee production, which consists of 59.6% Arabicas. From all Arabicas, the import of Brazilian naturals is the highest. The demand for the different coffee types has not changed much in the past five years.



Source: [European Coffee Report 2022/2023](#)

Russia's war against Ukraine exposed sector vulnerability and drove up prices

Russia's war against Ukraine has influenced the coffee market in two ways. Firstly, the war affects the demand of both Russia and Ukraine. Secondly, it has an impact on the global prices of fertilisers.

From a demand perspective, coffee imports in both countries have decreased. Ukraine's coffee imports fell from 27 thousand tonnes in 2021 to 22 thousand tonnes in 2022. The exporting countries with the largest decrease are displayed in table x.

Table 1: Top 5 countries with the largest export decrease to Ukraine, in tonnes

Country	2021	2022
Vietnam	8,075	6,762
India	4,320	2,969
Brazil	5,650	4,607
Colombia	1,581	762
Ethiopia	1,853	1,541

Source: ITC Trade map

The impact on the Russian coffee market is a lot larger. It also remains very volatile. The import of green coffee was 205 thousand tonnes in 2021. This is about 7% more than Switzerland imported in the same period. After the invasion of Ukraine, the rouble plummeted in value, making coffee much more expensive. Since the mobilisation of military reservists in September 2022, the [sales of coffee businesses dropped by 20-25%](#).

Another impact of the war was the rise in the price of fertilisers. Coffee is highly dependent on fertilisers. Without fertilisers, yields can drop by 50%. Russia is one of the largest global producers of fertilisers. Just after the outbreak of the war, [prices drastically](#) increased. Prices were highest during April-June 2022. Since then, however, prices have decreased to pre-war levels.

The high fertiliser prices temporarily reduced profits for farmers and traders, despite an increase in coffee prices. In the long run, the increased fertiliser prices demonstrate a high dependency on global politics.



Source: World Bank

Tips:

Read this [study on the impact of the war on the coffee market](#) for more details.

Prepare for shortages or price increases by keeping a small stock of your most important inputs. Alternatively, you can investigate alternative inputs. These can for example be organic fertilisers such as compost and manure.

Find out how to create your own organic fertilisers. Do so by visiting our YouTube channel on [creating organic fertilisers in the coffee sector](#) (in Kinyarwanda only), or visit our YouTube channel on [creating organic fertilisers in the cocoa sector](#).

The forecast for the European coffee market is positive

Globally, the coffee market is expected to grow by 4-5% yearly. European coffee retail value is expected to grow by 3-4% yearly. This increase is mainly driven by new coffee shops opening and increased demand for premium and specialty coffee. Europeans will pay more for their coffee, but they will not drink a great deal more. Import

volumes are expected to increase by only 1-2% per year, due to the stable population size of European countries.

2. Which European markets offer most opportunities for coffee?

Germany is the largest European green coffee importer directly sourcing from producing countries. Italy, Belgium, Spain, Switzerland, and the United Kingdom follow Germany. These countries account for 82% of Europe's green coffee imports from producing countries.



Source: Eurostat and Trade Data

Germany, Italy, France, the Netherlands, Spain and Sweden [are the main roasting markets in Europe](#). Switzerland is a large roasting country as well, [exporting a large share of its roasted coffee](#).

Compared to the United States, Europe offers a very diverse market. Europe consists of many countries, which all have cultural differences. This includes their coffee culture. In Southern-European countries for instance, consumers prefer dark roasts. They favour espresso-based coffees, mostly including a large share of Robustas.

Certification is most important in Western-European countries, such as Germany and the United Kingdom. Scandinavian and British consumers have the highest preference for specialty coffee. Finnish consumers are known for their large volumes, with the largest consumption per person in the world. If you aim to export to the European market, it is essential to know about the differences in these markets.

Germany is Europe's most important coffee player

Germany is the largest importer of green coffee beans in Europe. In 2022, Germany imported 1.1 million tonnes of green coffee. The market has remained stable with a minor 0.5% yearly growth rate since 2018.

94% of the imports were sourced from producing countries directly. Brazil (405 thousand tonnes) is by far the largest supplier of green coffee to Germany. Brazil is followed by Vietnam (241 thousand tonnes), Honduras (75 thousand tonnes), Ethiopia (56 thousand tonnes) and Peru (55 thousand tonnes). The import from Brazil is mainly driven by price consciousness. Green coffee sourced from Honduras and Colombia are more often specialty coffees.

To see the export from your country to Germany, hover your mouse cursor or pointer over the countries in blue in figure x.



Source: Eurostat

Most green coffee beans enter Germany via 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 the largest importer in Europe, Germany is a potential destination for exporters of various qualities and origins, which are either roasted locally or re-exported to other markets. [Ecom](#) and [Rehm & Co.](#) are among the largest German coffee traders. [Neumann Kaffee Gruppe](#) is the largest coffee trading company worldwide.

The German coffee market is known to have fierce price competition between discounters. Examples are Aldi, Lidl, and Rewe. Aldi Nord [even has its own roaster facility](#).

Large-scale coffee roasters in Germany include [Melitta](#) and [Tchibo](#).

- Melitta experienced significant growth in non-certified coffee. The company bought [213 thousand tonnes of coffee in 2021](#), growing from 195 thousand tonnes in 2019. Out of this purchase, 25% was certified. This is a reduction of 11% compared to 2019, when 36% was certified.
- Tchibo is only slightly smaller, with 180 thousand tonnes of coffee purchased in 2019. 38% is certified.

Table 2 lists other larger German buyers. Note that this is only a short list of some of the larger companies. A trend in the German market is the [increase of smaller roasters](#).

Table 2: List of larger potential German buyers

Name	Location
Dallmayr	Munich
Jacobs	Bremen
Lavazza	Hamburg
J.J. Darboven	Hamburg
DIEDRICH Coffee	Cologne
Segafredo Zanetti	Hamburg

The number of small-scale German roasters is increasing

Germany has the second-largest coffee-roasting industry in Europe after Italy, supplying roasted coffee both for domestic demand and export. Roasting has long been embedded in German culture. The country is home to an increasing number of small-scale roasters. This trend is [expected to continue in the coming years](#).

Many of these small-scale roasters offer specialty coffee. Examples are [Supremo](#) (Unterhaching) and Berlin's [The Barn](#), [Five Elephant](#) and [Flying Roasters](#). They buy small volumes of high-quality single origin or Fairtrade coffee. Another example of a small-scale roaster is [Backyard Coffee](#), focussing on sustainable coffee.

Germany offers a large consumer market

German consumers mainly purchase whole bean coffee. Most German consumers have a filter coffee machine (51%), or a fully automated coffee machine (26%). 24% own a coffee pods machine, with 22% owning a coffee capsule machine. Sales of ground coffee and pods have decreased in recent years.

[Germany's yearly per capita coffee consumption averages 5.4 kg](#). This is not the highest in Europe but is still above the European average (5 kg). Germany has Europe's second-largest branded coffee shop market and Europe's [second-largest market for shops specifically focused on coffee](#), after the United Kingdom. [Germany is also Europe's largest market for organic products](#). This creates interesting opportunities for organically certified coffee exporters. However, Germany is also the most competitive organic coffee market in Europe.

The German retail market [is expected to grow by 3.2% yearly](#) until 2028. An important driver behind this growth is the increasing demand for specialty coffee.

Germany is a main roasted coffee exporter

Germany is Europe's second-largest roasted coffee exporter (after Italy), with exports amounting to 255

thousand tonnes. The main destination markets for roasted coffee were Poland (almost 40 thousand tonnes), the Netherlands (26 thousand tonnes) and France (23 thousand tonnes).

Germany has a large market for certified coffee

Germany has an interesting market for Fairtrade and Organic coffee. It also has a large market for Fairtrade and Organic multi-certified coffee.

According to Fairtrade Germany, 24,057 MT of German coffee consumption was Fairtrade-certified in 2022. This equals about 5% of total coffee consumption. Germany is [among the Top 5 Fairtrade consuming countries](#) globally.

Of this 5%, about 72% was also organic-certified according to [Statista](#). This percentage has been quite stable since 2011 (fluctuating between 68% and 78%). This means that approximately 4% of all coffee sales in Germany were Fairtrade Organic-certified.

The largest German retailers sell Fairtrade Organic coffee as part of their offer. [Aldi](#) sells Fairtrade Organic coffee under its own brand Simply Nature. [Lidl](#) sells Fairtrade Organic coffee under its own brand Café del Mundo. [REWE](#) also sells Fairtrade Organic coffee.

Organic coffee is widely available and consumed in Germany. Exporters of organic coffee will encounter a competitive market. Germany is known as the prime destination for producers of organic-certified coffee. Examples of German traders handling organic coffees include [Bernhard Rothfos](#), [InterAmerican Coffees](#), [List + Beisler](#) and [Rehm & Co](#).

Tips:

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

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

Find out more about the German coffee market by [reading our studies on Exporting coffee to Germany](#).

Italy has a strong coffee-roasting industry

Italy is the second-largest importer of green coffee beans in Europe, surpassed only by Germany. In 2022, Italian green coffee bean imports reached a volume of 672 thousand tonnes. Italian imports increased at an average yearly rate of 2.1% between 2018 and 2022.

Over 96% of Italian imports are sourced directly from coffee-producing countries. The main supplier of green coffee to Italy is Brazil (200 thousand tonnes), followed by Vietnam (150 thousand tonnes) and Uganda (110 thousand tonnes).

Third-party certification is very limited in Italy. The demand for organic coffee in Italy is about 0.5% of the total market volume. However, it is a growing market. Sales [grew by 500% in the last 5 years](#). In 2022, only 759,324 kg (0.32% of the total market) was sold Fairtrade-certified.

To see the export from your country to Italy, hover your mouse cursor or pointer over the countries in blue in

figure 9.

Source: Eurostat

In general, Italy imports a relatively large share of Robusta varieties, which are used as a basis for espresso blends.

Italy hosts the third-largest consumer market in Europe

With almost 60 million citizens, Italy has a large consumer market. In total, [Italians consumed 186 thousand tonnes of coffee](#) in 2022. This represents a market value of 2.48 billion euros. The consumption market of France, Europe's second-largest consumption market, equals 232 thousand tonnes.

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

Italy is home to many small-scale roasters. Some of these roasters are family-owned businesses. However, it also hosts some of the world's largest roasters. Examples of large roasters are [Lavazza](#), [Massimo Zanetti BG](#), and [IllyCaffè](#). Most of the Italian roasters produce for the domestic market. However, Italian roasters also export substantial amounts of coffee blends to destinations all over Europe and the United States.

The forecast for the Italian coffee market is positive

The Italian import volume is expected to [remain relatively stable](#) in the coming years. In terms of market value, however, the market is expected to rise [by around 3% yearly](#). This increase is driven by various trends. These include increased demand for higher quality beans, increased demand for coffee pods and capsules and a higher emphasis on ethical sourcing.

The demand for certification is still small but growing

The Italian market for certified coffee is still small. For example, in 2022 only 759,324 kg (0.32% of the total market) was sold Fairtrade-certified. The demand for Organic was slightly larger. But with only 1.2 million kg it is not comparable to the German market. Nevertheless, the amount of organic coffee sold has [increased significantly in recent years](#).

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

[IllyCaffè](#) is B Corp-certified and has its own verification program.

The 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 [only hosted 79 specialty coffee cafés](#), out of over 50 thousand cafés. This is 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 partly driven by large roasters launching their own specialty coffee brand.

An example is Lavazza, which [founded a specialty brand called 1895](#). Examples of specialty coffee roasters in Italy include [Nero Scuro](#), [Pierre Cafè](#) and [Cafezal Specialty Coffee](#).

For more information, we refer to our [study on the European specialty coffee market](#).

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 enter a growing market at an early stage.

Belgium is a trade hub for coffee in Europe

Belgium is one of the main trade hubs in Europe for coffee. Over 78% of its imports are re-exported, amounting to 298 thousand tonnes of green coffee re-exports in 2021. This makes Belgium the largest re-exporter in Europe, with a 46% share of total European green coffee re-exports.

Belgium's main export destinations are its direct neighbours, with the Netherlands accounting for about 44% of re-exports in 2021. Large, specialised Dutch coffee importers often use Belgian ports for their operations. Other re-exports went to France (28%), Spain (6.3%) and Italy (4.3%).

Belgium is Europe's third-largest green coffee importer. Since 2018, it has seen a 6.4% yearly growth rate in imports. This is the largest growth rate among the Top 15 EU importers. A 98% share of the country's green coffee imports was sourced directly from producing countries in 2022, amounting to 375 thousand tonnes.

Brazil was the largest supplier of green coffee to Belgium, with 133 thousand tonnes in 2022. Vietnam ranked second, supplying 68 thousand tonnes of green coffee, followed by Honduras, with 29 thousand tonnes.

To see the export from your country to Belgium, hover your mouse cursor or pointer over the countries in blue in figure 10.

Source: Eurostat

Belgium is home to a few very big ports

Belgium's important role as a coffee importer and re-exporter is largely due 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 and is a distribution platform for green coffee throughout Europe, with transports by rail, road and sea.

In early 2021, the two [ports agreed on a merger](#) and now operate jointly under the name [Port of Antwerp-Bruges](#). This has further cemented Belgium's position as a key coffee trade hub in Europe and one of the leading destinations for coffee exporters targeting European markets.

Supermarkets lead the way to certification in the Belgian consumer market

More and more people want 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 have UTZ-certified coffees](#). Supermarket chains are increasingly committing to certification. This also applies to their own private label brands.

The higher demand for ethical sourcing is also an important driver for the growing Belgian retail market. Other drivers are the growing demand for single-serve coffee and premium & specialty coffee. The Belgian retail market [is expected to grow with 5.3% per year](#).

Tip:

Consider shipping your export via Belgium if you have buyers in Western Europe. Belgium is a great hub into the Netherlands, Germany and France.

Spain hosts a large out-of-home coffee market

In 2022, Spanish green coffee bean imports reached a volume of 302 thousand tonnes. Spanish imports increased at an average yearly rate of 4.2% between 2018 and 2022.

Over 81% of Spanish imports are sourced directly from coffee-producing countries. The main supplier of green coffee to Spain is Vietnam (102 thousand tonnes), followed by Brazil (70 thousand tonnes). Spain also sources a lot of green coffee from Germany (29 thousand tonnes) and Belgium (25 thousand tonnes).

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

Source: Eurostat

Supracafé is one of the largest Spanish buyers. In 2021, they purchased 339 tonnes of coffee. 23% of this volume was certified. All coffee was sourced from Latin America.

Spanish consumers are social consumers

Spanish consumers drink [3 kg of coffee yearly on average](#). Spanish consumers prefer espresso-based coffees. Spain therefore offers a relatively large market for Robusta beans. With 260,000 coffee houses, Spain has [the largest coffee house density per citizen](#). Drinking coffee is about the social experience for most Spanish consumers. In addition to drinking high-caffeine Robustas, Spain also has a high number of decaffeinated coffee drinkers. The specialty coffee market is still very small but is growing.

Spain has a very high demand for decaffeinated coffee

Spain is the largest European market for decaffeinated coffee, with imports amounting to 12,668 tonnes in 2022. There are two main drivers for this high demand. The first is more focus on a healthier lifestyle. The second is that Spanish dine late at night. The increased consciousness of caffeine's effects on sleep quality fosters the demand for decaf.

Rainforest Alliance/UTZ is the main certificate in Spain

Just like in Belgium, supermarkets sell the largest share of certified coffee. In 2022, a study [was conducted about coffee certification in Spanish supermarkets](#). UTZ came out as the main certificate. 20.2% of all coffee

present in supermarkets owned the UTZ label. Note that UTZ and Rainforest Alliance merged in 2018. [The UTZ label will transition to the Rainforest Alliance seal](#) as packaging is renewed. Organic was the second label, with 5.6%. Rainforest Alliance (2.5%) and Fairtrade (2.2%) came last. Note that these percentages are only indicative. They represent the coffee available, and not the amount of coffee sold.

Tips:

Sell your Brazilian Arabicas and Robustas to Spain. Spain has, just like Italy, a focus on espresso-based coffees. They therefore 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 2022, Swiss green coffee bean imports reached a volume of 200 thousand tonnes. Swiss imports increased at an average yearly rate of 4.7% between 2018 and 2022.

Over 99% of Swiss imports are sourced directly from coffee-producing countries. The main supplier of green coffee to Switzerland is Brazil (56 thousand tonnes), followed by Colombia (33 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 in blue in figure 12.



Source: Eurostat

Higher demand for specialty coffee and ethical sourcing drive growth

Swiss consumers drink [3.2 kg of coffee on average yearly](#). Domestic [demand for mainstream quality coffees has stagnated](#), while that for high-quality coffees has grown. Swiss consumers also have a high demand for decaffeinated coffee, as well as espresso.

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

- The [Specialty Coffee Association Switzerland](#) (SCAS) organises specific coffee events, seminars and courses.
- The [Swiss Coffee Festival](#) is an example of such an event and is especially aimed 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. An example is [Académie du Café](#).

An 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.

More and more people care about how coffee is made and where it comes from. They want to buy coffee from companies that treat farmers fairly, use sustainable farming methods, and do not harm the environment. Certifications like Rainforest Alliance and Fairtrade are becoming more important on the Swiss market.

This also applies to the concept of Fair Trade. In 2021, Swiss consumers spend €120 per year on Fair Trade products. On the Swiss Fair Trade website, you can [find organisations trading Fair Trade coffee](#).

Both the higher demand for specialty coffee and increased demand for ethical sourcing are drivers behind the growth of the Swiss coffee market. The Swiss coffee market [is expected to grow by 1.7% until 2028](#).

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 per region. German and French are most in use, followed by Italian. Look [at the On The World Map website](#) for a map of the preferred language per region.

Find out more 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.

France has a high demand for certified products

Large certification labels are an important factor for French consumers. This has resulted in a large and diverse offer of certified coffees in supermarkets as well as in the out-of-home segment. Labels such as Fairtrade, Rainforest Alliance/UTZ and organic have gained a lot of importance in France. This trend is mainly driven by supermarkets and [is expected to continue in the coming years](#). The main certification label in France is Fairtrade. This especially applies to consumers in supermarkets. France is [among the Top 5 of Fairtrade consuming countries](#) globally.

France is, after Germany, also the second-largest European organic market in Europe. Organic retail sales amounted to €11.3 billion in 2019. In 2019, the organic growth rate amounted to 13%.

In 2022, French green coffee bean imports reached a volume of 213 thousand tonnes. France imports decreased at an average yearly rate of 1.0% between 2018 and 2022. The market is [expected to grow by 1.6% yearly](#).

About two third (67.9%) of French imports come directly from coffee-producing countries. The main supplier of green coffee to France is Brazil (56 thousand tonnes), followed by Colombia (33 thousand tonnes) and Vietnam (17 thousand tonnes).

To see the exports from your country to France, hover your mouse cursor or pointer over the countries in blue in figure 13.

Source: Eurostat

France has a large roasting industry for domestic consumption

France's influence as a hub is limited. Instead, it has a very large roasting industry. The largest coffee roasters in France are large multinationals like [Nestlé France](#), [Jacobs Douwe Egberts](#), [Lavazza](#) and [Segafredo Zanetti](#). Most coffee is consumed domestically. French consumers drink [3 kg of coffee on average yearly](#).

France hosts a large out-of-home market

Many French people consume their coffee out-of-home. They enjoy it in cafes and take their time savouring it. Drinking coffee with friends and family is deeply embedded in their culture. Espresso is the most popular type of coffee. About [35% of consumers said they visit a coffee shop at least 4-5 times a week](#).

Tips:

Target the French market if you supply large quantities of affordable but certified green coffee. The French market has a high demand for this product.

If you are a farmer, find the right market for your product, not vice versa. Your area (soil, altitude, etc.) determines which varieties grow best. High quality and quantity yields are key.

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

Find out 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 producing countries have most potential on the European market?

The coffee market is highly competitive, especially in the mainstream segment. However, opportunities in the high-end market are growing, as European consumers are increasingly willing to pay more for high-quality coffees. Consumers in Europe are also demanding more sustainably sourced coffee. Besides mainstream coffee, there are therefore significant opportunities for specialty, certified, premium, and flavoured coffee. These markets offer above-average opportunities because they offer better prices.

Growing demand for specialty coffee

Specialty coffee (sometimes also written as speciality coffee) is coffee of very high quality. There is no exact and agreed definition of speciality coffee. The most commonly used definition, also employed by the [Specialty Coffee Association \(SCA\)](#), states that coffees with cupping scores of 80 and above are considered speciality coffee. Associations in a few countries, such as the [Asociación Cafés Finos Costa Rica](#), also have their definition of speciality coffee. Usually, this refers to the physical quality of the coffee bean.

Europe has the highest demand for specialty coffee globally, with a [46% global market share](#). Globally, the market [is expected to grow by over 10% yearly](#). This trend is driven by increased spending power and the consumers' willingness to engage with their products. Many European consumers want to know the origin of their coffee, as well as where it comes from and how it was produced.

There is a growing demand for specialty coffee in all European markets, though this segment is the largest in Northwestern Europe. Young consumers (18-24) are particularly interested in specialty coffee, and the interest in the age group 25-39 is expanding rapidly. Higher-income levels and awareness about sustainable consumption characterise this region.

This increasing interest in specialty coffee is reflected in the growing number of coffee bars and chains, small roasters, local brands and an increasing number of well-trained baristas.

Many specialty coffees find their way to the consumer via branded coffee shops. This market consists of easily recognisable coffee chains. European examples include [Costa Coffee](#), [Caffè Nero](#), [Pret a Manger](#) (all from the

United Kingdom), [IllyCaffè](#) (Italy) and [Espresso House](#) (Sweden). The European branded coffee shop market grew by **3.2%** to more than 40,675 outlets in 2021. Although it seems unlikely that all of these branded coffee shops serve specialty coffees, the majority have coffees with **cupping scores of 80 and higher**. As they grow, these shops may start sourcing green beans directly from producers. An example is IllyCaffè, which is B Corp-certified and [sources from farmers directly](#).

Europe includes many small roasters only working with specialty coffee. Some of the larger players in the specialty coffee market are Caribou Coffee Company, Carte Noire, Dallmayr Prodomo Ground Coffee, Blue Bottle, Leroux, Buletproof, Costa Coffee, Jacques Fabre, Eight O'Clock Coffee, etc. Large roasters own all of these brands. The large roasters see the market potential for specialised coffee. It is expected that **consolidation in the industry will continue**. Note that not all specialty coffee brands are owned by larger roasters. Examples of independent specialty brands are [Wakuli](#), [The Coffee Quest](#), [This side Up](#) and [Trabocca](#). For more information on this trend, read [our study on trends in the coffee market](#).

High-end coffee consumers want to try new flavours

European coffee drinkers are becoming more conscious consumers, especially in the high-end market. This results in more specific demands for variety, health, convenience, taste and sustainability. This increases the need for roasters to diversify, especially in the higher segment. Two ways to diversify the taste of your product, are by new processing methods and infusing your coffee with extra flavours.

Experimental processing techniques become important diversifiers

Coffee processing is crucial in transforming raw coffee cherries into the beans we use to make coffee. There are several common methods for processing coffee. Each influence the flavour and characteristics of the final product. The washed process, natural process and honey process are most common. However, experimental ways of processing coffee are increasing in demand. These offer opportunities to diversify your products and distinguish yourself from the competition.

The main experimental fermented coffee techniques are aerobic and anaerobic fermentation. In an aerobic fermentation process, oxygen is included and in anaerobic fermentation, oxygen is eliminated. An example of anaerobic fermented coffee is the [Finca San Antonio Anaerobic Natural](#) from Nicaragua. The [Colombia Caicedonia Mallorco Estate](#) is an example of aerobic fermented coffee. Other experimental fermentation techniques include carbonic maceration, lactic fermentation, and double fermentation. Here are some examples:

- [Ethiopian Jabanto Coffee](#) is an example of carbonic maceration coffee.
- [Guava Banana Lactic](#) is an example of lactic fermented coffee.
- [La Loma Colombia](#) is an example of double-fermented coffee.
- An example of experimental processing is prolonging fermentation. Experimental techniques are **a growing trend within the specialty segment**. This way, producers can diversify themselves by bringing out more complex and unique coffee flavours. Traditional ways of processing include dry processing, wet processing, and honey processing.

In addition, you can use the fermentation process to infuse your coffee with different flavours. These flavours can either be added during fermentation, drying, storage, or after grinding or roasting. Infused coffee is often used as a synonym for flavoured coffee, or is regularly compared to it. There is **no clear distinction between both products**.

According to Data Bridge, the demand for infused coffee **will triple or quadruple by the end of 2029**. Important European buyers are Nestlé, Dualit and Unilever. However, there are also opportunities for small-scale specialty suppliers if you can infuse your coffee with local products. Adding local flavours may add to the taste of your beans and the story about your region. Typical added flavours are vanilla, fruits and nuts.

In the specialty coffee market, infused flavours must be subtle because the original coffee flavours need to

remain.

The market for coffee pods offers opportunities

Many European consumers are highly driven by convenience. The European market size for coffee pods and capsules was €5.5 billion in 2020. The largest consumer markets are Germany (€1.5 billion), France (€1.2 billion) and Italy (€800 million). This trend is partly driven by higher-quality pods that are becoming available. Although the market is expected to increase, it will remain less popular than in the United States. Major companies in this sector are Lavazza, Starbucks, JAB and Nestlé.

The market for coffee pods was 16% of the retail market volume in 2022. Coffee pods, however, are much more expensive than ground coffee or coffee beans. The coffee pods market is therefore a high-value market. Coffee pods account for a market share of 39% of the European retail coffee market value. Note that the market share of coffee pods differs per country. The market share is the largest in Ireland, representing even 78% of total retail value. With a mere 2% of the market retail value, Slovenian consumers show the lowest interest in coffee pods.

Figure 14 offers insights on the European countries with the largest coffee pods retail market share. Based on interviews with experts, the market for coffee pods offers opportunities for manufacturing- country suppliers. By producing coffee pods, you can add value to your country's manufacturing output. In addition, the quality hardly decreases over time. This is seen as one of the problems with exporting roasted beans.



Source: European coffee report 2022/ 2023

In general, the market for coffee pods is very unsustainable. The reason is that using pods creates a lot of waste, which is hard to recycle. Europeans are increasingly demanding [more sustainable coffee pods](#). There are initiatives aimed at [producing more sustainable pods](#). These include compostable or vegetable fibre-based capsules. However, this market is still very small. Some examples of coffee companies creating more sustainable pods are:

- Vergnano introduced compostable capsules certified "OK COMPOST". They can be disposed of in organic waste bins without separating the wrapper from the coffee.
- Lavazza launched compostable capsules made with "Mater-Bi bioplastics". These can be collected with organic waste.
- Illy implemented reverse vending machines for capsule disposal. It is also developing machines to separate plastic from coffee.

Health concerns drive the demand for low caffeinated coffee

Europeans are becoming increasingly concerned about their health. This results in the desire to reduce caffeine consumption. Especially in the high-end market, there is an increased interest in low-caffeinated coffee. The caffeine volume is mainly dependent on the bean. In general, Arabica beans contain less caffeine than Robusta. Within the Arabica varieties, [Laurina and Aramosa are the lowest in caffeine](#). The expectation is that the demand for these varieties will increase.

Europe imports more decaffeinated coffee from producing countries directly

Fully decaffeinated coffee is generally considered to taste worse than caffeinated coffee. Since 2018, the European demand for decaffeinated green coffee has only risen by 1.2% yearly. This is similar to the growth for regular green coffee, which is equal to 1.3% yearly. Between 2021 and 2022, imports of decaffeinated coffee even decreased by 7.0%.

Nevertheless, European countries show increased willingness to source decaffeinated green coffee directly from

producing countries. Between 2018 and 2022, the amount of green decaffeinated coffee imported from producing countries increased from 17 thousand tonnes to 30 thousand tonnes. This amounts to a yearly growth rate of 15.3%. One reason for this is that competition from producing countries has increased. Nestlé [has invested \\$75 million in a large decaffeinating plant](#) in Vietnam, mainly producing decaffeinated Robusta. In 2021, they invested another \$132 [to double the production](#).

The demand for decaffeinated green coffee from producing countries is highest in Spain, equalling 12,668 tonnes in 2022. This is followed by Switzerland (10,458 tonnes), and the United Kingdom (4,509 tonnes). Together, these three countries account for 92% of the imports of decaffeinated coffee from producing countries.

In comparison to roasting, decaffeinating adds value to the beans but does not lead to increased trade tariffs. Just like green coffee beans, there are no trade tariffs for decaffeinated green beans. Decaffeinating coffee therefore offers an opportunity to keep the added value in producing countries.



Source: Eurostat and Trade Map

A large share of the decaffeinated coffee manufactured in Europe is produced in Germany. Germany is also the main European consumer market for decaffeinated coffee. It is also a large exporter of decaffeinated coffee to Spain and to the United States.

Looking at producing countries only, Spain imports 95% of its decaffeinated green coffee from Vietnam. The United Kingdom imports 61% from Vietnam. Other imports come from Mexico (27%) and Colombia (7%). Switzerland is a different case, sourcing 45% from Brazil, 26% from Colombia and 14% from Costa Rica.

There are opportunities for alternative decaffeination processes in the specialty market as well. One supplier that is very successful in offering high-quality (SCAA 85+ rating) [decaffeinated coffee is Decafecol](#). The company makes use of the relatively new ethyl acetate (EA) method, also referred to as sugar cane method.

Tips:

Get well informed before shifting to other coffee varieties. Some beans (such as Laurina) are tempting due to higher prices, but also [require much work to grow](#). If you are a farmer, it is essential to have a good understanding of which beans suit your area well.

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

Explore the opportunities to offer more varieties and different processing techniques. This may increase income. Note that experimenting with different processing techniques requires a detailed description of your process. If your buyers like your product, it is important that you can produce regularly.

Choose local flavours when infusing your coffee. Local flavours add to the story of your product. This offers a stronger connection to the coffee's origin.

Invest in cupping facilities: a lab and skilled Q-graders. By better understanding the quality and value of your own product, you learn the language of the buyer and are better positioned to negotiate the right price.

Europe as world leader of certified coffee

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/UTZ](#). Note that the market size of individual schemes varies significantly from one country and segment to another in Europe.

Globally, the amount of coffee produced certified is much higher than the amount of coffee sold certified. This means that a large share of the certified coffee is sold without the premiums for certification. The gap between the percentage sold and the percentage produced varies considerably with each certification scheme. The gap is the largest for Fairtrade-certified coffee, [where less than one-third of the coffee produced is sold as such](#). According to experts, this gap between produced and sold differs significantly by region. It is lower in Latin American countries and higher in African countries. The gap is the smallest for C.A.F.E. Practices verification. About two-thirds of the C.A.F.E. verified production is sold as such. For Rainforest Alliance and UTZ, this is about half.

This indicates that you need to carefully check with your buyers if they are willing to purchase your certified produce. Selling certified coffee normally comes with a premium. Fairtrade coffee has a non-negotiable premium of \$0.20 per pound above the Fairtrade minimum price. This can go up if you are also certified Organic. The premium for organic is a requirement of Fairtrade. It is not required by the organic certification body SKAL. That is why Fairtrade and Organic are often combined. For an overview of the Fairtrade prices and premiums, we refer to [the Fairtrade website](#).

Certification makes having a long-term relationship with your buyers even more important. Long-term relationships increase the likelihood that your buyer will invest in a good relationship. This includes buying certified coffee for a longer period.

Besides premiums, certification comes with other benefits as well. Certification forces you to enhance your traceability and report on sustainability issues. This prepares you for current and future European sustainability regulations. Examples are the European Deforestation Regulation (EUDR, since mid-2023) and the Corporate Sustainability Due Diligence Directive (CSDDD, not yet in force). Due to stricter regulations and higher consumer awareness of sustainability, the demand for certified-produced coffee is expected to increase.

Fairtrade certification will only become more important due to new laws and regulations such as the Corporate Sustainability Due Diligence Directive (CSDDD), because it contributes to respect for human rights and the environment. It is a tool to give substance to the due diligence process.



Yme Quispel, business development manager at Fairtrade

Some certification bodies will also aid in other fields. Examples are providing business advice, training and help with market access. Fairtrade, for instance, does so via [CLAC in Latin America](#), [Fairtrade Africa in Africa](#), and [Fairtrade NAPP in Asia](#).

Source: based on [Eurobarometer 2023](#)

Rainforest Alliance/UTZ-certified coffee

Integrating UTZ and Rainforest Alliance into a single organisation has resulted in very large European market coverage. UTZ-certified coffee products are widely available in the Netherlands, Germany, Italy, Switzerland and the Nordic region. Many retailers in these countries, such as Ahold, Aldi, Ikea, Jumbo, Kaufland and Lidl, as well as coffee roasters and brands such as JDE Peet's, Lavazza, Paulig and Tchibo, offer their own private label products certified under the Rainforest Alliance standard.

Between 2017 and 2021, [Rainforest Alliance-certified Arabica sales increased by an average of 11% a year](#). Robusta sales increased by 17%. This is mainly a result of increasing demand from Latin America and Europe. The largest markets for Rainforest Alliance-certified coffee products in Europe are the United Kingdom, Germany, the Netherlands, Sweden and France. Nespresso is one well-known and popular coffee brand in Europe certified with the Rainforest Alliance label. Large European retailers also sell Rainforest Alliance-certified coffees. These include the German [Kaufland](#), [Lidl](#) and [REWE](#) chains, [ASDA](#) from the UK, and large roasters such as [Lavazza](#).

Certified organic coffee

The European organic market is the second-largest single organic market worldwide after the United States. [European organic retail sales reached €52 billion in 2020](#). Interest in organic coffee tends to follow general organic market trends in a country. The main markets for organic coffee in Europe are therefore the largest organic markets: Germany (29% share of the total European organic market in 2020), France (24%) and Italy (7.5%).

The estimated growth of organic coffee sold in Europe is [8.1% yearly](#). This is in line with organic market trends and the expected continued growth of organic retail sales in Europe overall. This is also driven by the [European Green Deal](#) (EGD). This deal aims to increase organic production and consumption in Europe significantly. Multiple [EGD-related regulations and measures](#) are being proposed or are entering into force. These regulations and measures may boost demand for and supplies of organic and sustainable products. The [COVID-19 pandemic has also further driven up demand for organic food and beverages](#). Organics are considered healthier, safer, and more environmentally friendly than conventional products.

[Organic coffee imports by the EU-27 reached 131 thousand tonnes in 2020](#). This is 4.0% of all green coffee imports by the EU-27 that year. This percentage shows that the organic coffee market is still a European niche segment. Nevertheless, the market is recording growth. EU organic coffee imports increased by 6.7% between 2019 and 2020.

Due to higher coffee prices, there is an increased demand for organic Robustas. Robustas are sold for a lower price than Arabicas. By blending organic Robustas, roasters can lower their prices. This trend is expected to continue, also if prices decrease.

Fairtrade-certified coffee

Germany is the [largest market](#) for Fairtrade-certified coffee, followed by the UK, the US, 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.

The United Kingdom is another major market for Fairtrade-certified products, including coffee. [Sainsbury's](#), [Waitrose](#) and [Marks & Spencer](#) are examples of British retailers that have converted all their private-label coffee lines to 100% Fairtrade. [Greggs](#), the largest bakery chain in the United Kingdom, [drove up growth in Fairtrade coffee sales in the out-of-home segment](#).

Double certified coffees have high growth rates

Fairtrade and organic products are also gaining in popularity in consumer markets across Europe. Between 2016 and 2020, the global sales volume of green coffee certified under both standards saw year-to-year growth of 9.0%, reaching 149 thousand tonnes in 2020. The popularity of this double certification is expected to continue growing.

In 2021, [approximately 74% of Fairtrade coffee sold in Germany was also certified as organic](#), for a total of 24 thousand tonnes. As a comparison, [sales of Fairtrade-certified coffee in 2014 reached almost 17 thousand tonnes](#), of which about 66% was organic-certified. Popular German brands with lines of Fairtrade and organic coffees include [GEPA](#), Kaffa by [Original Food](#) and [Rapunzel](#).

European retailers are also increasingly offering organic and Fairtrade-certified private-label coffees. An example is [Waitrose's No.1 line of coffees](#) in the United Kingdom. Swiss retailers are also offering more private-label organic and Fairtrade-certified products. The leading Swiss retailer [Coop](#) has around 25 private label brands, of which Naturaplan is the most relevant for organic coffees. Coop's [Naturaplan coffee capsules](#) are an example of a Swiss private-label product with both organic and Fairtrade certifications.

Tips:

Read our studies to learn more about the [specialty coffee sector in Europe](#), double-certified coffee, the [European market for certified coffees](#) and the [European market potential for organic coffee](#). You can also watch [recordings of our webinars](#) to learn more about exporting specialty coffee and get tips for mapping markets, finding buyers and doing business.

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

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

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

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.

[Molgo Research](#), [Long Run Sustainability](#), [Amonarmah Consults](#) and [Ethos Agriculture](#) carried out this study on behalf of CBI.

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

