European Coffee Report 2005

European Coffee Federation

CONTENTS

European Coffee Federation

EUROPEAN COFFEE FEDERATION (ECF)
Sir Winston Churchilllaan 366 (19th Floor)
P.O. Box 161
2280 AD Rijswijk
The Netherlands
[t] +31 (0)70 336 51 65
[f] +31 (0)70 336 51 67
[e] ecf@ecf-coffee.org
[w] www.ecf-coffee.org

INTRODUCTION

This is the twenty-seventh issue of the ‘European Coffee Report’. The European Coffee Federation (ECF) continues this series with the report over 2005. As usual, it contains a lead article and a graph of the **ICO Indicator Prices, a chapter on EU import and export figures and chapters on the individual Western** European markets. 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.

Disclaimer: this report is for information purposes only. No rights or obligations can be derived from its contents.

This report was finalised on September 12, 2006

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

In the notation of figures, the convention of continental Europe is followed:

- thousands are separated by a dot (.)
- the decimal sign is the comma (,)

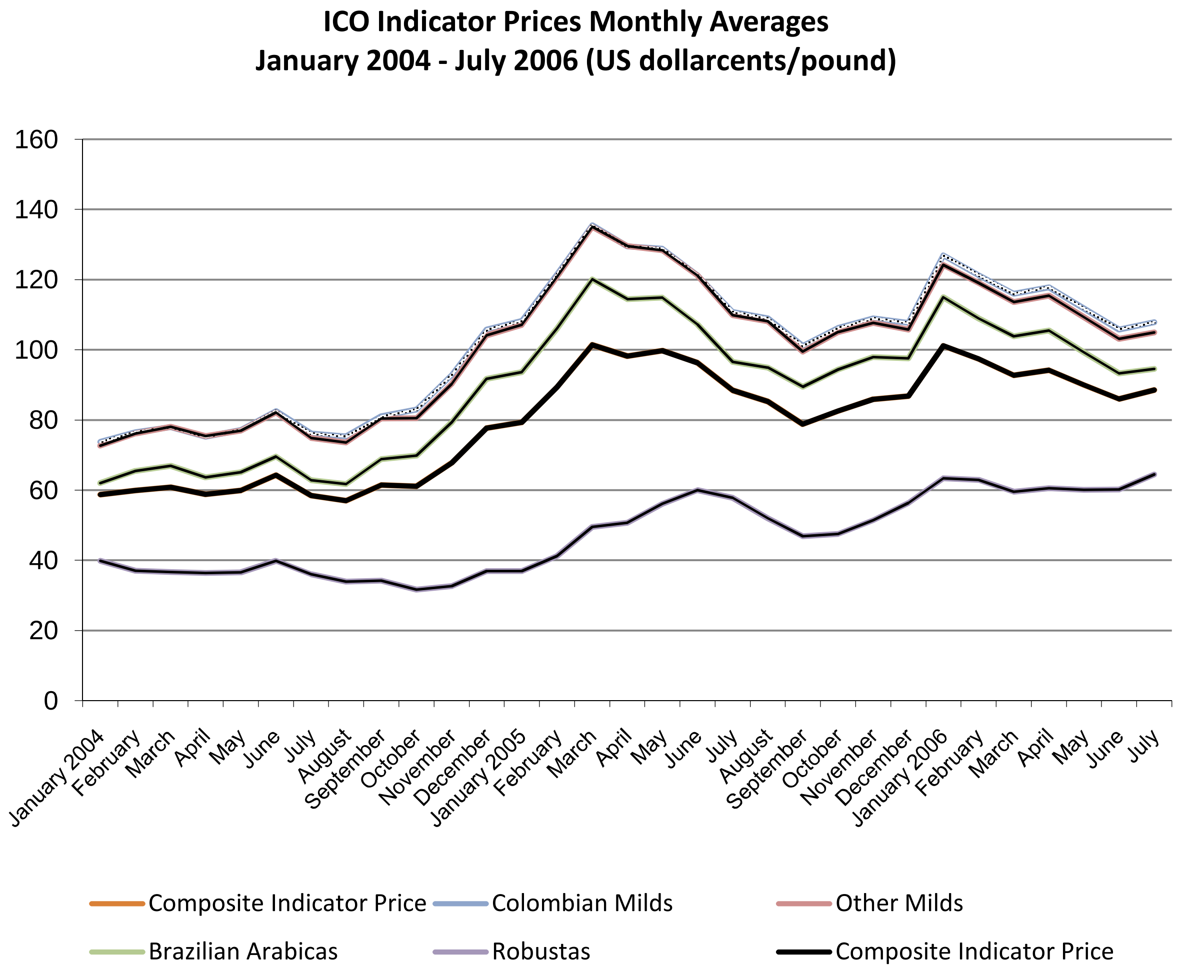
Abbreviations of currencies are those used for international banking purposes, based on ISO standards.

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:

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

ICO INDICATOR PRICES



As from 1 October 2003 the calculation of the ICO composite indicator price is weighted as follows: Colombian Milds: 13%

Other Milds: 27%

Brazilian Naturals: 25%

Robustas: 35%

FROM PREPARATION TO IMPLEMENTATION

Sometimes developments that have been maturing or are 'in the pipe-line' for a long time move from preparation to implementation in a fairly short period of time. In this report we would like to offer three examples: the restructuring of ECF, being the culmination of a long period of integration, the implementation of EU food safety legislation and the 'mainstreaming' of sustainability in the coffee sector.

New structure European Coffee Federation

ECF started its life twenty-seven years ago as a rather loose form of co-operation between CECA (the Committee of European Coffee Associations, representing the green coffee trade represented) and EUCA (the Federation of European Coffee Roasters Associations representing the coffee roasting industry). It was found convenient to organise the General Assemblies of CECA and EUCA at the same time and place, followed by a joint meeting under the flag 'European Coffee Federation' to discuss topics of common interest. In 1981 the co-operation between CECA and EUCA under the ECF umbrella was embodied in a 'Resolution Co-operation CECA-EUCA', making the ECF Annual General Meeting of 18 June 1981 the formal start of the ECF. This years meeting in Antwerp therefore marks the 25th Anniversary of the ECF AGM.

One of ECF's main activities in the early years was to provide input to the European government representatives of the International Coffee Organization (ICO). For much of the period from 1962 to mid-1989 the ICO operated an export quota system. This had a major impact on the day-to-day business of traders and roasters: the allocation to the individual producing countries dictated the availability of specific types and qualities of coffee and the documentation to implement the quota system was an increasing administrative burden. The ECF therefore made regular recommendations to the EU government delegates on the operation of the system. However, this was certainly not the only area of common interest for the green coffee trade and the coffee roasting industry. Transport and logistics, food safety, tracking and tracing, rules of origin and sustainability are among the many issues relevant to both the green coffee trade and the coffee manufacturing industry.

Over the years the effectiveness of jointly addressing a continuously increasing number of subjects was recognised and gradually the ECF, the 'child' of CECA and EUCA, outgrew its parents.

The ever-closer co-operation was facilitated when on 1 January 1999 the CECA secretariat, which so far had rotated together with the chairmanship, became permanently situated in the same office as the ECF and EUCA secretariats in Amsterdam. It received a further boost when the AFCASOLE secretariat also moved to Amsterdam in 2003. Being located in one office greatly helped to implement a process of increasing integration and consolidation of activities, resulting in a better efficiency of operations. This process has now been completed successfully. As from 1 January 2006 AFCASOLE, CECA and EUCA have merged fully into ECF and have ceased to exist as separate organisations. In the new structure ECF has a President and three Vice-Presidents (for green coffee, roasted coffee and soluble coffee), a 13-member Executive Committee and a plenary Council. The restructuring means that ECF is now in an even better position to be the single representative voice of the entire European coffee sector, from the largest manufacturer to the smallest trader.

Brussels food safety legislation and national implementation

Although the flow of legislative proposals from 'Brussels' (shorthand for the institutions of the European Union) will certainly not dry up, it will become less voluminous, at least as far as is relevant for the coffee sector. Important legislation has been finalised recently or will appear in the Official Journal in the near future. Food safety is now covered by the General Food Law and the so-called 'Hygiene package' (a set of interlinked regulations on food safety). Under this legislation the European Food Safety Authority (EFSA) was created as the scientific advisory body to the EU on food safety and risk analysis. Furthermore, this set of rules regulates the responsibility of operators in the food sector for the safety of their products, including management systems as HACCP (Hazard Analysis and Critical Control Points) and traceability. It is important to note that publication of EU legislation in the Official Journal is not the end of the story. Legislation in the statute books is only a semi-finished product. It needs to be implemented, and this remains very much the province of national authorities such as customs and food safety inspection agencies. The challenge will be to ensure a harmonised interpretation and application of these complex rules throughout all 25 members of the EU. Even within a single country we have observed different requirements of regional food inspectors regarding raw material controls. A recent survey of the CIAA (Confédération des Industries Agro-Alimentaires, i.e. the European umbrella organisation of the food manufacturing industry) identified some other challenges of consistency and uniform application of food safety legislation:

- threat of product recall because of an adulteration in packaging material of which EFSA advised that there was no cause for health concern at the levels reported and on which the EU Standing Committee had stated that 'there is no need to take any measures at EU level such as the withdrawal of the concerned products from the market'.
- presence of a colorant of which an independent risk assessment stated that 'there was no threat to public health', but two different competent authorities adopted two completely different risk management approaches (one insisting on a public recall, while the other did not).

There is a clear need for consistency, both between EU institutions like EFSA and national food inspection authorities and among national authorities. The EU can help to minimise differences in application firstly by clear legislation, leaving as little room as possible for deviating interpretation. Secondly, clarifying guidelines, such as the ones related to traceability and to the hygiene of foodstuffs, will assist operators as well as national authorities. Thirdly, we recommend regular co-ordination and exchange of information between national authorities is needed to detect and correct differences. Trade associations like ECF can assists the EU by reporting seriously deviating applications to the attention of the Commission and by making recommendations to their members on practical implementation. In combination such actions will serve the objective of equal treatment throughout the EU and optimal functioning of the internal market.

'Mainstreaming' of sustainability in the coffee sector

Sustainability is easy to define in general terms ('people, planet, profit') but much harder to translate into operational terms. Nevertheless in the coffee sector we can observe a variety of initiatives aiming at sustainability. Although growth figures - from a very modest beginning - have been impressive, the total market share of all sustainable coffee in the EU was only 1.6% in 2001[*]. Even when allowing for further increases in the following five years, the current market share is probably only around 2,5-3%. The *Common Code for the Coffee Community* (4C) initiative intends to boost this share very significantly by bringing sustainability to the mainstream market. The 4C initiative is a public-private partnership between the German and Swiss governments and the ECF. It is developed in a multi-stakeholder environment between producer representatives, civil society and the coffee trade and industry. 4C aims to develop and implement a base-line standard for good social, environmental and economic practices that is accessible for the large majority of coffee farmers and fits into the regular buying and marketing patterns of the industry. Additionally, 4C aims at developing good agricultural practices, proper farm management and market knowledge, enabling farmers to produce efficiently and to improve the quality and consistency of supply. This makes them more resilient in a changing market, and that is perhaps the best expression of sustainability. After four years of designing the system and preparing its application, 4C will make the change from preparation to implementation around the end of this year. As a base-line standard, 4C neither replaces nor competes with existing initiatives, which may have a higher level of ambition on either socio/economic or environmental aspects. Actually, 4C expects to be helpful to farmers by making it easier to step up from the basic 4C standard to the standards required by other initiatives. It will take time and effort, but ultimately 4C aims to ensure that all coffee available on the EU market has been produced in a manner that meets consumer expectations for an all-round good coffee quality, not only in taste but also in production circumstances. And satisfying consumer demand is a key element for a sustainable European coffee sector.

[*] The State of Sustainable Coffee: A study of twelve major markets; Giovannucci and Koekoek, 2003.

THE EUROPEAN COFFEE MARKET IN 2005

Imports and exports

The accession of 10 new member states to the EU in 2004 causes a discontinuity in the statistics. The trade figures for the 15-member EU are obviously not directly comparable to the data for the new 25-member EU. Last year we listed both imports into the EU(15) and EU(25) by way of transition, but from this year on we will just provide the EU(25) data. Additionally, the division between 'Western Europe' and 'Central and Eastern Europe' has changed now that a number of countries are included in the first group instead of the second. 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'. Please be aware that the following trade figures are not directly comparable to those in earlier editions of the European Coffee Report as far as the subtotals 'EU', 'Western Europe' and 'Centrals and Eastern Europe' are concerned.

IMPORTS OF GREEN COFFEE INTO EUROPEAN COUNTRIES FROM 2003 TO 2005

- in tons and in bags of 60 kilos -

	2003		2004		2005	
	tons	bags	tons	bags	tons	bags
Austria	62.894	1.048.230	59.386	989.763	48.338	805.633
Belgium	184.720	3.078.670	187.437	3.123.947	198.887	3.314.780
Cyprus	1.879	31.322	1.527	25.448	1.776	29.600
Czech Republic	25.493	424.888	25.197	419.953	23.218	386.965
Denmark	51.263	854.377	54.813	913.553	35.917	598.623
Estonia	21	355	13	222	34	567
Finland	61.421	1.023.682	63.461	1.057.680	63.269	1.054.478
France	287.450	4.790.828	234.761	3.912.688	209.499	3.491.648
Germany	872.654	14.544.227	958.042	15.967.365	899.806	14.996.765
Greece	25.602	426.692	27.532	458.865	25.594	426.573
Hungary	37.067	617.780	34.290	571.498	17.058	284.292
Ireland	5.404	90.062	4.714	78.558	5.259	87.642
Italy	382.929	6.382.147	387.452	6.457.535	399.882	6.664.692
Latvia	2.779	46.320	2.309	38.490	1.828	30.473
Lithuania	133	2.212	204	3.392	186	3.093
Luxembourg	195	3.257	188	3.133	170	2.837
Malta	102	1.693	31	522	40	660
Netherlands	134.760	2.246.000	138.595	2.309.920	135.885	2.264.757
Poland	n.a.	n.a.	104.189	1.736.477	103.405	1.723.408
Portugal	41.989	699.810	41.808	696.805	39.897	664.953
Slovakia	n.a.	n.a.	6.606	110.098	7.334	122.237
Slovenia	8.979	149.645	9.492	158.192	9.301	155.008
Spain	220.169	3.669.485	218.998	3.649.963	232.237	3.870.615
Sweden	84.309	1.405.153	89.466	1.491.107	102.524	1.708.732
United Kingdom	107.760	1.796.007	118.601	1.976.680	108.193	1.803.220
EU (25) Total	2.709.475	45.157.908	2.769.111	46.151.855	2.669.535	44.492.252
Norway	35.300	588.326	36.038	600.627	37.410	623.492
Switzerland	72.243	1.204.050	65.846	1.097.433	89.843	1.497.233
Western Europe total	2.817.018	46.950.284	2.870.995	47.849.915	2.796.788	46.612.977
Albania	4.289	71.475	-	-		
Belarus	1.934	32.239	-	-		
Bosnia and Herzegovina	10.974	182.899	-	-		
Bulgaria	20.606	343.432	25.401	423.350		
Croatia	22.255	370.915	24.920	415.341		

Kazakhstan	2.095	34.923	-	-
Macedonia	6.480	108.000	8.106	135.097
Moldova	779	12.980	-	-
Romania	44.368	739.462	49.693	828.213
Russian Federation	200.394	3.339.905	178.182	2.969.705
Serbia and Montenegro	44.838	747.301	51.594	859.902
Central and Eastern Europe total	359.012	5.983.531	337.896	5.631.608
Europe total	3.176.029	52.933.815	3.208.892	53.481.523

Note: Figures show imports of green coffee, not decaffeinated, but some Central and Eastern European countries do not distinguish between decaffeinated and not-decaffeinated green coffee.
Sources: Eurostat for EU, ICO for Central and Eastern Europe, external trade statistics for other countries.

Eurostat has helpfully backdated its trade statistics to include most of the new member states also in pre-2004 statistics. Unfortunately, as far as green coffee imports are concerned, details for Poland and Slovakia for 2003 are unavailable, but the EU(25) totals for those years do reflect all imports. Data for 2004 of several of the Central and Eastern European countries are unavailable, so please note that the totals for Central and Eastern Europe and for all Europe will be revised in next year's report.
With these cautionary remarks, we can record that in calendar year 2005 green coffee imports in Western Europe were 46,6 million bags, a decrease of 2,6% compared to the 47,8 million bags in 2004. The Western European market is dominated by the EU. Green coffee imports into the EU(25) dropped by 3,6% from 46,2 million bags in 2004 to 44,5 million bags in 2005. According to ICO data, Central and Eastern European imports in 2004 the most recent year available for many of the listed countries) amounted to close to 5,6 million bags, almost 6% lower than the year before. However, since some countries are not yet included in the 2004 figure, this will certainly be revised upwards.

The 'top 20' sources of EU(25) green coffee imports (excluding intra-EU trade) in 2003, 2004 and 2005 were as follows (listed in the order of 2005 imports):

Imports of green, not decaffeinated coffee into the EU(25) (excluding intra-EU trade) in 2003-2005 by main origins

	2003		2004		2005	
	bags	%	bags	%	bags	%
Brazil	12.786.317	30,0	12.343.735	28,7	11.991.303	29,2
Vietnam	6.948.805	16,3	8.092.197	18,8	7.231.003	17,6
Colombia	3.815.275	9,0	3.503.467	8,1	3.613.300	8,8
Indonesia	2.105.323	4,9	2.025.993	4,7	2.739.647	6,7
Uganda	2.133.788	5,0	1.823.617	4,2	1.595.758	3,9
Peru	1.395.868	3,3	1.673.783	3,9	1.592.118	3,9
India	1.717.537	4,0	1.857.012	4,3	1.482.243	3,6
Honduras	1.573.528	3,7	1.738.853	4,0	1.474.935	3,6
Ethiopia	1.168.437	2,7	1.307.928	3,0	1.355.588	3,3
Guatemala	1.078.258	2,5	914.393	2,1	855.708	2,1
Cote d'Ivoire	829.137	1,9	754.103	1,8	775.202	1,9
El Salvador	627.735	1,5	689.677	1,6	678.985	1,7
Cameroon	701.593	1,6	789.528	1,8	658.232	1,6
Kenya	674.375	1,6	664.952	1,5	598.702	1,5
Papua New Guinea	690.385	1,6	614.915	1,4	546.048	1,3
Costa Rica	739.712	1,7	633.612	1,5	497.802	1,2
Tanzania	533.548	1,3	329.222	0,8	481.998	1,2
Burundi	274.712	0,6	210.800	0,5	456.998	1,1
Nicaragua	444.628	1,0	587.620	1,4	453.327	1,1
Mexico	462.900	1,1	510.075	1,2	332.117	0,8
Others	2.814.257	6,6	3.026.852	7,0	2.439.500	5,9

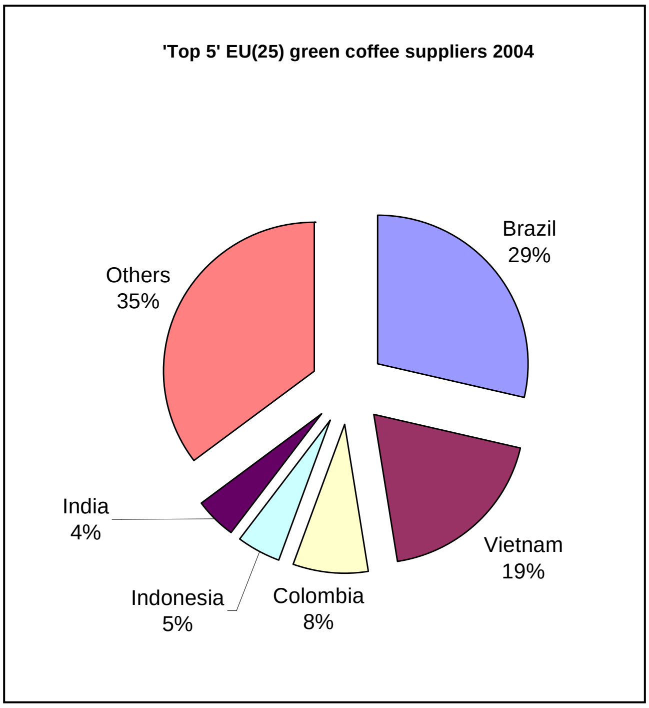
Total	42.608.590	100,0	42.994.638	100,0	41.065.072	100,0

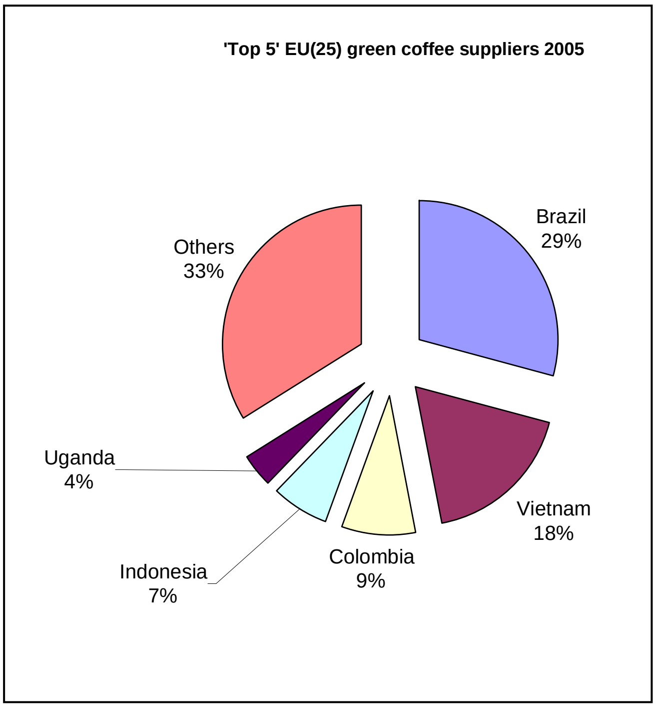
Source: Eurostat

With the exception of Uganda, the five main suppliers did not change position. Uganda regained the fifth place while India, last years number 5 supplier, dropped to seventh place. Brazil remained the major green coffee supplier to the EU. It's volume dropped with some 350.000 bags, but its market share increased with 0,5 percentage points. Vietnam retained its position as second supplier, but with a lower volume (860.000) and share (minus 1,2 percentage points). The imports from Colombia increased by over 100.000 bags in volume and 0,7 percentage points in share.

Last year we noted the rapid increase in EU green coffee imports from 'newcomer' China. In 2004 this country was just outside the top-20 with a volume of 150.000 bags. In 2005 the increase did not continue and volume dropped to just over 101.000 bags.

The next two graphs illustrate the (limited) changes in the 'top 5':





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 very 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(25) imports and exports of green coffee and (semi)finished products
from non-EU origins/to non-EU destinations

- in tons -

	Green		Green decaf		Roasted (incl decaf)		Soluble	
	2004	2005	2004	2005	2004	2005	2004	2005
Imports	2.579.637	2.464.077	2.354	1.777	10.209	12.573	38.973	39.610
Exports	15.533	14.712	93.743	85.426	63.285	75.182	35.455	53.192

Source: Eurostat

Please note that EU(25) figures can not be compared to earlier data for the 15-member EU, especially because exports to former non-members is now intra-EU trade. Compared to 2004 the (re)exports in 2005 of green coffee and green decaffeinated coffee both decreased. Exports of roasted and soluble coffee continued to rise and increased significantly with 19 and 50% respectively. Green decaffeinated imports, modest in volume, dropped by 25% after an increase of 46% the previous year. Imports of roasted coffee increased strongly by 23%; those of soluble coffee modestly by 2%.

Looking in some more detail at the EU exports of finished products, in the years 2003-2005 the twenty main destinations of roasted coffee (non-decaffeinated plus decaffeinated), listed according to their ranking in 2005, were:

EU(25) exports of roasted coffee (incl. decaf) to non-EU destinations

	2003		2004		2005	
	ton	%	ton	%	ton	%
United States	10.557	19	13.056	21	14.537	20
Romania	5.133	9	7.568	12	9.735	14
Ukraine	8.748	16	8.119	13	8.772	12
Russia	3.370	6	4.619	7	6.138	9
Switzerland	4.078	7	4.463	7	4.786	7
Norway	1.761	3	2.327	4	3.003	4
Australia	2.763	5	2.186	3	2.238	3
Bulgaria	1.925	3	2.078	3	1.914	3
Canada	1.279	2	1.784	3	1.700	2
Croatia	1.361	2	1.544	2	1.672	2
Iceland	1.629	3	1.372	2	1.597	2
Japan	867	2	922	1	1.141	2
South Africa	708	1	839	1	992	1
Israel	987	2	991	2	980	1
Bosnia and Herzegovina	1.127	2	899	1	936	1
United Arab Emirates	420	1	688	1	933	1
Albania	439	1	520	1	767	1
Turkey	512	1	589	1	717	1
Macedonia	334	1	479	1	654	1
Ceuta	454	1	463	1	475	1
Others	6.927	13	7.779	12	7.245	10
Total	55.379	100	63.285	100	70.934	100

Source: Eurostat

Once more it has to be emphasised that EU(25) data are not comparable to EU(15) figures. For example, traditionally important EU export destinations for roasted coffee like Poland or the Czech Republic are no longer non-EU destinations. In 2005 total exports of roasted coffee (including decaffeinated coffee) to non-EU destinations increased by 12% in volume. In the new EU membership situation, the US is by far the largest destination. Exports to the US continued to increase after a drop in 2003. Exports to Romania increased steadily and this country is now the second largest non-EU destination. In 2005 the Ukraine dropped to third place, but still with an increased volume of EU roasted coffee exports.

Regarding the EU exports of soluble coffee to non-EU destinations, in 2005 the three largest clients were Russia, Australia and Ukraine. In 2005 EU exports of soluble coffee to Russia increased 12% in volume and those to Australia with a remarkable 170%. Exports to Ukraine also increased significantly with close to 50%. In volume terms, listed according to their 2005 ranking, the 15 largest destinations in the three most recent years were:

EU(25) exports of soluble coffee to non-EU destinations

	2003		2004		2005	
Destination	ton	%	ton	%	ton	%
Russia	15.275	43,9	13.258	37,4	14.816	27,9

Australia	3.364	9,7	2.149	6,1	5.792	10,9
Ukraine	2.375	6,8	3.236	9,1	4.792	9,0
Turkey	2.087	6,0	2.749	7,8	3.150	5,9
Japan	1.081	3,1	1.595	4,5	1.922	3,6
United states	552	1,6	772	2,2	1.779	3,3
Switzerland	1.650	4,7	1.737	4,9	1.535	2,9
Romania	740	2,1	1.051	3,0	1.494	2,8
Norway	789	2,3	1.156	3,3	1.313	2,5
Saudi Arabia	742	2,1	905	2,6	972	1,8
Israel	931	2,7	1.011	2,9	958	1,8
South Africa	382	1,1	501	1,4	670	1,3
Canada	84	0,2	150	0,4	654	1,2
United Arab Emirates	363	1,0	456	1,3	536	1,0
Croatia	284	0,8	299	0,8	492	0,9
Bulgaria	237	0,7	283	0,8	318	0,6
Others	3.856	11,1	4.147	11,7	12.000	22,6
Total	34.791	100,0	34.455	100,0	53.192	100,0

Source: Eurostat

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, illustrates this: four out of the five largest suppliers in volume terms are coffee producing countries. In 2005 Brazil remained the largest non-EU origin with a higher volume and share. Ecuador strengthened its second place and Switzerland retained its third position, be it with a lower volume and share. Colombia and Cote d'Ivoire both lost volume and import market share.

EU(25) imports of soluble coffee from non-EU origins

	2003		2004		2005	
	ton	%	ton	%	ton	%
Brazil	12.428	30,2	12.352	31,7	13.232	33,4
Ecuador	5.688	13,8	7.162	18,4	8.552	21,6
Switzerland	7.410	18,0	6.355	16,3	5.639	14,2
Colombia	5.736	14,0	4.549	11,7	4.264	10,8
Cote d'Ivoire	4.529	11,0	3.229	8,3	2.559	6,5
Others	5.298	12,9	5.326	13,7	5.364	13,5
Total	41.088	100,0	38.973	100,0	39.610	100,0

Source: Eurostat

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

Value of EU(25) imports and exports of green, roasted and soluble coffee

- in mln EUR -

	Green		Green decaf		Roasted		Roasted decaf		Soluble	
Imports	**2004**	**2005**	**2004**	**2005**	**2004**	**2005**	**2004**	**2005**	**2004**	**2005**
From non-EU origins	2.648	3.583	5	4	71	92	10	13	190	203
Including intra-EU trade	2.871	3.881	53	75	956	1.215	82	90	810	907
Exports	**2004**	**2005**	**2004**	**2005**	**2004**	**2005**	**2004**	**2005**	**2004**	**2005**
To non-EU destinations	36	38	160	191	251	325	19	18	239	416
Including intra-EU trade	278	428	221	292	1.146	1.505	77	86	850	1.114

Source: Eurostat

These data underline the economic relevance of the coffee sector for the EU food and drinks industry and trade balance. The value of exports to non-EU destinations of finished coffee products (roasted and soluble coffee) in 2005 was EUR 759 million, almost 50% higher than the EUR 509 million in 2004. Once more, please note that these figures can not be compared with those in earlier reports. Exports to non-EU destinations have become smaller because the EU is now bigger!
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.

Production

The following table is a summary of the Eurostat Prodcom statistics over calendar years 2004 and 2005, summarising production of roasted, roasted decaffeinated and soluble coffee in volume and value.

Production of roasted and soluble coffee in selected EU and candidate EU member countries

- in tons -

	15861150 Roasted coffee, not decaffeinated		15861170 Roasted decaffeinated coffee		15861230 Extracts, essences and concentrates of coffee in solid form (including instant coffee)		15861250 Extracts, essences and concentrates of coffee in liquid form; preparations with a basis of extracts; essences or concentrates of coffee or with a basis of coffee	
	2004	2005	2004	2005	2004	2005	2004	2005
Austria	33.037	15.510	1.744	217	-	-	-	-
Belgium	81.784	84.897	10.255	9.858	-	-	-	-
Bulgaria	12.191	10.884	170	-	-	10	-	-
Croatia	10.373	9.403	62	61	-	-	-	-
Denmark	25.296	18.030	-	-	112	107	188	168
Finland	54.155	53.257	-	-	11	17	-	-
France	357.161	180.606	21.578	10.664	-	-	-	-
Germany	392.566	427.756	93.103	80.969	99.357	113.703	28.510	29.596
Greece	10.536	10.723	-	-	7.182	8.024	-	-
Hungary	22.199	12.724	-	-	-	-	8.754	10.425
Iceland	-	645	-	-	-	-	-	-
Italy	300.121	314.297	11.814	13.466	-	-	1.606	3.304
Netherlands	-	94.112	-	7.228	-	-	-	-
Norway	32.338	30.504	342	304	-	-	-	-
Poland	85.688	81.336	-	222	2.264	1.700	3.453	4.980
Portugal	31.118	32.666	1.404	1.543	-	-	-	-
Romania	30.066	29.431	-	-	-	-	-	-
Slovakia	-	3.848	-	-	-	-	-	-
Spain	108.359	111.365	13.295	14.085	30.325	33.954	-	2.983
Sweden	71.184	-	0	-	-	-	-	-
United Kingdom	16.154	-	1.513	-	50.116	-	-	-

Source: Eurostat

Production of roasted and soluble coffee in selected EU and candidate EU member countries

- in mln EUR -

	15861150 Roasted coffee, not decaffeinated		15861170 Roasted decaffeinated coffee		15861230 Extracts, essences and concentrates of coffee in solid form (including instant coffee)		15861250 Extracts, essences and concentrates of coffee in liquid form; preparations with a basis of extracts; essences or concentrates of coffee or with a basis of coffee	
	2004	2005	2004	2005	2004	2005	2004	2005
Austria	129	85	8	1	-	-	-	-
Belgium	334	394	52	56	-	-	-	-
Bulgaria	27	25	1	-	-	-	-	-
Croatia	52	52	-	-	-	-	-	-
Denmark	98	86	-	-	1	2	1	1
Finland	181	175	-	-	-	-	-	-
France	2.114	1.115	126	67	-	-	-	-
Germany	1.318	1.445	186	183	576	654	100	105
Greece	68	72	-	-	132	153	-	-
Hungary	52	29	-	-	-	-	32	41
Iceland	5	6	-	-	-	-	-	-
Ireland	32	-	-	-	-	-	-	-
Italy	2.039	2.222	97	112	-	-	19	33
Netherlands	-	531	-	-	-	65	-	-
Norway	124	146	2	2	-	-	-	-
Poland	180	202	-	-	11	10	14	28
Portugal	232	243	13	13	-	-	-	-
Romania	93	86	-	-	-	-	-	-
Slovakia	-	13	-	-	-	-	-	-
Spain	430	470	52	57	151	181	-	2
Sweden	298	-	-	-	-	-	-	-
United Kingdom	156	-	10	-	936	-	-	-

Source: Eurostat

The Prodcom statistics need to be used with caution. For a number of countries data are unavailable for reasons of confidentiality. Absence of a country or data therefore can mean ‘unavailable’ as well as ‘no production’. Only those countries for which at least some data are available have been included in the table. Some classifications are questionable: countries are mentioned as having soluble coffee production where industry sources do not indicate the existence of production facilities. For several countries data are only available from 2005. Please note that the Prodcom codes are not the same as the Harmonised System used for external trade data.

AUSTRIA

1. IMPORTS OF GREEN COFFEE

Imports of not–decaffeinated green coffee in 2005 reached a volume of 807.231 bags of 60 kilos (48.434 tons).This is a decrease of 15,2% in comparison with 2004, when 952.164 bags of 60 kilos were imported. (NB: 2004 figures are corrected and differ from those reported last year).

The imports of decaffeinated green coffee amounted to 60.575 bags (3.634 tons) in 2005, an increase of 19,2% to 2004. This is the highest import of decaffeinated coffee on record.

Total green coffee imports amounted to 867.780 bags (52.068 tons), which is 13,5% lower than 2004 (60.177 tons).

AUSTRIA: IMPORTS OF GREEN NOT-DECAFFEINATED COFFEE
- in bags of 60 kilos -

Countries of origin	2003	2004	2005
Vietnam	159.648	178.075	237.301
Brazil	384.735	344.120	208.438
Indonesia	59.235	87.835	91.868
Colombia	123.493	113.686	47.761
Nicaragua	30.896	28.918	34.875
Guatemala	29.415	27.895	31.498
India	45.933	25.053	26.890
Honduras	52.433	45.493	25.256
Others	162.948	101.088	103.344
Total	1.048.736	952.163	807.231

Source: OeStat

The most important country changed from Brazil to Vietnam. There are some reasons for this change: a development in 2004 to build up stocks in Brazilian coffee, the high level of exports to Eastern European countries in 2005 and the high rate of imports of roasted coffee from Germany.

Austria: Percentage distribution of green not-decaffeinated coffee
- Imports by main sources in % -

Countries of origin	2003	2004	2005
Vietnam	15,4	18,0	29,3
Brazil	36,7	34,8	25,8
Indonesia	5,6	8,9	11,4
Colombia	11,8	11,5	5,9
Nicaragua	3,0	2,9	4,3
Guatemala	2,8	2,8	3,9
India	4,4	1,4	3,3
Honduras	5,2	4,6	3,1
Others	15,1	15,1	13,0

2. FOREIGN TRADE IN ALL FORMS

The total volume of the international coffee trade in all forms (green, roasted and instant coffee and instant specialities) increased to 117,225 tons, in comparison to 111,639 tons in 2004, a plus of 5%, Imports were 76,421 tons (minus 7,6%), exports 40,804 tons (plus 40,9%)

3. COFFEE CONSUMPTION

AUSTRIA
Per capita consumption of green coffee
- in kilos -

Year	per capita consumption
1950	0,6
1960	1,9
1970	3,8
1980	6,9
1990	8,0
2000	7,9
2004	8,1
2005	8,1

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

The prices in retail market increased by 6% as a result of a price-increase by all firms in May/June 2005. In the gastronomic area the prices increased by 10 to 15%.
Further price increases may be required depending on increasing costs in all sectors for the coffee industry.

5. COMMENTS ON PARTICULAR SUBJECTS

Main highlight in Austria was again the 4th Day of Coffee on 1 October 2005. The press conference on the 20th of September 2005 brought a record of visiting journalists and more than 60 articles in the press. The Austrian Coffee Association partners, the Austrian Coffeehouses ('Kaffeehäuser') developed activities for the consumers in more than 200 Coffeehouses. In 2006 the Austrian Coffee Association will celebrate a small jubilee: the 5th Day of Coffee.
An other important activity was the implementation of a complete new website for coffee and tea: www.Kaffeeverband.at

BELGIUM-LUXEMBOURG

1. IMPORTS OF GREEN COFFEE

Imports of not-decaffeinated green coffee reached a volume of 3.150.044 bags (189.003 tons) in 2005. This is 0,83% more than the 2004 imports and 4,83% more than the 2003 imports.
As to the imports of decaffeinated green coffee, 113.700 bags (6.822 tons) were imported in 2005. This is an increase of 19,30% compared to 2004.
Total green coffee imports amounted to 3.263.744 bags (195.825 tons) in 2005.

Belgium-Luxembourg: Imports of green not-decaffeinated coffee
- in bags of 60 kg -

Countries of origin	2003	2004	2005
Brazil	669.534	619.931	650.744
France	432.072	397.487	292.018
Vietnam	303.306	316.807	267.597
Columbia	276.854	314.989	258.363
Honduras	136.453	143.838	177.004
Uganda	103.207	166.490	139.923
India	163.984	155.708	139.361
Ethiopia	84.015	81.705	123.515
Peru	51.101	106.281	116.176
Guatemala	102.538	90.364	105.914
Cameroon	61.144	80.501	93.531
Indonesia	57.847	55.224	56.893
Kenya	49.093	59.262	49.581
Costa Rica	35.701	51.471	33.230
Mexico	21.707	58.906	29.569
Others	456.477	424.990	616.625
Total	3.005.033	3.123.954	3.150.044

The top 4 of most important imports did not change. The most important country of origin was again Brazil with a total market share of 20,66%, which is slightly higher than its market share of 2004.

The top ten suppliers were the following countries:

Belgium- Luxembourg:
Percentage distribution of green not-decaffeinated coffee
Imports by main sources
- in % -

Countries of origin	2003	2004	2005
Brazil	22,28	19,84	20,66
France	14,38	12,72	9,27
Vietnam	10,09	10,14	8,50
Columbia	9,21	10,08	8,20
Honduras	4,54	4,60	5,62
Uganda	3,43	5,33	4,35
India	5,46	4,98	4,42
Ethiopia	2,80	2,62	3,92
Peru	1,70	3,40	3,69
Guatemala	3,41	2,89	3,36
Cameroon	2,03	2,58	2,97

France lost an important part of its market share (more than 3%). Columbia, after three years of increased market share, lost some in 2005. Honduras increased its market share and became more important than Uganda, which lost a part of its market share in 2005 but still did better than in 2003.

2. FOREIGN TRADE IN ALL FORMS

In relation to foreign trade in roasted coffee, Belgium has not only been an important market for foreign companies but also shows a strong export performance in finished goods.

Belgium-Luxembourg :
Imports of roasted coffee
- in tons -

Countries of origin	2005
Germany	8.665
Netherlands	6.739
France	4.459
Luxembourg	1.626
Italy	768
Switzerland	299
UK	204
Poland	106
Austria	82
Others	45
Total	22.993

Belgium-Luxembourg:
Exports of roasted coffee
- in tons -

Countries of origin	2005
France	22.363
Netherlands	9.868
Italy	5.888
UK	4.386
Germany	3.795
Luxembourg	1.380
USA	892
Russian Federation	319
Poland	282
Denmark	279
Greece	249
Others	726
Total	50.427

This means that Belgium exports 2,2 times more roasted coffee than it imports. This is certainly a very positive performance in a market dominated by international competition.

3. COFFEE CONSUMPTION

Receipt of excises on coffee give us a very clear view on the evolution of consumption as the amount to be paid is EUR 0,25 per kilo.

Belgium: Excises on coffee

Year	*EUR*	*Index*
1995	12.940	100,0
1996	13.708	105,9
1997	13.609	105,2
1998	14.180	109,6

1999	13.709	106,0
2000	13.411	103,6
2001	13.733	106,1
2002	12.809	99,0
2003	13.221	102,2
2004	13.864	107,1
2005	13.560	104,8

Excises have to be paid 30 days after the moment of roasting. This means that those figures can only be affected by stockpiling by the consumer. In a quiet market with no consumer price changes, the excises give a clear indication of the purchase behaviour of the consumer. Compared to ten years ago, this is an increase of 4,62%.

As to the consumption of regular coffee, we mention the following figures:

Belgium:
Roasted coffee consumption
- in tons -

Year	Tons
1995	51.300
1996	54.625
1997	54.041
1998	55.397
1999	53.059
2000	51.998
2001	52.778
2002	50.751
2003	51.005
2004	52.683
2005	52.351

Consumption decreased by 0,63% in relation to the previous year. Compared to ten years ago this means an increase of 2,1%.

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

Belgium:
Average consumer price
- in EUR/kilo, excises and VAT included -

2002	March	7,20
	June	7,12
	September	7,07
	December	7,07
2003	March	7,08
	June	7,00
	September	6,98
	December	6,91
2004	March	6,91
	June	6,90
	September	6,86
	December	6,83
2005	March	7,14
	June	7,31
	September	7,49
	December	7,42

5. COMMENTS ON PARTICULAR SUBJECTS

The most important event last year was the development of a guide for self-control by the sector, according to the European and Belgian laws on food hygiene and HACCP. This guide has been introduced to the Official Controlling body in Belgium (FAVV/AFSCA). The association is now awaiting their comments to adjust the guide and hopefully have it approved by the end of 2006. The final goal and purpose of this guide is to offer each Belgian coffee roaster a tool to implement the legal requirements in their factory. This guide will be used by the official controlling organism as a guideline for controls.

6. EXCISE DUTIES AND VAT LEVEL

Coffee carries an excise duty of EUR 0,25 per kg roasted coffee and EUR 0,69 per kg on soluble coffee. The Belgian VAT rate remains at 6%.

DENMARK

1. IMPORTS OF GREEN COFFEE

According to Eurostat data, imports of green not-decaffeinated coffee into Denmark from all sources were 35.918 tons (598.630 bags) in 2005, compared to 54.823 tons (913.712 bags) in 2004. This is a drop of 34%. This is caused by the fact that two roasters have discontinued production in Denmark. Conversely, the imports of roasted coffee have increased.

Denmark: Imports of green not-decaffeinated coffee
- in bags of 60 kilos -

Year	Volume
2003	854.377
2004	913.712
2005	598.630

Source: Eurostat

Brazil and Colombia remained Denmark's most important suppliers in 2005. Obviously, volume comparisons with 2004 are not relevant because of the overall lower import volumes. Vietnam retained the third spot. As was the case last year, Peru and Honduras completed the 'top 5'. Some of the smaller suppliers showed very large swings, for instance Burundi (almost triple the volume of 2004), and India (easily recovering from a drop the previous year).

Denmark: Imports of green not-decaffeinated coffee
- in bags of 60 kilos -

Countries of origin	2003	2004	2005
Brazil	398.418	412.190	273.362
Colombia	106.185	114.185	70.185
Vietnam	51.893	82.587	52.607
Peru	47.632	47.572	24.562
Honduras	41.693	36.298	21.115
Uganda	24.387	23.525	15.803
Burundi	8.500	4.368	15.195
Indonesia	18.023	22.148	13.720
Ethiopia	14.970	15.838	12.923
Papua New Guinea	5.112	6.022	6.640
India	5.573	1.910	6.400
Mexico	28.507	20.143	6.032
Kenya	17.290	9.452	5.245
Rwanda	8.367	8.652	3.940
El Salvador	4.648	8.833	3.323
Guatemala	10.290	6.062	3.248
Zimbabwe	2.870	3.850	3.050
Cameroon	2.728	4.888	2.760
Others	57.290	85.188	58.520
Total	854.377	913.712	598.630

Source: Eurostat

In percentage terms Brazil's import share increased slightly by 0,6 percentage points to 45,7%. The import share of Colombia (11,7%) showed a decline of 0,8 percentage points. Vietnam's growth in imports share levelled off. Peru and Honduras gradually lost market share in recent years.

Denmark: Percentage distribution of green not-decaffeinated coffee
Imports by main sources
- in % -

Countries of origin	2003	2004	2005
Brazil	46,6	45,1	45,7
Colombia	12,4	12,5	11,7
Vietnam	6,1	9,0	8,8
Peru	5,6	5,2	4,1
Honduras	4,9	4,0	3,5
Uganda	2,9	2,6	2,6
Burundi	1,0	0,5	2,5
Indonesia	2,1	2,4	2,3
Ethiopia	1,8	1,7	2,2
Papua New Guinea	0,6	0,7	1,1
India	0,7	0,2	1,1
Mexico	3,3	2,2	1,0
Kenya	2,0	1,0	0,9
Rwanda	1,0	0,9	0,7
El Salvador	0,5	1,0	0,6
Guatemala	1,2	0,7	0,5
Zimbabwe	0,3	0,4	0,5
Cameroon	0,3	0,5	0,5
Others	6,7	9,3	9,8
Total	100,0	100,0	100,0

Source: Eurostat

Denmark: Percentage distribution of green not-decaffeinated coffee
Imports by type

Types of coffee	2003		2004		2005	
Arabicas	84		79		78	
Colombian Milds		16		14		13
Other Milds		20		18		17
Brazilian Naturals		48		47		48
Robustas	12		15		14	
Unknown	4		6		8	

Source: Eurostat, ICO

The dominant market position of Arabica coffees has remained virtually unchanged in 2005. Within this group Brazilian Naturals have by far the largest and stable share. The percentage shares of Colombian Milds and Other Milds dropped by 1 percentage point, as did that of the Robustas.

2. FOREIGN TRADE IN COFFEE IN ALL FORMS

Denmark: Foreign trade in coffee including intra-EU25 trade
- in tons actual weight -

Forms of coffee	Imports		Exports	
	2004		2004	
Green coffee not decaffeinated	54.823	35.918	344	28
Green coffee decaffeinated	540	539	1	9
Roasted coffee not decaffeinated	4.120	12.041	12.285	7.089
Roasted coffee decaffeinated	120	130	11	45
Soluble coffee	2.487	2.322	462	904

Source: Eurostat

As a logical consequence of the discontinuation of production by two roasters in Denmark, imports of roasted coffee increased threefold and exports fell. Regarding imports of finished products, Sweden took over from Germany as the major supplier with a share of roasted coffee imports (including decaffeinated)of 82%. This again reflects the change in production location. Germany was the second source with a share of 11%, followed by the Netherlands (3%). In 2005 France was the most important supplier of soluble coffee (31%), followed by Switzerland (25%), Germany (13%), Colombia (9%) and Sweden (7%). In line with reduced production capacity, exports of roasted coffee products decreased. The most important destinations for roasted coffee exports (incl. decaffeinated) were Sweden (22%), Latvia (19%), Iceland (17%) and Lithuania (9%).

3. COFFEE CONSUMPTION

The Danish Coffee and Tea Importers Association reports that official statistics for coffee consumption are still not available. It estimates that the consumption has decreased.

The ICO calculated the Danish consumption in 2005 as being 814.000 bags (2004: 849.000). Per capita consumption in 2005 was 9,04 kg (2004: 9,42 kg).

4. COMMENTS ON PARTICULAR ASPECTS

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

5. 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

In 2005 Finland imported 1.052.660 bags of green coffee, a decrease of 0,6% compared to 2004.

Finland: Imports of green coffee in 1994-2005
- in bags of 60 kilos -

Year	Imports
1994	1.313.597
1995	793.556
1996	1.053.899
1997	1.037.833
1998	1.121.183
1999	1.146.675
2000	1.001.017
2001	1.025.000
2002	1.004.465
2003	1.023.708
2004	1.058.831
2005	1.052.660

The most important origins by volume were:

Finland: Imports of green coffee by country of origin
- in 1000 bags -

Countries of origin	2003	2004	2005
Brazil	441,7	473,4	468,5
Colombia	189,2	203,8	196,7
Nicaragua	43,5	57,9	58,7
Kenya	67,7	48,6	50,8
Guatemala	61,8	45,3	49,7
Honduras	43,5	63,8	36,2
Ethiopia	27,6	29,9	35,2
Peru	17,4	24,7	32,5
Zambia	9,6	25,6	20,6
Burundi	11,0	3,0	12,5
Tanzania	13,2	12,7	10,9
Vietnam	4,4	15,1	10,1
Costa Rica	29,6	3,6	10,0
Zimbabwe	9,2	10,3	9,2
Togo	0,0	0,0	8,4
El Salvador	17,2	9,2	8,3
Germany	0,8	1,2	8,0
India	20,6	13,4	6,8
Others	15,7	17,3	19,6
Total	1.023,7	1.058,8	1.052,7

The ‘top 5’ suppliers in 2005 were Brazil, Colombia, Nicaragua, Kenya and Guatemala. Imported volumes from Nicaragua, Guatemala and Kenya increased, while those of Brazil and Colombia decreased.

Finland: Percentage distribution of green coffee imports by main sources 2003-2005

- in % -

Countries of origin	2003	2004	2005
Brazil	43,2	44,7	44,5
Colombia	18,5	19,2	18,7
Nicaragua	4,3	5,5	5,6
Kenya	6,6	4,6	4,8
Guatemala	6,0	4,3	3,7
Honduras	4,3	6,0	3,4
Others	17,1	15,7	18,3
Total	100,0	100,0	100,0

2. FOREIGN TRADE OF COFFEE IN ALL FORMS

Green coffee

Imports of green coffee reached 63.160 tons in 2005. The imports decreased by 0,6% from the previous year. The average C.I.F price was EUR 1,83/kg.

Exports of green coffee were 3 tons in 2005 (102 tons in 2004).

Roasted coffee

Imports of roasted coffee were 3.657 tons in 2005, an increase of 5,1% from 2004.

Exports of roasted coffee decreased from 2004 by 12,0% to 5.571 tons. The main export destination for roasted coffee was Estonia (97,9%).

Finland: Foreign trade in coffee 2003-2005

- in tons -

Forms of coffee	Imports 2003	2004	2005	Exports 2003	2004	2005
Green coffee	61.442	63.530	63.130	157	102	3
Roasted coffee	2.867	3.482	3.657	6.033	6.332	5.571
Instant coffee	695	722	925	14	32	49

3. IMPORT RATES AND NATIONAL TAXES

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

4. COFFEE CONSUMPTION

The consumption of roasted and instant coffee was 9,8 kg/person in 2005.

5. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

The average consumer price of roasted coffee was EUR 4,71/kg in 2005, an increase of 13,8 % compared to 2004.

6. EXCISE DUTIES AND VAT LEVEL

The value-added tax for coffee is the same as for other food stuffs, i.e. 17%. There are no excise duties for coffee.

FRANCE

The following is provided by the *Confédération Nationale du Café.* All following figures are extracted from national official statistic provided by French customs and the French Economics Ministry.
The *Confédération Nationale du Café* (CNC) represents all the coffee trade and industry in France and membership covers over 95% of the volume of the sector:

- Green Coffee importers (UNACAF)
- Small roasters and coffee shops joined in the Comité Français du Café (CFC)
- Industrial roasters (Syndicat National de l'Industrie et du Commerce du Café – SNICC)
- Soluble Coffee manufacturers (SFFCS)

Overall coffee consumption in 2005 is divided as follows: 77% roast and ground, 21% soluble coffee. The remaining 2% is undefined. Considering retail sales only, which represent around 80% of the total market, roast and ground has a market share of 74% and soluble coffee of 26%.
The consumption of decaffeinated coffee represents approximately 7%.

1. IMPORTS

France: Total imports of green and processed coffee
- in tons -

	2005	2004	2003
Green coffee non decaf	211.503	234.816	287.410
Green coffee decaf	1.836	1.570	1.376
Roasted coffee non decaf (in green equivalent)	96.007	82.391	75.644
Roasted coffee decaf (in green equivalent)	2.958	4.010	3.322
Pure extracts (>95%) = soluble coffee (in green equivalent)	29.996	33.002	33.333
Other extracts (in green equivalent)	25.126	18.674	7.008
Total volume	367.426	374.463	408.093
TOTAL VALUE in 1.000 EUR	744.453	614.594	

The main green coffee suppliers in terms of volumes and percentages were:

France: Imports of green, not-decaffeinated coffee by main origins
- in tons and % -

	2005		2004		2003	
Brazil	60.395	28,56%	64.284	27,38%	75.342	23,76%
Vietnam	31.620	14,95%	39.654	16,89%	55.878	17,62%
Colombia	12.587	5,95%	15.336	6,53%	18.474	5,83%
Ethiopia	10.537	4,98%	10.140	4,32%	9.534	3,01%
Cote d'Ivoire	8.860	4,19%	13.218	5,63%	16.092	5,07%
Indonesia	6.420	3,04%	4.772	2,03%	2.897	0,91%
Cameroon	6.068	2,87%	10.098	4,30%	10.656	3,36%
Honduras	6.036	2,85%	6.924	2,95%	9.018	2,84%
Uganda	5.758	2,72%	7.170	3,05%	11.490	3,62%
Peru	4.962	2,35%	5.052	2,15%	5.904	1,86%
India	4.829	2,28%	6.564	2,80%	5.778	1,82%
Guatemala	3.992	1,89%	3.912	1,67%	3.984	1,26%
Madagascar	3.161	1,49%	4.009	1,71%	3.953	1,25%
Mexico	2.664	1,26%	4.350	1,85%	4.512	1,42%
Guinea	1.917	0,91%	1.791	0,76%		0,00%
EU	23.359	11,04%	20.972	8,93%	22.841	7,20%
Other	18.339	8,67%	16.570	7,06%	30.851	10,74%
Total	211.503	100,00%	234.816	100,00%	287.204	100,00%
	Change on previous year	- 9.93%	Change on previous year	- 18.24%	Change on previous year	- 4.53%

Brazil somewhat strengthened its position as first supplier, despite a lower volume. Cote d'Ivoire has decreased and is now fifth supplier after Ethiopia.

France: Percentage distribution of green not-decaffeinated coffee imports by types of coffee
- in % -

		2005		2004		2003
Arabicas	55,65%		54,25%		52,76%	
Colombian Milds		6,93%		7,23%		7,28%
Other Milds		14,99%		15,17%		15,78%
Brazilian Naturals		33,73%		31,85%		29,70%
Robustas	32,54%		35,89%		38,14%	
Other, not specified (*)	11,81%		9,86%		9,10%	

(*) considered to be mainly Robusta

<u>Prices of imported green coffee</u>

The import values of not decaffeinated green coffee can be detailed as follows:

France : Average import price of green coffee
- EUR per kilo -

	2005	2004	2003
January	1,19	0,95	0,99
February	1,31	0,99	1,03
March	1,25	1,03	1,07
April	1,49	1,04	1,10
May	1,40	1,12	1,03
June	1,57	1,06	1,01
July	1,70	1,06	0,92
August	1,68	1,03	1,01
September	1,56	1,02	1,00
October	1,59	1,05	0,89
November	1,52	1,09	1,11
December	1,55	1,12	1,01
Year average	1,48	1,05	1,01

2. FOREIGN TRADE IN COFFEE IN ALL FORMS:

The exports of processed coffee (in green bean equivalent) can be summarised as follows:

France : Exports of coffee
- in tons -

	2005	2004	2003
Green coffee non decaf	2.189	1.591	1.180
Green coffee decaf	16.358	15.209	22.229
Roasted coffee non decaf (in green equivalent)	14.961	12.348	12.473
Roasted coffee decaf (in green equivalent)	285	2.039	3.178
Pure extracts (>95%) = soluble coffee (in green equivalent)	25.406	34.337	45.494
Other extracts (in green equivalent)	5.314	5.633	5.591
Total exports of coffee in all forms	64.513	71.157	90.144

3. COFFEE CONSUMPTION

Coffee consumption is calculated as the difference between imports and exports of green coffee and green coffee equivalent for all other forms, including stocks.

Estimated internal consumption:
2005: 302.912 tons, means 5.05 kg per capita
2004: 303.752 tons, means 5.06 kg per capita
2003: 324.848 tons, means 5,41 kg per capita

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

According to the *Institut National de la Statistique et des Etudes Economiques* (INSEE) the retail price index for coffee showed the following development:

Average annual consumer price index:
Basis 100 in 1998
2005 = 93,38
2004 = 92,57
2003 = 93,31

5. COMMENTS ON PARTICULAR ASPECTS

In the past years the French market has lost significant volume and the companies are trying to stimulate consumption and to compensate for lower volumes by increasing value through the introduction of new products such as the roast & ground coffee pods.
In 2005 imports of green, not-decaffeinated coffee in France decreased again but the internal consumption seems to be stabilized around 303.000 tons.

The reasons for this decrease are regularly analyzed by the professionals.
Traditionally the contraction of the market is explained by structural causes

- Life styles involving the fragmentation of family participation in the meals, in particular breakfast which remains the focal moment of consumption
- Competition of other products at this focal time (chocolate milk, fruit juice) but also during other breaks (tea and infusions)
- Evolution of the taste of the younger consumers for sweeter and more convenient products
- Negative, but generally accepted ideas on the effects of coffee on health

In order to validate or to reject certain beliefs, the professionals are particularly interested in the young people and conducted a survey with Médiamétrie during December 2004.
This reveals that only 46,4% of the 11-23 years report that they consume coffee. Only after age 17 among boys and 19 for girls the coffee drinkers outnumber the non-drinkers.

The trade has reacted to the fall of consumption with innovations concerning:

- Origins: with a great diversity, France is the main European market to offer coffees of pure origins, responding to the particular sensitivity of the consumers to the concepts of soil and origin.
- Presentation and packaging for instant coffee and roast & ground coffee: France is today one of the main European markets for espresso machines with single-serve portions and, consequently, for the availability of coffee in single-serve portions which shows an exponential growth
- New solidarity by initiating partnerships with the producer countries to propose labels as regards sustainable development (organic coffees, fairly traded coffee and such)
- Products for easy home preparation, with an offer extending to cappuccino in particular, as well as new recipes suggested to the barmen to generate additional consumption in bars and brasseries: cold coffee shakes, flavoured coffees, cappuccino, coffee "macchiato".

In addition medical research and distribution of serious and reliable information concerning the positive effects of coffee consumption on health is being carried out. The profession supports the publication of a newsletter for use by doctors containing independent and objective research results by medical scientists: "Health & Coffee".

GERMANY

1. IMPORTS OF GREEN COFFEE

In 2005 gross imports of not-decaffeinated green coffee into the Federal Republic of Germany were 14,99 million bags (899.886 tons), compared to 15,96 million bags (958.080 tons) in 2004. Gross imports include coffees imported for free circulation, for passive processing under customs control and for storage. Stocks in terms of foreign trade statistics include free ports and customs stocks and open customs stocks.

To arrive at net import figures, the green coffee imports not destined for the German market but subject to passive processing under customs control must be deducted. Taking this into account, a net volume of 14.996.054 bags (899.763 tons) of green coffee was imported into the EU through Germany. In 2004 the comparable volume was 15.960.567 bags (957.634 tons).

The currently used method of collecting data for import statistics results in figures representing the flow of goods rather than exact registration of imports. This is illustrated by the fact that the net-import figures have remained largely unchanged in recent years, while consumption has been dropping. Detail in the countries of provenance has also suffered, although it is still possible to identify the approximate share of the various supplying countries.

Federal Republic of Germany:
Net imports of not-decaffeinated green coffee
- in bags of 60 kilos -

Countries of origin	2004	2005
Brazil	4.340.044	4.246.290
Vietnam	2.966.578	2.548.540
Columbia	1.395.194	1.446.586
Indonesia	1.037.598	1.405.440
Peru	916.100	741.245
Ethiopia	730.471	676.656
Honduras	782.217	671.243
Papua New Guinea	553.629	477.743
El Salvador	495.741	441.102
Guatemala	272.630	282.535
Kenya	267.283	225.366
Tanzania	152.452	212.818
Costa Rica	248.465	209.843
Burundi	120.726	199.737
Mexico	227.299	183.804
Uganda	257.633	169.237
India	302.066	159.438
Rwanda	120.876	141.113
Others	773.565	557.318
Total	15.960.567	14.996.054

Source: Statistisches Bundesamt

In 2005 net imports of not-decaffeinated green coffee were 6,1% lower than the previous year. The list of the countries of origin has remained fairly stable. Brazil remained the largest supplier, but with a decrease in volume (2,2% lower). Vietnam is placed second - also with a decrease in volume of 14,1% and Colombia shows an increase in volume of 3,7%.

Federal Republic of Germany: Percentage distribution of not-decaffeinated green coffee net imports by main sources
- in % -

Countries of origin	2004	2005
Brazil	27,19	28,32

Vietnam	18,59	16,99
Columbia	8,74	9,65
Indonesia	6,50	9,37
Peru	5,74	4,94
Ethiopia	4,58	4,51
Honduras	4,90	4,48
Papua New Guinea	3,47	3,19
El Salvador	3,11	2,94
Guatemala	1,71	1,88
Kenya	1,67	1,50
Tanzania	0,96	1,42
Costa Rica	1,56	1,40
Burundi	0,76	1,33
Mexico	1,42	1,23
Uganda	1,61	1,13
India	1,89	1,06
Rwanda	0,76	0,94
Others	4,85	3,72
Total	100,00	100,00

Source: Statistisches Bundesamt

The distribution of green coffee imports according to ICO coffee groups showed an increase in Robustas and a decrease in Arabicas.

Federal Republic of Germany: Percentage distribution of not-decaffeinated green coffee net imports by types of coffee

- in % -

	2003		2004		2005	
Arabicas	77		72		71	
Colombian Milds		15		12		13
Other Milds		27		28		25
Brazilian Naturals		35		32		33
Robustas	23		28		29	
Unknown	-		-		-	

2. FOREIGN TRADE IN COFFEE IN ALL FORMS

Please note that the source for the data in this paragraph is different and the data are therefore not directly comparable with those in other paragraphs.

Federal Republic of Germany: Foreign trade in coffee including intra-EU25 trade

- in tons actual weight -

Forms of coffee	Imports		Exports	
	2004	2005	2004	2005
Green coffee not decaffeinated	958.042	899.806	114.770	151.378
Green coffee decaffeinated	533	920	106.241	112.723
Roasted coffee not decaffeinated	32.124	43.875	89.344	151.378
Roasted coffee decaffeinated	1.488	938	7.858	9.222
Soluble coffee	27.380	29.406	44.857	51.712

Source: Eurostat

Imports of decaffeinated green coffee increased by 72%. Of the 2005 volume, the quasi-totality was imported from Italy.

Imports of roasted coffee (not-decaffeinated and decaffeinated together) increased by 1/3rd. In 2005 the largest suppliers of roasted coffee (incl. decaffeinated) were Austria (24% of total volume) and Italy (17%). The German imports of soluble coffee originated mainly from Belgium (23%) and the Netherlands (20% of total volume), the United Kingdom (11%), Ecuador (10%), Brazil (9%), Spain (7%), and Switzerland (5%).
Exports of roasted coffee (incl. decaffeinated) registered a 2/3rd increase and were mainly destined for the Netherlands (19% of total volume), France (13%), Austria (12%) and Poland (11%). Soluble coffee exports in 2005 were destined for Russia (15% of total volume), the United Kingdom (12%), Hungary (9%), France (9%) and the Netherlands (8%).

3. COFFEE CONSUMPTION

Import figures, production statistics or even tax revenue data no longer provide the basis for reliable statements regarding size or development of the domestic market for coffee products. As a consequence, since 1992 the 'Market Research' working group of the German Coffee Association has taken on the task of evaluating all available data, especially information gathered by the associations 'Coffee' registration pool which covers about 85% of coffee sales on a four-monthly basis through a trustee.

The turnover of the coffee industry in Germany was EUR 4,0 billion in 2005, an increase of nearly 17,6% compared to 2004 mainly due to higher consumer prices.

In volume terms coffee sales decreased by 4,4%. Recalculated to green coffee equivalent, 502.835 tons (8,38 million bags) of coffee were processed to roasted and soluble coffee. Statistically, in 2005 per capita consumption was 6,1 kg green coffee. In 2004 the figure was 6,4 kg. Roasted coffee sales decreased to a volume of 386.500 tons in 2005, compared to 407.000 tons in 2004. Soluble coffee sales increased to a volume of 16.500 tons in 2005, compared to 16.000 tons in 2004.

Federal Republic of Germany:
Imports of green coffee per capita*

Year	Green coffee imports in tons	Green coffee per capita in kilos
1953	75.417	1,5
1960	191.005	3,5
1970	295.789	4,9
1980	410.748	6,7
1990*	563.350	7,1
1991	590.101	7,4
1992**	605.500	7,5
1993**	601.200	7,4
1994**	578.800	7,1
1995**	564.600	6,9
1996**	562.250	6,9
1997**	552.620	6,7
1998**	548.170	6,7
1999**	549.520	6,7
2000**	548.520	6,7
2001**	549.530	6,7
2002**	541.050	6,6
2003**	532.030	6,5
2004**	525.930	6,4
2005**	502.835	6,1

* including 'new' federal states from 1990
** estimated total market volume
Source: German Coffee Association

Federal Republic of Germany: Coffee Market

- in tons -

	2004	2005
Total volume green coffee	525.930	502.835
of which roasted coffee	407.000	386.500
in green bean equivalent	484.330	459.935
Roasted coffee, not decaffeinated	364.500	348.000
Roasted coffee, decaffeinated	42.500	38.500
included in roasted coffee:		
Espresso/Caffè Crema	15.600	25.000
Coffeepads/-pouches	2.750	7.000
of which soluble coffee*	16.000	16.500
in green bean equivalent	41.600	42.900
Soluble coffee, not-decaffeinated	14.900	15.500
Soluble coffee, decaffeinated	1.100	1.000

* soluble coffee beverages are taken into account with their coffee content only

Source: German Coffee Association

The market share of various segments showed little or no change. Treated decaffeinated decreased to 9%, untreated others increased to 53% in the year 2005.

Federal Republic of Germany:
Market shares of roasted coffee products

- in % -

		2004		2005	
Untreated		70		71	
	naturally mild		18		18
	others		52		53
Treated		30		29	
	decaffeinated		10		9
	special mild		20		20

Source: German Coffee Association

The non-household consumption was difficult to assess statistically so far. According to market research, this segment accounts for 25% 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.

An ever-growing segment in the non-household as well as the household sector is the market for Espresso and Caffè Crema. In 2005 25.000 tons of Espresso and Caffè Crema were supplied to the total market, an increase of 60,3%! This includes the imports of roasted coffee from Italy: 14.000 tons in 2005. Instant coffee drinks, introduced in the mid-eighties, continue to increase in sales. In 2005 sales increased to 44.150 tons (2004: 42.000 tons). The instant coffee drinks, which consist only partially of coffee extracts, are represented here with their actual weight. The development of the share of these instant coffee drinks in the total instant coffee market is remarkable.

Federal Republic of Germany:
Sales of soluble coffee including instant coffee drinks

Year	Total market in tons	Instant coffee drinks share in %
1990	14.200	14

1991	15.800	21
1992	17.700	30
1993	21.700	45
1994	24.200	52
1995	26.350	58
1996	26.450	58
1997	26.400	60
1998	27.050	61
1999	29.910	64
2000	32.760	67
2001	37.600	70
2002	43.300	74
2003	49.000	76
2004	54.700	77
2005	55.700	79

Instant coffee drinks calculated with actual weight
Source: German Coffee Association

Within the group of instant coffee drinks the instant-cappuccinos are the largest sector. Their market-share shows 86% in 2005, cuts in so-called family-packages with a content up to 1000 grams instant-cappuccino (55%), followed by traditional cappuccino (27%) and aroma cappuccino (4%). Latte Macchiato has nearly doubled their market-share up to 4%. Iced-coffee, Café au lait and "Wiener Melange" show together 10% of the market.

4. DEVELOPMENTS OF PRICES FOR ROASTED COFFEE

The increase in green coffee prices, combined with ever-increasing as prices for oil (resulting in higher costs for – oil-based - packaging foils and higher energy costs), significantly higher freight rates and other fees, e.g. toll. has made the increase in retail prices necessary. At the beginning of 2005 a level from about EUR 2,90 per 500 grams had been established. In December 2005 it increased to EUR 3,77 with an average for 2005 of EUR 3,61. At the beginning of 2006 the increase for roasted coffee continued. A level of about EUR 3,81 per 500 grams has been reached in February 2006.

Federal Republic of Germany:
Retail prices of roasted coffee 1970-2004

Year	Roasted coffee EUR/500 g
1970	4,24
1975	4,10
1980	4,94
1985	5,46
1990	3,70
1991	3,57
1992	3,55
1993	3,43
1994	3,82
1995	4,08
1996	3,58
1997	3,97
1998	4,02
1999	3,56
2000	3,43
2001	3,27
2002	3,06
2003	3,00
2004	2,91
2005	3,61

average consumer price of not-decaffeinated roasted coffee
Source: German Coffee Association

5. COMMENTS ON PARTICULAR ASPECTS

The German Coffee Association answers an increasing number of questions on coffee from students, consumers, companies and journalists. www.kaffeeverband.de provides information regarding coffee worldwide, shows trends in consumption and contains recipes. Information material such as coffee library, coffee digests, brochures, posters, a film about coffee and photo CD-ROM can be ordered via the website. Furthermore there is a special section about health, where people can ask an expert questions about the effects of coffee on the human body and find a lot of information about coffee and its ingredients.

GREECE

1. IMPORTS OF GREEN COFFEE

In 2005 imports of green, not decaffeinated coffee from all sources into Greece were 25.594 tons (423.615 bags). In calendar year 2004 a volume of 27.532 tons (465.865 bags) was imported. This represents a drop of 7%.

Greece: Imports of green, not –decaffeinated coffee from all sources

	2003	2004	2005
ton	25.602	27.532	25.594
bags	426.692	458.865	423.615

Source: Eurostat

The most important origins in the most recent three years were (listed in the 2005 order):

Greece: Imports of green, not-decaffeinated coffee by origin
- in bags of 60 kilos -

Countries of origin:	2003	2004	2005
Brazil	308.803	336.252	327.390
India	38.667	47.463	34.623
Vietnam	37.378	32.035	29.027
Colombia	12.507	11.580	10.950
Ethiopia	7.525	8.087	7.205
Cote d'Ivoire	1.447	1.077	1.867
Costa Rica	1.085	1.082	853
Tanzania	92	0	753
Indonesia	2.343	4.643	697
Nicaragua	1.053	158	683
Uganda	1.583	1.370	652
Guatemala	812	603	453
Honduras	33	0	367
Kenya	1.097	1.028	330
Mexico	738	697	315
Others	11.528	12.790	10.408
Total	426.692	458.865	426.573

Source: Eurostat

In 2005 Brazil remained by far the most important supplier, even with a slightly lower 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 in 2005. Colombia and Ethiopia respectively retained their fourth and fifth position.

The following table gives the same information, expressed in percentage shares:

Greece: Imports of green, not-decaffeinated coffee by origin
- in % -

Countries of origin	2003	2004	2005
Brazil	72,37	73,28	76,75
India	9,06	10,34	8,12
Vietnam	8,76	6,98	6,80
Colombia	2,93	2,52	2,57
Ethiopia	1,76	1,76	1,69
Cote d'Ivoire	0,34	0,23	0,44
Costa Rica	0,25	0,24	0,20

Tanzania	0,02	0,00	0,18
Indonesia	0,55	1,01	0,16
Nicaragua	0,25	0,03	0,16
Uganda	0,37	0,30	0,15
Guatemala	0,19	0,13	0,11
Honduras	0,01	0,00	0,09
Kenya	0,26	0,22	0,08
Mexico	0,17	0,15	0,07
Others	2,70	2,79	2,44
Total	100,00	100,00	100,00

Source: Eurostat

Brazil continues to represent around 3/4th of the imports into Greece. India lost some market share and that of Vietnam dropped slightly. The shares of Colombia and Ethiopia were comparatively stable.

2. COFFEE CONSUMPTION

Due to lack of statistics in Greece definitive statements about consumption are not possible. The ICO calculates the consumption of coffee in Greece as follows:

Greece: Total consumption of green coffee
- in 1000 bags -

Years	Total consumption
1964-69 average	201
1970-79 average	290
1980-89 average	470
1990-99 average	504
2000	713
2001	578
2002	864
2003	1.003
2004	928
2005	911

Source: ICO

Greece: Per capita consumption
- in kg green coffee equivalent -

Year	Consumption
1990	3,75
1995	2,20
1996	4,19
1997	4,31
1998	3,87
1999	3,67
2000	4,69
2001	3,47
2002	4,72
2003	5,46
2004	5,05
2005	4,96

Source: ICO; 2003 and later data have been revised

The general picture emerges that coffee consumption in Greece is erratic, but on the whole shows an upward trend.

IRELAND

1. IMPORTS OF GREEN COFFEE

In 2005 imports of green, not decaffeinated coffee from all sources into Ireland were5.273 tons (87.888 bags) compared to 4.858 tons (80.965 bags) in 2004. This means that 2005 imports were 8,5% higher in volume than the previous year.

Ireland: Imports of green, not –decaffeinated coffee

	2003	2004	2005
tons	5.404	4.858	5.273
bags	90.062	80.965	87.888

Source: Eurostat

Over half of the green coffee imported into Ireland arrives through other EU members (mostly the United Kingdom), making it impossible to determine the original country of export. With this limitation, the following table lists the most important producing country origins in the three most recent years (in 2005 order):

Ireland: Imports of green, not-decaffeinated coffee by origin
- in bags of 60 kilos -

Countries of origin	2003	2004	2005
Colombia	9.393	13.615	9.730
Brazil	7.007	6.165	7.942
Indonesia	5.715	4.268	6.217
Papua New Guinea	8.205	9.940	5.797
Kenya	4.893	5.735	4.137
Honduras	6.838	6.393	4.112
Costa Rica	2.523	1.890	2.210
China	0	140	635
Guatemala	0	295	333
Congo Dem. Rep.	0	1.237	318
Others	45.487	31.287	46.458
Total	90.062	80.965	87.888

Source: Eurostat

The following table gives the same information, expressed in percentage shares:

Ireland: Imports of green, not-decaffeinated coffee by origin
- in % -

Countries of origin:	2002	2003	2004
Colombia	10,4	16,8	11,1
Brazil	7,8	7,6	9,0
Indonesia	6,3	5,3	7,1
Papua New Guinea	9,1	12,3	6,6
Kenya	5,4	7,1	4,7
Honduras	7,6	7,9	4,7
Costa Rica	2,8	2,3	2,5
China	0,0	0,2	0,7
Guatemala	0,0	0,4	0,4
Congo Dem. Rep.	0,0	1,5	0,4
Others	50,5	38,6	52,9
Total	100,0	100,0	100,0

Source: Eurostat

Given the high percentage of ‘others' it is not feasible to draw any firm conclusion on Irelands main suppliers.

2. FOREIGN TRADE IN ALL FORMS

Ireland: Foreign trade in coffee including intra-EU(25) trade

- in tons actual weight -

Forms of coffee	Imports		Exports	
	2004	2005	2004	2005
Green coffee not decaffeinated	4.858	5.273	108	66
Green coffee decaffeinated	6	29	24	12
Roasted coffee not decaffeinated	1.006	1.410	274	1.921
Roasted coffee decaffeinated	25	39	480	2
Soluble coffee	3.311	3.307	231	136

Source: Eurostat

This table illustrates the high percentage finished coffee imports into Ireland. Expressed in green coffee equivalent, in 2005 green coffee import volumes were only half of finished product imports. Recalculated to green coffee equivalent, total coffee imports in all forms into Ireland increased from 14.700 tons in 2004 to 15.625 tons in 2005 (+6%). Total exports (green coffee equivalent) increased by 67% from 1.629 tons in 2004 to 2.721 tons in 2005.
Virtually all of Irelands soluble coffee imports come from the United Kingdom. In 2005 the same origin represented 61% of Irelands roasted coffee imports. The other major supplier is Germany (30% in 2005).

3. COFFEE CONSUMPTION

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

Ireland: Total consumption of green coffee

- in 1000 bags -

Years	Total consumption
1964-69 average	20
1970-79 average	43
1980-89 average	84
1990-99 average	108
2000	83
2001	147
2002	137
2003	151
2004	217
2005	226

Source: ICO

Ireland: Per capita consumption

- in kg green coffee equivalent -

Year	Consumption
1998	1,49
1999	2,16
2000	1,31
2001	2,30
2002	2,08
2003	2,27
2004	3,22
2005	3,36

Source: ICO

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 2005 was 6.665.053 bags (399.903 tons), an increase of 3,22% compared to 2004.

This consistent increase indicates that working stocks in some measure have been rebuilt. Imports of coffee in all forms are up by 3,36%, exports show an increase of close to 10%. Assuming that around 100.000 bags is a reasonable volume to ascribe to the rise of working stocks, disappearance would appear substantially in line with the average annual growth of recent years.

The yearly data for green coffee imports however show that, for a number of reasons, import activity does not directly result from changes in demand in 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 seven years.

This comparison shows that the annual growth in the coffee processing sector for the period in consideration is about 2,80%. 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 3,18%, exports by 9,63% and disappearance in the same period increased only by 1,84%.

Italy: Imports of green coffee

- in bags -

Country of Origin	1999	2000	2001	2002	2003	2004	2005
Brazil	1.522.015	1.619.723	1.772.565	2.061.996	2.428.847	2.330.265	2.408.309
Vietnam	704.411	809.509	862.754	904.563	830.764	902.292	982.050
India	520.981	575.208	569.415	634.778	699.153	844.969	748.934
Indonesia	326.402	221.333	245.581	253.914	377.106	371.521	484.097
Cameroon	409.580	564.794	635.266	397.014	277.270	338.578	299.654
Colombia	237.094	209.233	226.897	236.270	246.345	253.460	352.293
Uganda	260.118	302.585	255.383	298.117	339.275	249.554	245.459
Guatemala	153.130	164.758	206.152	150.208	197.506	209.282	153.635
Ivory Coast	269.274	307.052	364.729	230.069	178.151	173.254	143.407
Honduras	146.609	153.637	151.935	155.608	124.212	123.754	89.880
Costa Rica	163.343	172.790	163.874	195.701	163.232	119.442	101.525
Ethiopia	71.634	72.873	72.832	91.426	104.803	108.052	141.412
Congo Dem. Rep.	291.894	248.963	135.608	64.138	66.325	81.030	85.292
Tanzania	14.211	55.603	36.163	35.482	33.331	49.153	95.299
Nicaragua	26.797	23.866	30.187	28.204	34.005	40.995	35.735
Togo	49.202	45.427	38.345	30.752	20.413	28.299	36.137
El Salvador	21.438	23.240	18.335	22.497	29.227	24.138	39.230
Dominican Rep.	32.472	30.796	29.832	26.848	21.372	21.622	16.682
Mexico	7.529	12.382	12.721	12.818	10.616	13.966	11.888
Kenya	12.392	17.515	18.682	11.571	10.197	8.681	9.938
Haiti	15.129	7.023	8.302	6.694	4.581	5.489	3.845
Burundi	825	1.434	2.370	2.386	3.639	4.689	43.081
Perù	11.751	1.284	9.735	17.857	15.002	25.173	38.556
Congo	30.486	31.376	29.188	46.305	57.906	57.491	24.522
Others	276.014	206.998	181.110	124.448	108.370	72.288	74.193
Total	5.574.731	5.879.402	6.077.961	6.039.664	6.381.648	6.457.437	6.665.053

The data for the year 2005 contained in the above table compared with the previous year show that:

- Brazil, with a volume increased in respect of 2004, maintains with a large margin its position as the number one supplier of coffee for the Italian market.
- imports from Vietnam have marked a new record;
- imports from Tanzania, Colombia, Indonesia and Burundi have shown a sizeable growth;

- imports from Cameroon, Honduras, India and Guatemala have decreased considerably;
- customs clearance of coffee from Dominican Republic, Haiti, Congo and Ivory Coast continued the downward trend of the last five years;
- in terms of percentage, the origins that in 2005 have shown the greatest improvement as suppliers to the Italian market are: Burundi, Tanzania, Colombia and Congo.

Italy: Imports of green coffee
- in % -

Country	1999	2000	2001	2002	2003	2004	2005
Brazil	27,30	27,55	29,16	34,14	38,06	36,09	36,13
Vietnam	12,64	13,77	14,19	14,98	13,02	13,98	14,74
India	9,35	9,78	9,37	10,51	10,96	13,09	11,24
Indonesia	5,86	3,76	4,04	4,20	5,91	5,76	7,26
Colombia	4,25	3,56	3,73	3,91	3,86	3,93	5,29
Cameroon	7,35	9,61	10,45	6,57	4,34	5,25	4,50
Uganda	4,67	5,15	4,20	4,94	5,32	3,87	3,68
Guatemala	2,75	2,80	3,39	2,49	3,09	3,24	2,31
Ivory Coast	4,83	5,22	6,00	3,81	2,79	2,69	2,15
Etiopia	1,28	1,24	1,20	1,51	1,64	1,67	2,12
Costarica	2,93	2,94	2,70	3,24	2,56	1,85	1,52
Others	16,79	14,62	11,57	9,70	8,45	8,58	9,06
Total	100,00	100,00	100,00	100,00	100,00	100,00	100,00

With regard to the percentage distribution according to groups of coffee, the imports of washed Arabica coffees are practically unchanged with the Colombian Milds up by 2,1% and the Other Milds down by 2,9%, while the Brazilian Naturals and Robusta coffees maintain substantially their position.

Italy: Imports of green coffee
- distribution by coffee type -

Type	1999	2000	2001	2002	2003	2004	2005
Colombian Milds	4,78	4,86	4,71	4,75	4,59	4,85	6,90
Other Milds	21,02	21,12	20,67	21,46	20,93	22,58	19,66
Brazilian Naturals	28,92	29,12	30,84	36,14	40,13	37,96	38,47
Robustas	45,28	44,90	43,78	37,65	34,35	34,61	34,97
Total	100,00	100,00	100,00	100,00	100,00	100,00	100,00

2. FOREIGN TRADE IN ALL FORMS

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

As can be seen from the following table - with the exception of exports of green decaffeinated and soluble coffee - the data both for imports and export of coffee in all forms show a positive trend.

The trade of coffee with countries in the European Union is particularly active.

Italy: Foreign trade in coffee
- in tons -

	Imports				Exports			
	2002	2003	2004	2005	2002	2003	2004	2005
Green coffee	362.380	382.899	387.446	399.903	2.783	3.683	4.198	4.992
Green decaffeinated coffee	5.944	6.933	7.240	8.278	597	607	891	812
Roasted coffee	12.112	14.183	14.364	14.767	61.113	63.729	70.294	76.318
Roasted decaffeinated coffee	199	290	310	320	2.131	2.261	2.403	2.927

Coffee Extracts	3.162	3.276	3.673	3.703	657	610	490	472
Preparations with coffee	844	679	821	1.046	857	1.062	2.568	3.262

Export of roasted coffee, which in recent years has represented the major positive factor of the activity in our sector - since the increase in internal consumption is rather limited – has increased significantly, exceeding 1,5 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 by our country for several years.

3. COFFEE CONSUMPTION

In 2005 total home coffee volumes in Italy slightly increased compared to the previous year (+1,1%).
If the market segmentation is analysed in detail, it has to be pointed out that the Moka segment (coffee with caffeine for coffee pot machines – about 72% of total household consumption in volume) has decreased (-0,6%), whereas the decaffeinated segment (7% of total household consumption in volume) continued to grow: the sales volume increased by 12% thanks to the enlargement of the number of households.

The Espresso segment (coffee blends for espresso machines – about 10% of total household consumption in volume) was stable (+0,4%).

Total packaged coffee (total market without the instant segment) sales location in percentage by type of client and point of sale (year 2005):			
TYPE OF CLIENT	%	Type of Sales Outlet	%
- LARGE DISTRIBUTORS	49,5	- Supermarkets & Hypermarkets	67
- Volunteer Union and Purchasing Groups	50,5	- Self Services & Groceries	24
		- Discount	9

The ‘out of home’ consumption remained substantially stable in the long term, but in the short and medium term we have signals of a slightly decrease.

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

In 2005 the average price of all regular coffee was EUR 7,27/Kg and it increased by 1,7% compared to 2004.

The average price of the Moka segment was EUR 6,70/Kg and it rose by 2%.
The price of the decaffeinated segment slightly declined compared to the previous year: EUR 8,87/Kg (-0,3%); the average price of the Espresso segment decreased by 0,4% to EUR 9,61/Kg.

5. COMMENTS ON PARTICULAR SUBJECTS

The Consorzio Promozione Caffè continued its public relations campaign in 2005, 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.
For the second year part of the budget was allocated to the ‘Healthcare Professionals Coffee Education Programme’, co-financed by ISIC on a 50:50 basis.

6. VAT LEVELS

Coffee is subject to 20 percent Value Added Tax. Soluble coffee is subject to 10 percent Value Added Tax.

THE NETHERLANDS

1. IMPORTS OF GREEN COFFEE

In 2005 imports of green coffee into the Netherlands reached a volume of 2.424.717 bags (145.483 tons), an increase compared to the previous year when 2.413.017 bags (144.781 tons) were imported. The table below shows the most important countries of origin.

The Netherlands: Imports of green coffee
- in bags of 60 kilos -

Countries of origin	2004	2005
Brazil	555.267	571.133
Vietnam	262.400	318.567
Uganda	340.900	284.883
Peru	145.783	194.383
Columbia	198.700	164.300
Honduras	185.483	149.767
Tanzania	31.550	63.383
Guatemala	55.283	60.550
India	43.933	59.500
Burundi	13.933	57.433
Others	579.783	500.817
Total	2.413.017	2.424.717

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.

The Netherlands: percentage distribution of net green coffee imports by main sources
- in %-

Countries of origin	2004	2005
Brazil	23,0	23,6
Vietnam	10,9	13,1
Uganda	14,1	11,7
Peru	6,0	8,0
Columbia	8,2	6,8
Honduras	7,7	6,2
Tanzania	1,3	2,6
Guatemala	2,3	2,5
India	1,8	2,5
Burundi	0,6	2,4
Others	24,0	20,7

Source: HPA

The figures in the tables above show that:
1. The position of Brazil as the main supplier of the Netherlands improved slightly in 2005. Its share of imports increased from 23,0% in 2004 to 23,6% 2005.
2. In 2005 imports from Burundi are more than four times the imports in 2004. Tanzania more than doubled its imports compared to 2004.
3. The imports from Vietnam and Peru increased considerably.
4. Uganda decreased its share of import from 14,1% in 2004 to 11,7% in 2005.
5. Less coffee was imported from Columbia and Honduras.

The Netherlands: breakdown of net green coffee imports by type of coffee
- in % -

Type of coffee		2003		2004		2005	
Arabicas		67		62		63	
	Colombian Milds		14		12		12
	Other Milds		25		24		26
	Brazilian Naturals		28		26		26
Robustas		24		28		28	
Not defined		9		10		9	

Source: HPA

2. FOREIGN TRADE IN COFFEE IN ALL FORMS

Forms of coffee	Imports		Exports	
	2004	2005	2004	2005
Green coffee (including decaffeinated)	144.780.990	145.483.391	5.561.643	5.829.311
Roasted coffee (including decaffeinated)	25.414.744	20.296.570	17.330.836	23.522.520

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

3. 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.

4. 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 2005 reached a volume of 113.335 tons, compared to 115.233 tons in 2004. The average annual per capita consumption in 2005 was 7,0 kg or 145 liters, compared to 7,1 kg or 148 liters in 2004.

The index of the coffee deliveries shows the following trend:

Total sales of roasted coffee

	x 1000 kg	Index
1970	77.891	100
1975	93.320	120
1980	103.241	133
1985	114.704	147
1990	124.974	160
1995	121.527	156
2000	116.405	149
2001	114.661	147
2002	113.853	146
2003	112.895	145
2004	115.233	148
2005	113.335	146

Source: CBS, HPA and private estimates

Per capita coffee consumption in the Netherlands

	Kg	Liter	Cups
1970	5,6	117	2,6
1975	6,8	142	3,1
1980	7,3	152	3,3
1985	7,8	163	3,6
1990	8,4	174	3,8
1995	7,9	164	3,6
2000	7,3	153	3,4
2001	7,1	148	3,3
2002	7,0	146	3,2
2003	6,8	142	3,2
2004	7,1	148	3,2
2005	7,0	145	3,2

Source: HPA, CBS and private estimates

5. COMMENTS ON PARTICULAR ASPECTS

Coffee and Tea Information Bureau
Each year the Netherlands Coffee and Tea Information Bureau answers large numbers 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 www.koffiethee.nl. The site provides ample information on the production process of coffee and tea, shows trends in consumption, contains recipes and the visitors can take part in an exam to test their knowledge of coffee and tea.

Information Bureau on Coffee and Health
In 2005 the association continued its activities in the field of the ICO/Health Care Professions Coffee Education Programme. One of the Information Bureau's main activities in 2005 was the publication of the book 'Coffee & Health'. The book discusses ten topics related to coffee and health. Objective and scientifically based information on coffee and health can be found on the website www.koffieengezondheid.nl. Primary target audiences of this campaign are general practitioners, dieticians, nutritionists, academic specialists and medical media.

NORWAY

1. IMPORTS OF GREEN COFFEE

In 2005 Norway imported 623.492 bags (37.410 tons) of not-decaffeinated green coffee.
This is a 3,8% increase compared to 2004.

The top-three suppliers remained unchanged. Brazil strengthened its first position.
Colombia and Guatemala remained the second and third suppliers. Of the other main suppliers, the imports from Honduras, Kenya and Ethiopia increased significantly. Imports from Peru and India were lower than in 2004.

Norway: Imports of not-decaffeinated green coffee
- in bags of 60 kilos -

Countries of origin	2003	2004	2005
Brazil	241.532	226.950	265.387
Colombia	158.199	176.280	140.425
Guatemala	55.851	50.570	59.873
Honduras	12.294	21.626	31.129
Kenya	28.596	24.341	28.999
Peru	25.609	36.298	23.548
Ethiopia	14.054	16.315	21.306
India	20.470	19.848	16.108
Mexico	4.762	9.212	11.730
Costa Rica	5.476	4.459	4.942
Nicaragua	8.284	5.469	4.190
Tanzania	2.100	1.367	3.844
Indonesia	2.363	3.092	3.244
Oman	0	0	1.659
Vietnam	4.466	2.634	1.447
Uganda	1.860	0	1.440
Panama	0	0	1.280
Canada	0	0	949
Ecuador	0	0	701
El Salvador	0	627	545
Others	2.410	1.538	745
Total	588.326	600.627	623.492

Source: Statistics Norway

The developments noted above are also reflected in the percentage distribution.
Of the top-three, Brazil and Guatemala won some market share, but Colombia decreased.

Norway: Percentage distribution of not-decaffeinated green coffee imports by main sources
- in % -

Countries of origin	2003	2004	2005
Brazil	41,1	37,8	42,6
Colombia	26,9	29,3	22,5
Guatemala	9,5	8,4	9,6
Honduras	2,1	3,6	5,0
Kenya	4,9	4,1	4,7
Peru	4,4	6,0	3,8
Ethiopia	2,4	2,7	3,4
India	3,5	3,3	2,6
Mexico	0,8	1,5	1,9
Others	4,6	3,2	3,9
Total	100,0	100,0	100,0

2. FOREIGN TRADE IN ALL FORMS

In 2005 imports of not-decaffeinated green coffee increased by 3,8% from 36.040 tons to 37.409 tons. Imports of decaffeinated green coffee decreased from 274 tons to 205 tons.

The total imports of roasted coffee increased from 2.396 tons to 3.208 tons (33,9 % increase). The most important suppliers of not-decaffeinated roasted coffee were Sweden (1.423 tons), the Netherlands (716 tons), Italy (333 tons), Denmark (260 tons) and Germany (231 tons).

Imports of soluble coffee were slightly lower. Switzerland remained by far the most important supplier with 568 tons, more than one third of the total soluble imports.

Norway: Foreign trade in coffee
- in tons-

Forms of coffee	Imports		Exports	
	2004	2005	2004	2005
green coffee	36.040	37.409	152	84
green coffee, decaff	274	205	1	1
green coffee, total	**36.314**	**37.614**	**153**	**85**
roasted coffee	2.363	3.186	156	323
roasted coffee, decaff	33	22		3
roasted coffee, total	**2.396**	**3.208**	**156**	**326**
soluble coffee	**1.461**	**1449**	**43**	**39**
coffee extracts, essences	**234**	**315**	**2**	**8**

Source: Statistics Norway

3. COFFEE CONSUMPTION

According to data from the Norwegian Coffee Association the total size of the Norwegian market (roasted and soluble coffee supplied by Norwegian roasters plus net imports of finished coffee products) in 2005 was 43.369 tons green bean equivalent (2004; 42.859 tons).
The per capita consumption in Norway was 9,4 kg in 2005, 0,1 kg up from 2004.

Norway: Per capita consumption of coffee
- in kg green bean equivalent –

The 1960s		The 1970s		The 1980s		The 1990s		After 2000	
		1971	9,2 kg	1981	10,6 kg	1991	10,6 kg	2001	9,3 kg
		1972	10,3 kg	1982	10,5 kg	1992	10,7 kg	2002	9,1 kg
		1973	9,5 kg	1983	10,7 kg	1993	10,5 kg	2003	9,3 kg
		1974	9,9 kg	1984	9,9 kg	1994	10,1 kg	2004	9,3 kg
1965	8,6 kg	1975	10,1 kg	1985	10,2 kg	1995	9,7 kg	2005	9,4 kg
1966	9,1 kg	1976	10,4 kg	1986	10,0 kg	1996	10,1 kg		
1967	9,3 kg	1977	8,8 kg	1987	10,5 kg	1997	9,4 kg		
1968	9,4 kg	1978	9,6 kg	1988	10,0 kg	1998	9,5 kg		
1969	9,6 kg	1979	10,3 kg	1989	10,1 kg	1999	9,9 kg		
1970	10,1 kg	1980	9,4 kg	1990	10,5 kg	2000	9,2 kg		
Average: 9,4 kg		**Average: 9,8 kg**		**Average: 10,3 kg**		**Average: 10 kg**		**Average: 9,3 kg**	

Source: Import and demographic statistics from Statistics Norway and statistics Norwegian Coffee Association.

The share of instant or liquid coffee was 10,5 % in 2005 (10,1 in 2004). The share of espresso was about 2 %.

Coffee drinking habits
Market research performed by the Norwegian Coffee Association in January 2006 provides the following information on coffee drinking habits:

How many
74,4 % of the people over 15 drink coffee regularly (compared to 86,4% in 1985).
The share of coffee drinkers between 25-50 years is declining.

Where and when
For the people under 50 years the workplace is the most important place to drink coffee during the workdays. Home coffee drinking is declining, but those who drink most coffee also drink a lot of coffee at home.
On an average 55% of the coffee is taken at home, 29% at work, 9% visiting friends and relatives and 7% elsewhere (restaurants/coffee bars/petrol stations).
These figures have been (very) stable since 1997. In Norway more coffee is drunk during the normal working hours and less in the evenings.

Brewing methods
About 72% say they most often use a filter brewer when making coffee, 10% say instant, 6% the old Nordic boiling method in a kettle, 4% the French Press (cafetière), 1% filter the coffee manually, 2% use an espresso machine or mocha/bialetti pot. The rest has not replied.
Again it is more popular to take the coffee without milk or sugar! About 78% take the coffee black

Espresso and espresso-based drinks
The growth in the espresso-based drinks seems to have flattened since our last research in 2003.
36% have tasted espresso, 52% have tasted cappuccino or caffè latte, but fewer than 6% took an espresso once a month last year - and 12% took a cappuccino/caffè latte once a month last year.

4. VAT AND DUTIES

Green coffee:	13% VAT
Roasted coffee:	13% VAT + 0,4% food tax + NOK 0,49 per kilo customs duty
Instants, extracts:	13% VAT + 0,4% food tax + 0,3% research tax + NOK 0,17 per kilo customs duty

PORTUGAL

1. IMPORTS OF GREEN COFFEE

Portuguese imports of green not-decaffeinated coffee from all sources in 2005 were 39.897 tons (664.953 bags), a drop of 4,6% compared to the 2004 imports of 41.808 tons (696.805 bags). The fifteen major suppliers were (ranked in order of 2005 imports):

Portugal: Imports of green not-decaffeinated coffee

- in bags of 60 kilos -

Countries of origin	2003	2004	2005
Brazil	121.420	122.733	104.553
Vietnam	60.425	67.158	94.522
Cote d'Ivoire	62.070	64.403	63.430
Uganda	69.563	64.465	58.777
Cameroon	49.677	59.218	56.657
India	60.458	55.117	52.008
Honduras	45.908	47.945	44.070
Guatemala	17.325	24.368	23.748
Indonesia	26.507	28.447	21.373
Costa Rica	27.093	21.507	20.035
Colombia	21.867	17.348	18.503
Nicaragua	4.518	8.815	12.983
Laos	620	5.885	11.867
Timor-Leste	5.313	6.947	9.858
Kenya	7.412	7.300	5.753
Others	119.633	95.148	66.815
Total	699.810	696.805	664.953

Source: Eurostat

Brazil remained the most important supplier, but Vietnam, fifth supplier in 2003, is getting closer in imported volume. This origin retained its second position. Imports from Cote d'Ivoire decreased, but nevertheless this origin became third supplier, overtaking Uganda. Cameroon completed the 'top-5'. In the top-15 the rapid increase of imports from Laos is noteworthy as well as the fact that Angola, traditionally an important origin for Portugal, did not make it into the top-15.

The following table summarises the information on the market shares of Portugal's main suppliers in percentage terms.

Portugal: Percentage distribution of green not-decaffeinated coffee imports by main sources

- in % -

Countries of origin	2003	2004	2005
Brazil	17,4	17,6	15,7
Vietnam	8,6	9,6	14,2
Uganda	8,9	9,2	9,5
Cote d'Ivoire	9,9	9,3	8,8
Cameroon	7,1	8,5	8,5
India	8,6	7,9	7,8
Honduras	6,6	6,9	6,6
Indonesia	2,5	3,5	3,6
Guatemala	3,8	4,1	3,2
Costa Rica	3,9	3,1	3,0
Colombia	3,1	2,5	2,8
Nicaragua	0,6	1,3	2,0
Angola	0,1	0,8	1,8

Kenya	0,8	1,0	1,5
Timor-Leste	1,1	1,0	0,9
Others	17,1	13,7	10,0
Total	100,0	100,0	100,0

The percentage distribution according to ICO groups has been quite stable in recent years:

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

Types of coffee	2003		2004		2005	
Arabicas	48		47		45	
Colombian Milds		4		4		4
Other Milds		25		24		24
Brazilian Naturals		18		19		16
Robustas	41		44		48	
Unknown	11		9		7	

Please note that in the intra-EU trade the information on the origin of the green coffee is lost in the administrative process. This is the reason for the relatively high percentage ‘unknown’. At the same time this makes it increasingly difficult to draw conclusions about the import pattern per type of coffee.

2. FOREIGN TRADE

Portugal: Foreign trade in coffee including intra-EU25 trade
- in tons actual weight -

	Imports		Exports	
	2004	2005	2004	2005
Green coffee not decaffeinated	41.808	39.897	134	158
Green coffee decaffeinated	1.449	1.795	1	20
Roasted coffee not decaffeinated	3.919	4.014	3.852	4.773
Roasted coffee decaffeinated	271	270	216	298
Soluble coffee	740	880	12	13

Source: Eurostat

The pattern of imports and exports of the various forms of coffee has been relatively stable in the last two years. In 2005 exports increased for all categories. On the import side, for decaffeinated green coffee the main source by far was Germany (61%), followed by Spain (35%) and Colombia (3%).
In 2005 the main sources of roasted coffee (incl. decaffeinated) were Italy (51%), Spain (29%) and Germany (17%). Spain was by far the most important destination for roasted coffee (incl. decaffeinated) with 3/4th of the total volume. The main sources for soluble coffee in 2005 were Spain (69%) and France (36%).

3. COFFEE CONSUMPTION

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

Portugal: Total consumption of green coffee
- in 1000 bags -

Years	Total consumption
1964-69 average	288
1970-79 average	292
1980-89 average	325
1990-99 average	609
2000	681
2001	768
2002	738

2003	679
2004	771
2005	749

Source: ICO

Portugal: Per capita consumption

- in kg green coffee equivalent -

Year	Consumption
1998	4,30
1999	4,84
2000	4,08
2001	4,48
2002	4,28
2003	3,90
2004	4,41
2005	4,28

Source: ICO

SPAIN

1. IMPORTS OF GREEN COFFEE

In 2005 Spain imported 4.020.600 bags of green coffee (241.402 tons) which represents an increase of 6% compared to the previous year. In year 2004 a total amount of 3.770.856 bags (226.251. tons) were imported.

Spain: Imports of green coffee 1996 - 2005
- in bags of 60 kilos -

Year	Volume
1996	3.270.741
1997	3.490.161
1998	3.483.274
1999	3.633.701
2000	3.511.108
2001	3.772.666
2002	3.681.934
2003	3.785.850
2004	3.770.856
2005	4.020.600

Source: Spanish Coffee Federation

The main suppliers were:

Spain: Imports of green coffee by origin
- in bags -

Countries of origin	2004	2005
Vietnam	1.293.216	1.429.556
Brazil	663.668	759.366
Uganda	352.230	323.666
Colombia	239.743	236.966
Cote d'Ivoire	230.783	307.866
India	232.216	171.833
Germany	129.995	216.366
Honduras	88.801	76.000
Nicaragua	114.095	82.966
Indonesia	83.356	112.783
Others	342.753	304216
Total	3.770.856	4.020.600

Source: Spanish Coffee Federation

Vietnam (+10,5%)and Brazil (+14,4%) remained the first Spanish suppliers. During year 2005 Nicaragua (-27,3%) and India (-26%) experienced notable decreases whilst countries that during year 2004 had continued to improve their market shares have also experienced a decrease such as Uganda (-8%) and Colombia (-1,2%).

In percentages, the main suppliers to Spain in recent years have been as follow:

Spain: Percentage distribution of green coffee imports by main sources
- in % -

Countries of origin	2001	2002	2003	2004	2005
Vietnam	29,3	26,5	25,4	34,29	35,5
Brazil	18,1	26,3	22,3	17,59	18,9
Uganda	10,1	12,5	13,1	9,34	8,1
Colombia	6,3	6,9	7,3	6,35	5,9
Cote d'Ivoire	8,0	4,1	6,2	6,12	7,7
India	n.a	n.a	n.a	6,15	4,3

Others	22,9	19,1	19,9	20,16	7,6

Source: Spanish Coffee Federation

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

Types of coffee	2001	2002	2003	2004	2005
Arabicas	40,65	43,68	45,49	39,22	38,88
1. Colombian Milds	6,54	7,29	7,74	6,72	6,45
2. Other Milds	13,6	12,19	13,08	12,21	8,76
3. Brazilian Naturals	20,51	24,2	24,67	20,29	23,67
Robustas	59,35	56,32	54,51	60,78	61,12
Others	0	0	0	0	0

Source: ANCAFE

Please note that this whole table differs from the one of the previous years. ANCAFE, the Spanish Coffee Importers Association, establishes imports per type of coffee, taking into account countries like Brazil, that export both Arabicas and Robustas.

2. FOREIGN TRADE IN COFFEE IN ALL FORMS

Spain: Foreign trade in coffee

- in tons -

Forms of coffee	Imports			Exports		
	2003	2004	2005	2003	2004	2005
Green coffee	227.151	226.251	241.402	18.095	20.791	22.737
Roasted coffee	10.443	10.667	11.560	6.710	5.586	9.225
Extracts	2.726	3.607	4.154	20.829	21.787	21.011

Comparing the Spanish foreign trade official figures in the last two years (which can be considered final for 2004 and provisional for 2005), please note that exports of green coffee continue to increase, confirming the trend observed in previous years. Roasted Coffee exports have grown remarkably (+65%) whilst soluble coffee has experienced a slight decrease.

Regarding imports, on the whole they have increased.

3. COFFEE CONSUMPTION

Spain: Coffee consumption 2005

- in tons -

Home consumption	
- Roasted	65.140
- Soluble	9.870
Food service	
- Roasted	62.500
- Soluble	2.120
Green coffee equivalent	
- Roasted	149.338
- Soluble	29.975
Total green coffee equivalent	179.314

Home coffee consumption in Spain increased during year 2005 by approximately 3%, whilst in the Food Service sector it experienced a 10% increase. This statistical increase in the Food Service Industry is not reflecting real changes in consumption since data is not fully available. In all, Spanish coffee consumption increased during 2005 by 6,2% compared to the previous year.

Per capita consumption during year 2005 can be estimated at approximately 4 kg of green coffee per year. Concerning different forms and destinations of coffee, roasted coffee represents 83,28% of the total market, whilst soluble coffee accounts for the remaining 16,72%, following a similar trend as previous years. Distribution between home consumption and food service gives a result of 53,7% of total consumption to the former sector and 46,3% to the latter.

Taking into account total coffee home consumption, ground coffee represents over 92,6% whilst whole beans account for the remaining 7,4%. These percentages have remained considerably stable in the last few years, with an increasing trend for ground coffee. It is also interesting to note the steady increase of decaffeinated roasted coffee figures, this type of product representing in 2005 17% of total home consumption of roasted coffee.

4. DUTIES AND VAT LEVELS

Regarding fiscal matters, there are no excise duties imposed on coffee in Spain, and during 2005 the VAT rate, which for coffee is 7%, has not changed.

SWEDEN

1. IMPORTS OF GREEN COFFEE

According to Statistics Sweden data, in 2005 Sweden imported 1.668.367 bags (100.102 tons) of green, not decaffeinated coffee. This is an increase of 12% compared to 2004. In that year the imports were 1.486.450 bags (89.187 tons), increasing 7%.

a) Sweden: Imports of not-decaffeinated green coffee 2003 - 2005

- in bags of 60 kilos -

Countries of origin	2003	Change	2004	Change	2005
Brazil	659.717	7%	707.733	9%	772.633
Colombia	282.933	-2%	276.483	5%	290.667
Peru	94.050	3%	96.817	32%	127.550
Kenya	85.450	9%	93.467	15%	107.550
Ethiopia	38.217	77%	67.567	26%	85.267
Honduras	67.100	-8%	61.950	-8%	57.267
Vietnam	1.983	195%	5.850	445%	31.883
Guatemala	57.267	-60%	22.933	23%	28.317
Nicaragua	13.633	102%	27.517	-4%	26.433
El Salvador	2.067	412%	10.583	94%	20.583
Burundi	9.433	48%	13.933	43%	19.933
Papua New Guinea	7.850	-51%	3.850	390%	18.867
Indonesia	2.383	-29%	1.683	1001%	18.533
Mexico	12.467	59%	19.850	-17%	16.500
Costa Rica	28.050	23%	34.567	-60%	13.967
Rwanda	4.350	-25%	3.250	197%	9.667
Uganda	7.067	97%	13.950	-52%	6.683
India	3.817	-33%	2.550	59%	4.067
Others	17.083	28%	21.917	-45%	12.000
Total	1.394.917	7%	1.486.450	12%	1.668.367

Source: Statistics Sweden

As usual Brazil and Colombia are the main suppliers. Together they account for about two thirds of Swedish imports. Both of them increased their volumes in 2005 but not enough to defend their shares of imports.

The other of the top five origins, Peru, Kenya and Ethiopia, all increased more and strengthened their positions in an unchanged order.

Most spectacular are the increases of the Robusta origins Vietnam (increasing 445% and climbing from fourteenth to seventh place), and Indonesia (increasing 1.000% and now number thirteen). These Robusta volumes however do not reflect any big change in the Swedish consumption pattern but substantially increased export volumes of roasted coffee and Sweden is still an almost 100% Arabica market.

Sweden: Imports of not decaffeinated green coffee 2003 - 2005

- percentage distribution by main sources -

Countries of origin	2003	2004	2005
Brazil	47,3%	47,6%	46,3%
Colombia	20,3%	18,6%	17,4%
Peru	6,7%	6,5%	7,6%
Kenya	6,1%	6,3%	6,4%
Ethiopia	2,7%	4,5%	5,1%
Honduras	4,8%	4,2%	3,4%

Vietnam	0,9%	1,3%	1,9%
Guatemala	1,0%	1,9%	1,7%
Nicaragua	4,1%	1,5%	1,6%
El Salvador	0,2%	0,1%	1,2%
Burundi	0,6%	0,3%	1,2%
Papua New Guinea	2,0%	2,3%	1,1%
Indonesia	0,2%	0,1%	1,1%
Mexico	0,1%	0,7%	1,0%
Costa Rica	0,1%	0,4%	0,8%
Rwanda	0,3%	0,2%	0,6%
Uganda	0,7%	0,9%	0,4%
India	0,5%	0,9%	0,2%
Others	1,2%	1,5%	0,7%
Total	100,0	100,0	100,0

Source: Statistics Sweden

Sweden: Imports of not decaffeinated green coffee 2003 - 2005

- percentage distribution by types of coffee -

Types of coffee	2003	2004	2005
Arabicas	99	98	97
Colombian Milds	26	25	24
Other Milds	22	21	21
Brazilian Naturals	50	52	51
Robustas	1	2	3

Source: Statistics Sweden and own estimates

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. However, in the long run Brazilian Naturals have increased to the cost of Colombian and Other Milds. The increased shares of Robustas reflect increases in exports, mainly to Denmark and the Baltic countries.

2. FOREIGN TRADE IN ALL FORMS OF COFFEE

Sweden: Foreign trade in coffee 2003 - 2005

- in tons actual weight -

	2003	2004	2005	2003	2004	2005
	Imports			Exports		
Green coffee	84.326	90.543	102.539	99	145	238
Green coffee (decaf)	1.232	1.442	1.495	0	0	0
Roasted coffee	8.573	9.654	8.297	10.546	11.547	23.727
Roasted coffee (decaf)	394	692	924	1.350	1.326	1.210
Instant coffee	2.796	2.474	3.101	415	467	533

Source: Statistics Sweden and own estimates

The huge increase of exports of roasted coffee in 2005 – the volume nearly tripled – 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 in 2005 became the biggest export market with 45% of the volume.

Even when excluding Denmark, the exports of roasted coffee increased (+14%). The largest destination after Denmark was the USA (24% of total exports), followed by the Baltic countries (13%), Norway (6%), Finland (5%) and Great Britain (3%).

Imports of roasted coffee decreased about 15% and came mainly from the Netherlands and Germany (41% and 29% respectively).

Imports of instant coffee (only pure instant is registered) have recovered since last years' dip.

3. COFFEE CONSUMPTION

The total size of the Swedish market in 2005 was 82.783 tons roasted coffee equivalent, giving a total per capita consumption of all forms of coffee of 9,15 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 12% was instant coffee, which is a recovering after a dip in 2004 (probably just a statistical dip due to changes in stocks).

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

The consumption of ecological coffee is about 4% and slightly increasing while Fair Trade coffee still accounts for only about 0,5%. Other certification programs for responsibility or sustainability (Utz Kapeh and Rain Forest Alliance) have gained market presence during 2005 and the total market share of these ethical labelled coffees was above 5% and is still increasing.

Espresso is doing well, increasing to a share close to 2% 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 import decreased in 2005 with 1,4%, which probably reflects decreased stocks. Consumption now seems to be back on the relatively high level of the early nineties. 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 relatively stable.

The figures *cups/day* are calculated as 7,5 grams coffee/cup of 0,125 litre.

Sweden: Per capita consumption of coffee 2003 – 2005

		2003	2004	2005
Roasted ground coffee	kg/capita	7,77	8,45	8,01
Instant	gr/capita	265	223	284
All coffee as roasted	kg/capita	8,83	9,34	9,15
	cups/day	3,2	3,4	3,3
- as an average of three latest years	kg/capita	8,90	9,08	9,11
	cups/day	3,3	3,3	3,3

Source: Statistics Sweden and the Swedish National Coffee Association

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

According to Statistics Sweden data, the average retail price for roasted coffee was SEK 49,18 per kilo in 2005 and SEK 49,90 in 2004. However the official statistics underestimate discounts and campaign prices which are very frequent in Sweden and a weighted average price per kilo is 15 - 20% lower. The table does reflect the trend of price level, which has been decreasing since 1999.

Sweden: Retail prices roasted ground coffee 1996 - 2005

Year	SEK/kg	Year	SEK/kg
1996	58,60	2001	57,60
1997	73,40	2002	54,60
1998	77,20	2003	52,30
1999	63,80	2004	49,90
2000	61,00	2005	49,18

Source: Statistics Sweden

5. COMMENTS ON PARTICULAR SUBJECTS

No national promotion campaigns are run in Sweden. The Swedish National Coffee Association (*Svensk Kaffeinformation*) is working towards the schools with some education material and its web site www.kaffeinformation.se (today partly available in English).

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.

SWITZERLAND

1. IMPORTS OF GREEN COFFEE

Green not-decaffeinated coffee imports into Switzerland reached a total of 89.843 tons (1.497.233 bags). This is an increase of 36% compared to the 65.846 tons (1.097.433 bags) imported in 2004.

According to F.O. Licht data, the main supplying and countries of origin (2005 ranking) were:

Switzerland: Imports of green not-decaffeinated coffee
- in % -

	2004	2005
Brazil	27,2	29,2
Colombia	11,1	10,5
India	5,2	6,5
Honduras	4,0	6,0
Vietnam	1,3	6,0
Guatemala	4,6	5,3
Mexico	8,4	4,6
Costa Rica	3,6	4,2
Indonesia	2,9	4,0
Laos	4,4	3,6
Others	27,3	20,2
Total	100,0	100,0

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

In 2005, Brazil increased its market share compared to 2004. The second supplier, Colombia, lost some market share. Of the other 'top-5' suppliers, the share of India, Honduras and especially Vietnam increased.

2. FOREIGN TRADE IN COFFEE IN ALL FORMS

Switzerland: Foreign trade in coffee
- in tons-

	Imports		Exports	
	2004	2005	2004	2005
Green coffee	65.846	89.834	237	687
Green coffee, decaffeinated	2.115	2.481	178	106
Roasted coffee	2.569	3.381	7.723	9.538
Soluble coffee*	1.130	1.472	8.071	8.494

* pure extracts only
Source: RéserveSuisse

On the whole, the pattern of imports and exports is fairly stable. However, the increase of roasted coffee exports is notable (+23,5%).

3. COFFEE CONSUMPTION

Domestic coffee consumption in Switzerland in 2005 was an estimated 66.000 tons green coffee equivalent, according to data of RéserveSuisse. This compares to 46.000 ton green coffee equivalent in 2004.
Three distinct consumption patterns can be noted. In the German-speaking north coffee drinkers prefer the lightly roasted blends with more fine acidity. Both in the French-speaking and Italian -speaking parts of the country the darker roasted blends, i.e. the Italian-type roasts, are most popular. However, the large number of espresso machines in Swiss households (60%) means that the consumption is gradually becoming more similar. The north is becoming increasingly interested in the darker roasts.

Fully automated espresso machines (preferably with integrated grinders) have started to dominate the out-of-home sector. Standard coffees outside the home are now espressos.

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

In January 2005 the average retail price of roasted coffee was CHF 4,02 per 250 grams. In December 2005 this figure had risen marginally to CHF 4,04.

5. PROMOTION CAMPAIGN

PROCAFE is continuing its generic promotion activities with a budget of CHF 142.000 in 2005.

6. VAT AND OTHER DUTIES

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

	Normal tariff	Developing countries	LDC's	Compulsory stocks contribution
Green coffee:	0,00*	0,00*	0	4,75
Green coffee, decaffeinated:	00,00*	0,00*	0	4,75
roasted coffee:	63,00**	46,75***	0	5,70
roasted coffee, decaffeinated:	63,00**	46,75***	0	5,70
soluble coffee:	182,00**	127,50***	0	11,25

*: since 1 February 2005
**: 0,00 for European and least developed countries
***: not for Brazil
Note: LDC is Least Developed Country
Source: RéserveSuisse

UNITED KINGDOM

1. IMPORTS OF GREEN COFFEE

Imports into the United Kingdom during 2005 of non-decaffeinated green coffee, fell to just below the 2003 level. The major suppliers are as follows:

United Kingdom:
Imports of green coffee non-decaffeinated
- in bags of 60 kilos -

Countries of origin	2004	2005
Vietnam	660.518	468.490
Colombia	228.319	352.723
Indonesia	162.809	336.065
Brazil	400.221	222.261
Peru	84.662	97.848
Nicaragua	75.934	38.687
Kenya	57.121	37.877
Honduras	73.916	33.207
Ethiopia	29.556	31.899
Uganda	17.698	25.296
El Salvador	31.412	14.666
Guatemala	16.599	12.660
Costa Rica	24.218	12.248
India	17.194	12.220
Mexico	6.961	8.029
Papua New Guinea	4.341	5.958
Tanzania	5.646	4.983
Others	32.103	25.967
Total	1.929.228	1.741.084

Source: Coffee Trade Federation Ltd

Once again Vietnam was the leading supplier although its share fell from 34,2% to 26,9% of total imports of non-decaffeinated green coffee. The other three major suppliers also showed some heavy swings in imports. Brazil imports were substantially reduced from 20,7% to 12,8% whilst Indonesia increased its market share from 8,4% to 19,3% and Colombia gained from 11,8% to 20,3%. Again, the other major suppliers were mostly Centrals, led by Peru, together with Kenya, Ethiopia, Uganda, India and Papua New Guinea, taking less than 20% of the market.

United Kingdom
Percentage distribution of green coffee non-decaffeinated imports by main origin
- in % -

Countries of Origin	2004	2005
Vietnam	34,2	26,9
Colombia	11,8	20,3
Indonesia	8,4	19,3
Brazil	20,7	12,8
Peru	4,4	5,6
Nicaragua	3,9	2,2
Kenya	3,0	2,2
Honduras	3,8	1,9
Ethiopia	1,5	1,8
Uganda	0,9	1,5
El Salvador	1,6	0,8
Guatemala	0,9	0,7

Costa Rica	1,3	0,7
India	0,9	0,7
Mexico	0,4	0,5
Papua New Guinea	0,2	0,3
Tanzania	0,3	0,3
Others	1,8	1,5
Total	100,0	100,0

Source: Coffee Trade Federation Ltd

United Kingdom: Imports by types of coffee (ICO)

- in % -

Types of coffee	2003		2004		2005	
Arabicas	59		55		52	
Colombian Milds		18		15		23
Other Milds		20		18		14
Brazilian Naturals		21		22		15
Robustas	40		44		47	
Unknown	1		1		1	

Source: Coffee Trade Federation Ltd

Total imports of Arabicas again fell, this year from 55% to 52%. Consequently, the Robusta share showed a corresponding increase from 44% to 47%.

2. FOREIGN TRADE IN ALL FORMS

United Kingdom: Foreign Trade in Coffee

- tons -

	Imports		Exports	
	2004	2005	2004	2005
Green	115.754	104.465	1.732	1.818
Green Decaf	270	244	55	82
Roasted	717	841	2.489	2,774
Roasted Decaf	179	177	306	153
Soluble/Extracts	6.695	8.762	21.273	17,461

Source: Coffee Trade Federation Ltd

Imports of soluble/extracts increased by over 30% from 6.695 tons to 8.762 tons. This was mainly accounted for by Brazil which almost doubled its share of soluble imports from 2.200 tons to 4.218 tons. Ecuador continued in second place, supplying 2.142 tons of soluble whilst Colombia exported 1.045 tons.

Exports of soluble/extracts were down by almost 18%. The EU accounts for around 60% of the UK's exports of both soluble and extracts.

Imports of roasted increased as did exports, whilst exports of roasted decaffeinated showed a significant fall.

3. COFFEE CONSUMPTION

According to data of the International Coffee Organization (ICO), total consumption in 2005 equated to 2.207.000 bags of green coffee and per capita consumption (in kg green coffee equivalent) was 2,22.

4. COMMENTS ON PARTICULAR SUBJECTS

2005 saw the continuation of the Coffee Break programme, aimed at Healthcare Professionals.
Coffee BREAK (Bringing Research, Education, Advice and Knowledge) was developed to deliver a high profile, impactful yet credible BCA campaign, with strong third party endorsement to General Practitioners, Practice

Nurses, Dieticians and Midwives. A dedicated newsletter as well as attendance at conferences and relevant media activity throughout the year allowed the BCA to communicate directly with healthcare professionals to ensure they were given the latest information on coffee & health and could therefore provide relevant advice to their patents.

The BCA also continued to communicate more directly to the consumer to provide the facts of coffee/caffeine, leading them to have a more positive view of the role of coffee in their diet and reinforcing the message that moderate consumption of 4-5 cups per day can be part of a healthy balanced diet. This campaign started with the redesign and launch of the BCA website as well as the production and distribution of a new leaflet titled Coffee and Your Health. This co-ordinated with a strong PR programme working with selected UK consumer media has helped to raise the profile of coffee in the UK and provide the truth about coffee and health.

5. EXCISE DUTIES AND VAT LEVEL

The UK VAT level on coffee remained unchanged at 0%.

SELECTED OTHER EU MEMBERS

The following table summarises the green, roasted and soluble coffee imports from all sources into the five larger (> 100.000 bags green coffee imports) coffee markets among the new EU members.

Coffee imports 2005
- in tons -

Czech Republic

Green coffee (incl. decaf)		Roasted coffee (incl. decaf)		Soluble coffee	
Vietnam	2.841	Germany	4.906	Germany	2.616
Indonesia	2.608	Austria	3.571	Spain	1.714
Brazil	2.295	Poland	2.034	Brazil	1.251
Colombia	1.157	Hungary	550	Colombia	1.164
Peru	1.090	Italy	347	Hungary	1.198
Others	13.495	Others	335	Others	1.788
Total	23.485	Total	11.743	Total	9.731

Hungary

Green coffee (incl. decaf)		Roasted coffee (incl. decaf)		Soluble coffee	
Vietnam	5.330	Austria	5.258	Germany	4.664
Brazil	2.595	Germany	4.481	India	1.001
Uganda	2.195	Poland	757	Spain	616
Honduras	510	Italy	412	Switzerland	377
Ethiopia	285	United Kingdom	217	Poland	288
Others	6.143	Others	252	Others	656
Total	17.058	Total	11.377	Total	7.601

Poland

Green coffee (incl. decaf)		Roasted coffee (incl. decaf)		Soluble coffee	
Germany	39.434	Germany	13.242	Germany	3.793
Vietnam	21.407	Czech Republic	1.572	Hungary	2.851
Uganda	12.089	Italy	1.283	Czech Republic	2.538
Indonesia	7.695	Hungary	277	Ecuador	2.430
Laos	5.604	Austria	210	United Kingdom	1.289
Others	56.923	Others	647	Others	3.352
Total	103.718	Total	17.231	Total	16.254

Slovakia

Green coffee (incl. decaf)		Roasted coffee (incl. decaf)		Soluble coffee	
Germany	3.046	Czech Republic	3.811	Hungary	577
Poland	1.011	Poland	2.015	Czech Republic	468
Vietnam	441	Austria	1.633	Poland	304
Indonesia	335	Italy	433	Germany	250
Italy	235	Germany	182	United Kingdom	101
Others	872	Others	47	Others	184
Total	5.940	Total	8.121	Total	1.782

Slovenia

Green coffee (incl. decaf)		Roasted coffee (incl. decaf)		Soluble coffee	
Brazil	4.742	Italy	812	Austria	176
Vietnam	1.956	Croatia	246	Italy	41
Colombia	853	Austria	204	Germany	16
India	702	Bosnia and Herzegovina	135	Czech Republic	5
Italy	377	Bulgaria	30	Switzerland	2
Others	676	Others	95	Others	10
Total	9.305	Total	1.492	Total	250

Source: Eurostat

EU VAT AND EXCISE DUTIES

Indirect taxes on coffee as at 2006

	VAT	Excise duties		
		Green coffee	Roasted coffee	Extracts/soluble coffee
Austria	20%			
Belgium	6%	EUR 0,1983/kg	EUR 0,2479/kg	EUR 0,6941/kg
Cyprus	0%			
Czech Republic	19%			
Denmark	25%	DKK 5,45/kg	DKK 6,54/kg	DKK 14,17/kg
Estonia	18%			
Finland	17%			
France	5,5%			
Germany	7%		EUR 2,19/kg	EUR 4,78/kg
Greece	9%			
Hungary	15%			
Ireland	0%			
Italy	20% (soluble coffee 10%)			
Latvia	18%		LVL 50/100 kg	LVL 50/100 kg
Lithuania	18%			
Luxembourg	3%			
Malta	0%			
Netherlands	6%			
Norway	13%		0,4% food tax + NOK 0,49 per kilo customs duty	0,4% food tax + 0,3% research tax + NOK 0,17 per kilo customs duty
Poland	22%			
Portugal	12%			
Slovakia	19%			
Slovenia	8,5%			
Spain	7%			
Sweden	12%			
Switzerland	2%	Special national fees on coffee		
United Kingdom	0%			

Sources: DG Trade Expanding Exports Helpdesk website and national data

IMPORT DUTIES

Import duties for EU origin coffee products into selected countries in 2006

Importing country	Green	Green decaf	Roasted	Roasted decaf	Instant
Algeria	30	30	30	30	30
Brazil	10	10	10	10	16
Bulgaria	0	0	0	0	0
Colombia	10	15	15-20	20	20
Egypt	5	5	32	32	28,5
Romania	0	0	0	0	18
Switzerland (CHF/kg)	0,35	0,35	0,63	0,63	0
Turkey	11	11	11	11	0
U.S.A.	0	0	0	0	0

Import duties on coffee from selected origins into EU in 2006

Exporting country	Green	Green decaf	Roasted	Roasted decaf	Instant
WTO members	0	8,3	7,5	9,0	9,0
G.S.P.	0	4,8	2,6	3,1	3,1
Everything But Arms	0	0	0	0	0
Brazil	0	4,8	2,6	3,1	9,0
Bulgaria	0	0	0	0	0
Romania	0	0	0	0	0
Switzerland	0	0	0	0	0
Turkey	0	0	0	0	0
USA	0	8,3	7,5	9,0	9,0

Up-to-date information on import duties, VAT and excise duties can be found on the European Commission Export Helpdesk website 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 guaranteed upon consultation of their official sources.

LIST OF ASSOCIATION MEMBERS AND COMPANY MEMBERS

Secretariat

• Mr. J.A.J.R. Vaessen
Sir Winston Churchilllaan 366 (19th floor)
P.O. Box 161, 2280 AD Rijswijk
The Netherlands
Tel: +31-(0)70-336 51 65 Fax: +31-(0)70-336 51 67
E-mail: ecf@ecf-coffee.org

Austria
• FIAA Food Industries Association of Austria – Kaffee und Teeverband
Zaunergasse 1-3, A-1030 Wien
Tel. +431 712 21 2144 Fax. +43 1 712 21 2135
E-mail: kaffeetee@eunet.at

Belgium
• Union Professionnelle du Commerce Anversois d'Importation du Café "UPCAIC"/ Beroepsvereniging van de Antwerpse Koffie-Invoerhandel "BVDAKI"
Generaal Lemanstraat 74, bus 11
B-2600 Antwerp
Tel +32 3 281 60 16 Fax +32 3 281 60 19
E-mail: bvdaki-upcaic@skynet.be

• Belgian Coffee Roasters'Association
Willeriekse Dreef 20
Brussel 1160 Bruxelles
Tel. +32 2 657 18 09 Fax. +32 2 657 59 77
E-mail: utc-vvk@koffiecafe.be

Denmark
• Association of Danish Coffee and Tea Importers
Nyhavn 6,
DK-1051 Copenhagen K.
Tel. + 45 33 11 93 13 Fax. + 45 33 32 08 48
E-mail: NG@adv-nyhavn.dk

Finland
• Finnish Coffee Roasters'Association
P.O. Box 115
FIN-00241 Helsinki
Tel. +358 9 148 871 Fax. +358 9 148 87 201
E-mail: elisa.piesala@etl.fi
Website: www.kahvi.net and www.etl.fi

France
• Syndicat Français du Café
194 rue de Rivoli F-75001 Paris
Tel. + 33 144 778 558 Fax. +33 142619 534
Florence Rossillion.
Mail: frossillion@alliance7.com
Website: www.alliance7.com

Germany
• Deutscher Kaffee-Verband e.V.
Pickhuben 4, D-20457 Hamburg
Tel. + 49 40 366 256 Fax. +49 40 365 414
E-mail: info@kaffeeverband.de
Website: www.kaffeeverband.de

Italy
• Federazione Caffè Verde
Via Giuseppe Avezzana 45 int. 6
I-00195 Roma
Tel. + 39 06 36 00 28 89 Fax. + 39 06 32 30 536
E-mail: comitcaf@comitcaf.it

• Associazione Commercio Caffè, Droghe e Coloniali "ASSOCAF"
Piazza San Matteo N. 15/5
I-16123 Genova
Tel/Fax +39 010 24 74 800
E-mail: assocaf@assocaf.it

• Associazione Caffè Trieste/Trieste Coffee Association
Via dei Bonomo 4
I-34126 Trieste
Tel +39 040 56 91 80 Fax +39 040 56 79 20
E-mail: info@asscaffe.it

• Associazione Italiana Industrie Prodotti Alimentari (AIIPA)
Corso di Porta Nuova 34
IT-20121 Milano
Tel. + 39 02 36 00 28 89 Fax. + 39 02 65 48 22
E-mail : v.bordoni@aiipa.it

• Associazione Nazionale Torrefattori di Caffè
Via Giuseppe Avezzana 45 int. 6
I-00195 Roma
Tel. + 39 06 36 00 28 89 Fax. + 39 06 32 30 536
E-mail: comitcaf@comitcaf.it

The Netherlands
• Vereniging van Nederlandse Koffiebranders en Theepakkers
Sir Winston Churchilllaan 366 (19th floor)
P.O. Box 161
2280 AD Rijswijk
Tel +31 70 336 51 61 Fax: +31 70 336 51 67
E-mail: vnkt@vnkt.nl
Website: www.vnkt.nl

• Koninklijke Nederlandse Vereniging voor de Koffiehandel/Royal Netherlands Coffee Trade Association
Sir Winston Churchilllaan 366 (19th floor)
P.O. Box 161
2280 AD Rijswijk
Tel +31 70 336 51 64 Fax: +31 70 336 51 67
E-mail: knvk@coffeetrade.org

Norway
• Norwegian Coffee Association
Niels Juels gate 16
N-0272 Oslo
Tel. +47 2313 1850 Fax. +47 2313 1851
E-mail: egil@kaffe.no

Portugal
• AICC – Associacâo Industrial e Comercail do Café/Portuguese Coffee Roasters Association
Rua Padre Francisco Alvares No 1 – 1 Dt. Letra A
1500-476 Lisboa
Tel. +351 21 774 16 74 Fax +351 21 778 53 44
E-mail: a.i.c.cafe@mail.telepac.pt

Spain
• Spanish Coffee Federation
c/o Ms. Eileen Gordon
C/Gral. Alvarez de Castro 20, E-28010 Madrid
Tel +34 91 448 82 12 Fax +34 91 448 85 01
E-mail: aefcs@federacioncafe.com
Website: www.federacioncafe.com

Sweden
• Svensk Kaffeinformation
c/o Mr Håkan Björglund
Box 155680
S-102 15, Stockholm
Tel. + 46 87 626 520 Fax. + 46 87 626 512
E-mail: hakan.bjorglund@li.se

Switzerland
• Swiss Coffee Trade Association
1 place St-Gervais
P.O. Box 5425
1211 Geneva 11, Switzerland
Tel +41 22 839 77 32 Fax +41 22 702 92 26
E-mail: scta@sucafina.ch

United Kingdom
• British Coffee Association
P.O. Box 5
Chipping Norton D.O. Oxon OX75UD
Tel. + 44 160 864 49 95 Fax. + 44 160 864 49 96
E-mail: info@britishcoffeeassociation.org

Company Members:
• Bernhard Rothfos GmbH
Mr. J. Janecki
Am Sandtorkai 5, 20457 Hamburg Germany
Tel. +49 403 70 01 256 Fax +49 403 70 01 338
E-mail: Janecki@rothfos.de

• Complete Coffee Limited
Mr. I. Breminer
1 Kentish Buildings, 125 Borough High Street,
SE1 1NP London United Kingdom
Tel. +44 207 403 8787 Fax +44 207 403 5276

• Deutsche Extrakt Kaffee GmbH
Mr. H. Bebensee,
Buschwerder Hauptdeich 10,
21107 Hamburg Germany
Tel +49 40 37 88 90 Fax +49 40 36 43 11,
E-mail: bebensee@kord-hh.com
and harmgardt@kord-hh.com

• J.Th. Douqué's Koffie BV
P.O. Box 552, 1180 AN Amstelveen
The Netherlands
Tel. +31 20 62 22 477 Fax +31 20 62 21 868
E-mail: jtdcoffee@douque.com

• ECOM Agroindustrial Corp. Ltd
Mr. K. Harding, P.O. Box 64
CH-1009 Pully, Switzerland
Tel. +41 217 21 72 46 Fax +41 217 11 10 75
E-mail: kharding@ecomtrading.com

• EFICO s.a.
Mr. P.F. Installé
Italiëlei 181, B-2000 Antwerp, Belgium
Tel.+ 32 323 37 865 Fax +32 322 64 738
E-mail: efico@efico.com

• Kraft Foods Europe
Lindbergh-Allee 1, CH - 8152 Glattpark,
Switzerland

• Luigi Lavazza S.p.A.
Dr. Mario Cerutti
Strada Settimo 410, I-10156 Torino
Tel. +39 011 239 8326 Fax +39 011 239 8290
E-mail: m.cerutti@lavazza.it

• Nestlé UK Ltd
Mr. M. Hall
St. George's House Park Lane
CR9 1NR Croydon, Surrey, United Kingdom
Tel. + 44 208 667 6316 Fax + 44 208 667 5527
E-mail: Christine.Wicks@uk.nestle.com

• Sara Lee/DE,
Mrs. V. Hombroekx
Potaarde, 1850 Grimbergen Belgium
Tel. +32 2 260 06 11, Fax +32 2 260 07 04

• Sucafina sa
Mr. X. Fagart
1 Place St Gervais
CP 5425 Geneva Switzerland
Tel. +41 22 839 7778 Fax +41 22 702 9221
E-mail: xf@sucafina.ch

• Tchibo GmbH
Mr. Klaus Krämer
Überseering 18, D-22290 Hamburg Germany
Tel. +49 40 63 87 23 49 Fax +49 40 63 87 21 70
E-mail: klaus.kraemer@tchibo.de

• VOLCAFE LTD
Mr. H. Zipsin
Gertrudstrasse 1
CH-8401 Winterthur Switzerland
Tel. +41 522 64 94 94 Fax 41 522 64 94 00
E-mail: hzipsin@volcafe.ch