European Coffee Report 2023/2024

EUROPEAN
COFFEE
FEDERATION

CONTENTS

1. INTRODUCTION

This is the forty-first edition of the 'European Coffee Report'. The Covid pandemic deterred ECF from publishing this report after 2019 given ECF's focus on more pressing matters and the difficulties associated to the collection, compilation, and analysis of the relevant data. ECF resumed the publication of the 'European Coffee Report' with the 2022/2023 edition and now presents an updated and detailed analysis of the European coffee market in 2023/2024 relying on official data (Eurostat), data collected by ECF, and market intelligence provided by Euromonitor International, which we trust continues to be an important and welcome addition.

The European Coffee Report is available in electronic format only and can be downloaded from ECF's website: www.ecf-coffee.org.

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This report was finalised in May 2024

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2. CONVENTIONS, NOTATIONS AND DEFINITIONS

Coffee units:

In these reports we will mostly use metric data (tonnes and kilograms) since the use of bags as reference has been phased out. Some tables include data in bags in addition to metric data:

- Bags are bags of 60 kilograms.
- Tonnes are metric tonnes (1,000 kilograms).

Conversion factors:

The recalculation of roasted and soluble coffee uses the conversion factors applied by the International Coffee Organization (ICO) as described in its 'Rules' (Rules on Statistics / Certificates of Origin. Revised version approved by the International Coffee Council at its 134th Session on 7 October 2022). Available online at: https://www.icocoffee.org/wp-content/uploads/2022/11/icc-102-9-r5e-rules-certificates-origin-final.pdf

- from roasted coffee to green coffee: multiply the net weight of roasted coffee by 1.19.
- from soluble to green coffee: multiply by the net weight of soluble coffee 2.60.
- from green decaffeinated to green coffee: multiply the net weight of green decaffeinated coffee by 1.05.
- from roasted decaffeinated to green coffee: multiply the net weight of roasted decaffeinated coffee by 1.25.
- from soluble decaffeinated to green coffee: multiply the net weight of the soluble decaffeinated coffee by 2.73.

Green coffee equivalent is the aggregated volume of green, green decaffeinated, roasted, and soluble coffee recalculated to green coffee after applying the above conversion factors.

Notations:

In the notation of figures, the convention of written English:
- the thousands separator is the comma (,)
- the decimal separator is the dot (.)

'yoy' refers to 'year-on-year'. It is calculated using current values and previous year's values and it is expressed in percentage terms.

Currencies:

Abbreviations of currencies are those used for international banking purposes, based on ISO standards.

Data:
When analysing data, the term ‘analysis period’ refers to the period 2021 to 2023.

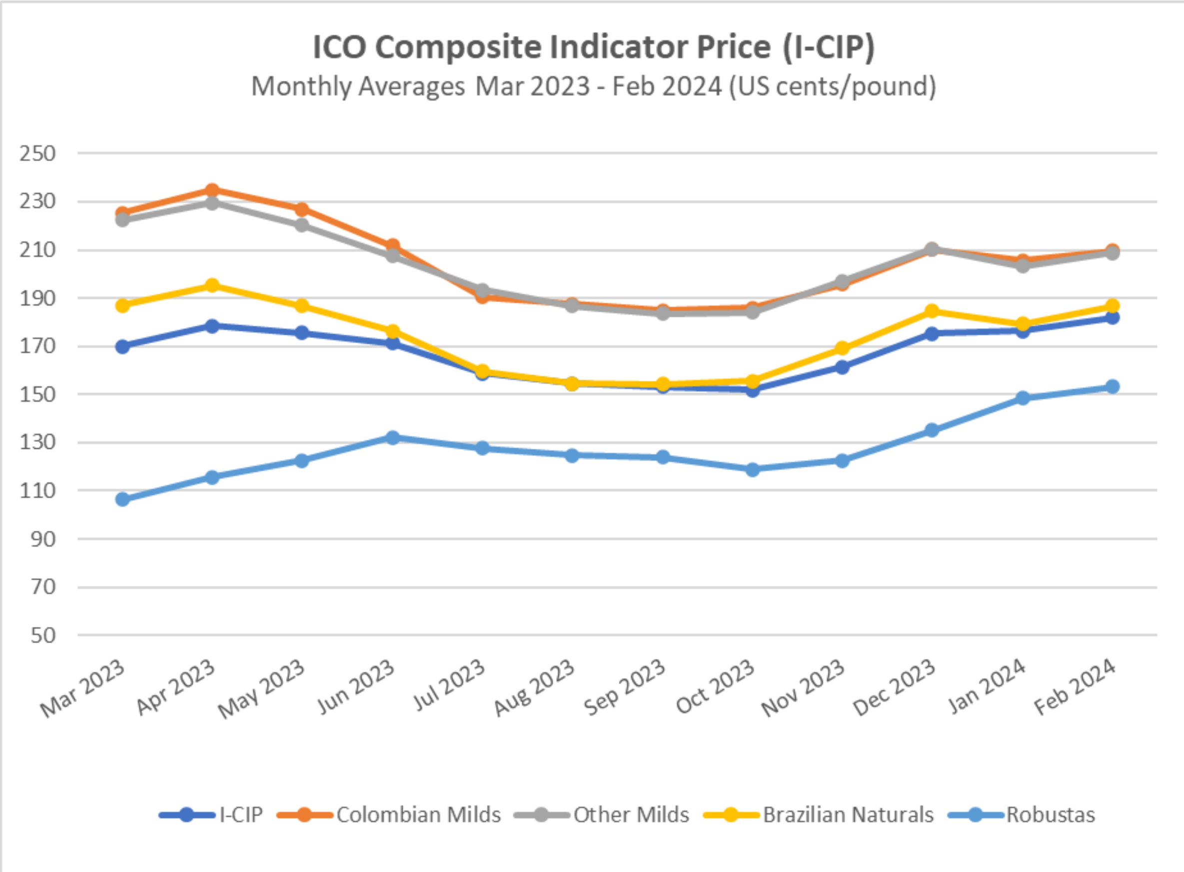
Eurostat, ICO or World Bank (WITS) trade figures may differ from those available from national sources.

Distribution of green coffee imports by type of coffee:

The distribution of green coffee imports by type of coffee is based on the following grouping of coffee producing countries according to the criteria applied by the International Coffee Organization (ICO):

	Arabicas		**Robustas**
Colombian Milds	Other Milds	Brazilian Naturals	
Colombia	Bolivia	Brazil	Angola
Kenya	Burundi	Ethiopia	Benin
Tanzania	Costa Rica	Paraguay	Cameroon
	Cuba		Central African Rep.
	Dominican Republic		Congo
	Ecuador		Congo Democratic Rep.
	El Salvador		Cote d’Ivoire
	Guatemala		Equatorial Guinea
	Haiti		Gabon
	Honduras		Ghana
	India		Guinea
	Jamaica		Indonesia
	Malawi		Liberia
	Mexico		Madagascar
	Nicaragua		Nigeria
	Panama		Philippines
	Papua New Guinea		Sierra Leone
	Peru		Sri Lanka
	Rwanda		Thailand
	Timor-Leste		Togo
	Venezuela		Trinidad and Tobago
	Zambia		Uganda
	Zimbabwe		Vietnam

3. GREEN COFFEE PRICES AND EUROPEAN COFFEE STOCKS

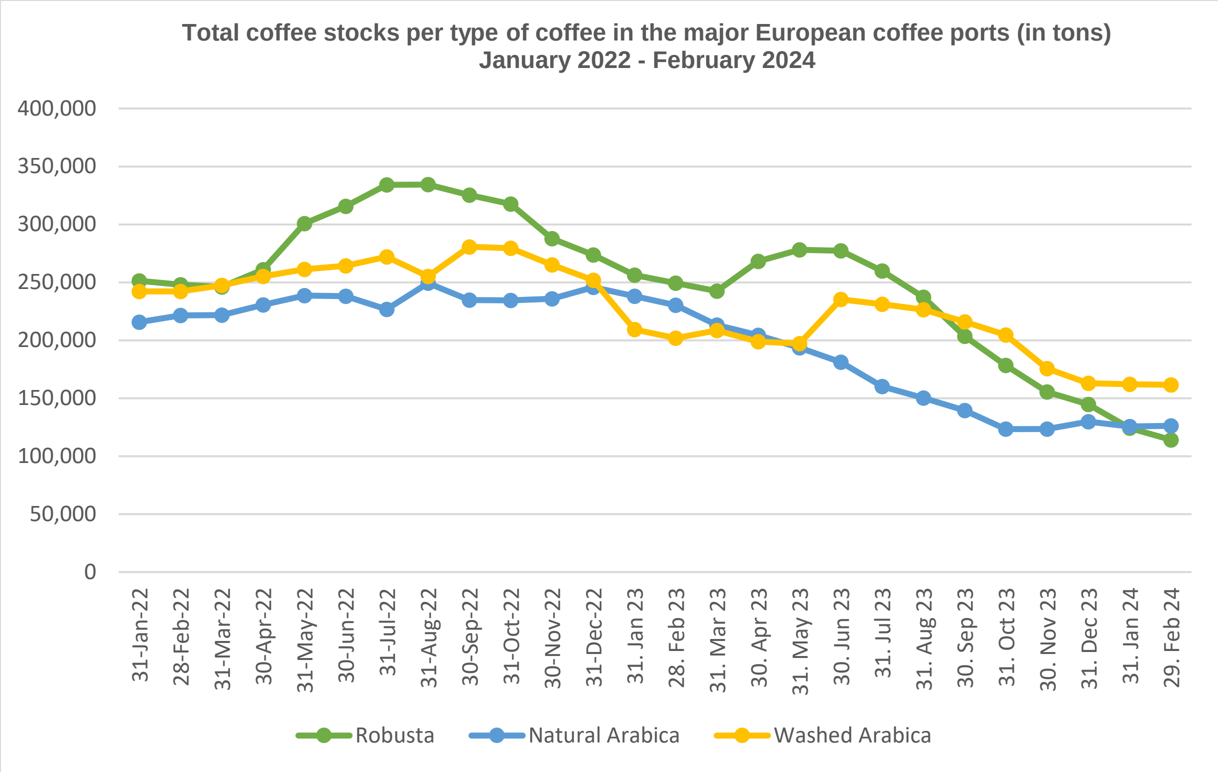


Source: ICO

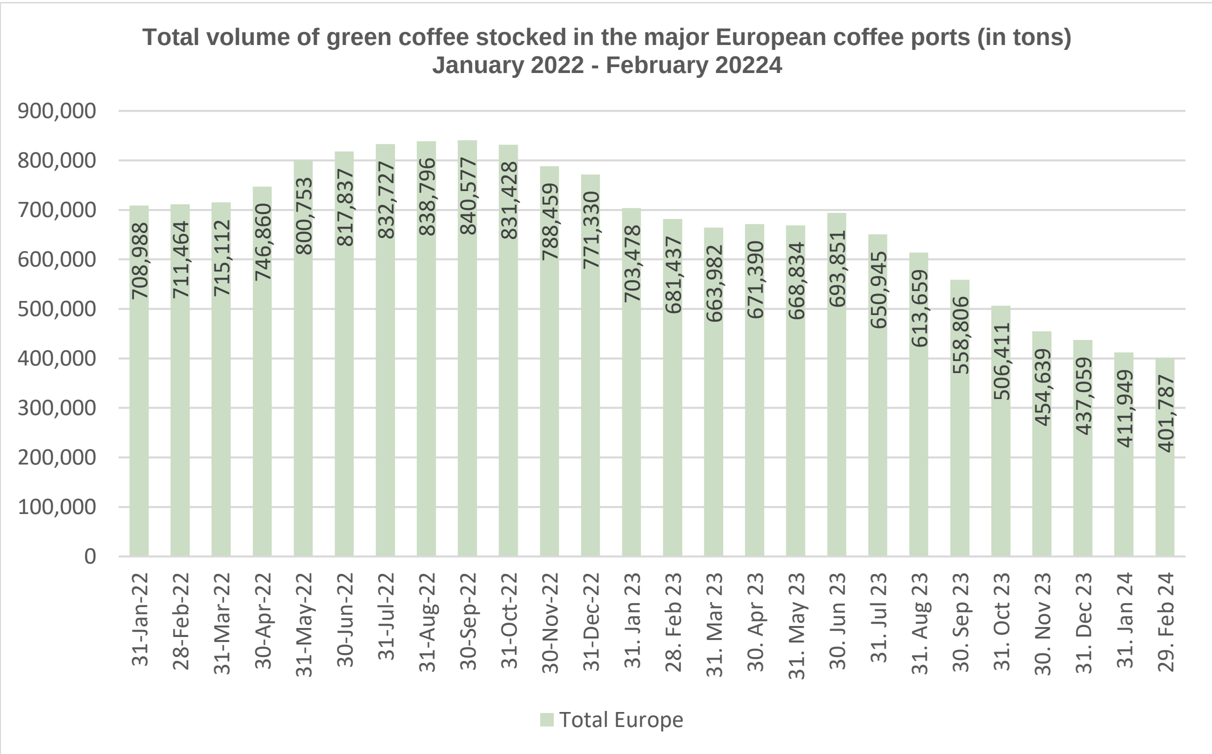
According to ICO document ICC-105-17 (Rev. 1) Annex 1, the calculation of the ICO Composite indicator price is weighted as follows:

Colombian Milds:	12%
Other Milds:	21%
Brazilian Naturals:	30%
Robustas:	37%

From May 2021, the ICO has moved to a new system of collection of prices. For further details, please see https://icocoffee.org/wp-content/uploads/2023/01/icc-105-17-r1e-rules-indicator-prices.pdf



Source: ECF



Source: ECF

Note: The ports covered are: Antwerp, Hamburg, Le Havre, Barcelona, Trieste, Genoa, Napoli, Tallin, London, Felixstowe, and Bremen (partly). The stocks have been broken down in three categories: Robusta, Natural Arabica (includes Brazil semi-washed) and Washed Arabica. Stocks include ICE certified stocks as well as non-exchange stocks. The data are supplied by warehousing and port organisations in the listed port areas and have been compiled by ECF.

4. EU27 GREEN COFFEE IMPORTS: VOLUME, ORIGINS AND TYPE OF COFFEE

The terms 'Western Europe' and 'Central and Eastern Europe' do not follow a strict definition. Many Central and Eastern European countries are now members of the EU while the UK is no longer a member. In this report, the 'Western Europe' region includes all EU27 countries plus the United Kingdom, Switzerland, Norway, and Iceland. The 'Central and Eastern Europe' region currently includes Albania, Belarus, Bosnia and Herzegovina, Georgia, North Macedonia, Moldova, Montenegro, the Russian Federation, Serbia, and Ukraine.

Imports of GREEN COFFEE into Europe

Data by importing country 2021 – 2023 (in tonnes and in 60 kg bags, EXTRA-EU Trade for EU27 countries)

COUNTRY	2021		2022		2023	
	in tonnes	in bags	in tonnes	in bags	in tonnes	in bags
AUSTRIA	5,807.8	96,796	6,558.0	109,301	6,145.1	102,419
BELGIUM	336,600.7	5,610,012	378,366.9	6,306,115	276,111.7	4,601,862
BULGARIA	23,390.6	389,843	20,915.3	348,589	17,556.0	292,599
CROATIA	292.9	4,881	160.5	2,674	75.1	1,252
CYPRUS	1,099.4	18,324	1,073.2	17,886	1,163.0	19,383
CZECHIA	2,520.1	42,001	2,083.6	34,727	1,560.7	26,012
DENMARK	12,037.7	200,629	11,942.3	199,038	13,608.4	226,807
ESTONIA	60.9	1,015	100.1	1,668	98.4	1,640
FINLAND	51,391.6	856,526	50,752.1	845,869	45,830.4	763,841
FRANCE	158,399.3	2,639,989	146,040.5	2,434,009	148,661.8	2,477,696
GERMANY	1,074,070.3	17,901,172	1,086,030.8	18,100,513	900,449.1	15,007,486
GREECE	33,721.7	562,028	33,513.7	558,562	35,506.0	591,767
HUNGARY	264.6	4,410	183.9	3,065	149.0	2,483
IRELAND	5,405.3	90,088	7,524.4	125,407	6,999.4	116,657
ITALY	596,534.7	9,942,246	649,737.4	10,828,957	622,080.5	10,368,008
LATVIA	1,339.9	22,332	1,109.8	18,497	485.9	8,098
LITHUANIA	801.2	13,353	1,303.1	21,719	1,933.3	32,222
LUXEMBOURG	74.4	1,241	74.3	1,238	55.1	918
MALTA	39.2	653	1.4	23	0.4	6
NETHERLANDS	62,002.3	1,033,372	107,352.9	1,789,214	159,906.6	2,665,110
POLAND	31,981.4	533,023	24,854.1	414,235	20,654.9	344,249
PORTUGAL	36,068.5	601,141	39,502.4	658,373	42,911.6	715,193
ROMANIA	11,774.4	196,239	11,524.6	192,077	10,736.7	178,945
SLOVAKIA	163.1	2,718	203.2	3,386	272.7	4,545
SLOVENIA	26,661.5	444,358	26,336.6	438,943	25,833.9	430,565
SPAIN	229,320.8	3,822,014	259,652.3	4,327,538	230,624.6	3,843,744
SWEDEN	86,206.7	1,436,779	85,877.6	1,431,294	83,543.1	1,392,385
EU27 TOTAL	2,788,031.0	46,467,183	2,952,775.0	49,212,917	2,652,953.5	44,215,891
UNITED KINGDOM	148,138.0	2,468,965	176,618.1	2,943,635	160,552.1	2,675,869
SWITZERLAND	192,401.0	3,206,683	199,316.5	3,321,941	182,572.7	3,042,878
NORWAY	32,756.5	545,942	31,019.1	516,985	29,117.1	485,285
ICELAND	911.4	15,191	846.3	14,105	952.2	15,870
WESTERN EUROPE TOTAL	3,162,237.9	52,703,964	3,360,575.0	56,009,583	3,026,147.6	50,435,793

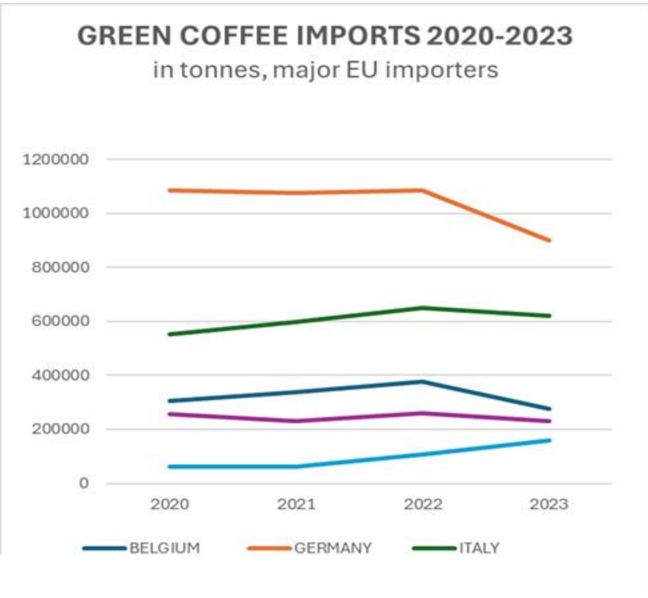
(cont.)

Imports of GREEN COFFEE into Europe Data by importing country 2021 – 2023 (in tonnes and in 60 kg bags, EXTRA EU-Trade for EU27 countries)						
COUNTRY	2021		2022		2023	
	in tonnes	in bags	in tonnes	in bags	in tonnes	in bags
ALBANIA	4,540.4	75,673	529.9	8,832	n.a.	n.a.
BELARUS*	2,311.8	38,530	1,665.0	27,750	n.a.	n.a.
BOSNIA AND HERZEGOVINA	20,664.9	344,415	17,970.9	299,515	n.a.	n.a.
GEORGIA	5,134.9	85,582	5,997.8	99,963	n.a.	n.a.
NORTH MACEDONIA	5,157.0	85,950	4,781.1	79,685	n.a.	n.a.
MOLDOVA	74.0	1,233	62.8	1,046	n.a.	n.a.
MONTENEGRO	2,130.4	35,507	2,310.4	38,507	n.a.	n.a.
RUSSIAN FEDERATION*	205,269.0	3,421,150	182,690.0	3,044,834	n.a.	n.a.
SERBIA	29,851.3	497,522	27,965.4	466,090	n.a.	n.a.
UKRAINE	27,192.2	453,203	22,018.0	366,967	n.a.	n.a.
CENTRAL AND EASTERN EUROPE	302,325.9	5,038,765	265,991.3	4,433,189	n.a.	n.a.
EUROPE TOTAL*	3,464,563.8	57,742,729	3,626,566.3	60,442,772	3,300,000.0 e	n.a.

Source: Eurostat (European Union's countries); Statistics Iceland/Hagstofa (Iceland); Statistics Norway/Statbank (Norway); Swiss Federal Customs Administration/Swiss-Impex (Switzerland); HMRC (United Kingdom); and World Bank WITS (other European countries). Figures show imports of green coffee, not decaffeinated (HS 090111). For EU27 countries, data include EXTRA-EU TRADE only. Totals may differ from the sum of the items due to rounding.

*Figures for Belarus and the Russian Federation have been modelled based on historic data and the UN Comtrade Database data. Europe Total 2023 has been estimated (e).

The figures for Europe as a whole are only available for 2020 and 2021. **European total imports of green coffee reached 3.63 million tonnes in 2022 (+4.7**%). Imports in 2022 showed a positive trend all over Western Europe (+6.3% yoy), but Western Europe's figures in 2023 (-10.0%) will certainly drag down total European imports (by over 334,000 tonnes). Therefore, **it can be estimated that Europe's total imports of green coffee will not exceed 3.3 million tonnes in 2023**, quite far from the pre-pandemic peak level reached in 2016 and 2017 with 4.1 and 3.9 million tonnes, respectively**.** European green coffee imports had stabilised near the 3.5 million tonnes per year mark after the Covid pandemic (2020-2022), but the decline seems to resume in 2023. **Green coffee imports into Europe would have shrunk by close to 20% during the 2016-2023 period.**



Source: Eurostat

In 2023 those countries included in the 'Western Europe' region imported on aggregate 3.03 million tonnes of green coffee, a -10.0% variation compared to 2022. This sharp decline more than compensates the healthy growth experienced in 2022 (+6.3% yoy) and brings **Western Europe's green coffee imports to a substantially lower level than the average of the last decade.** Western Europe includes EU27 countries plus Switzerland, the United Kingdom, Norway, and Iceland. Switzerland is the main importer (outside the EU27 bloc) with 0,18 million tonnes of green coffee imported in 2023 (-8.4%), while the UK imported 0.16 million tonnes in 2023 (-9.1%). Both countries adhere to the negative trend experienced all over Europe.

EU27 countries absorb 87.7% of total green coffee imports into Western Europe (80.4% of Europe's total imports) with 2.65 million tonnes in 2022 (-10.2% yoy). EU27's imports recovered in 2022 (+5.9% yoy), but that spike did not compensate the negative effects of the Covid pandemic and the statistical effect of Brexit. The sharp decline in EU27's green coffee imports during 2023 seem to respond to an apparent general negative trend (pre-pandemic) compounded by the current economic scenario, both in producing countries and in Europe. **Germany, the largest importer in the EU27 bloc, has reduced its imports by 17.1% in 2023 (ca. 174,000 tonnes), explaining more than half of EU27's imports shrinkage.**

Finally, the figures for Central and Eastern Europe are only available for 2021 and 2022, although the World Bank WITS database no longer published updated data for Belarus and the Russian Federation in 2022. **Countries in Central and Eastern Europe decreased their imports of green coffee in 2022 to 0.27 million tonnes (-12.0%).** The trend was negative in most markets, with the incognita of the Russian Federation's current alternative trade channels, probably hampering an accurate statistical analysis (modelled yoy decrease of 11% in 2022). According to the UN Comtrade database, the Russian Federation is now sourcing most of its green coffee via Kazakhstan, the UAE, and Belarus. It has to be noted that **the Russian Federation represents approximately two thirds of green coffee imports in the Central and Eastern Europe region**. Serbia is the second largest importer in this region and its green coffee imports decreased by 6.3% in 2022, while Ukraine's imports also declined by 11% in the same year.

EU 27 Largest Absolute Variations in GREEN COFFEE Imports (in tonnes, 2023 vs. 2021)			
TOP 5	**TONNES**	**BOTTOM 5**	**TONNES**
NETHERLANDS	97,904	**GERMANY**	-173,621
ITALY	25,546	**BELGIUM**	-60,489
PORTUGAL	6,843	**POLAND**	-11,326
GREECE	1,784	**FRANCE**	-9,738
IRELAND	1,594	**BULGARIA**	-5,835

Source: Eurostat

Focusing on the EU27 bloc, **green coffee imports persisted along the path of further concentration in traditional major importing countries** during the analysis period (2021-2023)**.** Although **Germany remained the largest importer with 33.9% of EU's green coffee imports** coming through its ports in 2023 (900,449 tonnes), during that year German imports have experienced a sharp decline (-17.1% yoy). **Italy, the second largest importer, channels 23.5% of EU imports after posting the second largest growth in volume (+25,546 tonnes) during the analysis period.** Coffee traffic through Belgian ports decreased by 27% in 2023 (-60,489 tonnes), virtually cancelling the growth experienced in previous years. **Belgian imports are decreasing (-60,489 tonnes) in tandem with the rise in imports to the EU coming through the Netherlands (+97,904 tonnes), pointing to a shift in the port of entry of green coffee in the Benelux from Antwerp to Rotterdam.** However, Belgium still imported 12.8% of total green coffee into the EU in 2023 and is the third largest importing country in the EU, while the Netherlands channelled 6.0% of imports. **Spain was the fourth largest importer with 230,625 tonnes in 2023** (8.7% of total green coffee EU imports). **These five EU countries (Germany, Italy, Belgium,**

Spain, and the Netherlands) channelled on aggregate more than 82% of total EU imports of green coffee in 2023. With the exceptions of France (5.6%) and Sweden (3.1%), all other countries' share of EU green coffee imports stays below 2%. In all, green coffee imports are further concentrating their point of entry in the EU27 bloc due to the confluence of two factors related to economies of scale: market/industry size (Germany, Italy) and location of the busiest ports in Europe (the Netherlands, Belgium, Germany, Spain).

Shipping after the pandemic has been transformed and the need for efficiency gains gave large ports in Europe an advantage over cost, distance to market or other criteria. This fact could explain the reduction in direct imports of green coffee during the analysis period to countries such as Croatia (-74.4%), Hungary (-43.7%), Czechia (-38.1%), Poland (-35.4%), or Bulgaria (-24.9%). Coffee consumption in these countries has not decreased substantially during the analysis period. Therefore, these figures can only represent how **imports are being increasingly funnelled towards the largest European ports mainly located in Germany, Italy, Belgium, and the Netherlands.** As a general rule, landlocked countries such as Hungary or Czechia have substantially reduced their green coffee imports, while smaller EU members have virtually stopped importing green coffee: Malta (0.4 tonnes), Luxembourg (55.1 tonnes), and Croatia (75.1 tonnes).

4.1. Origins of green coffee imported into the EU27 area

The table below lists the ‘top 20’ countries of origin for green coffee imported into the EU27 area as a whole (excluding intra-EU trade) during the analysis period (2021-2023). Countries are ranked according to 2023 volumes:

COUNTRY	2021		2022		2023	
	IN TONNES	% OF TOTAL	IN TONNES	% OF TOTAL	IN TONNES	% OF TOTAL
BRAZIL	1,033,105	37.1%	1,041,696	35.3%	921,545	34.7%
VIET NAM	533,059	19.1%	648,005	22.0%	632,750	23.9%
UGANDA	212,289	7.6%	214,649	7.3%	206,254	7.8%
HONDURAS	191,085	6.9%	158,430	5.4%	168,719	6.4%
INDIA	122,506	4.4%	151,471	5.1%	118,079	4.5%
COLOMBIA	142,211	5.1%	124,278	4.2%	111,986	4.2%
PERU	84,618	3.0%	130,285	4.4%	83,005	3.1%
INDONESIA	85,941	3.1%	102,152	3.5%	68,212	2.6%
ETHIOPIA	83,113	3.0%	92,474	3.1%	59,027	2.2%
TANZANIA	40,182	1.4%	35,496	1.2%	45,049	1.7%
NICARAGUA	41,924	1.5%	38,170	1.3%	33,281	1.3%
GUATEMALA	33,079	1.2%	31,442	1.1%	32,753	1.2%
PAPUA NEW GUINEA	19,912	0.7%	21,725	0.7%	28,673	1.1%
KENYA	15,951	0.6%	20,056	0.7%	26,025	1.0%
MEXICO	27,776	1.0%	25,533	0.9%	17,170	0.6%
CÔTE D'IVOIRE	13,195	0.5%	13,163	0.4%	14,604	0.6%
COSTA RICA	13,276	0.5%	9,373	0.3%	12,148	0.5%
CAMEROON	15,286	0.5%	9,734	0.3%	9,256	0.3%
EL SALVADOR	6,949	0.2%	8,804	0.3%	8,877	0.3%
LAO PEOPLE’S REP.	12,196	0.4%	8,434	0.3%	8,309	0.3%
BURUNDI	10,375	0.4%	4,755	0.1%	8,221	0.3%
RWANDA	8,394	0.3%	7,734	0.2%	8,133	0.3%
OTHERS	41,609	1.5%	54,918	1.9%	30,878	1.1%
EU27 TOTAL (excl. intra-EU)	**2,788,031**	**100.0%**	**2,952,775**	**100.0%**	**2,652,954**	**100.0%**

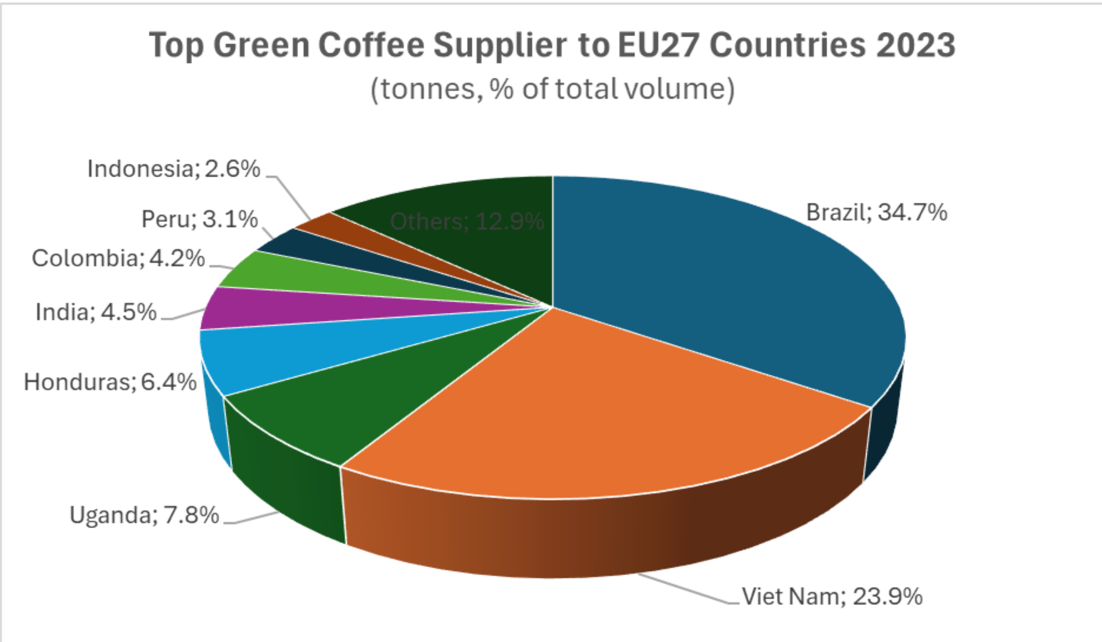
Source: Eurostat

Brazil remains the largest supplier of green coffee to EU27 countries with its market share well consolidated above one third of total EU27 imports (34.7% in 2023). However, Brazil lost the “one-million tonnes” mark in 2023 after supplying just 921,545 tonnes of green coffee Brazil’s deliveries sharply decreased in 2023 (-11.5%). If comparing 2021 and 2023 figures, Brazil’s exports to EU27 countries have shrunk by 111,560 tonnes. Although in line with the general negative trend in 2023, Brazil’s market share has also shrunk from 37.1% in 2021 to 34.7% in 2023. It is important to note that Brazilian coffee deliveries were severely affected by adverse weather. Brazil’s 2022 harvest was estimated to suffer a loss of at least 10 to 12 million bags due to frost-damaged coffee alone.

Viet Nam supplied 632,750 tonnes of green coffee to the EU27 area or 23.9% of its total imports in 2023. However, Viet Nam’s figures are far from its peak export levels reached in 2018 when EU27 countries acquired mora than 758,000 tonnes of Vietnamese green coffee. In spite of this, Vietnam's market share has managed to climb steadily and is now closer to the 25% mark. **Brazil and Viet Nam have consistently ranked as the top-two suppliers to EU27 countries during the last decade**, typically supply over 55% of the total green coffee imported by this economic area (58.6% in 2023).

Each of the other green coffee origins supplying the EU27 bloc hold a market share below 10%. **Uganda seems to have consolidated its position as the third green coffee supplier to the EU 27 bloc** with exports consistently increasing during the past few years. Uganda exported 206,254 tonnes of green coffee to EU27 countries in 2023 after a slight decrease (-2.8%) during the analysis period (-6,035 tonnes), probably explained by drought conditions that reduced coffee production by 6.8%. Still, **Uganda alone supplies more coffee to the EU27 than the rest of Africa combined and has turned into "Africa's coffee powerhouse"** and East Africa is undoubtedly the key coffee exporting region in Africa**.** Other relevant origins in East Africa are Ethiopia (9th largest supplier, -24,000 tonnes during the analysis period), Tanzania (10th largest supplier, +4,900 tonnes), and Kenya (14th largest supplier, +10,100 tonnes). Traditional West African producers saw their exports to EU27 countries decline on aggregate during the analysis period. Côte d'Ivoire managed to improve its deliveries (+1,400 tonnes) while Cameroon's continued to slide (-6,000 tonnes). **It has to be noted that these two West African countries exported together 59,000 tonnes of green coffee to EU27 countries in 2016, while in 2023 their combined exports only reached 24,000 tonnes** signalling the decline of West Africa as a coffee exporting region.

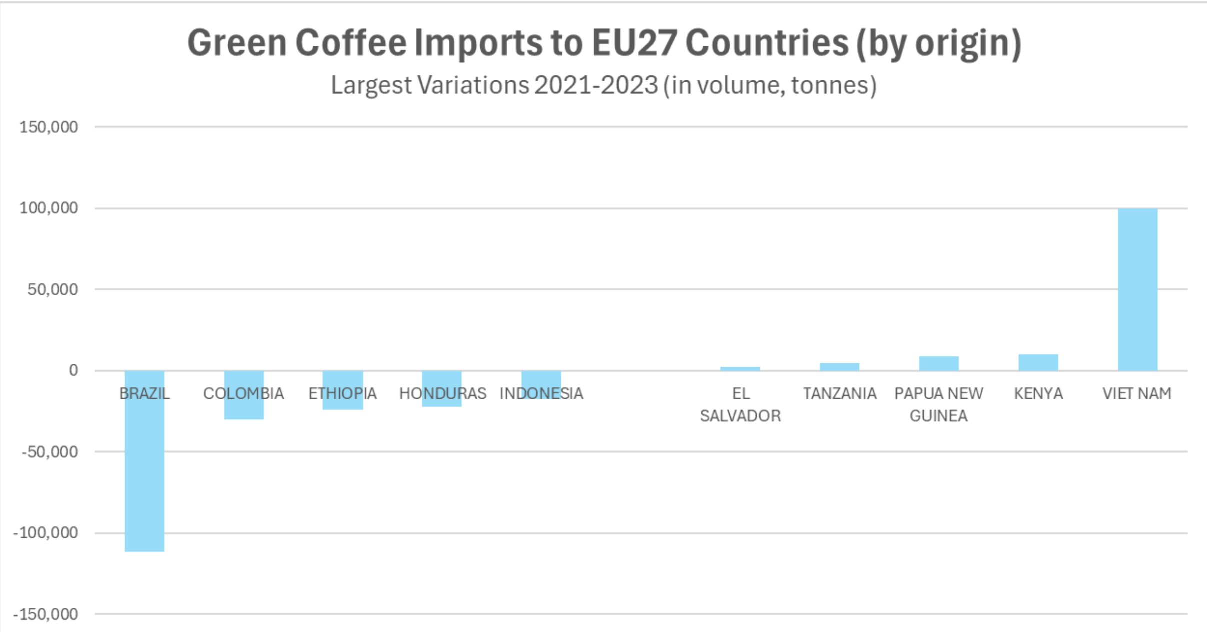
Honduras remains the fourth largest green coffee supplier to EU27 countries, although exported volumes seem to follow a slightly negative trend. In 2023 Honduras exported 168,719 tonnes of green coffee to EU27 countries (+6.5% yoy), but still much less than in 2021 (-11.7% during the analysis period). Honduras' share of the EU27 market slightly recovered in 2023 to 6.4%. However, adding approximately 10,000 tonnes in exports during the negative global context experienced in 2023 has helped Honduras to protect its position as the fourth largest supplier to the EU bloc. Honduras managed to increase production by 14.7% to 5.7 million bags in spite of labour shortages, high fertiliser costs, heavy rain, and reports of a resurgence of coffee leaf rust disease.



Source: Eurostat

Among the American green coffee origins, the trends in Colombia and Peru are both very negative in 2023. Colombia used to rank as the 4th largest supplier (193,600 tonnes in 2016, 6.5% market share) and ranked in 2023 as the 6th supplier to the EU27 market with 111,986 tonnes delivered and a 4.2% market share. **During the analysis period, Colombia's exports decreased by approximately 30,000 tonnes (-21.2%).** Peru's exports have also declined steadily since 2016, with a respite in 2022 when they jumped by approximately 36,000 tonnes. **However, Peru's deliveries to the EU retreated in 2023 back to 2021 levels at 83,000 tonnes (-36.3% yoy)** making it the 7th largest supplier to EU27 countries with a 3.1% market share. In Central America, Nicaragua remains a relevant green coffee exporter to the EU27 trade bloc (11th) supplying 33,300 tonnes in 2023 (-12.8% yoy). Guatemala has managed to escape the global negative trend and its exports to EU27 countries edged up to 32,800 tonnes in 2023 (+4.2% yoy).

While the picture in Africa and the Americas is mostly negative, the trend in Asia is mixed. Leaving aside Viet Nam's relentless climb, India has consolidated a 4.5% share of the EU27 market, although its green coffee exports plummeted in 2023 to 118,100 tonnes (-22.0% yoy). Still, **India remains as the EU bloc's 5th largest supplier of green coffee.** Indonesia has substantially reduced its deliveries to the EU27 trade bloc during the analysis period (-17,700 tonnes), sinking to 68,200 tonnes in 2023 (-33.2% yoy). This is particularly surprising if we consider that Indonesia has managed to increase production (+2.4% yoy) and it has also added 71,000 hectares of coffee plantations from 2018 to 2022, pointing to customers other that the EU absorbing Indonesian coffee, including the domestic market. On the positive side, **Papua New Guinea keeps gaining market share** (at 1.1% in 2023) after adding 8,800 tonnes in exports during the analysis period. Papua New Guinea exported 28,700 tonnes of green coffee to EU27 countries in 2023 (+32.0% yoy). **It is worth noting that China has vanished from the ranking of top exporters of green coffee to EU27 countries in 2023.** It delivered 21,100 tonnes in 2022 and only 6,500 in 2023 (-69.2%). **China's virtual disappearance from the green coffee exporting panorama –and Indonesia's decline to some extent as already mentioned– can be explained by their thriving domestic and regional markets**, which obviously leaves less room for exports and could soon turn into hunger for imports in the case of China.



Source: Eurostat, ECF

It has to be noted that although data from Eurostat are perfectly reliable, real imports by origin or type of coffee are practically impossible to determine with any accuracy. Intra-EU trade represents a relevant share of traded green coffee in the EU. For the case of intra-EU trade, Eurostat's country statistics do not reveal the country of production of green coffee. After arriving at major coffee ports in the EU, the origin of green coffee may be recorded thereafter as 'Germany' when it reaches the Port of Hamburg, or 'Belgium' when offloaded at the Port of Antwerp. The share of intra-EU trade is quite high with Germany and Belgium ranking as two of the top origins of green coffee imports to the EU. Therefore, analysis of green coffee imports into the EU27 trade bloc based on Eurostat data is meant to indicate trends rather than fully accurate figures. Chapter 9 includes intra-EU trade data allowing to further analyse the relevance of intra-EU traded coffee by country.

4.2. Type of green coffee imported into the EU27 area

The overall ratio of Arabica-to-Robusta green coffee imports seems to remain stable throughout the years at slightly below two-thirds to slightly above one-third: 63.8% of Arabica coffee compared to 35.6% of Robusta coffee was imported by EU27 countries in 2023.

EU27 Imports per Type of GREEN COFFEE % of total green coffee imports (volume, tonnes)		
	2022	**2023**
Arabicas	**60.9%**	**63.8%**
Brazilian Naturals	35.3%	37.0%
Colombian Milds	6.1%	6.9%
Other Milds	19.5%	19.9%
Robustas	**35.2%**	**35.6%**
Others	**3.9%**	**0.6%**
TOTAL	**100.0%**	**100.0%**

Source: Eurostat (intra-EU trade excluded). Totals may differ from the sum of the items due to rounding.

Within the ‘Arabicas’, the share of ‘Brazilian Naturals’ slightly increased –Brazil and Ethiopia’s exports declined but less than the average– with ‘Colombian Milds’ also edging up thanks to origins such as Kenya and Tanzania. ‘Other Milds’ also increased their share thanks to growth in Honduras. Imports of ‘Robusta’ coffee are driven by growing imports from Viet Nam. All origins benefited from a substantial reduction of the ‘Others’ rubric.

5. EU27 IMPORTS: GREEN DECAFEINATED COFFEE, ROASTED COFFEE, ROASTED DECAFFEINATED COFFEE AND SOLUBLE COFFEE

EU27 Imports and Exports of
GREEN COFFEE and (SEMI)FINISHED COFFEE PRODUCTS

From non-EU origins/To non-EU destinations
(In tonnes, 2021-2023)

	2021		2022		2023	
	Imports	Exports	Imports	Exports	Imports	Exports
Green coffee (HS 09011100)	2,788,031.00	60,176.40	2,952,775.00	65,030.10	2,652,953.50	54,581.00
Green coffee, decaffeinated (HS 09011200)	18,095.60	86,628.00	15,893.50	77,554.00	21,754.40	59,075.00
Roasted coffee (HS 09012100)	82,843.10	210,368.20	76,026.90	215,577.80	66,322.90	212,047.90
Roasted coffee, decaffeinated (HS 09012200)	4,667.40	4,543.60	4,160.00	5,336.30	3,648.50	4,822.20
Coffee extracts (HS 21011100)	56,407.50	80,888.10	59,366.50	78,044.70	64,534.30	83,562.20

Source: Eurostat

Green coffee imports represent close to 95% of the total volume of coffee and coffee-related products imported into the EU27 area. In spite of this, the analysis of other coffee products is also relevant in order to better understand the European coffee market. Although roasted and soluble coffee trade is modest in volume, it is much more relevant in terms of value and market position.

Green decaffeinated coffee imports have substantially increased during the last decade. They jumped by 36.9% in 2023 to 21,754 tonnes, a figure that almost doubles the imported volume in 2016.

EU27 Imports of ROASTED COFFEE (INCL. DECAF) 2020-2022
From non-EU Origins
HS09012100 and HS09012200, in tonnes

COUNTRY	2021	2022	2023
SWITZERLAND	60,976.60	60,367.70	53,051.60
UNITED KINGDOM	17,749.50	12,816.70	9,334.20
BOSNIA AND HERZEGOVINA	1,201.70	1,109.40	1,187.90
KENYA	1,069.1	1,291.00	1,161.50
SERBIA	809.6	797.2	710.4
NORWAY	586.1	477.3	624.4
TÜRKIYE	609.8	438	540.9

Source: Eurostat

Roasted coffee imports follow a 95:5 ration patterns for regular and decaf coffee, respectively. **Before the Covid pandemic, imports of roasted coffee into the EU27 trade bloc had followed an upward trend**, peaking in 2020 when they reached approximately 91,000 tonnes. **This trend has now been reversed with an accumulated reduction of 20.0% during the analysis period** to 69,971 tonnes.

Imports of roasted coffee into the EU27 area were traditionally the result of trade with one large commercial partner and a very junior partner: Switzerland and the United States, respectively. **Switzerland remains the largest non-EU supplier of roasted coffee to EU27 countries with 53,051.6 tonnes in 2023 or 75.8% of EU27's total imports** of roasted coffee. Imports from Switzerland had remained stable around the 60,000 tonnes mark since 2018 but decreased by 12.1% in 2023 to 53,052 tonnes. **Trade disputes between the US and the EU have resulted in the United States no longer being a relevant supplier of roasted coffee to the EU27 area.** US roasted coffee exports were already rapidly declining before the pandemic and have now simply become irrelevant. **Brexit has made of the United Kingdom the second largest external supplier of roasted coffee to the EU27 area with 9,334.2 tonnes in 2022 (-27.2% yoy).** This figure is substantially lower than the one registered in 2020 when it supplied 22,183 tonnes, with an accumulated fall of 58% since that year 2020. Brazil is another supplier that has disappeared from the map, while the traditional niche suppliers (Bosnia and Herzegovina, Serbia, Norway, and Türkiye) still furnish between 500 and 1,200 tonnes per year. By contrast, **Kenya has emerged as a major supplier of roasted coffee to the EU27 area with 1,162 tonnes in 2023 (-10% yoy)**.

Soluble coffee imports were following a downward trend before the pandemic (47,584 tonnes in 2018), **but changes in consumer behaviour boosted at-home coffee consumption to record levels.** Soluble coffee benefited from this trend and imports of soluble coffee rocketed to 63,577 tonnes in 2020. **Imports of soluble coffee to the EU27 area in 2020 were also somewhat distorted by the effects of Brexit**, since the United Kingdom instantly became the bloc's largest supplier with more than 22,000 tonnes. After returning to closer to average levels in 2021, **imports of soluble coffee picked up in 2022 and again in 2023 when they have reached 64,534.3 tonnes with yoy growth at 8.7%.**

EU27 Imports of SOLUBLE COFFEE
From non-EU Origins
(HS 21011100) 2021-2023, in tonnes and as a % of total imports

	2021		2022		2023	
	Tonnes	%	Tonnes	%	Tonnes	%
UNITED KINGDOM	10,401.7	18.4%	12,166.3	20.5%	15,242.2	23.6%
VIET NAM	7,885.3	14.0%	7,469.8	12.6%	11,563.9	17.9%
INDIA	7,727.8	13.7%	9,244.0	15.6%	9,885.0	15.3%
ECUADOR	4,200.4	7.4%	5,525.3	9.3%	7,700.0	11.9%
BRAZIL	9,116.9	16.2%	8,718.4	14.7%	7,022.2	10.9%
SWITZERLAND	5,727.0	10.2%	6,113.1	10.3%	5,663.4	8.8%
OTHERS	11,348.4	20.1%	10,129.7	17.1%	7,457.6	11.6%
TOTAL	56,407.5	100.0%	59,366.6	100.0%	64,534.3	100.0%

Source: Eurostat

The United Kingdom remains as the top exporter of soluble coffee to the EU27 bloc after delivering 15,242.2 tonnes of soluble coffee in 2023 (+25.3% yoy). The UK's market share sunk to 18.4% in 2021 (down from 34.8% in 2020) and it has gradually etched up to reach 23.6% in 2023. **Viet Nam has surpassed both India (third largest supplier with 9,885 tonnes) and Brazil, and now stands as the second largest supplier to the EU27 trade bloc with 11,563.9 tonnes exported in 2023 (+54.8%**

yoy). Viet Nam’s striking growth has moved in tandem with Brazil’s decline as soluble coffee supplier to the EU27 bloc. In 2016 Brazil’s market share of EU27’s soluble coffee imports reached 23.5% while it stands today at only 10.9% with 7,022.2 tonnes (-19.5% yoy). Ecuador has rapidly climbed in the ranking to become the fourth largest supplier in 2023 with 7,700 tonnes (11.9% market share), accumulating 83.3% growth during the analysis period.

6. EU27 COFFEE EXPORTS: DATA IN VOLUME

The EU27 trade bloc is not only a major importer of coffee, but also a significant exporter of green coffee and coffee-based finished products, specially roasted coffee. EU27's imports of green decaffeinated coffee and regular roasted coffee are modest compared to exports of those same products, while imports and exports of decaffeinated roasted coffee and soluble coffee (extracts) are within the same order of magnitude. **The trade balance for green decaffeinated coffee clearly favours the EU27 area** with exports topping imports by approximately 37,000 tonnes in 2023, although this figure has been steadily shrinking during the analysis period from 68,500 tonnes in 2021. **Roasted coffee's trade balance is even more favourable to the EU27 trade bloc in terms of volume, and it must be noted that its impact is even larger if considered in terms of value.** EU27 countries exported just under 217,000 tonnes of roasted coffee (including decaf) in 2023, exceeding imports by approximately 147,000 tonnes. This superavit has consistently widened during the past decade with a 25% increase on aggregate during the period of analysis (2020-2022).

EU27 Exports of GREEN COFFEE and (SEMI)FINISHED COFFEE PRODUCTS To non-EU destinations in tonnes, 2021-2023			
	2021	2022	2023
Green coffee (09011100)	60,176.4	65,030.8	54,581.0
Green coffee, decaffeinated (09011200)	86,628.0	77,554.0	59,075.0
Roasted coffee (09012100)	210,368.2	215,577.8	212,047.9
Roasted coffee (decaf) (09012200)	4,543.6	5,336.3	4,822.2
Coffee extracts (21011100)	80,888.1	78,044.7	83,562.2

Source: Eurostat

Re-exports of green coffee from EU27 countries plummeted to 54,581 tonnes in 2023 (-16.1%) yoy). The EU27 trade bloc had consolidated a strong position as re-exporter of green coffee with marked and consistent growth since 2016. The current global scenario in the coffee industry seems to have interrupted that trend, with **exports of green decaffeinated coffee sliding even further to 59,075 tonnes in 2023 (-23.8% yoy).** On aggregate, **total exports of green coffee (including decaffeinated) have shrunk by close to 23% during the analysis period from 146,800 tonnes in 2021 to 113,700 tonnes in 2023**.

Exports of roasted coffee in 2023 have also interrupted the pace of growth followed during the last decade. EU27 countries exported 216,870 tonnes of roasted coffee, including decaf (-1.8% yoy). It is a modest decline if compared to the general trend in the global coffee market, and especially considering that EU27 area's exports are close to 95,000 tonnes higher now than in 2016. Again, since Brexit all these figures include deliveries to the United Kingdom (40,000 tonnes) as exports (before intra-EU trade), significantly amplifying the otherwise undeniably positive trend in EU27's exports of roasted coffee.

Soluble coffee exports also managed to increase to 83,562 tonnes (+7.1% yoy) in 2023. As explained in previous sections, soluble coffee exports expanded during the pandemic and have consolidated at higher levels during the analysis period, with the added statistical boost of exports to the UK.

6.1 Roasted coffee exports

Looking in some more detail at EU exports of roasted coffee during the analysis period, it is worth analysing which countries are the major customers for EU roasted coffee (regular and decaffeinated). Those export markets are listed below and classified according to their ranking in 2023.

EU27 Exports of ROASTED COFFEE (incl. DECAFFENAITED ROASTED COFFEE) To non-EU destinations in tonnes and as a % of total exports, 2021-2023						
COUNTRY	2021		2022		2023	
United Kingdom	38,094.7	17.7%	40,095.9	18.1%	39,386.4	18.2%
Russian Federation	30,127.3	14.0%	25,712.1	11.6%	21,801.2	10.1%
Ukraine	24,387.0	11.3%	21,655.6	9.8%	20,797.2	9.6%
United States	19,922.3	9.3%	18,594.6	8.4%	18,713.5	8.6%
Switzerland	12,397.0	5.8%	12,029.6	5.4%	11,808.9	5.4%
Türkiye	7,317.4	3.4%	9,955.3	4.5%	11,034.9	5.1%
Norway	6,347.8	3.0%	6,380.0	2.9%	7,485.9	3.5%
United Arab Emirates	4,016.3	1.9%	5,223.2	2.4%	6,394.0	2.9%
Canada	6,489.5	3.0%	6,767.3	3.1%	6,249.3	2.9%
Australia	6,340.1	3.0%	6,427.3	2.9%	5,929.3	2.7%
Belarus	3,574.8	1.7%	8,596.8	3.9%	5,149.3	2.4%
Israel	4,321.8	2.0%	4,236.1	1.9%	4,493.3	2.1%
Korea	4,502.2	2.1%	4,550.2	2.1%	4,432.9	2.0%
Saudi Arabia	3,417.1	1.6%	3,675.9	1.7%	3,876.9	1.8%
Serbia	2,987.3	1.4%	3,675.1	1.7%	3,823.5	1.8%
Albania	2,767.1	1.3%	2,815.2	1.3%	3,026.0	1.4%
Libya	2,213.9	1.0%	2,586.5	1.2%	2,756.8	1.3%
China	3,979.0	1.9%	4,456.2	2.0%	2,697.3	1.2%
Morocco	3,193.1	1.5%	2,756.0	1.2%	2,442.9	1.1%
Others	28,516.2	13.3%	30,725.3	13.9%	32,964.8	15.2%
TOTAL	214,911.8	100.0%	220,914.2	100.0%	216,870.1	100.0%

Source: Eurostat

Once the Brexit turmoil has passed and its effects on trade have relatively diluted, **the United Kingdom has consolidated as the EU27 bloc's first customer for roasted coffee,** with exports now stable at approximately 40,000 tonnes a year (39,386 in 2023, -1.8% yoy). T**he United Kingdom is set to remain the EU27's largest export market in the near future with a market share of 18.2% in 2023.**

Before Brexit and the invasion of Ukraine, the Russian Federation was the largest customer for roasted coffee produced in the EU27 bloc. Exports to the Russian Federation consistently increased during the last decade and peaked in 2021 at 30,127 tonnes. However, **the invasion of Ukraine has reversed this trend and deliveries of roasted coffee to Russia continued to shrink in 2023.** The Russian Federation imported 21,801 tonnes of roasted coffee from the EU27 bloc (-15.2% yoy), although they still represent 10.1% of the EU27 bloc's total exports of roasted coffee. After jumping by more than 5,000 tonnes in

2022 to a whopping 8,597 tonnes, exports to Belarus shrunk in 2023 to 5,149 tonnes (-40.1% yoy). Still, Belarus has increased its acquisitions of EU27's roasted coffee by 1,575 tonnes during the analysis period.

Ukraine remains the third largest export market for roasted coffee originating in the EU27 area. Exports to Ukraine almost doubled during the 2016-2021 period (+82% on aggregate) peaking at 24,387 tonnes in 2021. As a consequence of the Russian invasion, exports to Ukraine have declined thereafter accumulating a reduction of 3,590 tonnes during the analysis period. Ukraine imported 20,797 tonnes of roasted coffee from the EU27 in 2023 (-4.0% yoy) and still absorbs 9.6% of total EU exports of roasted coffee.

The United States is the fourth largest export market for EU27's coffee roasters. Deliveries to the US had been on the increase until 2021 when they peaked at 19,922 tonnes. Exports to the US inched up by 0.6% in 2023 to 18,713 tonnes, representing 8.6% of EU27's total exports. Switzerland is also a traditional customer for EU27's roasters, although exports have decreased by almost 600 tonnes during the analysis period to 11,809 tonnes in 2023 (12,042 tonnes in 2022, -1.8% yoy).

EU27 ROASTED COFFEE Exports – Largest Absolute Variations
Total volume in tonnes, 2021-2023

TOP 5	Tonnes	BOTTOM 5	Tonnes
Türkiye	3,718	Russian Federation	-8,326.0
United Kingdom	2,898	Ukraine	-3,590.0
United Arab Emirates	2,378	China	-1,282.0
Belarus	1,575	United States	-1,209.0
Norway	1,138	Morocco	-750.0

Source: Eurostat

Among the new markets for EU27's coffee roasters, Türkiye is rapidly becoming a key export market adding 3,718 tonnes during the analysis period. Exports to Türkiye reached 11,035 tonnes in 2023 (+10.8% yoy) and it is now almost at a pair with Switzerland (5.1% market share). It has to be noted that exports to Türkiye in the year 2016 only represented 3,268 tonnes of roasted coffee.

In the **Middle East**, the United Arab Emirates (+2,378 tonnes) is rapidly climbing in the ranking of key export markets for European coffee roasters, with Saudi Arabia (+460 tonnes) and Israel (+171 tonnes) also posting positive figures.

EU27 ROASTED COFFEE Exports – Largest Variations (%)
As a percentage of total volume in tonnes, 2021-2023

TOP 5		BOTTOM 5	
United Arab Emirates	59.2%	China	-32.2%
Türkiye	50.8%	Russian Federation	-27.6%
Belarus	44.0%	Morocco	-23.5%
Serbia	28.0%	Ukraine	-14.7%
Libya	24.5%	Australia	-6.5%

Source: Eurostat

Other near markets in Europe and Africa, such as Norway (+1,138 tonnes) and Serbia (+836 tonnes), are also increasing their imports of EU roasted coffee, while Morocco substantially decreased its reliance on EU roasted coffee (-750 tonnes) during the analysis period. Libya, in exchange, added 543 tonnes to its yearly acquisitions of EU roasted coffee during the same period.

As for the **far markets**, Canada and Australia remain large customers for EU27's coffee roasters, although exports to these countries declined in 2023 by 7.7% yoy in both cases to 6,249 tonnes and 5,929 tonnes, respectively.

China deserves a special mention given its alleged market potential and increasing relevance as a global driver of the coffee market. Data from the ICO show that coffee demand from China grew 15% yoy (season ending in September 2023) to 3.1 million bags (186,000 tonnes). **The United States Department of Agriculture (USDA) sees the Chinese market absorbing 5 million bags of coffee in the 2023/2024 season (300,000 tonnes), which would make it the world's seventh-largest consumer.** Brazil's coffee exporters association (Cecafe) forecasts that shipments to China will nearly triple in 2023 to surpass 1 million bags for the first time, turning China into its eighth-largest market.

Although Chinese coffee consumption still pales when compared to top consumers such as the United States or Brazil (each consuming more than 20 million bags per year (1.2 million tonnes), the growing demand signals a cultural change similar to that experienced in Japan or South Korea. However, **EU27's exports of roasted coffee simply plummeted in 2023 (-32.2% yoy) to 2,697 tonnes.** This figure is the lowest since 2016 and represents 1,282 tonnes less of roasted coffee delivered to China in 2023 compared to 2022. Although it could be a one-off situation, **the Chinese coffee market is driven by consumption at coffee chains, both local and international (US and Canada).** According to Alegra Group, the number of branded coffee shops in China grew a staggering 58% in 2023 to 49,691 outlets. China's Luckin added 5,059 stores, while another Chinese chain, Cotti Coffee, opened 6,004 outlets during the year. U.S.-based Starbucks opened 700 stores in China in the last year and said it is on track to operate around 9,000 stores in the country by 2025, while Canada's Tim Hortons plans to have 3,000 stores in the country by 2027.

6.2 Soluble coffee exports

Regarding the EU27 area's exports of soluble coffee (officially: extracts, essences and concentrates of coffee included in HS21011100), **total exports jumped in 2023 (+7.1%) with deliveries staying at 83,562 tonnes to non-EU destinations.**

Exports of soluble coffee have been conditioned by the same two factors – Brexit and the invasion of Ukraine –already mentioned in the previous section as well as their effects on roasted coffee exports. Their influence on soluble coffee exports is comparable.

Brexit propelled the United Kingdom to the leading position among export markets for EU27 producers of soluble coffee. After reaching 25,351 tonnes in 2020 (33.5% of total exports), deliveries to the UK have steadily declined during the analysis period to 22,446 tonnes in 2023 (-1.5% yoy). This figure still represents 26.9% of EU27's total exports of soluble coffee.

Exports to the Russian Federation have plummeted to 5,880 tonnes in 2023. This figure represents a -19.1% variation during the analysis period and mora than half of soluble coffee sales to the Russian Federation have been lost since they peaked at 12,075 tonnes in 2016. In 2018 the Russian Federation absorbed 20.5% of total EU exports of soluble coffee while they only represent 7.0% in 2023.

Exports to the Ukraine have also fallen sharply in 2023 to 5,459 tonnes (-5.9% yoy). Ukraine is no longer the third largest market for EU27-produced soluble coffee (7th customer) with a 6.5% market share.

EU27 Exports of SOLUBLE COFFEE

To non-EU Destinations

HS 21011100, 2021-2023, in tonnes and as a percentage of total exports

COUNTRIES	2021		2022		2023	
	Tonnes	%	Tonnes	%	Tonnes	%
UNITED KINGDOM	23,720.8	29.3%	22,781.3	29.2%	22,445.9	26.9%
TÜRKIYE	6,484.5	8.0%	9,510.3	12.2%	9,206.1	11.0%
UNITED STATES	4,962.6	6.1%	3,215.5	4.1%	8,150.5	9.8%
SOUTH AFRICA	5,660.3	7.0%	5,674.5	7.3%	6,356.0	7.6%
AUSTRALIA	5,963.4	7.4%	5,582.1	7.2%	6,222.6	7.4%
RUSSIAN FEDERATION	7,268.4	9.0%	5,952.7	7.6%	5,880.5	7.0%
UKRAINE	6,947.8	8.6%	5,801.4	7.4%	5,458.9	6.5%
NORWAY	1,901.9	2.4%	1,880.5	2.4%	1,919.0	2.3%
EGYPT	2,403.0	3.0%	2,628.5	3.4%	1,682.2	2.0%
UNITED ARAB EMIRATES	823.9	1.0%	1,467.0	1.9%	1,238.1	1.5%
SAUDI ARABIA	1,207.2	1.5%	773.4	1.0%	1,160.9	1.4%
SWITZERLAND	1,553.7	1.9%	865.9	1.1%	1,075.4	1.3%
SERBIA	899.0	1.1%	917.4	1.2%	1,021.8	1.2%
CANADA	957.0	1.2%	982.4	1.3%	1,021.7	1.2%
CHINA	899.6	1.1%	1,147.5	1.5%	863.0	1.0%
OTHERS	9,234.8	11.4%	8,864.2	11.4%	9,859.6	11.8%
TOTAL	**80,888.1**	**100.0%**	**78,044.7**	**100.0%**	**83,562.2**	**100.0%**

Source: Eurostat

South Africa, Australia, and the United States traditionally completed the 'Top 5' destinations for EU27's soluble coffee (with The Russian Federation and Ukraine). Sales to this 'Anglo-Saxon Bloc' have been somewhat declining during the last decade, but deliveries to these countries have substantially increased in 2023: United States (8,151 tonnes; +153.5% yoy), South Africa (6,356 tonnes; +12.0%), and Australia (6,223 tonnes; +11.5%). These countries rank 3rd, 4th, and 5th respectively in the ranking of EU27's top customers for soluble coffee.

In the meantime, **Türkiye has emerged as the second largest market for EU27's soluble coffee with 9,206 tonnes exported to the country in 2023 (-3.2% yoy). Deliveries to Türkiye have experienced a six-fold increase since 2018** with close to 8,000 tonnes of soluble coffee added to exports. Türkiye's share of EU27's total exports of soluble coffee has blown up from 3.1% in 2018 to 11.0% in 2023.

Other markets presenting a favourable outlook are the United Arab Emirates (+414 tonnes during the analysis period) and Serbia (+123 tonnes). On the negative side, exports to Egypt plummeted in 2023 to 1,682 tonnes (-721 tonnes during the analysis period) and deliveries to Switzerland have decreased to 1,075 tonnes in 2023 (-479 tonnes).

7. EU 27 COFEE TRADE: IMPORTS AND EXPORTS IN VALUE

This section features some relevant data aimed at adequately valuating the importance of the coffee sector within the EU food and drinks industry.

The table below shows the value of imports and exports of green coffee (including decaffeinated coffee), roasted coffee (including decaffeinated coffee), and soluble coffee in the EU27 area during the analysis period.

EU27 Coffee Trade in Value 2021-2023 (EUR million)	GREEN COFFEE			ROASTED COFFEE			SOLUBLE COFFEE		
orts	2021	2022	2023	2021	2022	2023	2021	2022	2023
EU extra trade	6,531.2	11,128.9	9,037.8	1,703.7	1,682.8	1,593.9	418.4	614.7	675.7
EU intra trade	1,284.1	2,101.7	1,860.8	5,186.1	6,401.7	6,629.8	901.4	1,208.4	1,318.3
orts	2021	2022	2023	2021	2022	2023	2021	2022	2023
EU extra trade	487.3	710.2	544.9	1,578.3	1,919.3	2,016.8	759.0	926.7	1,074.9
EU intra trade	1,508.1	2,442.7	2,132.6	5,339.4	6,467.7	6,731.5	942.3	1,258.8	1,372.1

Source: Eurostat

These data make a distinction between intra EU trade and extra EU trade. Coffee is not only one of the most traded commodities in the world markets, but it is also subject to an intense trade between EU27 countries. The value of intra-EU exports of green coffee (normal and decaffeinated) decreased to EUR 2.13 billion in 2023 (-12.7% yoy), but it has to be noted that they had rocketed in 2022 (+61.9% yoy). At the same time, reexports of green coffee from the EU27 bloc only amounted to 0.54 billion in 2023 (-23.2% yoy).

EU27 GREEN COFFEE TRADE IN VALUE 2021-2023 (EUR million)	GREEN COFFEE			GREEN DECAF COFFEE			TOTAL GREEN COFFEE			
Imports	2021	2022	2023	2021	2022	2023	2021	2022	2023	Imports
EU extra trade	6,485.4	11,068.9	8,951.4	45.8	60.0	86.4	6,531.2	11,128.9	9,037.8	EU extra trade
EU intra trade	1,182.1	1,968.1	1,721.1	102.0	133.6	139.7	1,284.1	2,101.7	1,860.8	EU intra trade
Exports	2021	2022	2023	2021	2022	2023	2021	2022	2023	Exports
EU extra trade	196.9	314.2	248.6	290.4	396.0	296.3	487.3	710.2	544.9	EU extra trade
EU intra trade	1,307.2	2,167.8	1,855.3	200.9	274.9	277.3	1,508.1	2,442.7	2,132.6	EU intra trade

Source: Eurostat

Intra-EU trade of finished coffee products (roasted regular coffee, roasted decaffeinated coffee and soluble coffee) reached EUR 8.10 billion in 2023 (+4.9% yoy), while exports to non-EU countries of finished coffee products stayed at just under EUR 3.10 billion in that same year (+8.6% yoy). It has to be noted that the value of roasted coffee traded intra-EU is 2.6 times larger than exports to non-EU countries, pointing to a strong and cohesive internal market.

EU27 ROASTED COFFEE TRADE IN VALUE 2021-2023 (EUR million)										
	ROASTED COFFEE			ROASTED DECAF COFFEE			TOTAL ROASTED COFFEE			
Imports	2021	2022	2023	2021	2022	2023	2021	2022	2023	Imports
EU extra trade	1,582.3	1,571.4	1,489.8	121.4	111.4	104.1	**1,703.7**	**1,682.8**	**1,593.9**	EU extra trade
EU intra trade	4,918.0	6,119.0	6,328.2	268.1	282.7	301.6	**5,186.1**	**6,401.7**	**6,629.8**	EU intra trade
Exports	2021	2022	2023	2021	2022	2023	2021	2022	2023	Exports
EU extra trade	1,530.2	1,856.8	1,954.3	48.1	62.5	62.5	**1,578.3**	**1,919.3**	**2,016.8**	EU extra trade
EU intra trade	5,090.0	6,208.2	6,457.3	249.4	259.5	274.2	**5,339.4**	**6,467.7**	**6,731.5**	EU intra trade

Source: Eurostat

EU27 SOLUBLE COFFEE TRADE IN VALUE 2021-2023 (EUR million)			
	SOLUBLE COFFEE		
Imports	2021	2022	2023
EU extra trade	**418.4**	**614.7**	**675.7**
EU intra trade	**901.4**	**1,208.4**	**1,318.3**
Exports	2021	2022	2023
EU extra trade	**759.0**	**926.7**	**1,074.9**
EU intra trade	**942.3**	**1,258.8**	**1,372.1**

Source: Eurostat

Roasted coffee represents 65% of coffee products' export value at EUR 2.02 billion in 2023 (+5.1% yoy), while soluble coffee covers the remaining 35% with its exports valued at EUR 1.07 billion (+15.9% yoy).

As for intra-EU trade, the ratio roasted-to-soluble coffee stays at 83:17, substantially lower than in exports. Intra-EU trade of roasted coffee increased by 4.1% in 2023 to EUR 6.73 billion, while intra-EU trade of soluble coffee reached 1.37 billion (+9.0% yoy).

In conclusion, soluble coffee figures in terms of value seem to be relatively more positive if compared to those of roasted coffee, both as an export product as well as part of the intra-EU trade of coffee products.

8. COFFEE CONSUMPTION BY COUNTRY IN THE EU27

The following tables and graphs are derived from data provided by Euromonitor International. The data may differ from those obtained from other sources. This may be the result of the application of diverse definitions or diverging methodologies. "Coffee" is here the aggregation of fresh coffee (beans, pods, and ground coffee) and instant coffee (soluble). Please note that foodservice sales of coffee are volumes sold to the on-trade (foodservice) sector and do not represent values of coffee sold to the consumer.

Total Coffee Sales in EU27 Markets 2021-2023
In volume ('000 tonnes) and in value (EUR million)

	2021		2022		2023	
	Volume	Value	Volume	Value	Volume	Value
Austria	45.4	918	47.7	968	47.4	1,068
Belgium	42.7	652	43.9	700	44.6	775
Bulgaria	19.4	306	20.3	355	21.0	397
Croatia	22.1	183	21.6	197	21.6	210
Czechia	24.4	449	24.0	495	23.4	536
Denmark	33.4	463	32.2	518	32.0	535
Estonia*	6.0	140	5.8	144	5.9	149
Finland	47.9	407	43.2	481	42.3	472
France	229.9	4,474	220.9	4,541	213.1	4,664
Germany	450.3	5,359	466.4	5,643	473.9	6,057
Greece	33.1	348	33.2	365	31.9	383
Hungary	29.8	345	26.9	403	24.9	440
Ireland	8.4	201	8.8	222	9.0	250
Italy	186.1	2,348	189.5	2,456	190.6	2,571
Latvia*	5.0	155	4.9	156	4.9	159
Lithuania	12.3	106	12.2	148	12.1	151
Luxembourg	3.1	63	3.2	70	3.2	70
Malta	1.5	23	1.5	25	1.5	27
Netherlands	98.4	1,111	94.1	1,173	93.0	1,199
Poland	106.1	1,079	108.0	1,338	108.1	1,554
Portugal	28.7	668	31.0	659	31.6	670
Romania	47.5	482	46.3	575	46.3	633
Slovakia	14.8	284	14.5	300	14.5	324
Slovenia	14.5	182	14.7	203	15.0	235
Spain	143.9	1,867	145.7	1,991	147.4	2,186
Sweden	85.1	485	82.5	598	84.3	614

Source: © Euromonitor International. Value data in EUR million (current prices) and fixed 2023 exchange rates have been applied to non-Euro currencies. Value is calculated as 'Retail value' estimated as per Retail Sales Price (RSP).

*Data for Estonia and Latvia have been modelled.

The EU27 coffee market remained flat in terms of volume (+0.2%) during the analysis period (2021-2023) at 1.74 million tonnes in each of the three years covered. The stability of a mature sophisticated market as is the case of the EU is not the only factor explaining this lack of dynamism and other variables have to be considered. First, economic stagnation in the EU27 area and sticky inflation rates are damaging private consumption levels, especially in northern EU countries. **The Nordic countries have all posted strong negative growth during the analysis period,** with volume declining by 11.7% in Finland, 4.2% in Denmark, and 0.9% in Sweden, with the Baltic countries following a similar pattern. **Eastern EU countries have also experienced negative growth** during the analysis period (Hungary: -16.4%; Czechia: -4.1%; Romania: -2.5%; Slovakia: -2.0%), **with the exceptions of Poland (+1.9%) and Bulgaria (+8.2%). Among major EU27 markets, France (-7.3%) and The Netherlands (-5.5%) have also suffered a downturn in coffee volume sales,** while Austria (+4.4%) and Belgium (+4.4%) managed to post modest growth during the analysis period. **The largest EU27 market, Germany, has also managed to withstand the negative trend (+5.2%) and the same applies to Southern EU markets:** Portugal (+10.1%), Italy (+2.4%), and Spain (+2.4%).

The evolution of green coffee prices is putting additional strain on an already price-tensioned industrial scenario in the EU27 area. As a consequence, and in spite of flat growth in volume sales, t**he coffee market value climbed to EUR 26.33 billion in 2023 (+6.5% yoy)** and adding 14.0% during the analysis period. **Eastern EU markets have been more affected than average by these inflationary pressures,** with coffee sales value increasing substantially in spite of modest or absent growth: Poland (+44.0%), Lithuania (+42.5%), Romania (+31.3%), Bulgaria (29.7%), Slovenia (+29.1%), and Hungary (+27.5%).

COFFEE in RETAIL vs. Coffee in FOODSERVICES
Market Share in EU27 Markets 2023
as a percentage of total coffee volume sold

COUNTRY	Retail (%)	Foodservices (%)	COUNTRY	Retail (%)	Foodservices (%)
Austria	85	15	Italy	72	28
Belgium	76	24	Latvia*	87	13
Bulgaria	83	17	Lithuania	88	12
Croatia	58	42	Luxembourg	80	20
Cyprus	80	20	Malta	78	22
Czechia	92	8	Netherlands	79	21
Denmark	77	23	Poland	88	12
Estonia*	86	14	Portugal	55	45
Finland	82	18	Romania	81	19
France	84	16	Slovakia	96	4
Germany	89	11	Slovenia	85	15
Greece	47	53	Spain	61	39
Hungary	83	17	Sweden	70	30
Ireland	81	19	**EU27 TOTAL**	79	21

Source: © Euromonitor International
*Figures for Estonia and Latvia have been modelled

In terms of market channels, the share of retail and foodservices (essentially representing out-of-home consumption) differs substantially between markets, ranging from a 53% share of the foodservices channel in Greece to just 4% in Slovakia. The foodservice channel is also prominent in those countries where tourism is a key industry: Portugal (45%), Croatia (41%), Spain (39%), and Italy (28%). In exchange, the retail channel prevails not only in Slovakia (96%), but also in Czechia (92%), Germany (89%), or Poland (88%). **Most EU27 markets have seen coffee sales in retail decline in 2023 with the foodservices channel gaining ground, increasing its share from 19% to 21%.** Only Bulgaria and Lithuania increased volume sales of coffee through retail channels in 2023. In all, weak retail figures across EU27 markets probably indicate that at-home coffee consumption has reached its ceiling with the Covid pandemic effect now clearly waning.

FRESH vs. INSTANT COFFEE
Market Size by Channel 2023
total retail volume in tonnes

	RETAIL		FOODSERVICE	
COUNTRIES	Fresh	Instant	Fresh	Instant
Austria	36,631	3,677	7,112	0
Belgium	30,706	3,053	10,530	277
Bulgaria	10,839	6,448	3,012	654
Croatia	10,028	2,410	7,609	1,512
Cyprus	2,286	620	600	115
Czechia	14,328	7,235	1,719	137
Denmark	22,433	2,242	7,308	0
Estonia	n.a.	n.a.	n.a.	n.a.
Finland	33,715	827	7,726	0
France	167,827	11,812	31,275	2,222
Germany	368,699	53,190	48,771	3,201
Greece	11,714	3,363	15,151	1,653
Hungary	12,346	8,304	4,079	174
Ireland	3,031	4,250	1,078	652
Italy	133,834	4,231	50,153	2,340
Latvia	n.a.	n.a.	n.a.	n.a.
Lithuania	8,703	1,982	1,171	246
Luxembourg	2,311	245	613	31
Malta	1,024	118	286	42
Netherlands	69,191	4,557	18,483	801
Poland	74,565	20,423	12,110	1,050
Portugal	15,371	2,081	13,850	283
Romania	29,626	7,819	6,977	1,871
Slovakia	9,309	4,563	564	81
Slovenia	10,848	1,893	1,865	373
Spain	77,397	12,783	56,042	1,156
Sweden	56,104	2,701	25,362	179

Source: © Euromonitor International
*Euromonitor defines “fresh coffee” as the aggregate of “fresh coffee beans” (green coffee) and “fresh ground coffee”, which includes “standard fresh ground coffee” and “fresh ground coffee pods”.

It has to be noted that fresh coffee and instant coffee show diverging trends withing the retail channel. **In most EU27 countries, volume sales of fresh coffee through retail channels have suffered a deeper fall than those of instant coffee**. This is the case in the Nordic countries, as well as Belgium (fresh coffee: -15.0%; instant coffee: -3.2%), The Netherlands (fresh coffee: -8.9%; instant coffee: -2.2%), or France (fresh coffee: -9.9%; instant coffee: -7.8%). Germany even posted declining sales of fresh coffee in retail (-8.5%), while sales of instant coffee edged up (+4.5%), and the same happened in Italy (fresh coffee: -0.4%; instant coffee: +7.9%). This consumer trend could be explained by two factors:

1) Economic scenario. Lack of growth coupled with inflation is affecting the purchasing power of consumers across the EU27 bloc, with price sensitivity pushing those consumers to cheaper options.
2) The out-of-home paradox. Although consumers are seeing their purchasing power eroded after the Covid pandemic, they seem to prioritize leisure activities over long-term investment (housing, durable goods including cars). As a consequence, tourism and foodservices remain as two of the most dynamic industries in the EU27 bloc, with Southern European countries specially benefiting from this trend.

TRADITIONAL COFFEE vs. COFFEE PODS
Market Share in the EU27 Markets 2022-2023
as a percentage of total coffee volume (tonnes)

	2022		2023	
Countries	Traditional Coffee	Coffee Pods	Traditional Coffee	Coffee Pods
Austria	82	18	82	18
Belgium	69	31	78	22
Bulgaria	93	7	92	8
Croatia*	99	1	99	1
Cyprus*	92	8	92	8
Czechia	94	6	94	6
Denmark	98	2	98	2
Estonia	n.a.	n.a.	n.a.	n.a.
Finland	99	1	99	1
France	66	34	67	33
Germany	87	13	88	12
Greece	97	3	97	3
Hungary	95	5	96	4
Ireland	39	61	78	22
Italy	85	15	84	16
Latvia	n.a.	n.a.	n.a.	n.a.
Lithuania	98	2	98	2
Luxembourg	77	23	77	23
Malta	80	20	80	20
Netherlands	65	35	67	33
Poland	98	2	98	2
Portugal	73	27	76	24
Romania	97	3	97	3
Slovakia	95	5	95	5
Slovenia	99	1	99	1
Spain	84	16	85	15
Sweden	99	1	99	1
EU27 TOTAL*	84	16	85	15

Source: © Euromonitor International
*EU27 total figures do not include data from Estonia and Latvia.

In all, coffee consumer behaviour seems to be reversing the "at-home" and "in pods" trend experienced during and right after the Covid pandemic. In spite of seeing their purchasing power dent by inflation and economic stagnation, **European consumers seem to have opted for the "coffee experience",** enjoying their favourite drink at a nice coffee shop or while on holidays.

In any case, coffee pods[1] in all their formats have revolutionised the way we consume coffee in Europe and around the world, especially at home or in the office. The pandemic boosted sales of coffee in this format given the increased level of coffee consumption at home. Coffee pods represented 15% of the EU27 market in terms of volume (tonnes of coffee sold) in 2023. Coffee pods have lost market share during 2023 (one percentage point) to traditional coffee formats. **Although five out of six kilos of coffee are consumed via a different format, in value terms coffee pods generate 38% of total retail sales in the EU27 area (one percentage point less than in 2022).** Therefore, coffee pods will remain a key source of revenue for coffee roasters.

TRADITIONAL COFFEE vs. COFFEE PODS
Market Share in the EU27 Markets 2022-2023
as a percentage of total coffee retail value

	2022		2023	
COUNTRIES	**Traditional Coffee**	**Coffee Pods**	**Traditional Coffee**	**Coffee Pods**
Austria	58	42	56	44
Belgium	53	47	52	48
Bulgaria	77	23	77	23
Croatia*	92	8	92	8
Cyprus*	74	26	73	27
Czechia	87	13	87	13
Denmark	92	8	93	7
Estonia	n.a.	n.a.	n.a.	n.a.
Finland	95	5	95	5
France	35	65	37	63
Germany	75	25	76	24
Greece	81	19	79	21
Hungary	80	20	83	17
Ireland	22	78	59	41
Italy	44	56	44	56
Latvia	n.a.	n.a.	n.a.	n.a.
Lithuania	95	5	92	8
Luxembourg	43	57	44	56
Malta	46	54	46	54
Netherlands	49	51	50	50
Poland	93	7	93	7
Portugal	26	74	27	73
Romania	92	8	92	8
Slovakia	87	13	86	14
Slovenia	98	2	98	2
Spain	41	59	40	60
Sweden	91	9	95	5
EU27 TOTAL*	**61**	**39**	**62**	**38**

Source: © Euromonitor International
*EU27 total figures do not include data from Estonia and Latvia.

Note: Value data in EUR million (current prices) and fixed 2023 exchange rates have been applied to non-Euro currencies. Value is calculated as 'Retail value' estimated as per Retail Sales Price (RSP). 'Traditional coffee' includes

[1] Pods are portions of fresh ground coffee encapsulated in a container, which can be metal, plastic or paper. Both soft pods (pads) and hard pods (capsules) are included.

fresh coffee beans, fresh ground coffee and instant coffee, including ground and instant decaffeinated coffee. 'Coffee pods' includes all fresh ground coffee in pods.

Not all countries in the EU27 area have fallen in love with coffee pods. **Great "coffee nations" such as the Nordic countries and the Baltics remain loyal to coffee beans or ground coffee with the market share of coffee pods staying below 2% in 2023 in volume terms** (less than 10% in value terms). These countries tend to value high quality fresh coffee beans even when consuming coffee at home and the large size (mL) of their average coffee drink makes pods relatively less attractive in these markets. **Central and Eastern European countries are similarly less inclined to consume coffee in pods with a market share for this system consistently below 10%.** Coffee consumption in these countries certainly follows a more traditional pattern (method of preparation) and the cost per pod may still be a deterrent in these middle-income markets.

Germany marks the 'great coffee pods divide' in Europe. Although pods represent 12% of the market (volume) and 25% of sales (value), Germans still prefer traditional brewing systems for their cups of coffee. **In the rest of Western Europe, coffee pods have achieved higher market shares in terms of volume (2022):** Italy (16%), Spain (15%), Austria (18%), Portugal (24%), Belgium (22%), France (33%), and The Netherlands (33%). In many of these countries, value sales of coffee pods represent at least 50% of the market: The Netherlands (50%), Italy (56%), Spain (60%), France (63%), and Portugal (73%). However, **sales of coffee pods in all these markets (volume and value) did not increase their market share or reduced it during 2023[2].**

[2] Please note that Euromonitor's figures for Ireland in 2023 substantially diverge from those registered in previous years. Sales in the "Coffee pods" and "Fresh coffee (retail)" categories have been estimated downwards, with their loss being gained by the "Traditional coffee" and "Instant coffee (retail)" categories. This is probably due to product reclassification.

9. EU27 COUNTRIES KEY NATIONAL IMPORT DATA

IMPORT STATISTICS 2023 (by country of origin, incl. intra-EU trade, in tonnes)

AUSTRIA					
Green Coffee (incl. Decaf)		**Roasted Coffee (incl. Decaf)**		**Soluble Coffee**	
Germany	4,134.8	Germany	20,453.6	Germany	2,625.1
Viet Nam	3,021.0	Italy	11,393.0	Belgium	269.0
Italy	2,088.7	Slovakia	11,221.5	Poland	219.7
Brazil	2,034.6	Switzerland	3,066.0	Switzerland	188.7
Honduras	340.9	Netherlands	934.2	India	188.2
Others	1,471.8	Others	2,298.2	Others	351.5
TOTAL	**13,091.8**	**TOTAL**	**49,366.5**	**TOTAL**	**3,842.2**

BELGIUM					
Green Coffee (incl. Decaf)		**Roasted Coffee (incl. Decaf)**		**Soluble Coffee**	
Brazil	78,912.0	Netherlands	13,132.6	Germany	2,033.6
Viet Nam	57,914.0	Germany	12,297.6	Netherlands	1,264.4
Honduras	27,632.9	France	7,270.5	France	876,4
Colombia	14,290.0	Italy	3,353.5	India	763.8
Peru	14,061.8	Poland	1,834.5	Poland	364.7
Others	100,334.9	Others	4,677.8	Others	6,787.0
TOTAL	**293,145.6**	**TOTAL**	**42,566.5**	**TOTAL**	**6,787.0**

BULGARIA					
Green Coffee (incl. Decaf)		**Roasted Coffee (incl. Decaf)**		**Soluble Coffee**	
Brazil	4,923.9	Italy	6,478.2	Brazil	563.2
Brazil	4,659.0	Poland	1,364.2	Hungary	541.6
Germany	2,682.8	Germany	1,268.4	Poland	238.1
Indonesia	2,186.1	Spain	200.8	Spain	108.3
Uganda	2,027.6	Romania	168.0	Germany	102.7
Others	7,193.7	Others	808.8	Others	299.7
TOTAL	**23,673.1**	**TOTAL**	**10,288.4**	**TOTAL**	**1,853.6**

CROATIA					
Green Coffee (incl. Decaf)		**Roasted Coffee (incl. Decaf)**		**Soluble Coffee**	
Slovenia	9,856.7	Slovenia	2,607.4	Poland	466.3
Italy	2,381.0	Italy	2,559.4	Spain	381.0
Germany	731.8	Germany	576.3	Germany	302.6
Malta	37.0	Austria	361.1	Brazil	163.2
Slovakia	33.6	Greece	313.1	France	113.0
Others	115.6	Others	663.7	Others	314.6
TOTAL	**13,155.7**	**TOTAL**	**7,081.0**	**TOTAL**	**1,740.7**

CYPRUS					
Green Coffee (incl. Decaf)		**Roasted Coffee (incl. Decaf)**		**Soluble Coffee**	
Brazil	949.7	Greece	1,050.0	Greece	642.6
Greece	255.3	Italy	281.9	Poland	170.0
Lebanon	39.1	Germany	144.2	Netherlands	81.1
Colombia	38.5	Netherlands	123.7	India	56.0
Ethiopia	38.4	United Kingdom	107.1	United Kingdom	43.3
Others	136.6	Others	423.8	Others	198.0
TOTAL	**1,457.6**	**TOTAL**	**2,130.7**	**TOTAL**	**1,191.0**

CZECHIA					
Green Coffee (incl. Decaf)		**Roasted Coffee (incl. Decaf)**		**Soluble Coffee**	
Germany	16,132.0	Germany	17,041.3	Germany	3,425.8
Belgium	1,150.6	Poland	8,694.6	Netherlands	2,404.2
Côte d'Ivoire	451.7	Italy	5,645.2	Spain	1,660.0
Indonesia	338.6	Austria	2,071.9	Poland	1,523.5
Italy	208.7	Netherlands	1,904.8	Belgium	807.7
Others	1,195.7	Others	4,393.5	Others	1,261.6
TOTAL	**19,477.3**	**TOTAL**	**39,751.3**	**TOTAL**	**11,082.8**

DENMARK					
Green Coffee (incl. Decaf)		**Roasted Coffee (incl. Decaf)**		**Soluble Coffee**	
Brazil	5,297.8	Sweden	8,174.3	Netherlands	1,464.7
Germany	1,951.4	Germany	8,046.5	Switzerland	428.2
Viet Nam	1,650.3	Italy	3,625.3	Germany	425.9
Colombia	1,453.1	Belgium	1,019.0	France	310.4
Peru	1,350.3	Kenya	930.4	Hungary	305.5
Others	4,947.7	Others	3,347.2	Others	1,191.7
TOTAL	**16,650.6**	**TOTAL**	**25,142.7**	**TOTAL**	**4,126.4**

ESTONIA					
Green Coffee (incl. Decaf)		**Roasted Coffee (incl. Decaf)**		**Soluble Coffee**	
Belgium	182.1	Finland	2,506.1	Lithuania	109.1
Netherlands	148.0	Lithuania	1,593.7	Latvia	52.5
Lithuania	95.1	Latvia	1,005.4	Poland	17.9
Brazil	74.8	Italy	139.8	Finland	11.1
Poland	58.8	Poland	134.5	Netherlands	4.6
Others	24.1	Others	428.9	Others	7.9
TOTAL	**582.9**	**TOTAL**	**5,808.4**	**TOTAL**	**203.1**

FINLAND					
Green Coffee (incl. Decaf)		**Roasted Coffee (incl. Decaf)**		**Soluble Coffee**	
Brazil	23,275.4	Sweden	5,208.2	Sweden	243.3
Colombia	6,507.5	Netherlands	3,750.2	Germany	206.9
Honduras	6,024.2	Germany	1,747.1	Switzerland	139.7
Kenya	1,832.5	Denmark	545.6	Spain	86.4
Uganda	1,606.5	Estonia	220.7	Denmark	85.9
Others	7,095.0	Others	490.2	Others	62.6
TOTAL	**46,341.1**	**TOTAL**	**11,962.0**	**TOTAL**	**824.8**

FRANCE					
Green Coffee (incl. Decaf)		Roasted Coffee (incl. Decaf)		Soluble Coffee	
Belgium	65,183.7	Switzerland	32,193.3	Germany	4,043.1
Brazil	57,397.2	Italy	31,020.2	Spain	3,926.6
Viet Nam	31,733.3	Netherlands	28,527.0	United Kingdom	1,547.0
Ethiopia	10,144.1	Germany	23,078.3	Poland	800.8
Honduras	9,248.3	Belgium	17,098.1	Netherlands	785.7
Others	52,011.5	Others	22,230.2	Others	3,206.2
TOTAL	**225,718.1**	**TOTAL**	**154,147.1**	**TOTAL**	**14,309.4**

GERMANY					
Green Coffee (incl. Decaf)		Roasted Coffee (incl. Decaf)		Soluble Coffee	
Brazil	341,411.5	Italy	54,348.4	Belgium	6,285.1
Viet Nam	206,577.9	Netherlands	9,784.8	Poland	5,136.1
Honduras	76,013.0	Switzerland	9,402.8	Ecuador	4,693.3
Uganda	53,497.6	Poland	7,868.5	Spain	3,394.2
Netherlands	45,345.0	France	6,992.5	Netherlands	3,336.8
Others	262,672.6	Others	12,879.0	Others	13,343.6
TOTAL	**985,517.6**	**TOTAL**	**101,276.0**	**TOTAL**	**36,189.1**

GREECE					
Green Coffee (incl. Decaf)		Roasted Coffee (incl. Decaf)		Soluble Coffee	
Brazil	22,630.2	Italy	9,545.0	Spain	3,993.5
India	3,160.1	Spain	1,440.9	Netherlands	564.0
Viet Nam	2,650.4	Germany	1,371.1	France	355.0
Colombia	2,488.1	France	1,277.6	Germany	257.0
Italy	1,854.0	Bulgaria	952.6	United Kingdom	173.5
Others	7,799.0	Others	1,680.1	Others	328.8
TOTAL	**40,581.8**	**TOTAL**	**16,267.3**	**TOTAL**	**5,671.8**

HUNGARY					
Green Coffee (incl. Decaf)		Roasted Coffee (incl. Decaf)		Soluble Coffee	
Belgium	3,187.1	Slovakia	6,806.8	Spain	2,863.4
Germany	1,091.3	Germany	3,706.6	Viet Nam	1,233.8
Netherlands	441.0	Poland	2,816.3	France	544.0
Italy	119.2	Italy	1,833.2	Poland	347.1
France	47.4	Austria	1,145.0	Germany	228.0
Others	219.7	Others	2,668.1	Others	709.3
TOTAL	**5,105.7**	**TOTAL**	**18,976.0**	**TOTAL**	**5,925.6**

IRELAND					
Green Coffee (incl. Decaf)		Roasted Coffee (incl. Decaf)		Soluble Coffee	
Brazil	2,946.0	Denmark	4,791.7	United Kingdom	5,099.2
Colombia	997.9	United Kingdom	3,489.6	Germany	378.5
Netherlands	927.3	Germany	2,580.4	Spain	214.4
Peru	641.6	Netherlands	525.9	Poland	101.7
Honduras	604.4	Italy	515.9	Netherlands	32.5
Others	2,410.8	Others	1,794.1	Others	91.1
TOTAL	**8,528.0**	**TOTAL**	**13,697.6**	**TOTAL**	**5,917.4**

ITALY					
Green Coffee (incl. Decaf)		Roasted Coffee (incl. Decaf)		Soluble Coffee	
Brazil	198,368.2	Germany	7,521.1	India	1,398.8
Viet Nam	150,134.1	France	7,137.9	Spain	1,288.4
Uganda	98,199.3	Slovenia	2,343.4	France	637.2
India	49,878.2	Spain	2,303.9	Viet Nam	584.5
Tanzania	22,782.9	Croatia	2,267.1	Germany	418.4
Others	126,514.6	Others	4,575.9	Others	836.7
TOTAL	**645,877.3**	**TOTAL**	**26,149.3**	**TOTAL**	**5,164.0**

LATVIA					
Green Coffee (incl. Decaf)		**Roasted Coffee (incl. Decaf)**		**Soluble Coffee**	
Sweden	1,470.6	Lithuania	3,651.9	Lithuania	552.9
Brazil	405.7	Germany	2,187.1	Poland	175.6
Germany	183.9	Sweden	948.8	India	145.9
Lithuania	60.2	Italy	475.0	Ukraine	42.0
Poland	47.4	Estonia	419.2	Spain	21.9
Others	168.9	Others	894.8	Others	26.8
TOTAL	**2,336.7**	**TOTAL**	**8,576.8**	**TOTAL**	**965.1**

LITHUANIA					
Green Coffee (incl. Decaf)		**Roasted Coffee (incl. Decaf)**		**Soluble Coffee**	
Brazil	915.9	Denmark	5,637.2	Germany	283.1
Poland	657.2	Germany	3,638.8	Poland	188.3
Germany	541.9	Estonia	2,540.9	Brazil	122.7
Spain	398.1	Italy	2,421.0	Denmark	98.0
Viet Nam	326.4	Poland	1,395.1	France	88.3
Others	1,186.6	Others	3,645.9	Others	199.6
TOTAL	**4,026.1**	**TOTAL**	**19,278.9**	**TOTAL**	**980.0**

LUXEMBOURG					
Green Coffee (incl. Decaf)		**Roasted Coffee (incl. Decaf)**		**Soluble Coffee**	
Belgium	442.3	Germany	10,205.1	Germany	107.1
France	81.4	Italy	1,935.7	Belgium	84.7
Germany	64.0	Belgium	1,272.6	Netherlands	35.7
Colombia	33.8	Netherlands	1,026.5	Poland	2.7
Italy	32.7	Portugal	417.4	France	1.9
Others	50.2	Others	617.6	Others	1.5
TOTAL	**704.4**	**TOTAL**	**15,474.9**	**TOTAL**	**233.6**

MALTA					
Green Coffee (incl. Decaf)		**Roasted Coffee (incl. Decaf)**		**Soluble Coffee**	
Italy	53.0	Italy	424.0	Brazil	103.9
Netherlands	30.2	Germany	102.2	United Kingdom	96.1
Germany	28.9	Spain	49.5	Morocco	56.7
Belgium	2.0	United Kingdom	29.1	Italy	35.3
Slovenia	0.2	Portugal	23.6	Netherlands	28.9
Others	0.6	Others	663.4	Others	38.2
TOTAL	**114.9**	**TOTAL**	**663.4**	**TOTAL**	**359.1**

NETHERLANDS					
Green Coffee (incl. Decaf)		**Roasted Coffee (incl. Decaf)**		**Soluble Coffee**	
Brazil	61,638.8	Germany	28,085.1	Germany	5,673.5
Belgium	39,473.3	Belgium	9,882.3	United Kingdom	4,479.1
Viet Nam	39,141.2	Poland	9,759.3	France	1,236.2
Germany	16,537.1	Italy	6,040.2	Belgium	1,138.0
Honduras	11,632.1	Luxembourg	4,212.7	Brazil	1,052.8
Others	49,257.2	Others	17,440.3	Others	4,684.2
TOTAL	**217,679.7**	**TOTAL**	**75,419.9**	**TOTAL**	**18,263.8**

POLAND					
Green Coffee (incl. Decaf)		**Roasted Coffee (incl. Decaf)**		**Soluble Coffee**	
Germany	86,491.9	Germany	39,758.6	Germany	12,097.6
Belgium	12,220.7	Italy	19,747.1	India	5,137.1
Viet Nam	7,160.6	Netherlands	3,384.0	Spain	4,127.5
Brazil	5,366.0	Lithuania	2,334.9	Viet Nam	3,692.2
Uganda	3,259.5	Belgium	1,215.4	Brazil	2,440.1
Others	8,198.5	Others	7,790.8	Others	4,559.9
TOTAL	**122,697.2**	**TOTAL**	**74,230.8**	**TOTAL**	**32,054.4**

PORTUGAL					
Green Coffee (incl. Decaf)		**Roasted Coffee (incl. Decaf)**		**Soluble Coffee**	
Viet Nam	14,031.4	Spain	6,002.8	Spain	546.7
Uganda	7,829.5	Germany	4,900.6	Germany	433.8
Spain	6,840.1	France	2,473.6	France	156.1
Brazil	6,261.7	Italy	1,650.4	Netherlands	32.6
Indonesia	2,365.9	Belgium	386.7	Hungary	17.5
Others	14,548.3	Others	624.5	Others	44.6
TOTAL	**51,876.9**	**TOTAL**	**16,038.6**	**TOTAL**	**1,231.3**

ROMANIA					
Green Coffee (incl. Decaf)		**Roasted Coffee (incl. Decaf)**		**Soluble Coffee**	
Brazil	2,757.5	Germany	11,769.9	Poland	457.7
Viet Nam	2,420.7	Italy	10,973.6	Germany	450.5
Germany	2,239.8	Bulgaria	7,403.6	Spain	353.9
Uganda	1,891.0	Poland	5,158.8	Brazil	327.3
Colombia	1,858.0	Hungary	1,294.7	India	271.2
Others	5,933.5	Others	4,026.8	Others	1,011.0
TOTAL	**17,100.5**	**TOTAL**	**40,627.4**	**TOTAL**	**2,871.6**

SLOVAKIA					
Green Coffee (incl. Decaf)		**Roasted Coffee (incl. Decaf)**		**Soluble Coffee**	
Germany	1,705.6	Germany	14,874.6	Czechia	1,932.0
Belgium	1,202.3	Italy	6,809.5	Poland	671.9
Czechia	291.0	Poland	3,676.5	Germany	46.8
Viet Nam	103.2	Czechia	2,866.4	Spain	35.8
Netherlands	101.7	Hungary	1,298.5	Hungary	10.2
Others	388.7	Others	1,464.6	Others	31.6
TOTAL	**3,792.5**	**TOTAL**	**30,990.1**	**TOTAL**	**2,728.3**

SLOVENIA					
Green Coffee (incl. Decaf)		**Roasted Coffee (incl. Decaf)**		**Soluble Coffee**	
Brazil	11,076.8	Italy	2,191.3	Germany	86.8
India	6,156.8	Croatia	971.2	Croatia	80.5
Viet Nam	4,122.1	Bosnia and Herzegovina	645.5	Austria	55.7
Uganda	1,743.1	Serbia	251.5	Poland	39.7
Colombia	1,001.7	Germany	248.5	Italy	36.3
Others	3,043.8	Others	512.1	Others	62.6
TOTAL	**27,144.3**	**TOTAL**	**4,820.1**	**TOTAL**	**361.6**

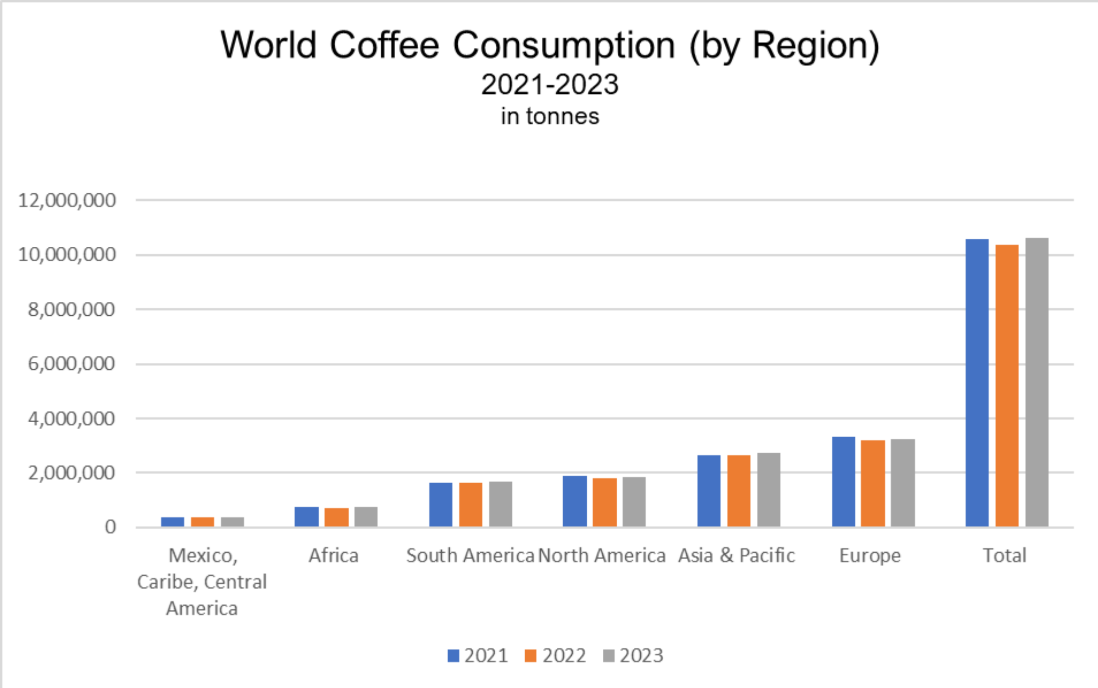
SPAIN					
Green Coffee (incl. Decaf)		**Roasted Coffee (incl. Decaf)**		**Soluble Coffee**	
Viet Nam	123,697.0	France	11,620.1	Viet Nam	2,843.6
Brazil	54,968.2	Germany	8,220.8	Ecuador	1,043.8
Germany	32,098.0	Portugal	5,038.7	Mexico	850.8
Belgium	17,229.6	Italy	3,985.9	Netherlands	842.1
Uganda	16,527.1	Netherlands	2,313.2	Germany	276.6
Others	61,147.3	Others	2,468.8	Others	1,005.0
TOTAL	**305,667.2**	**TOTAL**	**33,647.5**	**TOTAL**	**6,861.9**

SWEDEN					
Green Coffee (incl. Decaf)		**Roasted Coffee (incl. Decaf)**		**Soluble Coffee**	
Brazil	39,726.3	Netherlands	3,509.9	Switzerland	898.1
Honduras	10,964.0	Germany	3,409.4	Czechia	807.1
Peru	8,556.0	Italy	2,051.0	Netherlands	549.4
Kenya	4,673.4	Denmark	1,485.7	Germany	484.1
Germany	4,645.1	Switzerland	1,032.4	Hungary	389.7
Others	24,174.1	Others	3,049.5	Others	1,438.1
TOTAL	**92,738.9**	**TOTAL**	**14,537.9**	**TOTAL**	**4,566.5**

Source: Eurostat

10. EU27 MARKET IN PERSPECTIVE

Based on data from the International Coffee Organization (ICO), the graph below shows the evolution of coffee consumption in major regions in the world during the analysis period:



Source: ICO

Total world coffee consumption is expected to recover in 2023/2024 (+2.2% yoy) after dipping in 2022 (-2.0% yoy). **World coffee consumption should increase by 232,000 tonnes in 2023 and surpass 2021 levels at 10'740'000 tonnes.**

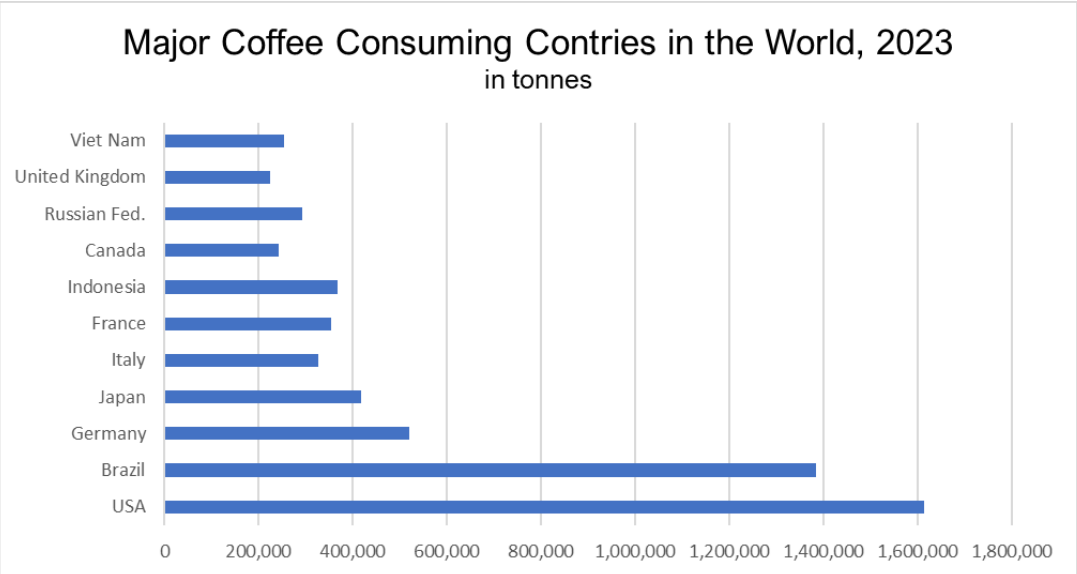
According to ICO analysis, coffee consumption in 2022/2023 did not faithfully follow the established pattern due to the impact of the high cost of living, falling disposable incomes, and a long stocks drawdown. **Despite coffee being a relatively inelastic product, the challenging global economic environment may have had a negative impact on its consumption.** At the same time, **there was a large drawdown of stocks in Western economies,** with combined stocks reported by the European Coffee Federation and those held at the Intercontinental Exchange's warehouses in the USA falling by 4.8 million bags from 14.5 million to 9.8 million. This drawdown would have reduced the need for purchases on the international market, seemingly reflected as lower and anomalous global consumption rates for the coffee year 2022/23.

The regional analysis of world coffee consumption shows that **North America and Asia-Pacific are expected to be the most dynamic consumer markets in 2023/2024** with growth estimated at 3.7% and 2.7% yoy, respectively. During the analysis period 2021-2023, **South America posted the largest increase in consumption on aggregate (+3.7%), followed by Asia-Pacific (+3.4%).** Consumption in most other regions is still below 2021 levels (Africa: -3.1%; Europe: -2.7%; North America: -1.3%). Both regions on aggregate account for 60% of total growth in volume during 2022. **Consumption in the Asia-Pacific region is clearly on a positive growth pattern after adding 90'000 tonnes during the analysis period,** while South America also registered 60`000 tonnes of additional coffee consumption during the same period.

ICO data show that **the United States is the largest coffee consumer in the world with 1.61 million tonnes in 2023 (+3.6% yoy), representing 15% of total world consumption of coffee.** Consumption in the United States seems to follow a more positive trend than in Europe after the pandemic and the economic scenario seems to be affecting US consumers to a lesser extent. In North America, Canada's coffee consumption also swiftly recovered after the pandemic, and it remains one of the best performers among Western countries in terms of coffee consumption. ICO figures show a 5.2% yoy increase in 2023 to 243,000 tonnes of coffee consumed in Canada.

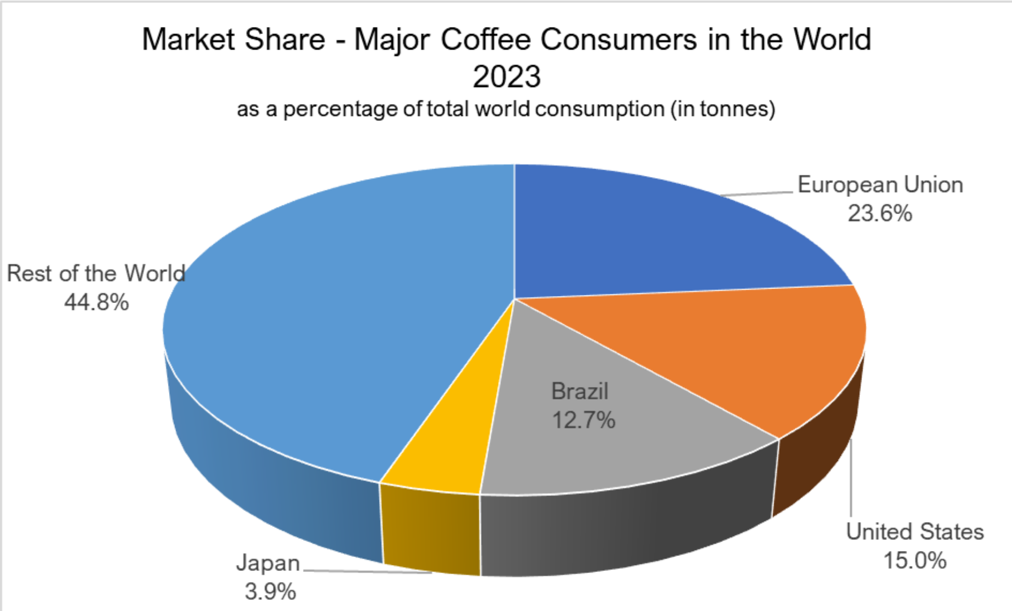
Brazil is not only the largest producer and exporter of coffee, but also the second largest consumer market in the world with 1.38 million tonnes of coffee brewed in the country during 2023 (+1.5% yoy) or 13% of total world consumption.

Coffee consumption in the EU27 bloc is estimated at 2.53 million tonnes in 2023 (+1.6% yoy). Within the EU27 area, Germany (520,000 tonnes, +0.7% yoy), Italy (327,000 million tonnes, +1.4% yoy), and France (354,000 million tonnes, +1.2% yoy) are the leading consuming countries. The EU27 bloc and the United States represented together 38.6% of global coffee consumption in 2023. Another large European consumer, the United Kingdom has experienced virtually flat growth in its coffee consumption during 2023 (+0.8%) at 225,000 tonnes. Finally, the Russian Federation remains a top coffee consumer in the world although the pandemic and the invasion of Ukraine had substantially affected consumption levels. At 293,000 tonnes in 2023, Russians still consumed approximately 5% less coffee than in 2019.



Source: ICO

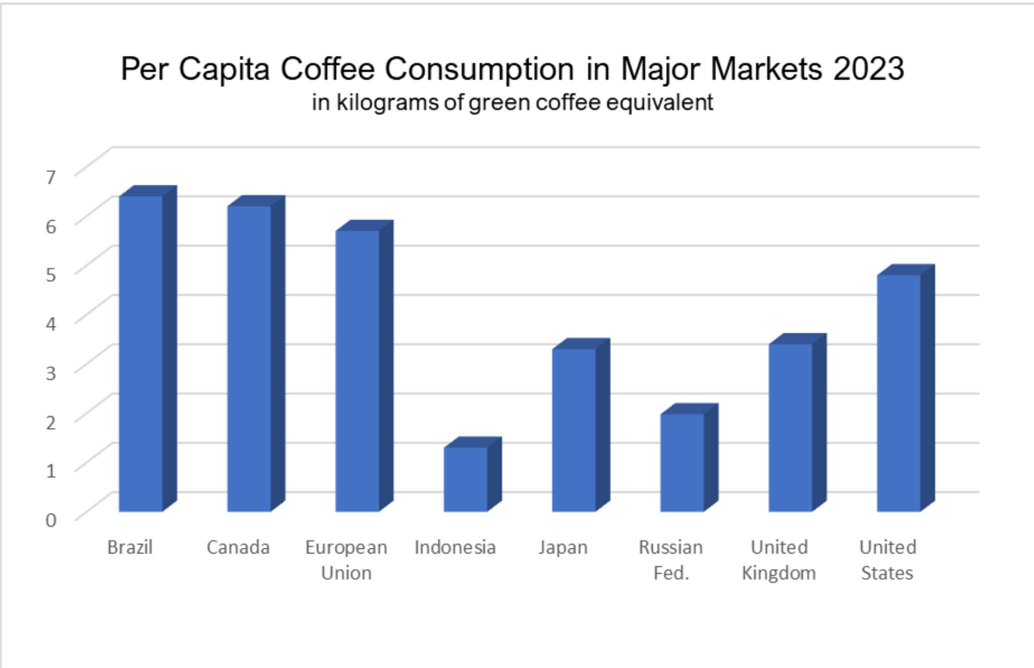
As for consuming countries in Asia, **Japan remains the largest coffee market with 417,000 tonnes consumed in 2023.** Japan only modestly bounced back in 2023 (+1.2% yoy) but remains on a downward trend since 2016 reflecting its society's shrinking of coffee culture and coffee consumption per capita. Indonesia is a major coffee producing country that increasingly enjoys drinking coffee: 367,000 tonnes in 2023 (+5.0% yoy). **At this pace, Indonesia will become Asia's largest coffee consuming country before 2025.** This thriving domestic market is reducing Indonesia's exporting capacity – which is also increasingly absorbed by near markets such as China – explaining lower deliveries of green coffee to EU27 countries. **Viet Nam is also a fast-growing market for coffee absorbing 254,000 tonnes in 2023 (+6.3% yoy),** with the Indonesia's analysis being also applicable to this large coffee producer.



Source: ICO

10.1 Coffee consumption per capita in the EU27 area and selected countries

Combining ICO consumption data (2023) and World Bank population information (2022), the per capita consumption in selected countries in 2023 would stay as follows:



Source: ICO, World Bank

Canada no longer tops the ranking (6.2 kg of coffee consumption per capita), with **Brazil now posting the largest per capita consumption in the world (6.4 kg) in 2023, considering the EU27 as a bloc.** Per capita consumption has shown a slightly negative trend in Western economies, while countries such as Indonesia (1.3 kg) or the Russian Federation (2.0 kg) are managing to increase their per capita consumption.

Western economies all experienced slight reductions in per capita consumption: USA (4.8 kg), EU27 (5.7 kg), and Canada (6.2 kg). The EU27 bloc's per capita consumption remained at 5.7 kg in 2023 but this figure obviously hides large per capita variations among its members, ranging from the high levels in the Nordic countries (**Finland: 10.5 kg**; Sweden: 9 kg; Denmark: 7.4 kg), to average levels in Germany (6.2 kg) and Italy (5.5 kg per capita) and even more modest levels in traditional coffee consumers such as France (5.2 kg), Spain (3.9 kg), and Portugal (5.0 kg).

11. EU VAT AND EXCISE DUTIES

ROASTED, NON-DECAFFEINATED COFFEE (0901210000), UNLESS INDICATED OTHERWISE		
COUNTRY	**VAT %**	**EXCISE DUTIES**
Austria	20	
Belgium	6	- Non-roasted coffee: EUR 0.2001 / kg net weight. - Roasted coffee: EUR 0.2502 / kg net weight. - An exemption from excise duty is granted when coffee serves for industrial uses other than the roasting of coffee or the production of coffee extracts.
Bulgaria	20	
Croatia	25	- Roasted coffee: EUR 0.80 / kg net weight. - Extracts, essences and concentrates of coffee: EUR 2.65 / kg net weight (for coffee extracts: EUR 2.65 / kg dry matter). - Preparations of coffee: EUR 0.80 / kg net weight. - Preparations based on extracts, essences and concentrates of coffee: EUR 2.65 / kg net weight. - Coffee substitutes containing coffee: EUR 0.80 / kg net weight.
Cyprus	5 A VAT tax rate of 0% applies to coffee until 30 of April 2024.	
Czechia	12	
Denmark	25	- Roasted coffee: DKK 7.67 / kg.
Estonia	22	
Finland	14	
France	5.5	
Germany	7	- Roasted coffee: EUR 2.19 / kg.
Greece	13	- Roasted coffee: EUR 3.00 / kg. - Non-roasted coffee: EUR 2.00 / kg.
Hungary	27	
Ireland	0	
Italy	22	
Latvia	21	- EUR 142.29 / 100 kg of pure coffee.
Lithuania	21	
Luxembourg	3	
Malta	0	
Netherlands	9	
Poland	23	
Portugal	23	
Romania	9	
Slovakia	20	
Slovenia	9.5	
Spain	10	- The import of non-reusable plastic packaging is taxed at a rate of EUR 0.45 / kg net of non-recyclable plastic per net kilogram of non-recyclable plastic. All tariff headings may be subject to this tax, as they are all likely to contain products subject to the tax. If it does not contain non-reusable plastic packaging, the product is not subject to the tax.
Sweden	12	

Source: Access2Markets (EC's trade helpdesk website) as of 22 April 2024

Up-to-date information on VAT and excise duties can be found on the European Commission's Trade Helpdesk website (Access2Markets): https://trade.ec.europa.eu/access-to-markets. Please note that indirect taxes, rates, and exemptions are established by each of the Member States' legislation. Therefore, full accuracy can only be obtained by consulting official sources. No responsibility can be accepted by ECF for any inadvertent errors or omissions.

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