European Coffee Report 2009
INTRODUCTION

This is the thirty-first issue of the ‘European Coffee Report’. The European Coffee Federation (ECF) continues this series with the report over 2009. As usual, it contains a graph of the ICO Indicator Prices, a chapter on EU import and export figures and chapters on the individual Western European markets plus information on stocks, covering both terminal market and other stocks in the major European coffee ports. This information is collected with the highly appreciated assistance of the warehouse and port communities in the ports concerned. The information for most of the country chapters has again been provided by the ECF member associations. Their contribution to this series is invaluable and has enabled the European Coffee Report to develop into a unique and convenient single source of basic information on the European coffee market. The European Coffee Report is available only in electronic format on the ECF website.

For the sake of a uniform presentation and for ease of comparison, not all the details of the national reports could be incorporated, given that they vary widely in volume and contents. In order to give a more complete overview, the national reports were in part complemented with statistical material from other sources. This applies as well to those countries whose coffee associations are not members of ECF, but on which this report gives some information for the sake of completeness.

On the closing page of this report a list of the member associations of ECF can be found.

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This report was finalised in August 2010

EUROPEAN COFFEE FEDERATION
NOTE ON THE TABLES

Bags are bags of 60 kilos
Tons are metric tons

The recalculation of roasted and soluble coffee uses the conversion factors of the International Coffee Agreement 2001, Annex 1:
• from roasted to green: multiply by 1.19
• from soluble to green: multiply by 2.6

Green coffee equivalent is the sum total of the volume of green, roasted and soluble coffee recalculated to green coffee with the above conversion factors.

In the notation of figures, the convention of continental Europe is followed:
• thousands are separated by a dot (.)
• the decimal sign is the comma (,)

For large numbers the so-called ‘long scale’ is used: $10^6 = $ one million, $10^9 = $ one milliard, $10^{12} = $ one billion, $10^{15} = $ one billiard, $10^{18} = $ one trillion, etc

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

Eurostat import figures may differ from those from national sources

Distribution of green coffee imports by types of coffee is based on the following grouping of coffee producing countries applied by the International Coffee Organization:

<table>
<thead>
<tr>
<th>Arabicas</th>
<th>Colombian Milds</th>
<th>Other Milds</th>
<th>Brazilian Naturals</th>
<th>Robustas</th>
</tr>
</thead>
<tbody>
<tr>
<td>Colombia</td>
<td>Burundi</td>
<td>Costa Rica</td>
<td>Bolivia</td>
<td>Angola</td>
</tr>
<tr>
<td>Kenya</td>
<td>Cuba</td>
<td>Dominican Republic</td>
<td>Brazil</td>
<td>Benin</td>
</tr>
<tr>
<td>Tanzania</td>
<td>El Salvador</td>
<td>Paraguay</td>
<td>Ethiopia</td>
<td>Cameroon</td>
</tr>
<tr>
<td></td>
<td>Ecuador</td>
<td>Central African Rep.</td>
<td>Congo</td>
<td>Cameroon</td>
</tr>
<tr>
<td></td>
<td>Guatemala</td>
<td></td>
<td></td>
<td>Congo Democratic Rep.</td>
</tr>
<tr>
<td></td>
<td>Haiti</td>
<td></td>
<td></td>
<td>Cote d’Ivoire</td>
</tr>
<tr>
<td></td>
<td>Honduras</td>
<td></td>
<td></td>
<td>Equatorial Guinea</td>
</tr>
<tr>
<td></td>
<td>India</td>
<td></td>
<td></td>
<td>Gabon</td>
</tr>
<tr>
<td></td>
<td>Jamaica</td>
<td></td>
<td></td>
<td>Ghana</td>
</tr>
<tr>
<td></td>
<td>Malawi</td>
<td></td>
<td></td>
<td>Guinea</td>
</tr>
<tr>
<td></td>
<td>Mexico</td>
<td></td>
<td></td>
<td>Indonesia</td>
</tr>
<tr>
<td></td>
<td>Nicaragua</td>
<td></td>
<td></td>
<td>Liberia</td>
</tr>
<tr>
<td></td>
<td>Panama</td>
<td></td>
<td></td>
<td>Madagascar</td>
</tr>
<tr>
<td></td>
<td>Papua New Guinea</td>
<td></td>
<td></td>
<td>Nigeria</td>
</tr>
<tr>
<td></td>
<td>Peru</td>
<td></td>
<td></td>
<td>Philippines</td>
</tr>
<tr>
<td></td>
<td>Rwanda</td>
<td></td>
<td></td>
<td>Sierra Leone</td>
</tr>
<tr>
<td></td>
<td>Venezuela</td>
<td></td>
<td></td>
<td>Sri Lanka</td>
</tr>
<tr>
<td></td>
<td>Zambia</td>
<td></td>
<td></td>
<td>Thailand</td>
</tr>
<tr>
<td></td>
<td>Zimbabwe</td>
<td></td>
<td></td>
<td>Togo</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Trinidad and Tobago</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Uganda</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Vietnam</td>
</tr>
</tbody>
</table>
As from 1 October 2005 the calculation of the ICO composite indicator price is weighted as follows:

- Colombian Milds: 13%
- Other Milds: 24%
- Brazilian Naturals: 29%
- Robustas: 34%

As from 1 October 2007 the weighting is as follows:

- Colombian Milds: 14%
- Other Milds: 20%
- Brazilian Naturals: 31%
- Robustas: 35%

As from 1 October 2009 the weighting is as follows:

- Colombian Milds: 13%
- Other Milds: 23%
- Brazilian Naturals: 30%
- Robustas: 34%
GREEN COFFEE STOCKS IN MAJOR EUROPEAN COFFEE PORTS

Volumes are in bags of 60 kilos. The ports covered are: Antwerp, Bremen, Hamburg, Genova/Savona Vado, Le Havre and Trieste. Stocks include LIFFE and 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.
1. IMPORTS AND EXPORTS

EU data refer to the 27-member European Union. The traditional division between 'Western Europe' and 'Central and Eastern Europe' has changed over time with the increasing EU membership. The terms 'Western Europe' and 'Central and Eastern Europe' are not strictly defined, and the inclusion of a country in one or the other group has always been somewhat arbitrary. We designate EU plus Norway and Switzerland as 'Western Europe'.

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Austria</td>
<td>66.204</td>
<td>1.103.395</td>
<td>62.488</td>
<td>1.041.460</td>
<td>24.782</td>
<td>413.027</td>
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<tr>
<td>Belgium</td>
<td>185.960</td>
<td>3.099.333</td>
<td>356.558</td>
<td>5.942.625</td>
<td>307.279</td>
<td>5.121.317</td>
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<tr>
<td>Cyprus</td>
<td>1.697</td>
<td>28.287</td>
<td>1.718</td>
<td>28.633</td>
<td>1.350</td>
<td>22.495</td>
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<tr>
<td>Czech Republic</td>
<td>16.388</td>
<td>273.130</td>
<td>15.795</td>
<td>263.242</td>
<td>15.669</td>
<td>261.152</td>
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<tr>
<td>Denmark</td>
<td>33.246</td>
<td>554.093</td>
<td>33.747</td>
<td>562.447</td>
<td>34.709</td>
<td>578.482</td>
</tr>
<tr>
<td>Estonia</td>
<td>31</td>
<td>510</td>
<td>42</td>
<td>705</td>
<td>87</td>
<td>1.452</td>
</tr>
<tr>
<td>Finland</td>
<td>67.237</td>
<td>1.120.623</td>
<td>70.970</td>
<td>1.182.828</td>
<td>67.410</td>
<td>1.123.493</td>
</tr>
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<td>France</td>
<td>244.204</td>
<td>4.070.067</td>
<td>218.457</td>
<td>3.640.943</td>
<td>248.087</td>
<td>4.134.780</td>
</tr>
<tr>
<td>Germany</td>
<td>1.040.125</td>
<td>17.335.410</td>
<td>1.067.446</td>
<td>17.790.770</td>
<td>1.050.594</td>
<td>17.509.905</td>
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<td>Greece</td>
<td>28.518</td>
<td>475.297</td>
<td>27.238</td>
<td>453.970</td>
<td>27.752</td>
<td>462.528</td>
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<tr>
<td>Ireland</td>
<td>5.062</td>
<td>84.358</td>
<td>3.085</td>
<td>51.412</td>
<td>2.473</td>
<td>41.208</td>
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<tr>
<td>Italy</td>
<td>444.160</td>
<td>7.402.672</td>
<td>448.496</td>
<td>7.474.933</td>
<td>448.909</td>
<td>7.481.810</td>
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<tr>
<td>Latvia</td>
<td>2.139</td>
<td>35.645</td>
<td>2.296</td>
<td>38.263</td>
<td>3.295</td>
<td>54.913</td>
</tr>
<tr>
<td>Lithuania</td>
<td>264</td>
<td>4.398</td>
<td>314</td>
<td>5.238</td>
<td>291</td>
<td>4.842</td>
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<tr>
<td>Luxembourg</td>
<td>262</td>
<td>4.368</td>
<td>540</td>
<td>8.992</td>
<td>510</td>
<td>8.503</td>
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<tr>
<td>Malta</td>
<td>26</td>
<td>425</td>
<td>38</td>
<td>635</td>
<td>20</td>
<td>332</td>
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<td>Netherlands</td>
<td>153.804</td>
<td>2.563.402</td>
<td>65.803</td>
<td>1.096.708</td>
<td>70.445</td>
<td>1.174.080</td>
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<tr>
<td>Poland</td>
<td>62.595</td>
<td>1.043.245</td>
<td>67.053</td>
<td>1.117.552</td>
<td>93.054</td>
<td>1.550.902</td>
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<tr>
<td>Portugal</td>
<td>42.983</td>
<td>716.383</td>
<td>41.782</td>
<td>696.358</td>
<td>41.983</td>
<td>699.715</td>
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<td>Rumania</td>
<td>24.492</td>
<td>408.203</td>
<td>22.247</td>
<td>370.777</td>
<td>22.102</td>
<td>368.370</td>
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<tr>
<td>Slovakia</td>
<td>4.379</td>
<td>72.975</td>
<td>4.549</td>
<td>75.822</td>
<td>3.791</td>
<td>63.177</td>
</tr>
<tr>
<td>Slovenia</td>
<td>8.676</td>
<td>144.597</td>
<td>9.358</td>
<td>155.973</td>
<td>10.257</td>
<td>170.953</td>
</tr>
<tr>
<td>Spain</td>
<td>249.994</td>
<td>4.166.562</td>
<td>248.253</td>
<td>4.137.553</td>
<td>242.363</td>
<td>4.039.387</td>
</tr>
<tr>
<td>Sweden</td>
<td>109.611</td>
<td>1.826.843</td>
<td>109.636</td>
<td>1.827.265</td>
<td>106.765</td>
<td>1.779.412</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>113.390</td>
<td>1.889.835</td>
<td>117.105</td>
<td>1.951.747</td>
<td>123.851</td>
<td>2.064.187</td>
</tr>
<tr>
<td><strong>EU(27) total</strong></td>
<td>2.936.344</td>
<td>48.939.063</td>
<td>3.030.110</td>
<td>50.501.825</td>
<td>2.982.053</td>
<td>49.700.888</td>
</tr>
<tr>
<td>Norway</td>
<td>38.448</td>
<td>640.798</td>
<td>34.336</td>
<td>572.262</td>
<td>34.377</td>
<td>572.943</td>
</tr>
<tr>
<td>Switzerland</td>
<td>95.304</td>
<td>1.588.400</td>
<td>103.644</td>
<td>1.727.400</td>
<td>110.262</td>
<td>1.837.700</td>
</tr>
<tr>
<td><strong>Western Europe total</strong></td>
<td><strong>3.070.096</strong></td>
<td><strong>51.168.261</strong></td>
<td><strong>3.168.089</strong></td>
<td><strong>52.801.487</strong></td>
<td><strong>3.126.692</strong></td>
<td><strong>52.111.531</strong></td>
</tr>
<tr>
<td>Albania</td>
<td>6.763</td>
<td>112.721</td>
<td>6.921</td>
<td>115.349</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Belarus</td>
<td>15.459</td>
<td>257.644</td>
<td>17.454</td>
<td>290.905</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bosnia and Herzegovina</td>
<td>24.605</td>
<td>410.808</td>
<td>24.460</td>
<td>407.662</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Croatia</td>
<td>24.826</td>
<td>413.765</td>
<td>24.320</td>
<td>405.326</td>
<td></td>
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</tr>
<tr>
<td>Kazakhstan</td>
<td>9.823</td>
<td>163.717</td>
<td>8.160</td>
<td>136.000</td>
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<td></td>
</tr>
</tbody>
</table>
In calendar year 2009 green coffee imports in Western Europe were 52.1 million bags, a decrease of 1.3% compared to the 52.8 million bags in 2008. The Western European market is dominated by the EU. Green coffee imports into the EU(27) – including intra-EU trade - decreased by 1.6% from 50.5 million bags in 2008 to 49.7 million bags in 2009. Please note that there are some slight variations with the data in last year’s report. Eurostat commonly corrects its data after initial publication. Looking at individual countries, we have to point out the large drop (-60%) of imports into Austria. This is caused by closure of a roasting facility, so that less green coffee is imported. Major shifts (in percentage terms) in smaller markets are not surprising. In a market like Estonia, one container load of around 20 tons represents roughly half of the imports in 2008 and one quarter of the imports in 2009. It makes a big difference if importation takes place just before the end of one calendar year or in the beginning of a new year.

According to ICO data, Central and Eastern European imports of coffee in all forms in 2008 (the most recent year available for most of these countries) amounted to 8.6 million bags, 6.4% higher than the year before. The ‘top 20’ sources of EU(27) green coffee imports (excluding intra-EU trade) in 2007, 2008 and 2009 were as follows (listed in the order of 2009 imports):

<table>
<thead>
<tr>
<th>Country</th>
<th>2007</th>
<th>%</th>
<th>2008</th>
<th>%</th>
<th>2009</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brazil</td>
<td>13.093.722</td>
<td>28,8</td>
<td>13.708.290</td>
<td>30,0</td>
<td>14.604.177</td>
<td>32,6</td>
</tr>
<tr>
<td>Vietnam</td>
<td>10.254.418</td>
<td>22,5</td>
<td>8.499.700</td>
<td>18,6</td>
<td>8.417.947</td>
<td>18,8</td>
</tr>
<tr>
<td>Indonesia</td>
<td>1.710.813</td>
<td>3,8</td>
<td>2.763.910</td>
<td>6,1</td>
<td>2.969.125</td>
<td>6,6</td>
</tr>
<tr>
<td>Honduras</td>
<td>1.788.630</td>
<td>3,9</td>
<td>2.257.012</td>
<td>4,9</td>
<td>2.389.678</td>
<td>5,3</td>
</tr>
<tr>
<td>Peru</td>
<td>1.950.227</td>
<td>4,3</td>
<td>2.205.725</td>
<td>4,8</td>
<td>2.195.500</td>
<td>4,9</td>
</tr>
<tr>
<td>Colombia</td>
<td>4.209.857</td>
<td>9,2</td>
<td>3.956.898</td>
<td>8,7</td>
<td>2.193.555</td>
<td>4,9</td>
</tr>
<tr>
<td>Uganda</td>
<td>1.562.125</td>
<td>3,4</td>
<td>1.996.485</td>
<td>4,4</td>
<td>2.154.335</td>
<td>4,8</td>
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<tr>
<td>Ethiopia</td>
<td>1.287.663</td>
<td>2,8</td>
<td>1.463.378</td>
<td>3,2</td>
<td>1.320.863</td>
<td>3,0</td>
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<tr>
<td>India</td>
<td>1.781.433</td>
<td>3,9</td>
<td>1.599.763</td>
<td>3,5</td>
<td>1.295.962</td>
<td>2,9</td>
</tr>
<tr>
<td>Guatemala</td>
<td>939.350</td>
<td>2,1</td>
<td>1.008.697</td>
<td>2,2</td>
<td>784.427</td>
<td>1,8</td>
</tr>
<tr>
<td>El Salvador</td>
<td>621.733</td>
<td>1,4</td>
<td>704.937</td>
<td>1,5</td>
<td>740.037</td>
<td>1,7</td>
</tr>
<tr>
<td>Kenya</td>
<td>625.782</td>
<td>1,4</td>
<td>497.440</td>
<td>1,1</td>
<td>640.645</td>
<td>1,4</td>
</tr>
<tr>
<td>Tanzania</td>
<td>617.860</td>
<td>1,4</td>
<td>372.303</td>
<td>0,8</td>
<td>548.868</td>
<td>1,2</td>
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<tr>
<td>Nicaragua</td>
<td>580.222</td>
<td>1,3</td>
<td>568.010</td>
<td>1,2</td>
<td>525.320</td>
<td>1,2</td>
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<tr>
<td>Mexico</td>
<td>566.038</td>
<td>1,2</td>
<td>444.922</td>
<td>1,0</td>
<td>494.162</td>
<td>1,1</td>
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<tr>
<td>Papua New Guinea</td>
<td>362.470</td>
<td>0,8</td>
<td>587.900</td>
<td>1,3</td>
<td>448.070</td>
<td>1,0</td>
</tr>
<tr>
<td>Cameroon</td>
<td>625.348</td>
<td>1,4</td>
<td>481.038</td>
<td>1,1</td>
<td>375.430</td>
<td>0,8</td>
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<tr>
<td>China</td>
<td>163.143</td>
<td>0,4</td>
<td>217.728</td>
<td>0,5</td>
<td>323.033</td>
<td>0,7</td>
</tr>
<tr>
<td>Costa Rica</td>
<td>414.897</td>
<td>0,9</td>
<td>425.918</td>
<td>0,9</td>
<td>319.688</td>
<td>0,7</td>
</tr>
<tr>
<td>Côte d’Ivoire</td>
<td>481.247</td>
<td>1,1</td>
<td>305.943</td>
<td>0,7</td>
<td>311.512</td>
<td>0,7</td>
</tr>
</tbody>
</table>
In the past years Brazil, Vietnam and Colombia were consistently the top-3 suppliers to the EU. That changed in 2009, with Indonesia replacing Colombia as third-largest origin. Brazil continued to be the major green coffee supplier to the EU. Its volume increased with close to 900,000 bags, and its market share grew with 2.6 percentage point to 32.6%. Vietnam retained its position as second supplier, with a slightly lower volume (-82,000 bags) and a marginally higher import share (+0.2 percentage points). The share of Indonesia in EU imports increased from 3.8% in 2007 to 6.1% in 2008 and 6.6% in 2009. Colombia dropped to 6th place with a market share of 4.9%, down from 8.7% in 2008, and with a volume that was 1.7 million bags lower. This is caused by significantly reduced crops in Colombia, due to adverse weather conditions and the temporary effects of the national rejuvenation programme. Older trees are replaced by new ones, which in the longer term assures an improved productivity, but it takes a few years before the new coffee trees are fully productive. In 2009 the top-5 was completed by Honduras and Peru. Both countries have replaced some of the volume traditionally sourced from Colombia. In the last three years imports from Honduras have shown a steady increase both in volume and share. The steady rise of Peru’s share of EU imports in previous years has levelled off and this country is currently a stable top-5 source.

The next two graphs illustrate the changes in the ‘top 5’:

<table>
<thead>
<tr>
<th></th>
<th>1,880,555</th>
<th>4,1</th>
<th>1,586,378</th>
<th>3,5</th>
<th>1,703,827</th>
<th>3,8</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU(27) excl. intra-EU</td>
<td>45,517,533</td>
<td>100.0</td>
<td>45,652,377</td>
<td>100.0</td>
<td>44,756,160</td>
<td>100.0</td>
</tr>
</tbody>
</table>

Source: Eurostat
Note: 2007 and 2008 data have been revised by Eurostat since our previous publication.
Because of its economic development and rapidly increasing impact on the global economy, there is always an interest in coffee imports from China. In 2005 this country supplied 101,330 bags to the EU27, in 2006 this increased marginally to 107,270 and in 2007 significantly (by 52%) to 163,143 bags. The pattern continued in 2008 (217,728 bags, +33% compared to the previous year) and 2009 (323,033 bags, +48%). In 2009 China entered the top-20 of EU suppliers at number 18. With this, China overtook the numbers 19 and 20 of the 2009 ranking, respectively Costa Rica and Côte d’Ivoire.

The EU is not only an important importer of green coffee, but also a significant exporter of finished products. The EU imports of green decaffeinated coffee and roasted coffee are modest compared to the exports of the same products while the imports and the exports of soluble coffee are in the same order of magnitude.

| EU(27) imports and exports of green coffee and (semi)finished products from non-EU origins/to non-EU destinations - in tons - |
|-------------------------------|----------------|----------------|----------------|
| Green coffee (09011100)        | 2,731.052   | 11.398       | 2,739.143   | 12.469       | 2,685.370   | 15.931       |
| Green coffee, decaffeinated (09011200) | 2.454     | 91.391       | 3.019       | 92.226       | 2.511       | 81.016       |
| Roasted coffee (09012100)      | 16.926      | 67.171       | 21.182      | 71.305       | 24.564      | 70.510       |
| Roasted coffee, decaffeinated (09012200) | 1.833     | 3.551        | 2.338       | 3.350        | 2.530       | 3.220        |
| Soluble coffee (21011100)      | 47.482      | 51.535       | 43.816      | 39.050       | 41.066      | 39.229       |

Source: Eurostat

Note (1): Eurostat revised its 2007 and 2008 data since our previous publication.

Note (2): in 2008 the customs code 21011100 (coffee extracts in dry and liquid form) replaced the earlier separate codes 21011111 (dry coffee extracts) and 21011119 (liquid essences and concentrates).

Compared to 2008 the re-exports in 2009 of green coffee increased by 28%. The exports of green decaffeinated coffee dropped (-12%). Exports of roasted coffee were lower, both for regular (-1%) and for decaffeinated coffee (-4%). Soluble coffee exports remained virtually unchanged. Comparison of soluble coffee trade data with 2007 should take into account the change in customs code; data may not be fully comparable. Green decaffeinated imports decreased with 17% in 2009 compared to 2008. Imports of roasted coffee increased for both regular (+16%) and for decaffeinated roasted coffee (+8%). Imports of soluble dropped with 6%.
Looking in some more detail at the EU exports of finished products, in the years 2007-2009 the twenty main destinations of roasted coffee (non-decaffeinated plus decaffeinated), listed according to their ranking in 2009, were:

<table>
<thead>
<tr>
<th>EU(27) exports of roasted coffee (incl. decaf) to non-EU destinations</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>tons</td>
<td>%</td>
<td>tons</td>
</tr>
<tr>
<td>United States</td>
<td>14.575</td>
<td>20,6</td>
<td>13.146</td>
</tr>
<tr>
<td>Switzerland</td>
<td>8.122</td>
<td>11,5</td>
<td>8.749</td>
</tr>
<tr>
<td>Russian Federation</td>
<td>8.743</td>
<td>12,4</td>
<td>9.325</td>
</tr>
<tr>
<td>Ukraine</td>
<td>8.242</td>
<td>11,7</td>
<td>9.601</td>
</tr>
<tr>
<td>Australia</td>
<td>3.720</td>
<td>5,3</td>
<td>3.838</td>
</tr>
<tr>
<td>Norway</td>
<td>2.852</td>
<td>4,0</td>
<td>3.087</td>
</tr>
<tr>
<td>Canada</td>
<td>2.173</td>
<td>3,1</td>
<td>2.440</td>
</tr>
<tr>
<td>Croatia</td>
<td>1.933</td>
<td>2,7</td>
<td>1.971</td>
</tr>
<tr>
<td>Albania</td>
<td>1.103</td>
<td>1,6</td>
<td>1.236</td>
</tr>
<tr>
<td>Israel</td>
<td>1.167</td>
<td>1,7</td>
<td>1.253</td>
</tr>
<tr>
<td>Bosnia and Herzegovina</td>
<td>1.052</td>
<td>1,5</td>
<td>998</td>
</tr>
<tr>
<td>United Arab Emirates</td>
<td>848</td>
<td>1,2</td>
<td>961</td>
</tr>
<tr>
<td>Iceland</td>
<td>1.392</td>
<td>2,0</td>
<td>1.221</td>
</tr>
<tr>
<td>Japan</td>
<td>1.275</td>
<td>1,8</td>
<td>1.376</td>
</tr>
<tr>
<td>Turkey</td>
<td>1.071</td>
<td>1,5</td>
<td>994</td>
</tr>
<tr>
<td>Belarus</td>
<td>693</td>
<td>1,0</td>
<td>970</td>
</tr>
<tr>
<td>South Africa</td>
<td>853</td>
<td>1,2</td>
<td>907</td>
</tr>
<tr>
<td>Ceuta</td>
<td>721</td>
<td>1,0</td>
<td>802</td>
</tr>
<tr>
<td>Serbia</td>
<td>786</td>
<td>1,1</td>
<td>772</td>
</tr>
<tr>
<td>South Korea</td>
<td>486</td>
<td>0,7</td>
<td>819</td>
</tr>
<tr>
<td>Others</td>
<td>8.917</td>
<td>12,6</td>
<td>10.191</td>
</tr>
<tr>
<td><strong>Total external trade</strong></td>
<td><strong>70.722</strong></td>
<td><strong>100,0</strong></td>
<td><strong>74.655</strong></td>
</tr>
</tbody>
</table>

Source: Eurostat

In 2009 total exports of roasted coffee (including decaffeinated coffee) to non-EU destinations decreased by 1,2% in volume compared to the previous year. The US remained by far the largest non-EU destination, even though exports to the US decreased both in volume (-11,1%) and in share. The second largest destination in 2009 was Switzerland (4th in 2008), closely followed by the Russian Federation and Ukraine.

Regarding the EU exports of soluble coffee (officially: extracts, essences and concentrates of coffee) to non-EU destinations, we report only on the two most recent years because the change in the customs code makes comparisons with earlier years less relevant. The total volume remained virtually unchanged (-0,5%). In 2008 and 2009 the three largest clients were the Russian Federation, Ukraine and Turkey, but the top-two switched places. Exports to the Russian Federation decreased with 32% in volume, those to Ukraine increased with 3,3%. Turkey completes the top-three with a volume that increased with close to 18% in 2009. Exports to the United States recovered from significant drops in previous years and increased with almost 64%. In volume terms, listed according to their 2009 ranking, the 10 largest destinations in the two most recent years were:

<table>
<thead>
<tr>
<th>EU(27) exports of soluble coffee to non-EU destinations (HS 21011100)</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>tons</td>
<td>%</td>
</tr>
<tr>
<td>Ukraine</td>
<td>8.663</td>
<td>22,2</td>
</tr>
<tr>
<td>Russian Federation</td>
<td>11.355</td>
<td>29,1</td>
</tr>
<tr>
<td>Turkey</td>
<td>1.810</td>
<td>4,6</td>
</tr>
<tr>
<td>United States</td>
<td>1.283</td>
<td>3,3</td>
</tr>
<tr>
<td>Switzerland</td>
<td>1.476</td>
<td>3,8</td>
</tr>
<tr>
<td>Canada</td>
<td>1.343</td>
<td>3,4</td>
</tr>
</tbody>
</table>
Several coffee-producing countries have a sizeable production and export of soluble coffee. The following table, giving EU imports of soluble coffee from the five main non-EU origins in the two most recent years, illustrates this: all of the five largest suppliers in volume terms are coffee producing countries. Overall volume dropped by close to 6.3%. In 2009 Brazil retained its first position albeit with a lower volume and share. Ecuador maintained its second place with a slightly lower volume but higher share. Cote d’Ivoire lost some volume, but maintained its third position. Switzerland dropped out of the top-five and was replaced by India. Although India’s volume and share was lower in 2009, that of Switzerland dropped even more.

<table>
<thead>
<tr>
<th>Country</th>
<th>2008 Tons</th>
<th>2008 %</th>
<th>2009 Tons</th>
<th>2009 %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brazil</td>
<td>12.029</td>
<td>27,5</td>
<td>11.125</td>
<td>27,1</td>
</tr>
<tr>
<td>Ecuador</td>
<td>10.436</td>
<td>23,8</td>
<td>10.178</td>
<td>24,8</td>
</tr>
<tr>
<td>Cote d’Ivoire</td>
<td>5.173</td>
<td>11,8</td>
<td>4.219</td>
<td>10,3</td>
</tr>
<tr>
<td>Colombia</td>
<td>3.967</td>
<td>9,1</td>
<td>3.521</td>
<td>8,6</td>
</tr>
<tr>
<td>India</td>
<td>3.732</td>
<td>8,5</td>
<td>3.303</td>
<td>8,0</td>
</tr>
<tr>
<td>Others</td>
<td>8.478</td>
<td>19,4</td>
<td>8.720</td>
<td>21,2</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>43.816</strong></td>
<td><strong>100,0</strong></td>
<td><strong>41.066</strong></td>
<td><strong>100,0</strong></td>
</tr>
</tbody>
</table>

Finally in this section some data on the value of imports and exports of green, roasted and soluble coffee:

<table>
<thead>
<tr>
<th>Country</th>
<th>2008 Value (EUR)</th>
<th>2009 Value (EUR)</th>
</tr>
</thead>
<tbody>
<tr>
<td>From non-EU origins</td>
<td>5.158</td>
<td>4.701</td>
</tr>
<tr>
<td>Including intra-EU trade</td>
<td>5.752</td>
<td>5.284</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>10.910</strong></td>
<td><strong>10.477</strong></td>
</tr>
<tr>
<td>To non-EU destinations</td>
<td>39</td>
<td>42</td>
</tr>
<tr>
<td>Including intra-EU trade</td>
<td>934</td>
<td>846</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>946</strong></td>
<td><strong>889</strong></td>
</tr>
</tbody>
</table>

These data underline the economic relevance of the coffee sector for the EU food and drinks industry and trade balance. The value of the intra-EU trade of finished coffee products (roasted and soluble coffee) in 2009 was EUR 2,7 billion. In comparison, the value of exports to non-EU destinations of finished coffee products was much smaller, but still represents a serious contribution to the EU export performance: EUR 754 million. At the same time the EU green coffee imports represent about half of the world trade, both in terms of volume and value, making the EU a significant trading partner of the coffee exporting countries.
2. PRODUCTION

The following table is a summary of the Eurostat Prodcom statistics over calendar years 2007 and 2008, summarising production of decaffeinated green, roasted, roasted decaffeinated and soluble coffee in volume and value.

<table>
<thead>
<tr>
<th>Production of green decaffeinated, roasted and soluble coffee in selected EU and EFTA countries</th>
<th>PRCODE - 10831130 - Decaffeinated coffee, not roasted.</th>
<th>PRCODE - 10831150 - Roasted coffee, not decaffeinated.</th>
<th>PRCODE - 10831170 - Roasted decaffeinated coffee.</th>
<th>PRCODE - 10831240 - Extracts, essences and concentrates, of coffee, and preparations with a basis of these extracts, essences or concentrates or with a basis of coffee.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Austria</td>
<td>0</td>
<td>0</td>
<td>35.226</td>
<td>19.542</td>
</tr>
<tr>
<td>Belgium</td>
<td>0</td>
<td>0</td>
<td>63.230</td>
<td>63.382</td>
</tr>
<tr>
<td>Bulgaria</td>
<td>0</td>
<td>0</td>
<td>12.643</td>
<td>14.668</td>
</tr>
<tr>
<td>Croatia</td>
<td>0</td>
<td>0</td>
<td>12.465</td>
<td>13.284</td>
</tr>
<tr>
<td>Denmark</td>
<td>0</td>
<td>0</td>
<td>28.879</td>
<td>29.253</td>
</tr>
<tr>
<td>Finland</td>
<td>0</td>
<td>0</td>
<td>57.089</td>
<td>57.740</td>
</tr>
<tr>
<td>France</td>
<td>181</td>
<td>181</td>
<td>132.858</td>
<td>123.172</td>
</tr>
<tr>
<td>Germany</td>
<td>284.603</td>
<td>217.583</td>
<td>495.331</td>
<td>511.415</td>
</tr>
<tr>
<td>Greece</td>
<td>0</td>
<td>0</td>
<td>13.699</td>
<td>13.506</td>
</tr>
<tr>
<td>Hungary</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Iceland</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Italy</td>
<td>27.683</td>
<td>18.446</td>
<td>397.946</td>
<td>383.547</td>
</tr>
<tr>
<td>Latvia</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Lithuania</td>
<td>0</td>
<td>0</td>
<td>93</td>
<td>91</td>
</tr>
<tr>
<td>Netherlands</td>
<td>0</td>
<td>0</td>
<td>109.126</td>
<td>109.631</td>
</tr>
<tr>
<td>Norway</td>
<td>0</td>
<td>0</td>
<td>31.849</td>
<td>31.639</td>
</tr>
<tr>
<td>Poland</td>
<td>0</td>
<td>0</td>
<td>49.040</td>
<td>48.773</td>
</tr>
<tr>
<td>Portugal</td>
<td>0</td>
<td>0</td>
<td>35.755</td>
<td>38.059</td>
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<tr>
<td>Romania</td>
<td>0</td>
<td>0</td>
<td>28.764</td>
<td>0</td>
</tr>
<tr>
<td>Slovakia</td>
<td>0</td>
<td>0</td>
<td>3.226</td>
<td>2.690</td>
</tr>
<tr>
<td>Spain</td>
<td>30.481</td>
<td>24.314</td>
<td>108.760</td>
<td>115.000</td>
</tr>
<tr>
<td>Sweden</td>
<td>0</td>
<td>0</td>
<td>86.816</td>
<td>102.061</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>0</td>
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<td>22.638</td>
<td>24.118</td>
</tr>
<tr>
<td>EU27 totals</td>
<td>344.740</td>
<td>261.905</td>
<td>1,716.424</td>
<td>1,702.026</td>
</tr>
</tbody>
</table>

Source: Eurostat

Note: The product codes are those of NACE rev 2.
## Production of green decaffeinated, roasted and soluble coffee in selected EU and EFTA countries

- in million EUR -

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>PRCCODE - 10831130 - Decaffeinated coffee, not roasted.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Austria</td>
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<td>103</td>
<td>75</td>
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</tr>
<tr>
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<td>1</td>
<td>1</td>
<td>1.097</td>
<td>853</td>
<td>33</td>
<td>26</td>
<td>311</td>
<td>430</td>
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<td>189</td>
<td>1.481</td>
<td>1.319</td>
<td>114</td>
<td>93</td>
<td>755</td>
<td>642</td>
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<td>25</td>
<td>20</td>
<td>2.760</td>
<td>2.710</td>
<td>196</td>
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<td>7</td>
<td>8</td>
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<td>8.965</td>
<td>8.319</td>
<td>565</td>
<td>514</td>
<td>2.990</td>
<td>2.650</td>
</tr>
</tbody>
</table>

Source: Eurostat

Note: The product codes are those of NACE rev 2.

The Prodcom statistics need to be used with care. For a number of countries data are unavailable for reasons of confidentiality. Absence of a country or ‘zero’ reporting therefore can mean ‘unavailable’ as well as ‘no production’. Only those countries for which at least some data are available have been included. In some cases the reporting is questionable: countries are mentioned as having soluble coffee production where industry sources do not indicate the existence of production facilities. Please note that the Prodcom categories are not the same as those of the Harmonised System used for external trade data.
1. IMPORTS OF GREEN COFFEE

Imports of not-decaffeinated green coffee in 2009 reached a volume of 413,027 bags (24,782 tons). This is a decrease of 60% in comparison to 2008, when 1,041,460 bags (62,488 tons) were imported. This very large drop is caused by the closure of a major processing facility.

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Brazil</td>
<td>46,228</td>
<td>4,2</td>
<td>49,897</td>
<td>4,8</td>
<td>46,027</td>
<td>11,1</td>
</tr>
<tr>
<td>India</td>
<td>18,522</td>
<td>1,7</td>
<td>25,453</td>
<td>2,4</td>
<td>28,185</td>
<td>6,8</td>
</tr>
<tr>
<td>Vietnam</td>
<td>27,153</td>
<td>2,5</td>
<td>34,415</td>
<td>3,3</td>
<td>21,083</td>
<td>5,1</td>
</tr>
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<td>Cameroon</td>
<td>14,695</td>
<td>1,3</td>
<td>15,493</td>
<td>1,5</td>
<td>11,325</td>
<td>2,7</td>
</tr>
<tr>
<td>Peru</td>
<td>4,032</td>
<td>0,4</td>
<td>4,695</td>
<td>0,5</td>
<td>8,955</td>
<td>2,2</td>
</tr>
<tr>
<td>Guatemala</td>
<td>7,343</td>
<td>0,7</td>
<td>3,985</td>
<td>0,4</td>
<td>6,183</td>
<td>1,5</td>
</tr>
<tr>
<td>Honduras</td>
<td>5,928</td>
<td>0,5</td>
<td>10,043</td>
<td>1,0</td>
<td>5,353</td>
<td>1,3</td>
</tr>
<tr>
<td>Costa Rica</td>
<td>6,872</td>
<td>0,6</td>
<td>9,232</td>
<td>0,9</td>
<td>4,978</td>
<td>1,2</td>
</tr>
<tr>
<td>El Salvador</td>
<td>1,925</td>
<td>0,2</td>
<td>2,642</td>
<td>0,3</td>
<td>4,090</td>
<td>1,0</td>
</tr>
<tr>
<td>Côte d’Ivoire</td>
<td>0</td>
<td>0,0</td>
<td>0</td>
<td>0,0</td>
<td>2,745</td>
<td>0,7</td>
</tr>
<tr>
<td>Nicaragua</td>
<td>2,450</td>
<td>0,2</td>
<td>2,065</td>
<td>0,2</td>
<td>2,645</td>
<td>0,6</td>
</tr>
<tr>
<td>Colombia</td>
<td>7,995</td>
<td>0,7</td>
<td>5,610</td>
<td>0,5</td>
<td>2,292</td>
<td>0,6</td>
</tr>
<tr>
<td>Uganda</td>
<td>2,365</td>
<td>0,2</td>
<td>2,142</td>
<td>0,2</td>
<td>2,160</td>
<td>0,5</td>
</tr>
<tr>
<td>China</td>
<td>3,358</td>
<td>0,3</td>
<td>2,912</td>
<td>0,3</td>
<td>2,132</td>
<td>0,5</td>
</tr>
<tr>
<td>Ecuador</td>
<td>950</td>
<td>0,1</td>
<td>1,267</td>
<td>0,1</td>
<td>1,267</td>
<td>0,3</td>
</tr>
<tr>
<td>Others</td>
<td>953,578</td>
<td>86,4</td>
<td>871,610</td>
<td>83,7</td>
<td>263,607</td>
<td>63,8</td>
</tr>
<tr>
<td><strong>Total all origins</strong></td>
<td>1,103,395</td>
<td>100,0</td>
<td>1,041,460</td>
<td>100,0</td>
<td>413,027</td>
<td>100,0</td>
</tr>
</tbody>
</table>

Source: Eurostat

Austria is a landlocked country and therefore the green coffee arrives mainly through other EU countries. For statistical purposes such coffee loses its initial origin. This explains the very large percentage of ‘other’ origins: these are EU countries with seaports in easy reach of Austria, such as Germany. At the same time this means that the list of major origins in the table above paints only a very partial picture. It is not known what origins are represented in the coffee arriving via other EU members and in which volume.

2. FOREIGN TRADE IN ALL FORMS

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Green</td>
<td>11.098</td>
<td>9.222</td>
<td>0</td>
<td>0</td>
<td>1.702</td>
<td>1.837</td>
<td>180</td>
<td>153</td>
<td>649</td>
<td>559</td>
</tr>
<tr>
<td>Roasted</td>
<td>41.232</td>
<td>15.947</td>
<td>362</td>
<td>88</td>
<td>274</td>
<td>253</td>
<td>481</td>
<td>413</td>
<td>540</td>
<td>530</td>
</tr>
<tr>
<td>Roasted decaf</td>
<td>45.390</td>
<td>18.394</td>
<td>119</td>
<td>325</td>
<td>266</td>
<td>277</td>
<td>266</td>
<td>277</td>
<td>540</td>
<td>530</td>
</tr>
<tr>
<td>Soluble</td>
<td>41.232</td>
<td>15.947</td>
<td>362</td>
<td>88</td>
<td>274</td>
<td>253</td>
<td>481</td>
<td>413</td>
<td>540</td>
<td>530</td>
</tr>
</tbody>
</table>

Source: Eurostat
The closure of a large production facility logically resulted in shifts in the pattern of international trade. Total re-exports of green non-decaffeinated coffee and exports of roasted non-decaffeinated coffee fell by 34% and 59% respectively, which is consistent with expectations. In comparison, the increase in total imports of roasted non-decaffeinated coffee (+5%) is lower than could have been expected. The large drop in total imports of soluble coffee (-33%) is also remarkable. Next year’s data will possibly show a more settled and consistent pattern.

3. COFFEE CONSUMPTION

According to data of the International Coffee Organization (a different source compared to previous reports) Austrian total and per capita coffee consumption in recent years were as follows:

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Coffee Consumption</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>874,731</td>
</tr>
<tr>
<td>2001</td>
<td>1,012,664</td>
</tr>
<tr>
<td>2002</td>
<td>926,027</td>
</tr>
<tr>
<td>2003</td>
<td>719,572</td>
</tr>
<tr>
<td>2004</td>
<td>995,824</td>
</tr>
<tr>
<td>2005</td>
<td>772,066</td>
</tr>
<tr>
<td>2006</td>
<td>612,471</td>
</tr>
<tr>
<td>2007</td>
<td>846,816</td>
</tr>
<tr>
<td>2008</td>
<td>907,887</td>
</tr>
<tr>
<td>2009</td>
<td>885,716</td>
</tr>
</tbody>
</table>

Source: ICO

<table>
<thead>
<tr>
<th>Year</th>
<th>Per Capita Coffee Consumption</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005</td>
<td>5,63</td>
</tr>
<tr>
<td>2006</td>
<td>4,44</td>
</tr>
<tr>
<td>2007</td>
<td>6,11</td>
</tr>
<tr>
<td>2008</td>
<td>6,53</td>
</tr>
<tr>
<td>2009</td>
<td>6,37</td>
</tr>
</tbody>
</table>

Source: ICO

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

According to data of the International Coffee Organization, Austrian retail prices in recent years were as follows:

<table>
<thead>
<tr>
<th>Year</th>
<th>Retail Prices for Roasted Coffee</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>7,27</td>
</tr>
<tr>
<td>2001</td>
<td>7,22</td>
</tr>
<tr>
<td>2002</td>
<td>6,66</td>
</tr>
<tr>
<td>2003</td>
<td>6,20</td>
</tr>
<tr>
<td>2004</td>
<td>5,90</td>
</tr>
<tr>
<td>2005</td>
<td>6,67</td>
</tr>
<tr>
<td>2006</td>
<td>7,25</td>
</tr>
<tr>
<td>2007</td>
<td>6,87</td>
</tr>
<tr>
<td>2008</td>
<td>7,11</td>
</tr>
<tr>
<td>2009</td>
<td>10,99</td>
</tr>
</tbody>
</table>

Source: ICO. The original dollar values have been converted to Euro using the European Central Bank (ECB) reference exchange rate annual averages.
The increase in 2009 is remarkable. In the ICO’s Monthly Coffee Report of June 2010, there is a footnote indicating a change in type of coffee product, but no further details are given.

5. **INFORMATION ON THE AUSTRIAN COFFEE AND TEA ASSOCIATION**

The membership of the association covers 75% of the national coffee market.

6. **VAT**

In Austria the Value Added Tax (VAT - ‘Mehrwertsteuer’) for roasted coffee is 10% and for soluble coffee 20%.
BELGIUM

1. IMPORTS OF GREEN COFFEE

Please note that the sources for the data for Belgium are now mostly Eurostat and ICO. Comparability with earlier versions is not assured.

In our previous report we observed that total imports of not-decaffeinated green coffee in 2008 were 91.7% higher than in 2007. For the current report we took the latest available 2007 data from the Eurostat website, but the statistical anomaly remains. Volumes from individual origins are unrealistically different from the 2008 and 2009 volumes. Between 2008 and 2009 the pattern is more ‘as usual’. While there are changes, these are of an order of magnitude that can be considered normal.

<table>
<thead>
<tr>
<th>Countries of origin</th>
<th>2007</th>
<th>%</th>
<th>2008</th>
<th>%</th>
<th>2009</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brazil</td>
<td>674,228</td>
<td>21.8</td>
<td>1,549,073</td>
<td>26.1</td>
<td>1,455,275</td>
<td>28.4</td>
</tr>
<tr>
<td>Vietnam</td>
<td>369,532</td>
<td>11.9</td>
<td>1,080,953</td>
<td>18.2</td>
<td>761,932</td>
<td>14.9</td>
</tr>
<tr>
<td>Honduras</td>
<td>173,162</td>
<td>5.6</td>
<td>421,828</td>
<td>7.1</td>
<td>395,710</td>
<td>7.7</td>
</tr>
<tr>
<td>Colombia</td>
<td>108,373</td>
<td>3.5</td>
<td>426,993</td>
<td>7.2</td>
<td>378,627</td>
<td>7.4</td>
</tr>
<tr>
<td>Uganda</td>
<td>166,532</td>
<td>5.4</td>
<td>504,238</td>
<td>8.5</td>
<td>375,222</td>
<td>7.3</td>
</tr>
<tr>
<td>Peru</td>
<td>315,227</td>
<td>10.2</td>
<td>484,397</td>
<td>8.2</td>
<td>284,295</td>
<td>5.6</td>
</tr>
<tr>
<td>Ethiopia</td>
<td>106,547</td>
<td>3.4</td>
<td>114,988</td>
<td>1.9</td>
<td>158,637</td>
<td>3.1</td>
</tr>
<tr>
<td>Indonesia</td>
<td>172,032</td>
<td>5.6</td>
<td>165,675</td>
<td>2.8</td>
<td>128,652</td>
<td>2.5</td>
</tr>
<tr>
<td>India</td>
<td>53,650</td>
<td>1.7</td>
<td>137,998</td>
<td>2.3</td>
<td>114,968</td>
<td>2.2</td>
</tr>
<tr>
<td>Guatemala</td>
<td>97,613</td>
<td>3.1</td>
<td>117,422</td>
<td>2.0</td>
<td>110,930</td>
<td>2.2</td>
</tr>
<tr>
<td>Mexico</td>
<td>53,023</td>
<td>1.7</td>
<td>63,280</td>
<td>1.1</td>
<td>108,505</td>
<td>2.1</td>
</tr>
<tr>
<td>Nicaragua</td>
<td>19,432</td>
<td>0.6</td>
<td>69,198</td>
<td>1.2</td>
<td>103,293</td>
<td>2.0</td>
</tr>
<tr>
<td>Rwanda</td>
<td>63,247</td>
<td>2.0</td>
<td>60,340</td>
<td>1.0</td>
<td>84,078</td>
<td>1.6</td>
</tr>
<tr>
<td>Kenya</td>
<td>48,320</td>
<td>1.6</td>
<td>51,887</td>
<td>0.9</td>
<td>69,972</td>
<td>1.4</td>
</tr>
<tr>
<td>El Salvador</td>
<td>130,013</td>
<td>4.2</td>
<td>127,665</td>
<td>2.1</td>
<td>68,092</td>
<td>1.3</td>
</tr>
<tr>
<td>Others</td>
<td>548,403</td>
<td>17.7</td>
<td>566,688</td>
<td>9.5</td>
<td>523,130</td>
<td>10.2</td>
</tr>
<tr>
<td>Total all origins</td>
<td>3,099,333</td>
<td>100.0</td>
<td>5,942,625</td>
<td>100.0</td>
<td>5,121,317</td>
<td>100.0</td>
</tr>
</tbody>
</table>

Source: Eurostat

In 2009 the total non-decaffeinated green coffee imports from all origins were almost 14% lower than in 2008. In 2009 the most important country of origin remained Brazil with a share in imports of 28.4%. Brazil was followed by Vietnam (14.9%) and Honduras (7.7%).

2. FOREIGN TRADE IN ALL FORMS

Regarding foreign trade in roasted and soluble coffee, Belgium is clearly an important point of entry for green coffee destined ultimately for other EU markets. This is illustrated by the large volumes of re-exported green coffee within the EU. Belgium also shows a strong export performance in processed coffee, in particular roasted coffee.

| Belgium: international trade in green, roasted and soluble coffee - in tons - |
|---------------------------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| Imports                         | Green           | Green decaf     | Roasted         | Roasted decaf   | Soluble         |
| From EU origins                 | 4,739 | 5,149 | 5,965 | 6,227 | 17,401 | 17,891 | 3,580 | 2,397 | 4,275 | 3,626 |
| Total                           | 356,538 | 307,279 | 6,014 | 6,245 | 17,980 | 18,627 | 3,692 | 2,513 | 6,962 | 6,064 |
### Exports

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>To non-EU</td>
<td>1.864</td>
<td>1.813</td>
<td>3</td>
<td>9</td>
<td>1.645</td>
<td>1.497</td>
<td>243</td>
<td>60</td>
</tr>
<tr>
<td>destinations</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>To EU destinations</td>
<td>260.169</td>
<td>220.546</td>
<td>241</td>
<td>240</td>
<td>39.764</td>
<td>41.104</td>
<td>2.177</td>
<td>2.842</td>
</tr>
<tr>
<td>Total</td>
<td>262.032</td>
<td>222.359</td>
<td>243</td>
<td>249</td>
<td>41.409</td>
<td>42.053</td>
<td>2.420</td>
<td>2.901</td>
</tr>
</tbody>
</table>

Source: Eurostat

### 3. COFFEE CONSUMPTION

According to data of the International Coffee Organization, Belgian total and per capita consumption in recent years were as follows:

#### Belgium: total coffee consumption

<table>
<thead>
<tr>
<th>Year</th>
<th>Consumption (in bags)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>1,133,361</td>
</tr>
<tr>
<td>2001</td>
<td>884,233</td>
</tr>
<tr>
<td>2002</td>
<td>1,484,301</td>
</tr>
<tr>
<td>2003</td>
<td>1,579,419</td>
</tr>
<tr>
<td>2004</td>
<td>1,396,235</td>
</tr>
<tr>
<td>2005</td>
<td>1,158,038</td>
</tr>
<tr>
<td>2006</td>
<td>1,537,413</td>
</tr>
<tr>
<td>2007</td>
<td>1,103,118</td>
</tr>
<tr>
<td>2008</td>
<td>649,931</td>
</tr>
<tr>
<td>2009</td>
<td>934,293</td>
</tr>
</tbody>
</table>

Source: ICO

#### Belgium: per capita coffee consumption

<table>
<thead>
<tr>
<th>Year</th>
<th>Per Capita Consumption (in kilos)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005</td>
<td>6,67</td>
</tr>
<tr>
<td>2006</td>
<td>8,81</td>
</tr>
<tr>
<td>2007</td>
<td>6,29</td>
</tr>
<tr>
<td>2008</td>
<td>3,68</td>
</tr>
<tr>
<td>2009</td>
<td>5,29</td>
</tr>
</tbody>
</table>

Source: ICO

The 2008 data are surely a statistical anomaly. This may be connected with the inconsistencies in green coffee trade data mentioned before. In previous years, Belgian consumption data were based on excise duty payments, which gave an accurate picture. Currently we use the data of the International Coffee Organization. The ICO calculates total market size on the basis of net imports (total imports minus re-exports) plus or minus stock changes. The per capita consumption calculation is derived from this: total market divided by number of inhabitants. If there are errors in the underlying trade data supplied to the ICO, this obviously impacts on their calculation of total and per capita consumption.

### 4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

Based on ICO data, the development of retail prices for roasted coffee in recent years was as follows:

#### Belgium: retail prices for roasted coffee

<table>
<thead>
<tr>
<th>Year</th>
<th>Price (EUR/kilo)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>7,68</td>
</tr>
<tr>
<td>2001</td>
<td>7,38</td>
</tr>
<tr>
<td>2002</td>
<td>7,11</td>
</tr>
<tr>
<td>2003</td>
<td>7,01</td>
</tr>
</tbody>
</table>
EXCISE DUTIES AND VAT LEVEL

Belgium applies the following excise duties:

- Green coffee: EUR 0.1983 / kg net weight
- Roasted coffee: EUR 0.2479 / kg net weight
- Soluble coffee: EUR 0.6941 / kg dry matter

The Belgian VAT rate remains at 6%.
1. IMPORTS OF GREEN COFFEE

According to data provided by the Danish Coffee Association, imports of green not-decaffeinated coffee into Denmark from all sources were 34.700 tons (578.334 bags) in 2009, compared to 33.764 tons (562.733 bags) in 2008. This is an increase of 2,8%.

Brazil and Vietnam were Denmark’s most important suppliers in 2009. Imports from Brazil showed a remarkable reduction of 56% in volume. Its share in Danish green coffee imports fell from 42% in 2008 to 18% in 2009. Colombia, traditionally the ‘number two’ dropped to the fourth spot. In 2009, Uganda completed the ‘top 5’. Some of the smaller suppliers showed very large swings, for instance Honduras, which saw its imports reduced to 1/3rd of the 2008 volume.

<table>
<thead>
<tr>
<th>Countries of origin</th>
<th>2007 bags</th>
<th>2008 bags</th>
<th>2009 bags</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brazil</td>
<td>227.085</td>
<td>238.176</td>
<td>103.593</td>
</tr>
<tr>
<td>Vietnam</td>
<td>44.812</td>
<td>37.251</td>
<td>33.808</td>
</tr>
<tr>
<td>Uganda</td>
<td>24.245</td>
<td>12.447</td>
<td>22.831</td>
</tr>
<tr>
<td>Colombia</td>
<td>24.340</td>
<td>44.441</td>
<td>22.831</td>
</tr>
<tr>
<td>Peru</td>
<td>11.452</td>
<td>30.327</td>
<td>20.045</td>
</tr>
<tr>
<td>Indonesia</td>
<td>1.450</td>
<td>9.398</td>
<td>12.332</td>
</tr>
<tr>
<td>Tanzania</td>
<td>26.340</td>
<td>3.836</td>
<td>11.771</td>
</tr>
<tr>
<td>Honduras</td>
<td>5.075</td>
<td>34.541</td>
<td>10.713</td>
</tr>
<tr>
<td>Burundi</td>
<td>5.395</td>
<td>2.235</td>
<td>4.150</td>
</tr>
<tr>
<td>Papua New Guinea</td>
<td>9.448</td>
<td>5.021</td>
<td>3.873</td>
</tr>
<tr>
<td>Mexico</td>
<td>5.588</td>
<td>9.883</td>
<td>3.742</td>
</tr>
<tr>
<td>Kenya</td>
<td>8.427</td>
<td>6.600</td>
<td>2.323</td>
</tr>
<tr>
<td>Guatemala</td>
<td>1.823</td>
<td>1.816</td>
<td>1.980</td>
</tr>
<tr>
<td>Malawi</td>
<td>285</td>
<td>914</td>
<td>900</td>
</tr>
<tr>
<td>Ethiopia</td>
<td>2.905</td>
<td>2.976</td>
<td>857</td>
</tr>
<tr>
<td>Others</td>
<td>155.423</td>
<td>122.871</td>
<td>322.573</td>
</tr>
<tr>
<td>Total</td>
<td>554.093</td>
<td>562.733</td>
<td>578.334</td>
</tr>
</tbody>
</table>

Source: Eurostat (2007) and Danish Coffee Association (2008 and 2009)

When looking at the import volumes and shares, we have to express a word of caution. The category ‘others’ has more than doubled in 2009. Included in this category are EU countries with large seaports through which the coffee arrives in Denmark, such as Germany. For statistical purposes such coffee loses its initial origin. This means that the list of major origins in the table above paints only a very partial picture. It is not known what origins are represented in the coffee arriving via other EU members and in which volume. For the same reason it has become meaningless to present the usual table of imports by type (Colombian Milds, Other Milds, Brazilian naturals and Robustas).

2. FOREIGN TRADE IN COFFEE IN ALL FORMS

<p>| Denmark: international trade in green, roasted and soluble coffee |
|---|---|---|---|---|---|---|
| Imports | Green | Green | Roasted | Roasted | Soluble |
| From non-EU origins | 27.042 | 15.848 | 0 | 1 | 182 | 256 | 8 | 13 |
| From EU origins | 6.705 | 18.861 | 1.397 | 1.338 | 15.284 | 13.214 | 258 | 155 |</p>
<table>
<thead>
<tr>
<th>Total</th>
<th>33.747</th>
<th>34.709</th>
<th>1.397</th>
<th>1.340</th>
<th>15.466</th>
<th>13.470</th>
<th>266</th>
<th>168</th>
</tr>
</thead>
<tbody>
<tr>
<td>To non-EU destinations</td>
<td>25</td>
<td>8</td>
<td>0</td>
<td>0</td>
<td>1.462</td>
<td>1.452</td>
<td>5</td>
<td>4</td>
</tr>
<tr>
<td>To EU destinations</td>
<td>0</td>
<td>28</td>
<td>0</td>
<td>0</td>
<td>5.956</td>
<td>5.788</td>
<td>23</td>
<td>0</td>
</tr>
<tr>
<td>Total</td>
<td>25</td>
<td>36</td>
<td>0</td>
<td>0</td>
<td>7.418</td>
<td>7.240</td>
<td>27</td>
<td>4</td>
</tr>
</tbody>
</table>

Source: Eurostat;

Please note that the source for these data is different from 2008 and 2009 in the first table. Regarding imports of processed coffee in 2009, Sweden and Germany covered the quasi-totality of Denmark’s of decaffeinated green coffee imports with a share of 57% and 39%. The remaining 3,7% was supplied by Belgium. Sweden remained by far the major supplier of roasted non-decaffeinated coffee imports with a share of 82%. Germany was the second source (8%), followed by the Netherlands (2,7%), Belgium (2,5%) and Italy (2,0%). Sweden and Germany are also the major suppliers of roasted decaffeinated coffee, with a share of 51% and 39% respectively. Both 2008 and 2009 registered zero imports of soluble coffee. This is likely to be a confidentiality requirement.

3. COFFEE CONSUMPTION

According to data of the International Coffee Organization, the Danish total and per capita consumption in recent years was as follows:

<table>
<thead>
<tr>
<th>Denmark: total coffee consumption</th>
<th>- in bags -</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>790.644</td>
</tr>
<tr>
<td>2001</td>
<td>868.401</td>
</tr>
<tr>
<td>2002</td>
<td>804.592</td>
</tr>
<tr>
<td>2003</td>
<td>724.039</td>
</tr>
<tr>
<td>2004</td>
<td>848.846</td>
</tr>
<tr>
<td>2005</td>
<td>794.550</td>
</tr>
<tr>
<td>2006</td>
<td>822.494</td>
</tr>
<tr>
<td>2007</td>
<td>773.536</td>
</tr>
<tr>
<td>2008</td>
<td>694.690</td>
</tr>
<tr>
<td>2009</td>
<td>719.223</td>
</tr>
</tbody>
</table>

Source: ICO

<table>
<thead>
<tr>
<th>Denmark: per capita coffee consumption</th>
<th>- in kilos -</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005</td>
<td>8,8</td>
</tr>
<tr>
<td>2006</td>
<td>9,1</td>
</tr>
<tr>
<td>2007</td>
<td>8,5</td>
</tr>
<tr>
<td>2008</td>
<td>7,6</td>
</tr>
<tr>
<td>2009</td>
<td>7,9</td>
</tr>
</tbody>
</table>

Source: ICO

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

Based on ICO data, the development of retail prices for roasted coffee in recent years was as follows:

<table>
<thead>
<tr>
<th>Denmark: retail prices for roasted coffee</th>
<th>- EUR/kilo -</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>8,23</td>
</tr>
<tr>
<td>2001</td>
<td>7,85</td>
</tr>
<tr>
<td>2002</td>
<td>7,21</td>
</tr>
<tr>
<td>Year</td>
<td>Value</td>
</tr>
<tr>
<td>------</td>
<td>-------</td>
</tr>
<tr>
<td>2003</td>
<td>6.96</td>
</tr>
<tr>
<td>2004</td>
<td>7.01</td>
</tr>
<tr>
<td>2005</td>
<td>7.58</td>
</tr>
<tr>
<td>2006</td>
<td>7.78</td>
</tr>
<tr>
<td>2007</td>
<td>7.75</td>
</tr>
<tr>
<td>2008</td>
<td>8.09</td>
</tr>
<tr>
<td>2009</td>
<td>8.36</td>
</tr>
</tbody>
</table>

Source: ICO. The original dollar values have been converted to Euro using the European Central Bank (ECB) reference exchange rate annual averages.

5. **COMMENTS ON PARTICULAR ASPECTS**

The Danish coffee association promotion activities have focused on the coffee information office.

6. **EXCISE DUTIES AND VAT LEVEL**

VAT is unchanged at 25% and the excise duties are DKK 5.45 per kilo for green coffee, DKK 6.54 for roasted coffee and DKK 14.17 for coffee extracts.
FINLAND

1. IMPORTS OF GREEN COFFEE

Unless otherwise indicated, the data in this chapter were supplied by the Finnish Coffee Roasters Association.

In 2009 Finland imported 1.123.491 bags of green coffee, a decrease of 5% compared to 2008.

<table>
<thead>
<tr>
<th>Year</th>
<th>Imports</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>1.001.017</td>
</tr>
<tr>
<td>2001</td>
<td>1.025.000</td>
</tr>
<tr>
<td>2002</td>
<td>1.004.465</td>
</tr>
<tr>
<td>2003</td>
<td>1.023.708</td>
</tr>
<tr>
<td>2004</td>
<td>1.058.831</td>
</tr>
<tr>
<td>2005</td>
<td>1.052.660</td>
</tr>
<tr>
<td>2006</td>
<td>1.077.847</td>
</tr>
<tr>
<td>2007</td>
<td>1.120.611</td>
</tr>
<tr>
<td>2008</td>
<td>1.182.799</td>
</tr>
<tr>
<td>2009</td>
<td>1.123.491</td>
</tr>
</tbody>
</table>

The most important origins by volume were:

<table>
<thead>
<tr>
<th>Countries of origin</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brazil</td>
<td>465,7</td>
<td>500,6</td>
<td>467,1</td>
</tr>
<tr>
<td>Colombia</td>
<td>261,0</td>
<td>238,3</td>
<td>112,5</td>
</tr>
<tr>
<td>Guatemala</td>
<td>86,2</td>
<td>78,2</td>
<td>80,0</td>
</tr>
<tr>
<td>Nicaragua</td>
<td>68,3</td>
<td>92,0</td>
<td>87,4</td>
</tr>
<tr>
<td>Kenya</td>
<td>62,7</td>
<td>59,2</td>
<td>91,1</td>
</tr>
<tr>
<td>Ethiopia</td>
<td>35,8</td>
<td>37,6</td>
<td>18,6</td>
</tr>
<tr>
<td>Honduras</td>
<td>34,4</td>
<td>75,2</td>
<td>98,4</td>
</tr>
<tr>
<td>Peru</td>
<td>21,8</td>
<td>28,6</td>
<td>23,6</td>
</tr>
<tr>
<td>Tanzania</td>
<td>18,8</td>
<td>9,3</td>
<td>38,8</td>
</tr>
<tr>
<td>Vietnam</td>
<td>17,4</td>
<td>17,1</td>
<td>19,9</td>
</tr>
<tr>
<td>Zambia</td>
<td>10,9</td>
<td>3,3</td>
<td>2,4</td>
</tr>
<tr>
<td>Burundi</td>
<td>7,5</td>
<td>4,2</td>
<td>11,1</td>
</tr>
<tr>
<td>India</td>
<td>5,2</td>
<td>3,7</td>
<td>7,3</td>
</tr>
<tr>
<td>Costa Rica</td>
<td>4,5</td>
<td>11,1</td>
<td>5,7</td>
</tr>
<tr>
<td>Cameroon</td>
<td>4,1</td>
<td>0,0</td>
<td>1,0</td>
</tr>
<tr>
<td>Togo</td>
<td>3,6</td>
<td>0,0</td>
<td>0,0</td>
</tr>
<tr>
<td>Germany</td>
<td>2,6</td>
<td>0,0</td>
<td>2,2</td>
</tr>
<tr>
<td>El Salvador</td>
<td>2,4</td>
<td>10,4</td>
<td>14,0</td>
</tr>
<tr>
<td>Others</td>
<td>7,7</td>
<td>14,0</td>
<td>45,6</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>1.120,6</td>
<td>1.182,8</td>
<td>1.123,5</td>
</tr>
</tbody>
</table>

The ‘top 5’ suppliers in 2009 were Brazil, Colombia, Honduras, Kenya and Nicaragua.

<table>
<thead>
<tr>
<th>Countries of origin</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brazil</td>
<td>41,6</td>
<td>42,3</td>
<td>42</td>
</tr>
<tr>
<td>Colombia</td>
<td>23,3</td>
<td>20,1</td>
<td>10</td>
</tr>
<tr>
<td>Guatemala</td>
<td>7,7</td>
<td>6,6</td>
<td>7,1</td>
</tr>
</tbody>
</table>
2. FOREIGN TRADE OF COFFEE IN ALL FORMS

Green coffee
Imports of green coffee reached 67,409 tons in 2009. The imports decreased by 5% from the previous year. The average C.I.F price was EUR 2,10/kg.

There were 122 tons exports of green coffee 2009 (no export in 2008).

Roasted coffee
Imports of roasted coffee were 5,200 tons in 2009, an increase of 48% from 2008.

Exports of roasted coffee increased from 2008 by 8,2% to 9,150 tons. The main export destination for roasted coffee were the Baltic Countries and Russia (98,7%).

<table>
<thead>
<tr>
<th>Form of coffee</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>Exports</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Green coffee</td>
<td>67,237</td>
<td>70,968</td>
<td>67,409</td>
<td>192</td>
<td>0</td>
<td>122</td>
<td></td>
</tr>
<tr>
<td>Roasted coffee</td>
<td>2,509</td>
<td>3,517</td>
<td>5,200</td>
<td>7,676</td>
<td>8,551</td>
<td>9,150</td>
<td></td>
</tr>
<tr>
<td>Instant coffee</td>
<td>1,142</td>
<td>1,327</td>
<td>0,838</td>
<td>5</td>
<td>9</td>
<td>48</td>
<td></td>
</tr>
</tbody>
</table>

3. IMPORT RATES AND NATIONAL TAXES

There are no national import rates or national taxes for coffee.

4. COFFEE CONSUMPTION

The consumption of roasted coffee was 9,9 kg/person in 2009.

5. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

Based on ICO data, the development of retail prices for roasted coffee in recent years was as follows:

<table>
<thead>
<tr>
<th>Year</th>
<th>Price (EUR/kilo)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>5,47</td>
</tr>
<tr>
<td>2001</td>
<td>4,87</td>
</tr>
<tr>
<td>2002</td>
<td>4,29</td>
</tr>
<tr>
<td>2003</td>
<td>4,15</td>
</tr>
<tr>
<td>2004</td>
<td>4,14</td>
</tr>
<tr>
<td>2005</td>
<td>5,03</td>
</tr>
<tr>
<td>2006</td>
<td>5,16</td>
</tr>
<tr>
<td>2007</td>
<td>5,23</td>
</tr>
<tr>
<td>2008</td>
<td>5,58</td>
</tr>
<tr>
<td>2009</td>
<td>5,55</td>
</tr>
</tbody>
</table>

Source: ICO. The original dollar values have been converted to Euro using the European Central Bank (ECB) reference exchange rate annual averages.
6. EXCISE DUTIES AND VAT LEVEL

The value-added tax for coffee is the same as for other food stuffs, i.e. 13%. The value-added tax decreased from 17 to 13% during year 2009. There are no excise duties for coffee.
FRANCE

The following is provided by the Syndicat Français du Café which represents the interest of the entire coffee sector. All the figures below are extracted from national official statistics provided by French customs and the French Economics Ministry.

1. IMPORTS

Total non-decaffeinated green coffee imports into France from all origins in 2009 were 248,261 tons (4,137,683 bags). This was 13,1% more than the 219,473 tons (3,657,883 bags) imported in 2008. The main green coffee suppliers in terms of volumes and percentages were:

<table>
<thead>
<tr>
<th>Country</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>bags</td>
<td>%</td>
<td>bags</td>
<td>%</td>
</tr>
<tr>
<td>Brazil</td>
<td>1,030,000</td>
<td>25,29</td>
<td>889,500</td>
</tr>
<tr>
<td>Vietnam</td>
<td>788,883</td>
<td>19,37</td>
<td>529,667</td>
</tr>
<tr>
<td>Colombia</td>
<td>271,917</td>
<td>6,68</td>
<td>275,950</td>
</tr>
<tr>
<td>Honduras</td>
<td>93,733</td>
<td>2,30</td>
<td>122,333</td>
</tr>
<tr>
<td>Ethiopia</td>
<td>169,883</td>
<td>4,17</td>
<td>153,333</td>
</tr>
<tr>
<td>Indonesia</td>
<td>36,317</td>
<td>0,89</td>
<td>129,650</td>
</tr>
<tr>
<td>Peru</td>
<td>109,283</td>
<td>2,68</td>
<td>93,817</td>
</tr>
<tr>
<td>Uganda</td>
<td>116,200</td>
<td>2,85</td>
<td>106,983</td>
</tr>
<tr>
<td>Nicaragua</td>
<td>69,633</td>
<td>1,71</td>
<td>34,383</td>
</tr>
<tr>
<td>El Salvador</td>
<td>25,067</td>
<td>0,62</td>
<td>41,000</td>
</tr>
<tr>
<td>India</td>
<td>86,883</td>
<td>2,13</td>
<td>86,017</td>
</tr>
<tr>
<td>Guinea</td>
<td>83,367</td>
<td>2,07</td>
<td>29,383</td>
</tr>
<tr>
<td>Cameroon</td>
<td>97,300</td>
<td>2,39</td>
<td>71,333</td>
</tr>
<tr>
<td>Guatemala</td>
<td>80,467</td>
<td>1,98</td>
<td>75,700</td>
</tr>
<tr>
<td>Mexico</td>
<td>64,567</td>
<td>1,59</td>
<td>34,367</td>
</tr>
<tr>
<td>Congo Dem Rep</td>
<td>8,250</td>
<td>0,20</td>
<td>12,300</td>
</tr>
<tr>
<td>Sierra Leone</td>
<td>7,933</td>
<td>0,19</td>
<td>11,283</td>
</tr>
<tr>
<td>Côte d’Ivoire</td>
<td>59,450</td>
<td>1,46</td>
<td>29,083</td>
</tr>
<tr>
<td>Togo</td>
<td>23,867</td>
<td>0,59</td>
<td>21,467</td>
</tr>
<tr>
<td>China</td>
<td>14,617</td>
<td>0,36</td>
<td>19,933</td>
</tr>
<tr>
<td>Burundi</td>
<td>28,433</td>
<td>0,70</td>
<td>9,733</td>
</tr>
<tr>
<td>Madagascar</td>
<td>47,483</td>
<td>1,17</td>
<td>61,850</td>
</tr>
<tr>
<td>Costa Rica</td>
<td>24,400</td>
<td>0,60</td>
<td>32,417</td>
</tr>
<tr>
<td>Rwanda</td>
<td>16,867</td>
<td>0,41</td>
<td>20,350</td>
</tr>
<tr>
<td>EU</td>
<td>602,700</td>
<td>14,80</td>
<td>665,433</td>
</tr>
<tr>
<td>Others</td>
<td>115,067</td>
<td>2,82</td>
<td>100,617</td>
</tr>
</tbody>
</table>

**Total all origins:** 4,072,567 100,00

Source: Eurostat

Brazil retained its position of first supplier. Its market share remained fairly stable, but this still represented an import volume increase of over 89,000 bags. Vietnam remained the second supplier, with a volume that was close to 115,000 bags larger and a 1,1 percentage points higher share of imports. Import volumes from Colombia dropped by 10%. The fourths and fifth suppliers, respectively Honduras and Ethiopia, both recorded large volume increases: Honduras 59% and Ethiopia 14%.

Imports split according to the types of coffee showed a slight decrease of both the Arabica and Robusta share. This is only possible because the ‘unspecified’ category increased, making it more difficult to have a precise idea of the percentage distribution per type of coffee.
France: Percentage distribution of green non-decaffeinated coffee imports by types of coffee - in % -

<table>
<thead>
<tr>
<th>Type of Coffee</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arabicas</td>
<td>51,48</td>
<td>52,68</td>
<td>49,78</td>
</tr>
<tr>
<td>Colombian Milds</td>
<td>7,21</td>
<td>8,61</td>
<td>6,75</td>
</tr>
<tr>
<td>Other Milds</td>
<td>14,81</td>
<td>15,54</td>
<td>14,86</td>
</tr>
<tr>
<td>Brazilian Naturals</td>
<td>29,46</td>
<td>28,71</td>
<td>28,17</td>
</tr>
<tr>
<td>Robustas</td>
<td>30,18</td>
<td>28,17</td>
<td>27,95</td>
</tr>
<tr>
<td>Other, not specified</td>
<td>18,34</td>
<td>18,97</td>
<td>22,27</td>
</tr>
</tbody>
</table>

2. FOREIGN TRADE FOR ALL FORMS OF COFFEE

Exports of processed coffee (in green bean equivalent):

<table>
<thead>
<tr>
<th>Type of Coffee</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coffee, green not decaffeinated</td>
<td>977</td>
<td>1.839</td>
<td>2.272</td>
</tr>
<tr>
<td>Coffee, green decaffeinated</td>
<td>6.903</td>
<td>7.034</td>
<td>4.847</td>
</tr>
<tr>
<td>Coffee, roasted not decaffeinated</td>
<td>12.384</td>
<td>15.447</td>
<td>17.710</td>
</tr>
<tr>
<td>Coffee, roasted decaffeinated</td>
<td>563</td>
<td>765</td>
<td>823</td>
</tr>
<tr>
<td>Extracts, essences and concentrates</td>
<td>32.791</td>
<td>32.069</td>
<td>34.344</td>
</tr>
<tr>
<td>Other</td>
<td>4.109</td>
<td>5.638</td>
<td>6.757</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>57.727</strong></td>
<td><strong>62.792</strong></td>
<td><strong>66.753</strong></td>
</tr>
</tbody>
</table>

Total exports of coffee in all forms increased by 6.3% in 2009. Of the processed products, especially the exports of roasted not decaffeinated coffee showed a strong performance: +15%. The exports of green decaffeinated coffee dropped with 31%.

3. COFFEE CONSUMPTION

<table>
<thead>
<tr>
<th>Type of Coffee</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value (turnover before tax) EUR million</td>
<td>1.946</td>
<td>1.933</td>
<td>1.873</td>
</tr>
<tr>
<td>Volume (green coffee equivalent) Tons</td>
<td>349.600</td>
<td>330.000</td>
<td>343.300</td>
</tr>
</tbody>
</table>

For 2009, the per capita consumption is calculated to be 5,58 kg.

5. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

Based on ICO data, the development of retail prices for roasted coffee in recent years was as follows:

<table>
<thead>
<tr>
<th>Year</th>
<th>Price EUR/kilo</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>6,76</td>
</tr>
<tr>
<td>2001</td>
<td>6,48</td>
</tr>
<tr>
<td>2002</td>
<td>6,36</td>
</tr>
<tr>
<td>2003</td>
<td>6,20</td>
</tr>
<tr>
<td>2004</td>
<td>5,89</td>
</tr>
<tr>
<td>2005</td>
<td>7,20</td>
</tr>
<tr>
<td>2006</td>
<td>7,59</td>
</tr>
<tr>
<td>2007</td>
<td>7,54</td>
</tr>
<tr>
<td>2008</td>
<td>7,69</td>
</tr>
</tbody>
</table>
6. OTHER ASPECTS

- In 2009 soluble coffee represented 15% of coffee (green bean equivalent) consumed in France.
- The espresso method of preparation is becoming increasingly popular: annually 16.7 milliard cups are consumed in this form.
- Of the roasted coffee, over 80% of sales take place in medium-sized and larger supermarkets. The remaining 20% is divided between cafés/hotels/restaurants, other out-of-home, vending and speciality shops.
- The share of decaffeinated coffee is estimated to be 7% of consumption.
- The share of ethically traded and sustainably produced coffee. It is estimated to be 2.5%.
1. IMPORTS OF GREEN COFFEE

According to Eurostat data, imports of not-decaffeinated green coffee into the Federal Republic of Germany in 2009 reached a volume of 17.5 million bags (1.050.594 tons), a slight decrease of 1.6% compared to the 17.8 million bags (1.067.446 tons) imported in 2008.

<table>
<thead>
<tr>
<th>Country</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brazil</td>
<td>4.808.893</td>
<td>4.914.440</td>
<td>5.881.318</td>
</tr>
<tr>
<td>Vietnam</td>
<td>3.990.752</td>
<td>2.809.103</td>
<td>2.855.978</td>
</tr>
<tr>
<td>Indonesia</td>
<td>809.033</td>
<td>1.533.213</td>
<td>1.390.622</td>
</tr>
<tr>
<td>Peru</td>
<td>1.045.750</td>
<td>1.124.445</td>
<td>1.190.290</td>
</tr>
<tr>
<td>Honduras</td>
<td>915.188</td>
<td>1.054.673</td>
<td>1.074.133</td>
</tr>
<tr>
<td>Ethiopia</td>
<td>605.795</td>
<td>786.490</td>
<td>750.673</td>
</tr>
<tr>
<td>Uganda</td>
<td>367.093</td>
<td>472.865</td>
<td>621.263</td>
</tr>
<tr>
<td>Colombia</td>
<td>1.466.602</td>
<td>1.290.802</td>
<td>494.272</td>
</tr>
<tr>
<td>El Salvador</td>
<td>447.665</td>
<td>518.605</td>
<td>482.138</td>
</tr>
<tr>
<td>Papua New Guinea</td>
<td>324.648</td>
<td>552.027</td>
<td>412.750</td>
</tr>
<tr>
<td>China</td>
<td>98.097</td>
<td>137.380</td>
<td>244.513</td>
</tr>
<tr>
<td>Mexico</td>
<td>295.563</td>
<td>246.450</td>
<td>217.125</td>
</tr>
<tr>
<td>Guatemala</td>
<td>786.490</td>
<td>339.007</td>
<td>209.162</td>
</tr>
<tr>
<td>Kenya</td>
<td>218.358</td>
<td>138.422</td>
<td>191.183</td>
</tr>
<tr>
<td>India</td>
<td>236.398</td>
<td>247.935</td>
<td>154.980</td>
</tr>
<tr>
<td>Others</td>
<td>1.426.885</td>
<td>1.624.913</td>
<td>1.339.503</td>
</tr>
<tr>
<td>Total all origins</td>
<td>17.335.410</td>
<td>17.790.770</td>
<td>17.509.905</td>
</tr>
</tbody>
</table>

Source: Eurostat

Note: 2007 totals are based on older extra-trade figures and provisional

The list of the countries of origin changed in 2009. While Brazil remained the largest supplier and Vietnam the second largest, Colombia dropped from third to eighth place. This was the consequence of the significantly lower crop volumes in Colombia. Imported volumes from Brazil increased with 20% (close to 1 million bags). Those from Vietnam remained fairly stable (+1,7% - 47.000 bags). Volumes from Colombia dropped with 62% - close to 800.000 bags. Indonesia became the third supplier. Peru and Honduras completed the top-5 with a fairly stable volume and import share.

The 2009 distribution of green coffee imports according to ICO coffee groups illustrates the much reduced imports from Colombia. The overall share of Arabicas remained unchanged thanks to a higher share of Brazilian Naturals.

<table>
<thead>
<tr>
<th>Coffee Group</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arabicas</td>
<td>68</td>
<td>68</td>
<td>68</td>
</tr>
<tr>
<td>Colombian Milds</td>
<td>12</td>
<td>9</td>
<td>5</td>
</tr>
<tr>
<td>Other Milds</td>
<td>25</td>
<td>27</td>
<td>25</td>
</tr>
<tr>
<td>Brazilian Naturals</td>
<td>31</td>
<td>32</td>
<td>38</td>
</tr>
<tr>
<td>Robustas</td>
<td>31</td>
<td>28</td>
<td>29</td>
</tr>
<tr>
<td>Other/Unknown</td>
<td>1</td>
<td>4</td>
<td>3</td>
</tr>
</tbody>
</table>

Source: derived from Eurostat and ICO. Due to rounding total may differ from sum of components
2. FOREIGN TRADE IN COFFEE

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>0901 11 00</td>
<td>1,051,458</td>
<td>1,050,505</td>
<td>145,808</td>
<td>174,023</td>
</tr>
<tr>
<td>0901 12 00</td>
<td>3,229</td>
<td>2,099</td>
<td>140,459</td>
<td>123,951</td>
</tr>
<tr>
<td>0901 21 00</td>
<td>55,178</td>
<td>39,902</td>
<td>145,399</td>
<td>158,281</td>
</tr>
<tr>
<td>0901 22 00</td>
<td>1,032</td>
<td>755</td>
<td>9,460</td>
<td>9,188</td>
</tr>
<tr>
<td>2101 11 00</td>
<td>25,063</td>
<td>23,036</td>
<td>57,671</td>
<td>56,933</td>
</tr>
<tr>
<td>2101 12 92</td>
<td>10,203</td>
<td>13,388</td>
<td>14,737</td>
<td>14,617</td>
</tr>
</tbody>
</table>

Source: Statistisches Bundesamt

*until 31.12.2008 listed separately: dry coffee extracts (Customs code 2101 11 11) & liquid essences and concentrates (Customs code 2101 11 19)

**on the basis of extracts, essences and concentrates of coffee

According to Eurostat data, the 2009 import of decaffeinated green coffee was dominated by three countries: Italy (40.4%) followed by the Netherlands (33.4%) and Spain (13.9%). The main suppliers of roasted non-decaffeinated coffee were Italy (33.3%) and Poland (15.9%) and the Netherlands (14.8%). The main sources for roasted decaffeinated coffee were the Netherlands (43.0%), the Czech Republic (29.1%) and Belgium (10.4%). Coffee extracts were mainly sourced from Belgium (32.8%), Ecuador (18.4%) and Spain (10.8%).

The main export destinations of decaffeinated green coffee in 2009 were the United States (55.2%), Spain (11.7%) and the Netherlands (7.8%). Exports of roasted non-decaffeinated coffee were mainly destined to Poland (15.6%), France (15.0%), the Netherlands (14.8%), and Austria (6.7%). In 2009 the three largest export destinations for roasted decaffeinated coffee were France (21.5%), the Netherlands (17.3%) and Belgium (15.1%). Coffee extracts were mainly destined for the United Kingdom (14.9%), Poland (13.0), France (11.9%) and Ukraine (9.1%).

3. COFFEE CONSUMPTION

In 2009, the statistical total consumption increased slightly with 1.4%, as did the per capita consumption: from 6.2 kilo (green coffee equivalent) to 6.3 kilo.
### Germany: coffee market segments

<table>
<thead>
<tr>
<th></th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Roasted coffee</td>
<td>394.000</td>
<td>400.000</td>
<td>407.000</td>
</tr>
<tr>
<td>Of which:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Roasted coffee, not decaffeinated</td>
<td>361.000</td>
<td>367.000</td>
<td>376.000</td>
</tr>
<tr>
<td>Roasted coffee, decaffeinated</td>
<td>33.000</td>
<td>33.000</td>
<td>31.000</td>
</tr>
<tr>
<td>Included in roasted coffee:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Espresso/Caffè Crema</td>
<td>36.000</td>
<td>43.000</td>
<td>48.000</td>
</tr>
<tr>
<td>Coffee pads/-capsules</td>
<td>21.000</td>
<td>26.000</td>
<td>30.000</td>
</tr>
<tr>
<td>Soluble coffee*</td>
<td>16.600</td>
<td>16.600</td>
<td>16.600</td>
</tr>
<tr>
<td>Of which:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Soluble coffee, not decaffeinated*</td>
<td>15.800</td>
<td>15.820</td>
<td>15.870</td>
</tr>
<tr>
<td>Soluble coffee, decaffeinated*</td>
<td>800</td>
<td>780</td>
<td>730</td>
</tr>
<tr>
<td>Of which:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Soluble coffee in pure form</td>
<td>12.000</td>
<td>12.200</td>
<td>12.400</td>
</tr>
<tr>
<td>Soluble coffee in mixes*</td>
<td>4.600</td>
<td>4.400</td>
<td>4.200</td>
</tr>
</tbody>
</table>

- **Source:** Deutscher Kaffeeverband
- *For soluble coffee only the coffee component has been included in the calculations.

The market share of the segments single portions and espresso/caffè crema kept increasing. In 2008 43,000 tons of espresso and caffè crema were supplied to the total market.

Non-household consumption is difficult to assess statistically. According to market research, this segment accounts for 30% of the total market. However, a large part of this segment is covered by household packs. There are no exact data as to how many household packs are consumed in the out-of-home sector.

### 4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

<table>
<thead>
<tr>
<th></th>
<th>- Euro/500g -</th>
</tr>
</thead>
<tbody>
<tr>
<td>1970</td>
<td>4,24</td>
</tr>
<tr>
<td>1980</td>
<td>4,94</td>
</tr>
<tr>
<td>1990</td>
<td>3,70</td>
</tr>
<tr>
<td>2000</td>
<td>3,43</td>
</tr>
<tr>
<td>2001</td>
<td>3,27</td>
</tr>
<tr>
<td>2002</td>
<td>3,06</td>
</tr>
<tr>
<td>2003</td>
<td>3,00</td>
</tr>
<tr>
<td>2004</td>
<td>2,91</td>
</tr>
<tr>
<td>2005</td>
<td>3,61</td>
</tr>
<tr>
<td>2006</td>
<td>3,79</td>
</tr>
</tbody>
</table>
5. ASSOCIATION MEMBERSHIP

As at end of March 2010, the membership of the German Coffee Association consisted of:

- Coffee Agents and Brokers: 6
- Green coffee importers: 14
- Warehousing companies: 3
- Producers of decaffeinated coffee: 3
- Producers of soluble coffee and soluble coffee beverages: 8
- Coffee roasters: 65
- Coffee associated members: 15
- Supporting members: 25

6. COMMENTS ON PARTICULAR ASPECTS

On September 25th 2009 the German Coffee Day was celebrated for the fourth time with great success. More than 300 companies organised different activities in order to promote coffee and demonstrate its diversity.

In 2009 the German Coffee Association continued the national Healthcare Professions Coffee Education Programme. The aim is to counteract the prejudices against the health effects of coffee among the target group of opinion leaders in health questions.

7. VAT, EXCISE DUTIES

VAT on coffee is 7% (in retail). Germany has a specific excise duty on coffee. This is EUR 2.19 for 1 kg roasted coffee and EUR 4.78 for 1 kg soluble coffee. For products containing coffee the following excise duties apply:

<table>
<thead>
<tr>
<th>Volume of roasted or soluble coffee per kilo product</th>
<th>Roasted coffee</th>
<th>Soluble coffee</th>
</tr>
</thead>
<tbody>
<tr>
<td>10 g to 100 g per kg</td>
<td>0.12</td>
<td>0.26</td>
</tr>
<tr>
<td>&gt; 100 g to 300 g per kg</td>
<td>0.43</td>
<td>0.94</td>
</tr>
<tr>
<td>&gt; 300 g to 500 g per kg</td>
<td>0.86</td>
<td>1.91</td>
</tr>
<tr>
<td>&gt; 500 g to 700 g per kg</td>
<td>1.32</td>
<td>2.86</td>
</tr>
<tr>
<td>&gt; 700 g to 900 g per kg</td>
<td>1.76</td>
<td>3.83</td>
</tr>
</tbody>
</table>

Source: Kaffeesteuergesetz (coffee tax law)
GREECE

1. IMPORTS OF GREEN COFFEE

In 2009 imports of green, not decaffeinated coffee from all sources into Greece were 27.752 tons (462.528 bags). In calendar year 2008 a volume of 27.238 tons (453.970 bags) was imported. This represents a modest increase of 1.9%.

The most important origins in the most recent three years were (listed in the 2009 order):

<table>
<thead>
<tr>
<th>Countries of origin</th>
<th>2007 bags</th>
<th>2007 %</th>
<th>2008 bags</th>
<th>2008 %</th>
<th>2009 bags</th>
<th>2009 %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brazil</td>
<td>327,360</td>
<td>68,9</td>
<td>300,130</td>
<td>66,1</td>
<td>311,788</td>
<td>67,4</td>
</tr>
<tr>
<td>Vietnam</td>
<td>44,782</td>
<td>9,4</td>
<td>35,980</td>
<td>7,9</td>
<td>42,833</td>
<td>9,3</td>
</tr>
<tr>
<td>India</td>
<td>46,400</td>
<td>9,8</td>
<td>42,242</td>
<td>9,3</td>
<td>41,755</td>
<td>9,0</td>
</tr>
<tr>
<td>Indonesia</td>
<td>15,797</td>
<td>3,3</td>
<td>19,805</td>
<td>4,4</td>
<td>17,288</td>
<td>3,7</td>
</tr>
<tr>
<td>Colombia</td>
<td>8,382</td>
<td>1,8</td>
<td>9,410</td>
<td>2,1</td>
<td>7,340</td>
<td>1,6</td>
</tr>
<tr>
<td>Ethiopia</td>
<td>6,715</td>
<td>1,4</td>
<td>7,105</td>
<td>1,6</td>
<td>6,638</td>
<td>1,4</td>
</tr>
<tr>
<td>Uganda</td>
<td>1,513</td>
<td>0,3</td>
<td>5,860</td>
<td>1,3</td>
<td>2,082</td>
<td>0,5</td>
</tr>
<tr>
<td>Tanzania</td>
<td>335</td>
<td>0,1</td>
<td>0</td>
<td>0,0</td>
<td>1,170</td>
<td>0,3</td>
</tr>
<tr>
<td>Costa Rica</td>
<td>900</td>
<td>0,2</td>
<td>783</td>
<td>0,2</td>
<td>1,105</td>
<td>0,2</td>
</tr>
<tr>
<td>Cameroon</td>
<td>1,848</td>
<td>0,4</td>
<td>1,623</td>
<td>0,4</td>
<td>918</td>
<td>0,2</td>
</tr>
<tr>
<td>Guatemala</td>
<td>205</td>
<td>0,0</td>
<td>365</td>
<td>0,1</td>
<td>652</td>
<td>0,1</td>
</tr>
<tr>
<td>Congo Dem Rep</td>
<td>0</td>
<td>0,0</td>
<td>0</td>
<td>0,0</td>
<td>650</td>
<td>0,1</td>
</tr>
<tr>
<td>Nicaragua</td>
<td>775</td>
<td>0,2</td>
<td>417</td>
<td>0,1</td>
<td>523</td>
<td>0,1</td>
</tr>
<tr>
<td>Madagascar</td>
<td>0</td>
<td>0,0</td>
<td>937</td>
<td>0,2</td>
<td>350</td>
<td>0,1</td>
</tr>
<tr>
<td>Kenya</td>
<td>550</td>
<td>0,1</td>
<td>310</td>
<td>0,1</td>
<td>228</td>
<td>0,0</td>
</tr>
<tr>
<td>Others</td>
<td>19,735</td>
<td>4,2</td>
<td>29,003</td>
<td>6,4</td>
<td>27,207</td>
<td>5,9</td>
</tr>
<tr>
<td>Total all origins</td>
<td>475,297</td>
<td>100,0</td>
<td>453,970</td>
<td>100,0</td>
<td>462,528</td>
<td>100,0</td>
</tr>
</tbody>
</table>

Source: Eurostat

In 2009 Brazil remained by far the most important supplier, with a higher volume. In recent years, India and Vietnam have contested the second place. In 2004 India overtook Vietnam, which became the third supplier. This ranking was maintained until this year. In 2009 Vietnam re-took the second position, swapping places with India. The fourth position in 2009 was again taken by Indonesia and Colombia remained fifth supplier. It seems that the huge fluctuations in import pattern observed previously has levelled off in recent years, at least for the five major suppliers. The fact that Colombia recorded a 22% drop in imports in 2009 is a consequence of the lower crops in that country. Big swings can still be observed among the smaller origins such as Uganda (-64,5%) and Guatemala (+78,5%).

2. FOREIGN TRADE IN ALL FORMS

| Greece: international trade in green, roasted and soluble coffee - in tons - |
|-----------------------------|--------|--------|--------|--------|--------|--------|--------|--------|
| Imports                     | Green  | Green decaf | Roasted | Roasted decaf | Soluble |        |        |        |
| From non-EU origins         | 25.783 | 26.183 | 0      | 3      | 91     | 44     | 6      | 0      | 5.211  | 4.296  |
| From EU origins             | 1.456  | 1.569 | 165    | 119    | 90.974 | 10.400 | 304    | 165    | 3.864  | 4.139  |
| Total                       | 27.238 | 27.752 | 166    | 122    | 9.065  | 10.444 | 309    | 165    | 9.075  | 8.435  |
This table illustrates the high percentage finished coffee imports into Greece. Expressed in green coffee equivalent, the volume of the 2009 finished coffee imports (roasted + soluble) was 1/4\(^{th}\) larger than the green coffee imports. Total coffee imports of all forms into Greece increased marginally (+0.4%) from 62,154 tons green coffee equivalent in 2008 to 62,428 tons in 2009. Greece’s roasted coffee imports (regular + decaffeinated) came from Italy (39.4%), Germany (33.4%) and Portugal (7.4%). In 2009 Côte d’Ivoire (49.9%) and Spain (31.5%) were the main sources for soluble coffee.

3. COFFEE CONSUMPTION

The ICO calculates the consumption of coffee in Greece as follows:

<table>
<thead>
<tr>
<th>Years</th>
<th>Total consumption</th>
<th>Per capita consumption</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>687,436</td>
<td>4.72</td>
</tr>
<tr>
<td>2001</td>
<td>547,851</td>
<td>4.63</td>
</tr>
<tr>
<td>2002</td>
<td>826,549</td>
<td>5.48</td>
</tr>
<tr>
<td>2003</td>
<td>928,563</td>
<td>5.27</td>
</tr>
<tr>
<td>2004</td>
<td>871,045</td>
<td>5.25</td>
</tr>
<tr>
<td>2005</td>
<td>870,119</td>
<td></td>
</tr>
<tr>
<td>2006</td>
<td>856,589</td>
<td></td>
</tr>
<tr>
<td>2007</td>
<td>1,014,597</td>
<td></td>
</tr>
<tr>
<td>2008</td>
<td>978,073</td>
<td></td>
</tr>
<tr>
<td>2009</td>
<td>973,876</td>
<td></td>
</tr>
</tbody>
</table>

Source: ICO; some data revised

4. VAT, EXCISE DUTIES

In Greece, the VAT on roasted and soluble coffee is 11%. There are no excise duties.
1. IMPORTS OF GREEN COFFEE

In 2009 imports of green, not decaffeinated coffee from all sources into Ireland were 2.473 tons (41.208 bags) compared to 3.085 tons (51.412 bags) in 2008. This means that 2009 imports were almost 20% lower in volume than the previous year. Compared to the imports in 2007, the volume in 2009 has been halved.

Close to 90% of the green coffee imported into Ireland arrives through other EU members, mostly the United Kingdom (67%) and Germany (18%). This makes it impossible to determine the original country of export. With this limitation, the following table provides the most important producing country origins in the three most recent years (in 2009 order):

<table>
<thead>
<tr>
<th>Countries of origin</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>bags</td>
<td>%</td>
<td>bags</td>
</tr>
<tr>
<td>Nicaragua</td>
<td>2.473</td>
<td>2.9</td>
<td>3.685</td>
</tr>
<tr>
<td>Indonesia</td>
<td>9.027</td>
<td>10.7</td>
<td>3.620</td>
</tr>
<tr>
<td>Colombia</td>
<td>6.757</td>
<td>8.0</td>
<td>3.185</td>
</tr>
<tr>
<td>Brazil</td>
<td>5.120</td>
<td>6.1</td>
<td>6.468</td>
</tr>
<tr>
<td>Costa Rica</td>
<td>1.578</td>
<td>1.9</td>
<td>630</td>
</tr>
<tr>
<td>Malaysia</td>
<td>0</td>
<td>0.0</td>
<td>0</td>
</tr>
<tr>
<td>Others</td>
<td>59.403</td>
<td>70.4</td>
<td>33.823</td>
</tr>
<tr>
<td>Total all origins</td>
<td>84.358</td>
<td>100.0</td>
<td>51.412</td>
</tr>
</tbody>
</table>

Source: Eurostat

2. FOREIGN TRADE IN ALL FORMS

This table illustrates the high percentage finished coffee imports into Ireland. Expressed in green coffee equivalent, 2009 green coffee imports were only 42% of the volume of the finished product imports (roasted + soluble). Total coffee imports of all forms into Ireland increased from 7.631 tons green coffee equivalent in 2008 to 8.722 tons in 2009 (+14,3%). The vast majority of Irelands soluble coffee imports (almost 90% in 2009) came from the United Kingdom. The Netherlands (5,3%) and Italy (3,7%) supplied most of the remainder. In 2009 the UK represented 78% of Irelands roasted coffee imports. The second largest supplier – at a considerable distance - was Germany (8,5% in 2009).
3. COFFEE CONSUMPTION

The International Coffee Organisation provides the following data on coffee consumption in Ireland:

| Ireland: Total coffee consumption
- in bags - | Ireland: Per capita consumption
- in kg green coffee equivalent - |
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Years</strong></td>
<td><strong>Years</strong></td>
</tr>
<tr>
<td>2000</td>
<td>83.158</td>
</tr>
<tr>
<td>2001</td>
<td>146.240</td>
</tr>
<tr>
<td>2002</td>
<td>136.116</td>
</tr>
<tr>
<td>2003</td>
<td>150.926</td>
</tr>
<tr>
<td>2004</td>
<td>224.743</td>
</tr>
<tr>
<td>2005</td>
<td>222.892</td>
</tr>
<tr>
<td>2006</td>
<td>202.660</td>
</tr>
<tr>
<td>2007</td>
<td>244.346</td>
</tr>
<tr>
<td>2008</td>
<td>115.107</td>
</tr>
<tr>
<td>2009</td>
<td>134.496</td>
</tr>
</tbody>
</table>

Source: ICO

After the large and still unexplained apparent drop in total and per capita consumption in 2008, the 2009 data showed a significant increase, even if the levels of previous years have not been reached.
ITALY

1. IMPORTS OF GREEN COFFEE

According to official data from the National Institute of Statistics (ISTAT), the quantity of green coffee imported into Italy in the year 2009 was 7,484,143 bags (449,049 tons), an increase of 0.12% compared to 2008. This relatively low increase should be ascribed to the reduction of processed coffee exports by 1.29%. The annual data for green coffee imports however show that, for a number of reasons, import activity does not directly result from changes in demand of the coffee processing industry. In order to provide a more accurate and realistic analysis of the activity in this sector it is worthwhile taking into consideration data related to the import and export of coffee in all forms in the last six years.

This comparison shows that the annual growth in the coffee processing sector for the period in consideration is about 2.61%. On the other hand, if movement of all forms of coffee is used as the basis for calculation, within the same period coffee imports have increased by 2.50%, exports by 7.40%.

<table>
<thead>
<tr>
<th>Country of Origin</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brazil</td>
<td>2,428,847</td>
<td>2,330,265</td>
<td>2,408,309</td>
<td>2,555,270</td>
<td>2,622,211</td>
<td>2,632,506</td>
<td>2,629,697</td>
</tr>
<tr>
<td>Vietnam</td>
<td>830,764</td>
<td>902,292</td>
<td>982,050</td>
<td>1,118,287</td>
<td>1,363,381</td>
<td>1,322,467</td>
<td>1,367,306</td>
</tr>
<tr>
<td>India</td>
<td>699,153</td>
<td>844,969</td>
<td>748,934</td>
<td>893,873</td>
<td>943,971</td>
<td>769,871</td>
<td>729,856</td>
</tr>
<tr>
<td>Uganda</td>
<td>339,275</td>
<td>249,554</td>
<td>245,459</td>
<td>146,067</td>
<td>284,722</td>
<td>486,046</td>
<td>548,246</td>
</tr>
<tr>
<td>Indonesia</td>
<td>377,106</td>
<td>371,521</td>
<td>484,097</td>
<td>466,671</td>
<td>325,940</td>
<td>414,546</td>
<td>402,951</td>
</tr>
<tr>
<td>Colombia</td>
<td>246,345</td>
<td>253,460</td>
<td>352,293</td>
<td>399,286</td>
<td>414,546</td>
<td>402,951</td>
<td>214,159</td>
</tr>
<tr>
<td>Guatemala</td>
<td>197,506</td>
<td>209,282</td>
<td>153,635</td>
<td>174,292</td>
<td>183,956</td>
<td>208,262</td>
<td>193,137</td>
</tr>
<tr>
<td>Tanzania</td>
<td>33,331</td>
<td>49,153</td>
<td>95,299</td>
<td>73,174</td>
<td>79,280</td>
<td>79,993</td>
<td>186,111</td>
</tr>
<tr>
<td>Honduras</td>
<td>124,212</td>
<td>123,754</td>
<td>89,880</td>
<td>128,815</td>
<td>128,775</td>
<td>202,079</td>
<td>164,355</td>
</tr>
<tr>
<td>Cameroon</td>
<td>277,270</td>
<td>338,578</td>
<td>299,654</td>
<td>251,930</td>
<td>251,971</td>
<td>135,231</td>
<td>134,898</td>
</tr>
<tr>
<td>Ethiopia</td>
<td>104,803</td>
<td>108,052</td>
<td>141,412</td>
<td>105,468</td>
<td>125,381</td>
<td>135,231</td>
<td>134,898</td>
</tr>
<tr>
<td>Peru</td>
<td>15,002</td>
<td>25,173</td>
<td>38,556</td>
<td>29,448</td>
<td>50,813</td>
<td>84,119</td>
<td>99,291</td>
</tr>
<tr>
<td>Costa Rica</td>
<td>163,232</td>
<td>119,442</td>
<td>101,525</td>
<td>73,606</td>
<td>75,112</td>
<td>76,140</td>
<td>65,356</td>
</tr>
<tr>
<td>Côte d’Ivoire</td>
<td>178,151</td>
<td>173,254</td>
<td>143,407</td>
<td>128,354</td>
<td>114,729</td>
<td>90,842</td>
<td>53,881</td>
</tr>
<tr>
<td>Nicaragua</td>
<td>34,005</td>
<td>40,995</td>
<td>35,735</td>
<td>42,301</td>
<td>56,772</td>
<td>50,163</td>
<td>45,253</td>
</tr>
<tr>
<td>El Salvador</td>
<td>29,227</td>
<td>24,138</td>
<td>39,230</td>
<td>25,215</td>
<td>41,820</td>
<td>33,185</td>
<td>45,045</td>
</tr>
<tr>
<td>Togo</td>
<td>20,413</td>
<td>28,299</td>
<td>36,137</td>
<td>40,758</td>
<td>44,502</td>
<td>50,351</td>
<td>30,157</td>
</tr>
<tr>
<td>Congo</td>
<td>57,906</td>
<td>57,491</td>
<td>24,522</td>
<td>30,109</td>
<td>71,003</td>
<td>61,062</td>
<td>25,147</td>
</tr>
<tr>
<td>Kenya</td>
<td>10,197</td>
<td>8,681</td>
<td>9,398</td>
<td>10,628</td>
<td>10,699</td>
<td>10,212</td>
<td>18,882</td>
</tr>
<tr>
<td>Mexico</td>
<td>10,616</td>
<td>13,966</td>
<td>11,888</td>
<td>13,028</td>
<td>17,234</td>
<td>8,024</td>
<td>17,051</td>
</tr>
<tr>
<td>Dominican Rep.</td>
<td>21,372</td>
<td>21,622</td>
<td>16,682</td>
<td>16,805</td>
<td>19,010</td>
<td>13,516</td>
<td>13,928</td>
</tr>
<tr>
<td>Burundi</td>
<td>3,639</td>
<td>4,689</td>
<td>43,081</td>
<td>40,856</td>
<td>6,490</td>
<td>8,430</td>
<td>13,440</td>
</tr>
<tr>
<td>Haiti</td>
<td>4,581</td>
<td>5,489</td>
<td>3,845</td>
<td>3,760</td>
<td>4,651</td>
<td>3,833</td>
<td>3,856</td>
</tr>
<tr>
<td>Others</td>
<td>108,816</td>
<td>72,357</td>
<td>74,191</td>
<td>99,112</td>
<td>117,764</td>
<td>170,791</td>
<td>127,188</td>
</tr>
<tr>
<td>Total</td>
<td>6,382,094</td>
<td>6,457,506</td>
<td>6,665,051</td>
<td>6,935,480</td>
<td>7,402,623</td>
<td>7,474,879</td>
<td>7,484,143</td>
</tr>
</tbody>
</table>
The data for the year 2009 contained in the above table compared with the previous year show that:
- Brazil, with a slight decrease, maintains with a large margin its position as the number one supplier of coffee for the Italian market.
- Imports from Vietnam have increased; this country has consolidated its position of second supplier of the Italian market;
- Imports from Uganda, Indonesia, Tanzania, Honduras, Kenya and Mexico have shown a sizeable growth;
- Imports from India, Colombia and Congo have decreased considerably;
- In terms of percentage, the origins that in 2009 have shown the greatest improvement within the Italian market are: Uganda, Indonesia and Tanzania.

<table>
<thead>
<tr>
<th>Country</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brazil</td>
<td>38,06</td>
<td>36,09</td>
<td>36,13</td>
<td>36,84</td>
<td>1,49</td>
<td>35,32</td>
<td>35,14</td>
</tr>
<tr>
<td>Vietnam</td>
<td>13,02</td>
<td>13,98</td>
<td>14,74</td>
<td>16,04</td>
<td>0,78</td>
<td>17,69</td>
<td>18,27</td>
</tr>
<tr>
<td>India</td>
<td>10,96</td>
<td>13,09</td>
<td>11,24</td>
<td>12,89</td>
<td>12,75</td>
<td>10,33</td>
<td>9,75</td>
</tr>
<tr>
<td>Uganda</td>
<td>5,32</td>
<td>3,87</td>
<td>3,68</td>
<td>2,10</td>
<td>0,18</td>
<td>6,40</td>
<td>7,32</td>
</tr>
<tr>
<td>Indonesia</td>
<td>5,91</td>
<td>5,76</td>
<td>7,26</td>
<td>6,73</td>
<td>0,19</td>
<td>5,35</td>
<td>6,94</td>
</tr>
<tr>
<td>Colombia</td>
<td>3,86</td>
<td>3,93</td>
<td>5,29</td>
<td>5,76</td>
<td>5,60</td>
<td>5,42</td>
<td>2,86</td>
</tr>
<tr>
<td>Guatemala</td>
<td>3,09</td>
<td>3,24</td>
<td>2,31</td>
<td>2,51</td>
<td>2,49</td>
<td>2,82</td>
<td>2,58</td>
</tr>
<tr>
<td>Cameroon</td>
<td>4,34</td>
<td>5,25</td>
<td>4,50</td>
<td>3,64</td>
<td>3,40</td>
<td>2,72</td>
<td>2,20</td>
</tr>
<tr>
<td>Ethiopia</td>
<td>1,64</td>
<td>1,67</td>
<td>2,12</td>
<td>1,52</td>
<td>1,69</td>
<td>1,83</td>
<td>1,80</td>
</tr>
<tr>
<td>Costa Rica</td>
<td>2,56</td>
<td>1,85</td>
<td>1,52</td>
<td>1,07</td>
<td>1,01</td>
<td>1,02</td>
<td>0,87</td>
</tr>
<tr>
<td>Ivory Coast</td>
<td>2,79</td>
<td>2,69</td>
<td>2,15</td>
<td>1,85</td>
<td>1,55</td>
<td>1,21</td>
<td>0,72</td>
</tr>
<tr>
<td>Others</td>
<td>8,45</td>
<td>8,58</td>
<td>9,06</td>
<td>9,04</td>
<td>9,42</td>
<td>9,89</td>
<td>11,55</td>
</tr>
<tr>
<td>Total</td>
<td>100,00</td>
<td>100,00</td>
<td>100,00</td>
<td>100,00</td>
<td>100,00</td>
<td>100,00</td>
<td>100,00</td>
</tr>
</tbody>
</table>

With regard to the percentage distribution according to groups of coffee, there are significant movements only for “Colombian Milds” which are decreasing by 15,8%; “Brasilian Naturals” coffees maintain substantially their position, “Robusta” imports are growing by 2,8%, Other Milds” by 1,6%.

<table>
<thead>
<tr>
<th>Type</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Colombian Milds</td>
<td>4,59</td>
<td>4,85</td>
<td>6,90</td>
<td>6,99</td>
<td>6,87</td>
<td>6,72</td>
<td>5,66</td>
</tr>
<tr>
<td>Other Milds</td>
<td>20,93</td>
<td>22,58</td>
<td>19,66</td>
<td>21,07</td>
<td>21,20</td>
<td>18,95</td>
<td>19,25</td>
</tr>
<tr>
<td>Brasilian Naturals</td>
<td>40,13</td>
<td>37,96</td>
<td>38,47</td>
<td>38,51</td>
<td>37,43</td>
<td>37,62</td>
<td>37,33</td>
</tr>
<tr>
<td>Robustas</td>
<td>34,35</td>
<td>34,61</td>
<td>34,97</td>
<td>33,43</td>
<td>34,50</td>
<td>36,71</td>
<td>37,76</td>
</tr>
<tr>
<td>Total</td>
<td>100,00</td>
<td>100,00</td>
<td>100,00</td>
<td>100,00</td>
<td>100,00</td>
<td>100,00</td>
<td>100,00</td>
</tr>
</tbody>
</table>

2. FOREIGN TRADE IN ALL FORMS

The year under analysis is characterised by an unusually poor growth of green coffee imports and by the further sizeable expansion of the foreign trade of processed coffee.

As can be seen from the following table the import of green coffee and the export of roasted coffee show a positive trend.

The trade of coffee with countries in the European Union is particularly active.
### Italy: Foreign trade in coffee in all forms

- **in tons**

<table>
<thead>
<tr>
<th></th>
<th>Imports</th>
<th></th>
<th></th>
<th></th>
<th>Exports</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2006</td>
<td>2007</td>
<td>2008</td>
<td>2009</td>
<td>2006</td>
<td>2007</td>
<td>2008</td>
<td>2009</td>
</tr>
<tr>
<td>Green coffee</td>
<td>416.129</td>
<td>444.157</td>
<td>448.630</td>
<td>449.049</td>
<td>5.472</td>
<td>5.950</td>
<td>5.748</td>
<td>5.819</td>
</tr>
<tr>
<td>Green decaffeinated coffee</td>
<td>7367</td>
<td>7.740</td>
<td>7.970</td>
<td>8.078</td>
<td>875</td>
<td>764</td>
<td>827</td>
<td>720</td>
</tr>
<tr>
<td>Roasted decaffeinated coffee</td>
<td>505</td>
<td>440</td>
<td>700</td>
<td>630</td>
<td>2.816</td>
<td>3.177</td>
<td>3.279</td>
<td>3.002</td>
</tr>
<tr>
<td>Coffee Extracts</td>
<td>4.174</td>
<td>4.513</td>
<td>4.841</td>
<td>4.401</td>
<td>445</td>
<td>647</td>
<td>320</td>
<td>606</td>
</tr>
<tr>
<td>Preparations with coffee</td>
<td>1.348</td>
<td>1.616</td>
<td>1.864</td>
<td>2.657</td>
<td>4.634</td>
<td>7.401</td>
<td>6.681</td>
<td>5.958</td>
</tr>
</tbody>
</table>

Exports of roasted coffee, which in recent years has represented the major positive factor of the activity in the Italian coffee sector - since the increase in internal consumption is rather contained - has further increased reaching nearly 2.1 million bags green equivalent.

Thanks to this growth, Italian coffee roasting firms have strengthened their position in the group of major coffee exporters, consolidating the second place held for several years.

### 3. COFFEE CONSUMPTION

In 2009 the sales volume of the total home coffee market in Italy is stable (+0.2%) compared to the previous year.

If the market segmentation is analysed in detail, it has to be pointed out that the segments have different trends: the Moka segment (coffee with caffeine for coffee pot machines – about 70% of total household consumption in volume) is stable whereas the Espresso segment (coffee blends for espresso machines – about 12% of total household consumption in volume), the Beans segment (7% of total household consumption in volume) and the Decaffeinated segment (7% of total household consumption in volume) are decreasing by 1%. Finally, the Pods segment, which reached a share of 3% on the total market, rose by more than 50%.

Total packaged coffee (total market without the instant segment): sales location in percentage by type of client and point of sale (year 2009):

<table>
<thead>
<tr>
<th>Type of Client</th>
<th>%</th>
<th>Type of Sales Outlet</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Large Distributors</td>
<td>50,6</td>
<td>Supermarkets &amp; Hypermarkets</td>
<td>67</td>
</tr>
<tr>
<td>Volunteer Union and Purchasing Groups</td>
<td>49,4</td>
<td>Self Services &amp; Groceries</td>
<td>22</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Discount</td>
<td>11</td>
</tr>
</tbody>
</table>

In the “out of Home” consumption the economic downturn that encourages the switch from foodservice to other low-cost solutions (i.e. vending and/or unconventional point of sales) continues in 2009. Foodservice volume is therefore expected to decrease.

### 4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

In 2009 the average price of the total regular coffee was EUR 8.23/kg and it increased by 3.1% compared to 2008.

The average price of the Moka segment was EUR 7.34/kg and it decreased by 1.4%.

The price of the decaffeinated segment increased slightly compared to the previous year: EUR 9.19/kg (+0.3%); the average price of the Espresso segment decreased by 2.7% to EUR 9.33/kg.

### 5. COMMENTS ON PARTICULAR SUBJECTS

During 2009 the Consorzio Promozione Caffé continued its public relations campaign and communication campaign, aimed at consolidating the positive effects generated throughout the campaign in preceding years. This activity is focused primarily towards consumer reassurance through public relations and communication initiatives targeted at opinion leaders, the media and the world of consumerism.
A large part of the budget was destined to the “Education program on coffee, caffeine and health for the healthcare professionals”, co-financed by ISIC. All these activities will be carried out in 2010.

6. **VAT LEVELS**
   
   Coffee is subject to 20% Value Added Tax. Soluble coffee is subject to 10% Value Added Tax.
1. **IMPORTS OF GREEN COFFEE**

In 2009 imports of green coffee into the Netherlands reached a volume of 3.234.456 bags (194.067 tons), an increase compared to the previous year when 2.776.200 bags (166.572 tons) were imported. The table below shows the most important countries of origin.

<table>
<thead>
<tr>
<th>Countries of origin</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brazil</td>
<td>814.117</td>
<td>1.301.688</td>
</tr>
<tr>
<td>Vietnam</td>
<td>485.205</td>
<td>442.542</td>
</tr>
<tr>
<td>Uganda</td>
<td>198.683</td>
<td>269.785</td>
</tr>
<tr>
<td>Honduras</td>
<td>209.109</td>
<td>268.827</td>
</tr>
<tr>
<td>Peru</td>
<td>260.562</td>
<td>238.745</td>
</tr>
<tr>
<td>Colombia</td>
<td>204.850</td>
<td>133.825</td>
</tr>
<tr>
<td>Kenya</td>
<td>54.689</td>
<td>82.299</td>
</tr>
<tr>
<td>Guatemala</td>
<td>59.091</td>
<td>62.058</td>
</tr>
<tr>
<td>Mexico</td>
<td>18.826</td>
<td>61.806</td>
</tr>
<tr>
<td>Rwanda</td>
<td>22.574</td>
<td>47.455</td>
</tr>
<tr>
<td>Others</td>
<td>448.493</td>
<td>325.425</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>2.776.200</strong></td>
<td><strong>3.234.456</strong></td>
</tr>
</tbody>
</table>

Source: HPA (Central Commodity Board for Arable Products)

The figures in the table above are based upon registration of the origin of green coffee imported for roasting in the Netherlands.

<table>
<thead>
<tr>
<th>Countries of origin</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brazil</td>
<td>29,3</td>
<td>40,2</td>
</tr>
<tr>
<td>Vietnam</td>
<td>17,5</td>
<td>13,7</td>
</tr>
<tr>
<td>Uganda</td>
<td>7,2</td>
<td>8,3</td>
</tr>
<tr>
<td>Honduras</td>
<td>7,5</td>
<td>8,3</td>
</tr>
<tr>
<td>Peru</td>
<td>9,4</td>
<td>7,4</td>
</tr>
<tr>
<td>Colombia</td>
<td>7,4</td>
<td>4,1</td>
</tr>
<tr>
<td>Kenya</td>
<td>2,0</td>
<td>2,5</td>
</tr>
<tr>
<td>Guatemala</td>
<td>2,1</td>
<td>1,9</td>
</tr>
<tr>
<td>Mexico</td>
<td>0,7</td>
<td>1,9</td>
</tr>
<tr>
<td>Rwanda</td>
<td>0,8</td>
<td>1,5</td>
</tr>
<tr>
<td>Others</td>
<td>16,2</td>
<td>10,1</td>
</tr>
</tbody>
</table>

Source: HPA

The figures in the tables above show that:
1. Brazil remains the main supplier of the Netherlands. Imports are up compared to 2008 with a total share of imports reaching 38,9% or 1.301.688 bags.
2. In 2009 imports from Uganda are up by 3,3%, totalling 353.118 bags.
3. The imports from Honduras increase with 59.718 bags; whilst imports from Vietnam are down with a total of 42.663 bags.
4. Mexico and Rwanda joined the top ten with 61.806 and 47.455 bags imported in 2009 respectively.
The Netherlands: breakdown of net green coffee imports by type of coffee - in % -

<table>
<thead>
<tr>
<th>Type of coffee</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arabicas</td>
<td>67</td>
<td>66</td>
<td>73</td>
</tr>
<tr>
<td>Colombian Milds</td>
<td>14</td>
<td>12</td>
<td>8</td>
</tr>
<tr>
<td>Other Milds</td>
<td>22</td>
<td>22</td>
<td>24</td>
</tr>
<tr>
<td>Brazilian Naturals</td>
<td>31</td>
<td>32</td>
<td>41</td>
</tr>
<tr>
<td>Robustas</td>
<td>28</td>
<td>29</td>
<td>25</td>
</tr>
<tr>
<td>Not defined</td>
<td>5</td>
<td>5</td>
<td>2</td>
</tr>
</tbody>
</table>

Source: HPA

2. FOREIGN TRADE IN COFFEE IN ALL FORMS

<table>
<thead>
<tr>
<th>Forms of coffee</th>
<th>Imports</th>
<th>Exports</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2008</td>
<td>2009</td>
</tr>
<tr>
<td></td>
<td>2008</td>
<td>2009</td>
</tr>
<tr>
<td>Green coffee (including decaffeinated)</td>
<td>166.572.000</td>
<td>194.067.335</td>
</tr>
<tr>
<td></td>
<td>6.989.341</td>
<td>6.635.587</td>
</tr>
<tr>
<td>Roasted coffee (including decaffeinated)</td>
<td>37.381.100</td>
<td>43.266.000</td>
</tr>
<tr>
<td></td>
<td>33.380.101</td>
<td>38.876.057</td>
</tr>
</tbody>
</table>

Figures imports green coffee (including decaffeinated) from HPA, other figures from CBS

Source: HPA and CBS (Central Bureau for Statistics)

3. COFFEE CONSUMPTION

The calculation of the consumption of coffee is based on the quantity of roasted coffee delivered by the roasting industry for domestic consumption, plus the imports of roasted coffee. On this basis total consumption in 2009 reached a volume of 118.197 tons, compared to 117.113 tons in 2008. The average annual per capita consumption in 2009 was 7,1 kg or 148 litres, compared to 7,0 kg or 147 litres in 2008. The index of the coffee deliveries shows the following trend:

<table>
<thead>
<tr>
<th>Total sales of roasted coffee</th>
<th>x 1000 kg</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>1970</td>
<td>77,9</td>
<td>100</td>
</tr>
<tr>
<td>1975</td>
<td>93,3</td>
<td>120</td>
</tr>
<tr>
<td>1980</td>
<td>103,2</td>
<td>132</td>
</tr>
<tr>
<td>1985</td>
<td>114,7</td>
<td>147</td>
</tr>
<tr>
<td>1990</td>
<td>125,0</td>
<td>160</td>
</tr>
<tr>
<td>1995</td>
<td>121,5</td>
<td>156</td>
</tr>
<tr>
<td>2000</td>
<td>116,4</td>
<td>149</td>
</tr>
<tr>
<td>2005</td>
<td>110,1</td>
<td>141</td>
</tr>
<tr>
<td>2006</td>
<td>110,2</td>
<td>142</td>
</tr>
<tr>
<td>2007</td>
<td>113,6</td>
<td>146</td>
</tr>
<tr>
<td>2008</td>
<td>117,1</td>
<td>150</td>
</tr>
<tr>
<td>2009</td>
<td>118,2</td>
<td>152</td>
</tr>
</tbody>
</table>

Source: CBS, HPA and private estimates

<table>
<thead>
<tr>
<th>Per capita coffee consumption in the Netherlands</th>
<th>Kg</th>
<th>Litre</th>
<th>Cups</th>
</tr>
</thead>
<tbody>
<tr>
<td>1970</td>
<td>5,6</td>
<td>117</td>
<td>2,6</td>
</tr>
<tr>
<td>1975</td>
<td>6,8</td>
<td>142</td>
<td>3,1</td>
</tr>
<tr>
<td>1980</td>
<td>7,3</td>
<td>15</td>
<td>3,3</td>
</tr>
<tr>
<td>1985</td>
<td>7,8</td>
<td>163</td>
<td>3,6</td>
</tr>
<tr>
<td>1990</td>
<td>8,4</td>
<td>174</td>
<td>3,8</td>
</tr>
<tr>
<td>1995</td>
<td>7,9</td>
<td>164</td>
<td>3,6</td>
</tr>
</tbody>
</table>
### Coffee and Tea Information Bureau

Each year the Netherlands Coffee and Tea Information Bureau answers a large number of questions on coffee and tea from consumers, students, and companies. Moreover, information material, such as brochures, posters and CD-ROMs can be ordered by phone, e-mail or via the website. In 2009 the website [www.koffiethee.nl](http://www.koffiethee.nl) was replaced by two new websites [www.koffie.info](http://www.koffie.info) and [www.thee.info](http://www.thee.info). These websites provide ample information about history, production and the processing of coffee and tea. Also they contain information on health and sustainability.

#### Information Bureau on Coffee and Health

In 2009 the association continued its activities in the field of the ICO/Health Care Professions Coffee Education Programme. Some of the Information Bureau’s main activities in 2009 include the distribution of the booklet ‘Coffee Stomach, Intestines and Liver’. Also the Information Bureau participated with a stand at two health congresses. Objective and scientifically based information on coffee and health can be found on the website [www.koffiegezondheid.nl](http://www.koffiegezondheid.nl). Primary target audiences of this campaign are general practitioners, dieticians, nutritionists, academic specialists and medical media.

### CUSTOMS DUTY AND OTHER IMPORT DUTIES

The import duties are conform EU rates. There are no additional taxes on roasted coffee or soluble coffee in the Netherlands, except 6% VAT.
6. IMPORTS OF GREEN COFFEE

In 2009 Norway imported 572.943 bags (34.377 tons) of not-decaffeinated green coffee, a marginal increase of 0.1% compared to the 572.262 bags (34.336 tons) imported in 2008.

The top-three suppliers remained unchanged, even though volumes from number two, Colombia, dropped with 22%. Mexico took fourth place, with a large increase in volume (+82%). Kenya completed the top-five with a 30% increase in volume.

<table>
<thead>
<tr>
<th>Norway: Imports of not-decaffeinated green coffee - in bags -</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brazil</td>
<td>294,826</td>
<td>262,109</td>
<td>267,848</td>
</tr>
<tr>
<td>Colombia</td>
<td>172,577</td>
<td>139,328</td>
<td>108,705</td>
</tr>
<tr>
<td>Guatemala</td>
<td>69,536</td>
<td>69,236</td>
<td>58,439</td>
</tr>
<tr>
<td>Mexico</td>
<td>13,196</td>
<td>19,758</td>
<td>11,986</td>
</tr>
<tr>
<td>Kenya</td>
<td>26,674</td>
<td>25,602</td>
<td>33,134</td>
</tr>
<tr>
<td>Peru</td>
<td>8,300</td>
<td>9,202</td>
<td>17,179</td>
</tr>
<tr>
<td>Honduras</td>
<td>6,678</td>
<td>1,958</td>
<td>11,986</td>
</tr>
<tr>
<td>India</td>
<td>18,198</td>
<td>12,210</td>
<td>11,154</td>
</tr>
<tr>
<td>Vietnam</td>
<td>5,964</td>
<td>4,404</td>
<td>5,991</td>
</tr>
<tr>
<td>Tanzania</td>
<td>4,453</td>
<td>4,464</td>
<td>4,990</td>
</tr>
<tr>
<td>Nicaragua</td>
<td>4,113</td>
<td>6,300</td>
<td>4,167</td>
</tr>
<tr>
<td>El Salvador</td>
<td>173</td>
<td>175</td>
<td>3,233</td>
</tr>
<tr>
<td>Indonesia</td>
<td>4,043</td>
<td>4,367</td>
<td>3,156</td>
</tr>
<tr>
<td>Ethiopia</td>
<td>8,686</td>
<td>9,976</td>
<td>2,055</td>
</tr>
<tr>
<td>Uganda</td>
<td>0</td>
<td>0</td>
<td>969</td>
</tr>
<tr>
<td>Others</td>
<td>3,380</td>
<td>2,783</td>
<td>3,991</td>
</tr>
<tr>
<td>Total all origins</td>
<td>640,798</td>
<td>572,262</td>
<td>572,943</td>
</tr>
</tbody>
</table>

Source: Statistics Norway

7. FOREIGN TRADE IN ALL FORMS

In 2009 imports of not-decaffeinated green coffee were 34.377 tons, virtually unchanged (+0,1%) compared to 2008. Imports of decaffeinated green coffee dropped from 461 to 286 tons (-38%).

The imports of roasted, not decaffeinated coffee was quite stable. Together with decaffeinated roasted coffee, imports of all roasted coffee increased by 6.7%.

The most important suppliers of not-decaffeinated roasted coffee were Sweden (58,1%), the Netherlands (12,4%), Italy (9,0%), Switzerland (5,5%) and Germany (4,0%).

Imports of instant coffee were slightly higher (+2,1%). Switzerland remained by far the most important supplier with 35,4%, followed by the Netherlands (24,9%), and Germany (9,4%).

<table>
<thead>
<tr>
<th>Norway: Foreign trade in coffee - in tons -</th>
<th>Imports</th>
<th>Exports</th>
</tr>
</thead>
<tbody>
<tr>
<td>Forms of coffee</td>
<td>2007</td>
<td>2008</td>
</tr>
<tr>
<td>green coffee</td>
<td>38,448</td>
<td>34,336</td>
</tr>
<tr>
<td>green coffee, decaf</td>
<td>237</td>
<td>461</td>
</tr>
<tr>
<td>green coffee, total</td>
<td>38,685</td>
<td>34,797</td>
</tr>
<tr>
<td>roasted coffee</td>
<td>3,220</td>
<td>3,387</td>
</tr>
<tr>
<td>roasted coffee, decaf</td>
<td>39</td>
<td>22</td>
</tr>
</tbody>
</table>

Source: Statistics Norway
8. COFFEE CONSUMPTION

The International Coffee Organisation provides the following data on coffee consumption in Norway:

<table>
<thead>
<tr>
<th>Norway: Total coffee consumption - in bags -</th>
<th>Norway: Per capita consumption - in kg green coffee equivalent -</th>
</tr>
</thead>
<tbody>
<tr>
<td>Years</td>
<td>Years</td>
</tr>
<tr>
<td>2000            657.201</td>
<td>2005            9.61</td>
</tr>
<tr>
<td>2001            709.939</td>
<td>2006            9.25</td>
</tr>
<tr>
<td>2002            692.248</td>
<td>2007            9.81</td>
</tr>
<tr>
<td>2004            708.938</td>
<td>2009            9.00</td>
</tr>
<tr>
<td>2005            743.416</td>
<td></td>
</tr>
<tr>
<td>2006            721.267</td>
<td></td>
</tr>
<tr>
<td>2007            771.422</td>
<td></td>
</tr>
<tr>
<td>2008            714.560</td>
<td></td>
</tr>
<tr>
<td>2009            715.224</td>
<td></td>
</tr>
</tbody>
</table>

Source: ICO

9. ASSOCIATION MEMBERSHIP

The motto of the Norwegian Coffee Association (www.kaffe.no) is: 46 years in the business for good coffee. Its main features include:

- An information centre for coffee, serving consumers, catering trade and members. This was opened in 1962, being the first one of this type in a coffee consuming country
- Quality standards for coffee and coffee brewing
- Coffee Brewer Certification Programme since 1976

Members represent 98% of the coffee roasted in Norway and 90% of the coffee consumed in Norway.

The association is composed of:
- Coffee importers / roasters: 13
- Coffee agents: 1
- Importers of approved brewing equipment: 16
- Associate members (companies related to the coffee business like shipping, transport and packaging): 23

10. VAT AND DUTIES

Data supplied by the Norwegian Board of Customs and Excise (as at 30th of April 2009):

Roasted and green coffee imported to Norway are charged with a Food production fee (Foodstuffs Duty – FSD) as follows: 1,14% + 14% value added tax (VAT)

Instant and Liquid coffee is charged with a Food production fee (Foodstuffs Duty – FSD) as follows: 0,71% + 14% value added tax (VAT)
1. IMPORTS OF GREEN COFFEE

Portuguese imports of green not-decaffeinated coffee from all sources in 2009 were 41.983 tons (699.715 bags), compared to 41.782 tons (696.358 bags) in 2008. This is a marginal increase of 0,5%. The fifteen major suppliers were (ranked in order of 2009 imports):

<table>
<thead>
<tr>
<th>Countries of origin</th>
<th>2007</th>
<th>%</th>
<th>2008</th>
<th>%</th>
<th>2009</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vietnam</td>
<td>107,773</td>
<td>15,0</td>
<td>101,832</td>
<td>14,6</td>
<td>119,760</td>
<td>17,1</td>
</tr>
<tr>
<td>Brazil</td>
<td>121,695</td>
<td>17,0</td>
<td>95,017</td>
<td>13,6</td>
<td>98,158</td>
<td>14,0</td>
</tr>
<tr>
<td>Uganda</td>
<td>67,328</td>
<td>9,4</td>
<td>80,825</td>
<td>11,6</td>
<td>89,877</td>
<td>12,8</td>
</tr>
<tr>
<td>Cameroon</td>
<td>62,622</td>
<td>8,7</td>
<td>61,365</td>
<td>8,8</td>
<td>77,465</td>
<td>11,1</td>
</tr>
<tr>
<td>India</td>
<td>58,645</td>
<td>8,2</td>
<td>52,920</td>
<td>7,6</td>
<td>48,798</td>
<td>7,0</td>
</tr>
<tr>
<td>Honduras</td>
<td>45,985</td>
<td>6,4</td>
<td>48,362</td>
<td>6,9</td>
<td>47,975</td>
<td>6,9</td>
</tr>
<tr>
<td>Côte d’Ivoire</td>
<td>63,498</td>
<td>8,9</td>
<td>38,112</td>
<td>5,5</td>
<td>26,593</td>
<td>3,8</td>
</tr>
<tr>
<td>Indonesia</td>
<td>20,417</td>
<td>2,8</td>
<td>14,968</td>
<td>2,1</td>
<td>25,300</td>
<td>3,6</td>
</tr>
<tr>
<td>Colombia</td>
<td>43,728</td>
<td>6,1</td>
<td>36,060</td>
<td>5,2</td>
<td>22,830</td>
<td>3,3</td>
</tr>
<tr>
<td>Costa Rica</td>
<td>21,107</td>
<td>2,9</td>
<td>34,055</td>
<td>4,9</td>
<td>22,363</td>
<td>3,2</td>
</tr>
<tr>
<td>Guatemala</td>
<td>22,528</td>
<td>3,1</td>
<td>25,213</td>
<td>3,6</td>
<td>20,933</td>
<td>2,9</td>
</tr>
<tr>
<td>Laos</td>
<td>12,060</td>
<td>1,7</td>
<td>22,153</td>
<td>3,2</td>
<td>15,175</td>
<td>2,2</td>
</tr>
<tr>
<td>Nicaragua</td>
<td>12,025</td>
<td>1,7</td>
<td>18,317</td>
<td>2,6</td>
<td>14,695</td>
<td>2,1</td>
</tr>
<tr>
<td>Timor-Leste</td>
<td>1,053</td>
<td>0,1</td>
<td>3,760</td>
<td>0,5</td>
<td>7,180</td>
<td>1,0</td>
</tr>
<tr>
<td>Tanzania</td>
<td>1,900</td>
<td>0,3</td>
<td>1,772</td>
<td>0,3</td>
<td>5,520</td>
<td>0,8</td>
</tr>
<tr>
<td>Others</td>
<td>252,335</td>
<td>35,2</td>
<td>256,038</td>
<td>36,8</td>
<td>217,682</td>
<td>31,1</td>
</tr>
<tr>
<td>Total all origins</td>
<td>716,383</td>
<td>100,0</td>
<td>696,358</td>
<td>100,0</td>
<td>699,715</td>
<td>100,0</td>
</tr>
</tbody>
</table>

Source: Eurostat

In 2009 Vietnam, Brazil, Uganda and Cameroon retained their position as the four biggest suppliers. All four increased their volume and share in Portuguese imports. India completed the top-five, retaining its position of the previous year, albeit with a somewhat lower import volume (-7,8%) and import share (- 0,6 percentage points). Imports from Côte d’Ivoire dropped with 30%, those from Indonesia increased with close to 70%.

2. FOREIGN TRADE

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>From non-EU origins</td>
<td>39,644</td>
<td>40,203</td>
<td>57</td>
<td>0</td>
<td>710</td>
<td>950</td>
<td>107</td>
<td>132</td>
</tr>
<tr>
<td>From EU origins</td>
<td>2,138</td>
<td>1,780</td>
<td>1,474</td>
<td>2,043</td>
<td>4,354</td>
<td>3,698</td>
<td>177</td>
<td>178</td>
</tr>
<tr>
<td>Total</td>
<td>41,782</td>
<td>41,983</td>
<td>1,530</td>
<td>2,043</td>
<td>5,064</td>
<td>4,648</td>
<td>284</td>
<td>310</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>To non-EU destinations</td>
<td>59</td>
<td>75</td>
<td>0</td>
<td>0</td>
<td>736</td>
<td>809</td>
<td>15</td>
<td>28</td>
</tr>
<tr>
<td>To EU destinations</td>
<td>20</td>
<td>22</td>
<td>0</td>
<td>0</td>
<td>5,735</td>
<td>6,398</td>
<td>555</td>
<td>541</td>
</tr>
<tr>
<td>Total</td>
<td>78</td>
<td>96</td>
<td>0</td>
<td>0</td>
<td>6,471</td>
<td>7,207</td>
<td>570</td>
<td>569</td>
</tr>
</tbody>
</table>

Source: Eurostat
The pattern of imports and exports of the various forms of coffee has been relatively stable in the last two years. In 2009 imports of roasted non-decaf coffee dropped with 8% and exports increased with 11%. Imports of soluble coffee deceased with 4.8% and exports increased with 42%, albeit on a modest volume. On the import side, for decaffeinated green coffee the main source by far was Germany (70.1% in 2009), followed by Spain (29.2%). In 2009 the main sources of roasted coffee (incl. decaffeinated) were Italy (36.4%), Spain (22.4%), Switzerland (21.4%) and Germany (16.9%). The main sources for imported coffee extracts in 2009 were Spain (50.6%), the United Kingdom (32.7%) and France (11.1%). Spain was by far the most important export destination for roasted coffee (incl. decaffeinated) with 61.3% of the total volume, followed by Greece (10.2%) and Germany (6.5%).

3. COFFEE CONSUMPTION

The International Coffee Organization provides the following data on coffee consumption in Portugal:

<table>
<thead>
<tr>
<th>Portugal: Total coffee consumption</th>
<th>Portugal: Per capita consumption</th>
</tr>
</thead>
<tbody>
<tr>
<td>- in bags -</td>
<td>- in kg green coffee equivalent -</td>
</tr>
<tr>
<td>Years</td>
<td>Total consumption</td>
</tr>
<tr>
<td>2000</td>
<td>646.394</td>
</tr>
<tr>
<td>2001</td>
<td>745.496</td>
</tr>
<tr>
<td>2002</td>
<td>719.582</td>
</tr>
<tr>
<td>2003</td>
<td>657.369</td>
</tr>
<tr>
<td>2004</td>
<td>685.402</td>
</tr>
<tr>
<td>2005</td>
<td>655.544</td>
</tr>
<tr>
<td>2006</td>
<td>671.447</td>
</tr>
<tr>
<td>2007</td>
<td>716.861</td>
</tr>
<tr>
<td>2008</td>
<td>691.735</td>
</tr>
<tr>
<td>2009</td>
<td>721.363</td>
</tr>
</tbody>
</table>

Source: ICO

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

Based on ICO data, the development of retail prices for roasted coffee in recent years was as follows:

| Portugal: Retail prices for roasted coffee | Portugal: Per capita consumption |
| - EUR/kilo -                              | - in kg green coffee equivalent -|
| 2000                                       | 9,44                               | 2005       | 3,73        |
| 2001                                       | 9,45                               | 2006       | 3,80        |
| 2002                                       | 8,98                               | 2007       | 4,04        |
| 2003                                       | 8,88                               | 2008       | 3,89        |
| 2004                                       | 8,59                               | 2009       | 4,05        |
| 2005                                       | 8,54                               |            |             |
| 2006                                       | 8,32                               |            |             |
| 2007                                       | 8,23                               |            |             |
| 2008                                       | 8,58                               |            |             |
| 2009                                       | 8,44                               |            |             |

Source: ICO. The original dollar values have been converted to Euro using the European Central Bank (ECB) reference exchange rate annual averages

7. EXCISE DUTIES AND VAT LEVEL

The value-added tax for roasted coffee and for substitutes and mixtures of coffee, roasted in beans or powdered: is 13%. The value-added tax for soluble coffee is 21%. There are no excise duties for coffee.
1. **IMPORTS OF GREEN COFFEE**

In 2009 Spain imported 4,252,616 bags of green coffee (255,157 tons) which represents an approximate 1% drop compared to the previous year. In year 2008 a total volume of 257,061 tons was imported.

<table>
<thead>
<tr>
<th>Year</th>
<th>Volume</th>
</tr>
</thead>
<tbody>
<tr>
<td>1996</td>
<td>3,270,741</td>
</tr>
<tr>
<td>1997</td>
<td>3,490,161</td>
</tr>
<tr>
<td>1998</td>
<td>3,483,274</td>
</tr>
<tr>
<td>1999</td>
<td>3,633,701</td>
</tr>
<tr>
<td>2000</td>
<td>3,511,108</td>
</tr>
<tr>
<td>2001</td>
<td>3,772,666</td>
</tr>
<tr>
<td>2002</td>
<td>3,681,934</td>
</tr>
<tr>
<td>2003</td>
<td>3,785,850</td>
</tr>
<tr>
<td>2004</td>
<td>3,770,856</td>
</tr>
<tr>
<td>2005</td>
<td>4,020,600</td>
</tr>
<tr>
<td>2006</td>
<td>4,023,116</td>
</tr>
<tr>
<td>2007</td>
<td>4,370,450</td>
</tr>
<tr>
<td>2008</td>
<td>4,284,350</td>
</tr>
<tr>
<td>2009</td>
<td>4,252,616</td>
</tr>
</tbody>
</table>

Source: Spanish Coffee Federation

The main suppliers were:

<table>
<thead>
<tr>
<th>Countries of origin</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vietnam</td>
<td>1,577,550</td>
<td>1,758,083</td>
<td>1,549,168</td>
<td>1,578,233</td>
</tr>
<tr>
<td>Brazil</td>
<td>738,720</td>
<td>860,183</td>
<td>992,933</td>
<td>907,283</td>
</tr>
<tr>
<td>Uganda</td>
<td>228,170</td>
<td>256,000</td>
<td>309,016</td>
<td>297,250</td>
</tr>
<tr>
<td>Colombia</td>
<td>288,050</td>
<td>319,116</td>
<td>323,650</td>
<td>231,066</td>
</tr>
<tr>
<td>Côte d’Ivoire</td>
<td>208,050</td>
<td>215,316</td>
<td>127,066</td>
<td>148,116</td>
</tr>
<tr>
<td>India</td>
<td>161,230</td>
<td>171,183</td>
<td>164,600</td>
<td>115,250</td>
</tr>
<tr>
<td>Germany</td>
<td>252,630</td>
<td>209,583</td>
<td>186,733</td>
<td>280,983</td>
</tr>
<tr>
<td>Honduras</td>
<td>77,280</td>
<td>79,916</td>
<td>107,100</td>
<td>65,116</td>
</tr>
<tr>
<td>Nicaragua</td>
<td>91,780</td>
<td>103,016</td>
<td>97,566</td>
<td>98,466</td>
</tr>
<tr>
<td>Peru</td>
<td>25,083</td>
<td>47,850</td>
<td>62,666</td>
<td>31,349</td>
</tr>
<tr>
<td>Others</td>
<td>306,486</td>
<td>350,204</td>
<td>363,850</td>
<td>499,504</td>
</tr>
<tr>
<td>Total</td>
<td>4,023,116</td>
<td>4,023,116</td>
<td>4,284,350</td>
<td>4,252,616</td>
</tr>
</tbody>
</table>

Source: Spanish Coffee Federation

Since 2000 Vietnam is Spain’s main supplier representing approximately 40% of total imports, therefore Spain’s coffee imports are mainly made of robusta beans representing 60% of total imports. This figure is partially explained by the fact that Spain is an important base for soluble coffee production in Europe. Up to an estimated 30% of green coffee imports are absorbed by the soluble coffee industry with a considerable share of its production is being exported to other EU countries.

As for Arabica green coffee imports, in general they have experienced a slight drop (3.61%), even though Brazil still accounts for 21.33% of total imports.

In percentages, the main suppliers to Spain in recent years have been as follows:
Spain: Percentage distribution of green coffee imports by main sources

<table>
<thead>
<tr>
<th>Countries of origin</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vietnam</td>
<td>25,4</td>
<td>34,29</td>
<td>35,5</td>
<td>39,21</td>
<td>40,23</td>
<td>36,16</td>
<td>37,11</td>
</tr>
<tr>
<td>Brazil</td>
<td>22,3</td>
<td>17,59</td>
<td>18,9</td>
<td>18,36</td>
<td>19,68</td>
<td>23,18</td>
<td>21,33</td>
</tr>
<tr>
<td>Uganda</td>
<td>13,1</td>
<td>9,34</td>
<td>8,1</td>
<td>5,67</td>
<td>5,86</td>
<td>7,21</td>
<td>6,99</td>
</tr>
<tr>
<td>Colombia</td>
<td>7,3</td>
<td>6,35</td>
<td>5,9</td>
<td>7,16</td>
<td>7,30</td>
<td>7,55</td>
<td>5,43</td>
</tr>
<tr>
<td>Côte d’Ivoire</td>
<td>6,2</td>
<td>6,12</td>
<td>7,7</td>
<td>5,17</td>
<td>4,93</td>
<td>2,97</td>
<td>3,48</td>
</tr>
<tr>
<td>India</td>
<td>n.a</td>
<td>6,15</td>
<td>4,3</td>
<td>4,01</td>
<td>3,92</td>
<td>3,84</td>
<td>2,71</td>
</tr>
<tr>
<td>Germany</td>
<td>n.a</td>
<td>3,44</td>
<td>5,4</td>
<td>6,28</td>
<td>4,80</td>
<td>4,36</td>
<td>6,61</td>
</tr>
<tr>
<td>Honduras</td>
<td>n.a</td>
<td>2,35</td>
<td>1,9</td>
<td>1,92</td>
<td>1,83</td>
<td>2,50</td>
<td>1,53</td>
</tr>
<tr>
<td>Indonesia</td>
<td>n.a</td>
<td>2,21</td>
<td>2,8</td>
<td>2,28</td>
<td>0,70</td>
<td>0,86</td>
<td>4,65</td>
</tr>
<tr>
<td>Nicaragua</td>
<td>n.a</td>
<td>3,02</td>
<td>2,1</td>
<td>2,20</td>
<td>2,36</td>
<td>2,28</td>
<td>2,32</td>
</tr>
<tr>
<td>Others</td>
<td>25,7</td>
<td>9,14</td>
<td>7,4</td>
<td>7,73</td>
<td>8,41</td>
<td>9,09</td>
<td>7,84</td>
</tr>
</tbody>
</table>

Source: Spanish Coffee Federation

Spain: Percentage distribution of green coffee imports by types of coffee

<table>
<thead>
<tr>
<th>Types of coffee</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arabicas</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Colombian Milds</td>
<td>7,74</td>
<td>6,72</td>
<td>6,45</td>
<td>8,99</td>
<td>7,78</td>
<td>7,99</td>
<td>6,10</td>
</tr>
<tr>
<td>2. Other Milds</td>
<td>13,08</td>
<td>12,21</td>
<td>8,76</td>
<td>6,73</td>
<td>9,17</td>
<td>8,72</td>
<td>8,70</td>
</tr>
<tr>
<td>Robustas</td>
<td>54,51</td>
<td>60,78</td>
<td>61,12</td>
<td>60,82</td>
<td>59,61</td>
<td>60,41</td>
<td>64,02</td>
</tr>
<tr>
<td>Others</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Source: Spanish Coffee Federation

2. FOREIGN TRADE IN COFFEE IN ALL FORMS

<table>
<thead>
<tr>
<th>Forms of coffee</th>
<th>Imports</th>
<th>Exports</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2007</td>
<td>2008</td>
</tr>
<tr>
<td>Green coffee</td>
<td>262.227</td>
<td>257.061</td>
</tr>
<tr>
<td>Roasted</td>
<td>15.211</td>
<td>16.548</td>
</tr>
<tr>
<td>Soluble</td>
<td>6.318</td>
<td>8.159</td>
</tr>
</tbody>
</table>

During year 2009 green coffee imports have fallen by 0,74%, slightly less than in 2008, a contrast to previous years with imports continuously growing up until 2008. Roasted coffee imports have remained virtually constant during the past years, having grown during year 2009 by 5,38%. In addition, soluble imports have fallen by nearly 1% when in 2008 they rose by 29%.

As for green coffee exports, during 2009 they have experienced a substantial increase (48,5%), reaching the highest volume of exports ever recorded. On the other hand, roasted coffee exports have experienced for a second year a sharp fall of 19%, following a 36,60% growth in 2007. As for soluble coffee, exports have dropped slightly by 2,71%.
3. COFFEE CONSUMPTION

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Home consumption</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Roasted</td>
<td>63.600</td>
<td>64.300</td>
<td>63.722</td>
</tr>
<tr>
<td>- Soluble</td>
<td>10.200</td>
<td>10.300</td>
<td>10.286</td>
</tr>
<tr>
<td><strong>Food service</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Roasted</td>
<td>61.500</td>
<td>65.284</td>
<td>62.770</td>
</tr>
<tr>
<td>- Soluble</td>
<td>1.920</td>
<td>2.337</td>
<td>2.020</td>
</tr>
<tr>
<td><strong>Green coffee equivalent</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Roasted</td>
<td>146.367</td>
<td>151.613</td>
<td>147.996</td>
</tr>
<tr>
<td>- Soluble</td>
<td>30.300</td>
<td>31.593</td>
<td>30.765</td>
</tr>
<tr>
<td><strong>Total Green coffee equivalent</strong></td>
<td>176.667</td>
<td>183.206</td>
<td>178.761</td>
</tr>
</tbody>
</table>

Even though green coffee imports have risen during the past years (although they experience a slight drop since 2008), coffee consumption has remained stable at around 4.00 kg per person per year. Higher green coffee imports respond to stocks increase by roasters who foresee further rises in green coffee prices.

Within the Spanish coffee market (always in green coffee equivalent), there is a slight drop during 2009, affected of course by the general economic situation but fortunately, not as much as other food and drink manufactured products. There is an approximate 1% drop in home consumption roasted coffee and a 3.85% fall in out of home consumption. On the contrary soluble coffee has experienced, in out of home consumption, a much sharper drop (13.56%).

It is important to stress that it is only since June 2007 that the Ministry is providing official and consistent out of home consumption data, as up until then the line item included coffee and tea. In any case, the current market distribution assigns 56.10% of the market share to home consumption and the remaining 43.90% to the food service industry.

Concerning roasted and soluble coffee market distribution, roasted coffee (in green coffee equivalent) accounts for 82.79% of the market, whilst soluble coffee accounts for the remaining 17.21%, following an identical trend to previous years.

As for different forms of consuming coffee, when at home, blended coffee (natural & torrefacto) accounts for 41.20% of total consumption, whilst natural coffee (no added sugars) account for 36.60% of the market share. When enjoying a cup of coffee out of home Spaniards also prefer their coffee blended with torrefacto (44.57%) or otherwise natural (40.43%). Finally it is interesting to note the steady increase of decaffeinated ground roasted coffee figures, representing approximately 20% of total home roasted coffee consumption, and 13.5% of food service industry consumption.

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

Retail coffee prices for roasted coffee have increased by 5.75% during year 2009, as for soluble retail prices these have remained constant. Source: Spanish Ministry of Agriculture

5. INFORMATION ON ASSOCIATION MEMBERSHIP

The Spanish Coffee Federation, FEC, has achieved a solid position as the federated body of all three national associations within the coffee industry, representing approximately 90% of the total Spanish coffee production and distribution.

- Spanish Coffee Roasters Association. AETC – Represents 85% of the industry
- Spanish Green coffee Association. ANCAFE – Represents 92% of the industry
- Spanish Soluble coffee Manufacturers Assn. AEFCS – Represents 100% of the industry
6. STATUS NATIONAL COFFEE AND HEALTH PROGRAMME

The Spanish Coffee Federation joined, in January 2008, the ICO Health Care Professions Coffee Education Programme (HCP-CEP) so as to provide health care professionals with sound information regarding coffee and health. Doctors generally tend to recommend their patients to reduce their coffee intake regardless of what illness may ail them, normally because of lack of information. Our target is to prove with scientific evidence that coffee can be part of a healthy diet.

Up until now FEC has set up an Advisory Board composed of four members (GP, Nutritionist, Dietician & Neurologist) and two collaborators (Cardiology), has published up to 10 quarterly newsletters to be distributed by email to a medical database, has participated in several seminars on coffee and neurology, and has participated in congresses organised by the Spanish Neurology Society’s (SEN), the Spanish Primary Attention Association (SEMERGEN) and the Spanish Family and Community Medicine Society (SEMFYC) providing information on coffee and health.

FEC also sponsors since 2008 a research grant in collaboration with the Spanish Nutrition Foundation (III edition) and has recently published several articles (Coffee & Alzheimer/Parkinson/Hydration/Cancer/Diabetes/Liver function) in “Medicina Clinica” and “Atención Primaria” edited by SEMFYC with over 10,000 members.

We are currently working on a “coffee and a healthy lifestyle” monographic, endorsed by SEMFYC and with an introduction by the Spanish Nutrition Foundation.

Our new web site www.cicas.es (Coffee and Health Information Centre) provides health care professionals with scientifically based information on coffee and health.

7. DUTIES AND VAT LEVELS

Regarding fiscal matters, there are no excise duties imposed on coffee in Spain. During 2009 the VAT rate, which for coffee is 7%, has not changed, but in July 2010 it was increased to 8%.
1. **IMPORTS OF GREEN COFFEE**

According to Statistics Sweden, the import of non-decaffeinated coffee reached 106.686 tons (1.778.100 bags) in 2009. This is about 3% less than in 2008. In that year the imports were 109.635 tons (1.827.250 bags).

<table>
<thead>
<tr>
<th>Countries of origin</th>
<th>2007</th>
<th>Change</th>
<th>2008</th>
<th>Change</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brazil</td>
<td>46.228</td>
<td>-3%</td>
<td>44.762</td>
<td>-4%</td>
<td>43.174</td>
</tr>
<tr>
<td>Colombia</td>
<td>18.756</td>
<td>-8%</td>
<td>17.283</td>
<td>-28%</td>
<td>12.403</td>
</tr>
<tr>
<td>Peru</td>
<td>8.664</td>
<td>33%</td>
<td>11.563</td>
<td>-28%</td>
<td>8.374</td>
</tr>
<tr>
<td>Kenya</td>
<td>7.435</td>
<td>-7%</td>
<td>6.922</td>
<td>10%</td>
<td>7.601</td>
</tr>
<tr>
<td>Honduras</td>
<td>3.276</td>
<td>63%</td>
<td>5.342</td>
<td>19%</td>
<td>6.340</td>
</tr>
<tr>
<td>Burundi</td>
<td>1.610</td>
<td>-51%</td>
<td>789</td>
<td>320%</td>
<td>3.315</td>
</tr>
<tr>
<td>Nicaragua</td>
<td>1.100</td>
<td>97%</td>
<td>2.168</td>
<td>30%</td>
<td>2.825</td>
</tr>
<tr>
<td>Ethiopia</td>
<td>5.227</td>
<td>6%</td>
<td>5.532</td>
<td>-60%</td>
<td>2.215</td>
</tr>
<tr>
<td>Vietnam</td>
<td>1.998</td>
<td>2%</td>
<td>2.045</td>
<td>-2%</td>
<td>2.006</td>
</tr>
<tr>
<td>Mexico</td>
<td>745</td>
<td>21%</td>
<td>905</td>
<td>75%</td>
<td>1.581</td>
</tr>
<tr>
<td>Guatemala</td>
<td>3.310</td>
<td>-19%</td>
<td>2.676</td>
<td>-60%</td>
<td>1.065</td>
</tr>
<tr>
<td>Indonesia</td>
<td>1.060</td>
<td>3%</td>
<td>1.088</td>
<td>-20%</td>
<td>869</td>
</tr>
<tr>
<td>Uganda</td>
<td>878</td>
<td>22%</td>
<td>1.073</td>
<td>-27%</td>
<td>785</td>
</tr>
<tr>
<td>Tanzania</td>
<td>261</td>
<td>51%</td>
<td>395</td>
<td>79%</td>
<td>707</td>
</tr>
<tr>
<td>El Salvador</td>
<td>969</td>
<td>-47%</td>
<td>517</td>
<td>-2%</td>
<td>505</td>
</tr>
<tr>
<td>Dominican Republic</td>
<td>136</td>
<td>174%</td>
<td>373</td>
<td>-18%</td>
<td>307</td>
</tr>
<tr>
<td>Papua New Guinea</td>
<td>320</td>
<td>-89%</td>
<td>36</td>
<td>731%</td>
<td>299</td>
</tr>
<tr>
<td>Costa Rica</td>
<td>417</td>
<td>-59%</td>
<td>170</td>
<td>44%</td>
<td>245</td>
</tr>
<tr>
<td>Rwanda</td>
<td>474</td>
<td>-74%</td>
<td>125</td>
<td>89%</td>
<td>236</td>
</tr>
<tr>
<td>India</td>
<td>199</td>
<td>89%</td>
<td>377</td>
<td>-41%</td>
<td>221</td>
</tr>
<tr>
<td>Others*</td>
<td>6.546</td>
<td>-16%</td>
<td>5492</td>
<td>111%</td>
<td>11.614</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>109.610</strong></td>
<td><strong>0%</strong></td>
<td><strong>109.635</strong></td>
<td><strong>-3%</strong></td>
<td><strong>106.686</strong></td>
</tr>
</tbody>
</table>

Source: Statistics Sweden

*Volumes imported from other EU countries are reported as Others since the origin cannot be verified in the statistics.

As usual Brazil and Colombia are the main suppliers, both however decreasing their shares the last years. Together they now account for 52% of the Swedish imports. A few years ago their share was about two thirds of Swedish imports. Else you can see a tendency towards fewer origins and increased volumes from the remaining supply countries.

Among the other of the top five origins, Peru, Kenya and Ethiopia, only Kenya decreased its volumes and share of market. Most spectacular is how imports from Ethiopia decreased 60% and moved this origin from number five to number eight. New on position five is Honduras after two years of increasing exports to Sweden. Another runner up is Burundi, increasing 320% and now the sixth most important origin. Also Nicaragua is strengthening its position.

The Robusta origins Vietnam and Indonesia decreased their volumes in 2007 after a few years of good increases. In 2008 and 2009 they have more or less unchanged shares of total volume (2% and 1% respectively). These Robusta volumes however do not reflect any big change in the Swedish consumption pattern but substantially increased export volumes of roasted coffee of different qualities. Sweden is still an almost 100% Arabica market.
### Sweden: Imports of not decaffeinated green coffee from origin countries
- percentage distribution by main sources -

<table>
<thead>
<tr>
<th>Countries of origin</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brazil</td>
<td>42,2%</td>
<td>40,8%</td>
<td>40,5%</td>
</tr>
<tr>
<td>Colombia</td>
<td>17,1%</td>
<td>15,8%</td>
<td>11,6%</td>
</tr>
<tr>
<td>Peru</td>
<td>7,9%</td>
<td>10,5%</td>
<td>7,8%</td>
</tr>
<tr>
<td>Kenya</td>
<td>6,8%</td>
<td>6,3%</td>
<td>7,1%</td>
</tr>
<tr>
<td>Honduras</td>
<td>3,0%</td>
<td>4,9%</td>
<td>5,9%</td>
</tr>
<tr>
<td>Burundi</td>
<td>1,5%</td>
<td>0,7%</td>
<td>3,1%</td>
</tr>
<tr>
<td>Nicaragua</td>
<td>1,0%</td>
<td>2,0%</td>
<td>2,6%</td>
</tr>
<tr>
<td>Ethiopia</td>
<td>4,8%</td>
<td>5,0%</td>
<td>2,1%</td>
</tr>
<tr>
<td>Vietnam</td>
<td>1,8%</td>
<td>1,9%</td>
<td>1,9%</td>
</tr>
<tr>
<td>Mexico</td>
<td>0,7%</td>
<td>0,8%</td>
<td>1,5%</td>
</tr>
<tr>
<td>Guatemala</td>
<td>3,0%</td>
<td>2,4%</td>
<td>1,0%</td>
</tr>
<tr>
<td>Indonesia</td>
<td>1,0%</td>
<td>1,0%</td>
<td>0,8%</td>
</tr>
<tr>
<td>Uganda</td>
<td>0,8%</td>
<td>1,0%</td>
<td>0,7%</td>
</tr>
<tr>
<td>Tanzania</td>
<td>0,2%</td>
<td>0,4%</td>
<td>0,7%</td>
</tr>
<tr>
<td>El Salvador</td>
<td>0,9%</td>
<td>0,5%</td>
<td>0,5%</td>
</tr>
<tr>
<td>Dominican Republic</td>
<td>0,1%</td>
<td>0,3%</td>
<td>0,3%</td>
</tr>
<tr>
<td>Papua New Guinea</td>
<td>0,3%</td>
<td>0,0%</td>
<td>0,3%</td>
</tr>
<tr>
<td>Costa Rica</td>
<td>0,4%</td>
<td>0,2%</td>
<td>0,2%</td>
</tr>
<tr>
<td>Rwanda</td>
<td>0,4%</td>
<td>0,1%</td>
<td>0,2%</td>
</tr>
<tr>
<td>India</td>
<td>0,2%</td>
<td>0,3%</td>
<td>0,2%</td>
</tr>
<tr>
<td>Others*</td>
<td>6,0%</td>
<td>5,0%</td>
<td>10,9%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>100,0%</strong></td>
<td><strong>100,0%</strong></td>
<td><strong>100,0%</strong></td>
</tr>
</tbody>
</table>

Source: Statistics Sweden.

*Volumes imported from other EU countries are reported as Others since the origin cannot be verified in the statistics.

### Sweden: Imports of not decaffeinated green coffee
- percentage distribution by types of coffee -

<table>
<thead>
<tr>
<th>Type of coffee</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arabica</td>
<td>95%</td>
<td>93,2%</td>
<td>86,0%</td>
</tr>
<tr>
<td>Colombian Milds</td>
<td>26%</td>
<td>23,0%</td>
<td>19,4%</td>
</tr>
<tr>
<td>Other Milds</td>
<td>21%</td>
<td>24,0%</td>
<td>24,0%</td>
</tr>
<tr>
<td>Brazilian Naturals</td>
<td>49%</td>
<td>46,3%</td>
<td>42,5%</td>
</tr>
<tr>
<td>Robusta</td>
<td>3%</td>
<td>3,5%</td>
<td>3,1%</td>
</tr>
<tr>
<td>Not specified</td>
<td>2%</td>
<td>3,3%</td>
<td>10,9%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>100%</strong></td>
<td><strong>100,0%</strong></td>
<td><strong>100,0%</strong></td>
</tr>
</tbody>
</table>

Source: Statistics Sweden and the Swedish National Coffee Association

These data are not available in any official statistics but estimated on the basis of the origins. The shares are very stable and a decrease of one origin is most often balanced by an increase of another one within the same group. After some years when Brazilian Naturals increased to the cost of Colombian and Other Milds this trend was broken in 2007 with Milds increasing and Naturals decreasing as well as Robusta. In 2009 this development goes on with Brazilian Naturals losing volume. Other Milds increase to the cost of Colombian Milds. It is assumed that not specified volumes, which is coffee of unknown origin imported from other EU countries, have mainly the same mix as the directly imported volumes. The share of Robusta reflects exports, mainly to Denmark and the Baltic countries (and to a small extent the espresso trend in Sweden).
2. FOREIGN TRADE IN ALL FORMS OF COFFEE

<table>
<thead>
<tr>
<th>Sweden: Foreign trade in coffee</th>
<th>- in tons actual weight -</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Imports</td>
</tr>
<tr>
<td></td>
<td>2007</td>
</tr>
<tr>
<td>Green coffee</td>
<td>109,610</td>
</tr>
<tr>
<td>Green coffee (decaf)</td>
<td>1,074</td>
</tr>
<tr>
<td>Roasted coffee</td>
<td>8,309</td>
</tr>
<tr>
<td>Roasted coffee (decaf)</td>
<td>87</td>
</tr>
<tr>
<td>Instant coffee</td>
<td>2,847</td>
</tr>
</tbody>
</table>

Source: Statistics Sweden and the Swedish National Coffee Association

The higher level of exports of roasted coffee since 2005 is mainly an effect of structural changes in the Scandinavian coffee industry. Two roasting plants were closed in Denmark and these volumes were moved to Swedish plants. Thus Denmark since 2005 is the biggest export market with about 46% of the volume 2009.

In 2009 the export volume decreased 5%. The largest destination after Denmark was the USA (18% of total exports), followed by the other Nordic countries (15%) and the Baltic countries (8%), Germany and Great Britain (4% respectively).

Imports of roasted coffee seem to stabilize around 8,000 – 9,000 tons and came in 2009 mainly from the Netherlands, Denmark and Germany (52%, 13% and 13% respectively). Imports from Italy were 12% of the total import volume, reflecting the espresso trend.

Net imports of instant coffee (only pure instant is registered), increased and are now about 2,700 tons. The figures from 2008 and 2009 are best estimates based on internal statistics, since official figures after 2007 are not available.

3. COFFEE CONSUMPTION

The total size of the Swedish market in 2009 was 85,922 tons roasted coffee equivalent, giving a total per capita consumption of all forms of coffee of 9,2 kilos. (Roasted coffee is calculated as 85% of green coffee weight. A multiple of 4 is used in Sweden to calculate instant coffee as roasted.). Of coffee consumed, calculated this way, about 13% was instant coffee.

The consumption of decaffeinated coffee is negligible: less than 1%. Practically all the imported volume of decaffeinated green coffee is re-exported as roasted coffee.

The consumption of ecological coffee is about 10% and increasing (+21%). The certification programs for responsibility or sustainability (Fair Trade, Utz Certified and Rain Forest Alliance) have gained market and their total market share was well above 12%. Double certifying is common and about two thirds of these certified coffees are certified as ecological as well. Certified coffees have their strongest position on the out of home market, where their share is about 30%.

Espresso is doing well too on this typical filter coffee market, stabilizing its share about 2 – 3%, thanks to the coffee shop trend.

Consumption usually is estimated to be equivalent to net import, since stock changes are not registered or visible. Net imports are very stable and bigger changes probably reflect changes in stocks more than changes in consumption, which now seems to be back on the relatively high level of the very early nineties. As a matter of fact net imports last years have increased just enough to deliver the per capita consumption to the population growth. Total consumption was slightly decreasing during the nineties but has recovered since 2001. Since changes in stocks cannot be captured, moving average figures are presented as well, which also show that the per capita consumption now is quite stable. The figures cups/day are calculated as 7,5 grams coffee/cup of 0,125 litre. A multiple of 4 is used to calculate instant coffee as roasted volume.

### Sweden: Per capita consumption of coffee

<table>
<thead>
<tr>
<th></th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Roast&amp;ground coffee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>kg/capita</td>
<td>8,42</td>
<td>8,27</td>
<td>8,04</td>
</tr>
<tr>
<td>Instant</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>gr/capita</td>
<td>256</td>
<td>276</td>
<td>290</td>
</tr>
</tbody>
</table>
4. DEVELOPMENT OF RETAIL PRICES FOR ROASTED COFFEE

According to Statistics Sweden data, the average retail price for roasted coffee was SEK 59.54 per kilo in 2009 and SEK 54.10 in 2008. However, the official statistics underestimate discounts and campaign prices which are frequent in Sweden and a weighted average price per kilo is about 10% lower. The table does reflect the trend of price levels, which was decreasing the first half of this decade. 2006 was the first year since 1998 when the average price increased, a shift which was confirmed the following years.

<table>
<thead>
<tr>
<th>Year</th>
<th>SEK/kg</th>
<th>Year</th>
<th>SEK/kg</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>61.00</td>
<td>2005</td>
<td>49.18</td>
</tr>
<tr>
<td>2001</td>
<td>57.60</td>
<td>2006</td>
<td>51.12</td>
</tr>
<tr>
<td>2002</td>
<td>54.60</td>
<td>2007</td>
<td>52.20</td>
</tr>
<tr>
<td>2003</td>
<td>52.30</td>
<td>2008</td>
<td>54.10</td>
</tr>
<tr>
<td>2004</td>
<td>49.90</td>
<td>2009</td>
<td>59.54</td>
</tr>
</tbody>
</table>

Source: Statistics Sweden

5. COMMENTS ON PARTICULAR SUBJECTS

The Swedish National Coffee Association (Svensk Kaffeinformation), the organization of coffee roasters and importers, is working towards the public mainly by its web site www.kaffeinformation.se (partly available in English), where you may also find some more statistics about the Swedish market.

6. DUTIES AND VAT LEVELS

The import duties are EU rates. There are no other taxes on coffee in Sweden but the VAT, which on food and drinks is 12% in retailing and 25% in restaurants, coffee shops etc.
1. IMPORTS OF GREEN COFFEE

According to F.O. Licht’s International Coffee Report data green coffee imports into Switzerland reached a total of 1.837.100 bags in 2009. This is an increase of almost 6,4% compared to the 1.727.400 bags imported in 2008.

The main supplying countries of origin (2009 ranking) were:

<table>
<thead>
<tr>
<th>Country</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brazil</td>
<td>478.100</td>
<td>593.100</td>
</tr>
<tr>
<td>Colombia</td>
<td>242.300</td>
<td>259.600</td>
</tr>
<tr>
<td>Vietnam</td>
<td>169.500</td>
<td>162.500</td>
</tr>
<tr>
<td>India</td>
<td>116.300</td>
<td>138.200</td>
</tr>
<tr>
<td>Guatemala</td>
<td>84.400</td>
<td>91.900</td>
</tr>
<tr>
<td>Honduras</td>
<td>93.500</td>
<td>89.600</td>
</tr>
<tr>
<td>Costa Rica</td>
<td>91.300</td>
<td>78.600</td>
</tr>
<tr>
<td>Indonesia</td>
<td>42.700</td>
<td>62.500</td>
</tr>
<tr>
<td>Ethiopia</td>
<td>61.600</td>
<td>61.800</td>
</tr>
<tr>
<td>Mexico</td>
<td>36.700</td>
<td>43.000</td>
</tr>
<tr>
<td>Others</td>
<td>311.000</td>
<td>256.300</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>1.727.400</strong></td>
<td><strong>1.837.100</strong></td>
</tr>
</tbody>
</table>

Source: F.O. Licht’s International Coffee Report

Volumes from the main supplier, Brazil, increased significantly (+24%) and from the number two, Colombia, modestly (+7,1%). Imports from number three, Vietnam, dropped with 4,1%. Remarkable are the increases in imports from India (+18,8%) and Indonesia (+46,4%).

The following table contains the same information, expressed in percentages:

<table>
<thead>
<tr>
<th>Country</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brazil</td>
<td>27,7</td>
<td>32,3</td>
</tr>
<tr>
<td>Colombia</td>
<td>14,0</td>
<td>14,1</td>
</tr>
<tr>
<td>Vietnam</td>
<td>9,8</td>
<td>8,8</td>
</tr>
<tr>
<td>India</td>
<td>6,7</td>
<td>7,5</td>
</tr>
<tr>
<td>Guatemala</td>
<td>4,9</td>
<td>5,0</td>
</tr>
<tr>
<td>Honduras</td>
<td>5,4</td>
<td>4,9</td>
</tr>
<tr>
<td>Costa Rica</td>
<td>5,3</td>
<td>4,3</td>
</tr>
<tr>
<td>Indonesia</td>
<td>2,5</td>
<td>3,4</td>
</tr>
<tr>
<td>Ethiopia</td>
<td>3,6</td>
<td>3,4</td>
</tr>
<tr>
<td>Mexico</td>
<td>2,1</td>
<td>2,3</td>
</tr>
<tr>
<td>Others</td>
<td>18,0</td>
<td>14,0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>100,0</strong></td>
<td><strong>100,0</strong></td>
</tr>
</tbody>
</table>

Source: F.O. Licht’s International Coffee Report
2. FOREIGN TRADE IN COFFEE IN ALL FORMS

<table>
<thead>
<tr>
<th></th>
<th>Imports</th>
<th></th>
<th></th>
<th>Exports</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2008</td>
<td>2009</td>
<td>% change</td>
<td>2008</td>
<td>2009</td>
<td>% change</td>
</tr>
<tr>
<td>Green coffee</td>
<td>1.727,4</td>
<td>1.837,1</td>
<td>6,4</td>
<td>18,1</td>
<td>18,5</td>
<td>2,2</td>
</tr>
<tr>
<td>Roasted coffee</td>
<td>181,3</td>
<td>185,1</td>
<td>2,1</td>
<td>452,6</td>
<td>540,9</td>
<td>19,5</td>
</tr>
<tr>
<td>Soluble coffee</td>
<td>95,2</td>
<td>100,4</td>
<td>5,5</td>
<td>519,2</td>
<td>526,9</td>
<td>1,5</td>
</tr>
</tbody>
</table>

Source: F.O. Licht’s International Coffee Report

On the whole, changes in imported and exported volumes were modest, except for a 20% increase in the exports of roasted coffee.

3. COFFEE CONSUMPTION

The International Coffee Organization provides the following data on Swiss consumption:

<table>
<thead>
<tr>
<th>Switzerland: Total coffee consumption</th>
<th>Switzerland: Per capita consumption</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>- in bags -</strong></td>
<td><strong>- in kg green coffee equivalent -</strong></td>
</tr>
<tr>
<td>Years</td>
<td>Years</td>
</tr>
<tr>
<td>2000</td>
<td>2000</td>
</tr>
<tr>
<td>2001</td>
<td>2001</td>
</tr>
<tr>
<td>2002</td>
<td>2002</td>
</tr>
<tr>
<td>2003</td>
<td>2003</td>
</tr>
<tr>
<td>2004</td>
<td>2004</td>
</tr>
<tr>
<td>2005</td>
<td>2005</td>
</tr>
<tr>
<td>2006</td>
<td>2006</td>
</tr>
<tr>
<td>2007</td>
<td>2007</td>
</tr>
<tr>
<td>2008</td>
<td>2008</td>
</tr>
<tr>
<td>2009</td>
<td>2009</td>
</tr>
</tbody>
</table>

Source: ICO

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

<table>
<thead>
<tr>
<th>Switzerland: retail prices roasted coffee</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>- in CHF per kg -</strong></td>
<td></td>
</tr>
<tr>
<td>2000</td>
<td>5,34</td>
</tr>
<tr>
<td>2001</td>
<td>5,34</td>
</tr>
<tr>
<td>2002</td>
<td>6,32</td>
</tr>
<tr>
<td>2003</td>
<td>8,40</td>
</tr>
<tr>
<td>2004</td>
<td>10,09</td>
</tr>
<tr>
<td>2005</td>
<td>10,38</td>
</tr>
</tbody>
</table>

Source: ICO. The original dollar values have been converted to Swiss Francs using Swiss National Bank exchange rate annual averages. More recent data are not available from this source.

5. VAT AND OTHER DUTIES

Import duties and national fees (in CHF per 100 kilo gross weight) are:

<table>
<thead>
<tr>
<th></th>
<th>Normal tariff</th>
<th>Developing countries</th>
<th>LDC’s</th>
<th>Compulsory stocks contribution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Green coffee:</td>
<td>0,00</td>
<td>0,00</td>
<td>0</td>
<td>3,75</td>
</tr>
<tr>
<td>Green coffee, decaffeinated:</td>
<td>0,00</td>
<td>0,00</td>
<td>0</td>
<td>3,75</td>
</tr>
<tr>
<td>Product</td>
<td>Rate 1</td>
<td>Rate 2</td>
<td>Rate 3</td>
<td>Rate 4</td>
</tr>
<tr>
<td>------------------------------</td>
<td>--------</td>
<td>--------</td>
<td>--------</td>
<td>--------</td>
</tr>
<tr>
<td>roasted coffee</td>
<td>63,00*</td>
<td>46,75**</td>
<td>0</td>
<td>4,50</td>
</tr>
<tr>
<td>roasted coffee, decaffeinated</td>
<td>63,00*</td>
<td>46,75**</td>
<td>0</td>
<td>4,50</td>
</tr>
<tr>
<td>soluble coffee</td>
<td>182,00*</td>
<td>127,50**</td>
<td>0</td>
<td>8,85</td>
</tr>
</tbody>
</table>

*: 0,00 for European and least developed countries
**: not for Brazil

Note: LDC is Least Developed Country
Source: RéserveSuisse
1. IMPORTS OF GREEN COFFEE

Imports into the United Kingdom during 2009 of non-decaffeinated green coffee showed a marked increase.

<table>
<thead>
<tr>
<th>Countries of origin</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vietnam</td>
<td>553,936</td>
<td>589,825</td>
<td>465,314</td>
<td>457,423</td>
</tr>
<tr>
<td>Brazil</td>
<td>244,554</td>
<td>243,297</td>
<td>313,922</td>
<td>431,071</td>
</tr>
<tr>
<td>Colombia</td>
<td>378,413</td>
<td>465,603</td>
<td>446,211</td>
<td>306,781</td>
</tr>
<tr>
<td>Indonesia</td>
<td>228,862</td>
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<td>-</td>
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<td>21,199</td>
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<td>2,873</td>
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<td>1,843,811</td>
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</table>

Source: British Coffee Association

The main suppliers remain unchanged. Vietnam has decreased marginally, but the main change is Colombia with reduced volume due to the climatic issues and supply difficulties. Brazil has increased by approximately 25% but the largest change is seen in the levels of Honduran up 30%. Declines of 17% were noted in Kenyans, 25% in Costa Ricans and Nicaraguans. Côte d’Ivoire is added to the list for the first time with similar values to Uganda.

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<th>Countries of Origin</th>
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<th>2008</th>
<th>2009</th>
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<td>13,19</td>
<td>17,00</td>
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<td>0,86</td>
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United Kingdom: Imports of coffee (ICO) - in tons -

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<th>Types of coffee</th>
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<th>2010</th>
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<td>110,629</td>
<td>110,803</td>
<td>118,256</td>
<td>3,266</td>
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<td>Green Decaf</td>
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<td>212</td>
<td>303</td>
<td>281</td>
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<tr>
<td>Roasted</td>
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<td>1,061</td>
<td>1,066</td>
<td>1,064</td>
<td>2,898</td>
</tr>
<tr>
<td>Roasted Decaf</td>
<td>142</td>
<td>228</td>
<td>194</td>
<td>205</td>
<td>203</td>
</tr>
<tr>
<td>Soluble/Extracts</td>
<td>7,676</td>
<td>10,388</td>
<td>8,123</td>
<td>10,051</td>
<td>18,062</td>
</tr>
</tbody>
</table>

Source: British Coffee Association

Imports of soluble/extracts increased to levels last seen in 2007, while exports decreased. Brazil continues to be a major supplier of soluble, and Ecuador maintained its position as the second largest supplier.

Exports of soluble/extracts again fell this time by approximately 25%.

Roasted imports remained similar whilst exports increased substantially. Imports of roasted decaffeinated showed a marginal increase. Imports of green decaffeinated decreased during the year.

3. COFFEE CONSUMPTION

UK consumption remains around 3kg per capita. Expectation remains that a small but steady increase will continue.

Overall instant coffee represents 85% of the market with roast and ground occupying the balance. Changes are noted in out of home consumption, where soluble has declined and roast and ground increased to approximately 25% of the market. This trend is driven by increasing coffee shop activities and single “capsule” uptake. Decaffeinated consumption has remained very similar during the year to 2008. Current research shows a slightly wider spread as between 25 and 55 years, the younger consumer is still difficult to access due to the major conflict of “beverages” available.
4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

The Columbian supply issues affected Arabica prices in general, quality coffees commanding a considerable premium and in general short supply. Robustas have maintained similar overall pricing for 2008, shelf prices have naturally been increased in line with raw material costs.

5. INFORMATION ON ASSOCIATION MEMBERSHIP

The BCA continues to represent all aspects of the coffee industry in the UK. 2009 was an exceptional year; we gained 12 new members, 4 Full and 8 Associate Members. We expect membership to grow during 2010 but at a slower rate than 2009.

6. HEALTH

The successful programme is aimed at both Health Care Professionals and Consumers, and the objective still continues to be to overcome the negative perception of coffee and health, thus preventing any decline in coffee consumption.

As always the UK media continues to write prolifically on health, and more often than not they will write about coffee/caffeine, this is across all types of UK publications and media. The targeted PR campaign continues to show an increase in positive/balanced information written about coffee and a reduction in negative coffee/caffeine and health. In the detailed graphs below you can see the percentage shift change from 2008 to 2009.

7. EXCISE DUTIES AND VAT LEVEL

The UK VAT level on coffee remained unchanged at 0%.
### SELECTED OTHER EU MEMBERS

#### 1. KEY IMPORT DATA 2009

<table>
<thead>
<tr>
<th>Country</th>
<th>Green Coffee (incl Decaf)</th>
<th>Roasted Coffee (incl Decaf)</th>
<th>Extracts, essences</th>
</tr>
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<tbody>
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<td></td>
<td></td>
</tr>
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<td>Slovakia 1.066</td>
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<td>Germany 1.059</td>
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<td>Total 29.418</td>
<td>Total 19.497</td>
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<td>Others 354</td>
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### SELECTED OTHER EU MEMBERS

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<th>Total</th>
<th>Total</th>
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<td>3.204</td>
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<table>
<thead>
<tr>
<th>Country</th>
<th>Green Coffee (Incl Decaf)</th>
<th>Roasted Coffee (Incl Decaf)</th>
<th>Extracts, essences</th>
</tr>
</thead>
<tbody>
<tr>
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<table>
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<th>Extracts, essences</th>
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Source: Eurostat
Note: data are in tons and refer to imports from all origins

### 2. CONSUMPTION

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<th>Country</th>
<th>Total coffee consumption</th>
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Source: ICO
Note: total consumption is in bags, per capita consumption in kg
### EU COFFEE IMPORT DUTIES

Import duties for green and processed coffee into the EU from the 20 most important EU suppliers listed alphabetically

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<th>Roasted 0901210000</th>
<th>Roasted decaffeinated 0901220000</th>
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<td>0,0**</td>
</tr>
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<td>3,1*</td>
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<td>Vietnam</td>
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<td>4,8*</td>
<td>2,6*</td>
<td>3,1*</td>
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</tbody>
</table>

Source: DG External Trade Export Helpdesk website as at 19 August 2010

* Generalised System of Preferences
** Economic Partnership Agreements
*** Bilateral Trade Agreement

Please note that compliance criteria and/or documentary requirements apply in order to qualify for preferential tariff rates.

Interested in an origin not mentioned in this table or in more details, such as links to the applicable import regime? Please see the European Commission Export Helpdesk website [http://exporthelp.europa.eu/](http://exporthelp.europa.eu/).
## EU VAT AND EXCISE DUTIES

### ROASTED, NON-DECAFFEINATED COFFEE, UNLESS INDICATED OTHERWISE

<table>
<thead>
<tr>
<th>Country</th>
<th>VAT%</th>
<th>Excise Duties</th>
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</thead>
<tbody>
<tr>
<td>Austria</td>
<td>10,0</td>
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<tr>
<td>Belgium</td>
<td>6,0</td>
<td>Green: EUR 0,1983/kg; roasted 0,2479/kg; soluble 0,6941/kg</td>
</tr>
<tr>
<td>Bulgaria</td>
<td>20,0</td>
<td></td>
</tr>
<tr>
<td>Cyprus</td>
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<td></td>
</tr>
<tr>
<td>Czech Republic</td>
<td>10,0</td>
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</tr>
<tr>
<td>Denmark</td>
<td>25,0</td>
<td>Roasted: DKK 6,54/kg; soluble DKK 14,17/kg</td>
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<tr>
<td>Estonia</td>
<td>20,0</td>
<td></td>
</tr>
<tr>
<td>Finland</td>
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</tr>
<tr>
<td>France</td>
<td>5,5</td>
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<tr>
<td>Germany</td>
<td>7,0</td>
<td>Roasted: EUR 2,19/kg; soluble EUR 4,78/kg</td>
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<tr>
<td>Greece</td>
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<tr>
<td>Hungary</td>
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<tr>
<td>Italy</td>
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<td>Latvia</td>
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<td>LVL 100/100 kg pure coffee</td>
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<tr>
<td>Luxembourg</td>
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<tr>
<td>Portugal</td>
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<tr>
<td>Romania</td>
<td>24,0</td>
<td>Green: EUR 153/ton; roasted: EUR 225/ton; soluble: EUR 1800/ton</td>
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<tr>
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<td>19,0</td>
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<td>Slovenia</td>
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<td>Sweden</td>
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</tr>
<tr>
<td>United Kingdom</td>
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</tr>
</tbody>
</table>

Source: DG External Trade Export Helpdesk website as at 19 August 2010

Up-to-date information on VAT and excise duties can be found on the European Commission Export Helpdesk website [http://exporthelp.europa.eu/](http://exporthelp.europa.eu/). Please note that Indirect taxes’ rates and exemptions are established by the Member States’ legislation, therefore full accuracy can only be obtained from consultation of their official sources. No responsibility can be accepted by the ECF for any inadvertent errors or omissions.
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