European Coffee Report 2007

European Coffee Federation

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INTRODUCTION

This is the twenty-ninth issue of the 'European Coffee Report'. The European Coffee Federation (ECF) continues this series with the report over 2007. As usual, it contains a graph of the ICO Indicator Prices, a chapter on EU import and export figures and chapters on the individual Western European markets. The information for most of the country chapters has again been provided by the ECF member associations. Their contribution to this series is invaluable and has enabled the European Coffee Report to develop into a unique and convenient single source of basic information on the European coffee market. The European Coffee Report is available only in electronic format on the ECF website.

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

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

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This report was finalised in September 2008

EUROPEAN COFFEE FEDERATION

NOTE ON THE TABLES

Bags are bags of 60 kilos
Tons are metric tons

The recalculation of roasted and soluble coffee uses the conversion factors of the International Coffee Agreement 2001, Annex 1:

- from roasted to green: multiply by 1,19
- from soluble to green: multiply by 2,6

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

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

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

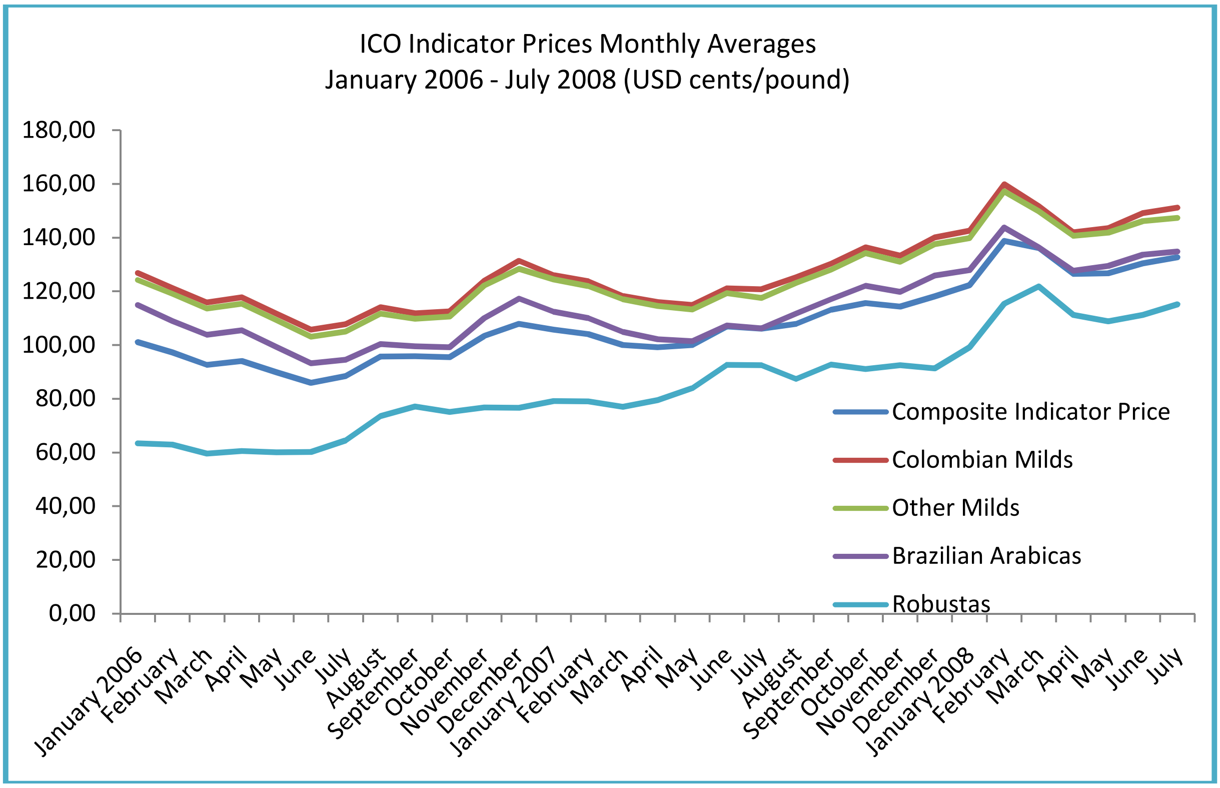
Abbreviations of currencies are those used for international banking purposes, based on ISO standards.

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 2005 the calculation of the ICO composite indicator price is weighted as follows:

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

As from 1 October 2007 the weighting is as follows:

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

THE EUROPEAN COFFEE MARKET IN 2007

1. IMPORTS AND EXPORTS

In this issue the EU data refer to the 27-member European Union. Eurostat has backdated import statistics for the new members to previous years, adding Bulgaria and Rumania to the dataset of years before they joined (on 1 January 2006). This helps to observe trends, but readers must be aware that the 2005 data in earlier reports are not the same as those in this report because of the addition of the two new EU members. The traditional division between 'Western Europe' and 'Central and Eastern Europe' is constantly changing with the increasing EU membership. The terms 'Western Europe' and 'Central and Eastern Europe' are not strictly defined, and the inclusion of a country in one or the other group has always been somewhat arbitrary. We designate EU plus Norway and Switzerland as 'Western Europe'. To expand our coverage, we added Ukraine and Turkey to the Central and Eastern European countries.

Imports of green coffee into European countries from 2004 to 2006
- in tons and in bags of 60 kilos -

	2005		2006		2007	
	tons	bags	tons	bags	tons	bags
Austria	48.338	805.633	65.619	1.093.653	66.204	1.103.395
Belgium	198.887	3.314.780	214.909	3.581.812	186.056	3.100.927
Bulgaria	20.169	336.147	19.250	320.825	16.254	270.893
Cyprus	1.776	29.600	1.692	28.200	1.697	28.287
Czech Republic	23.219	386.990	17.691	294.850	16.384	273.067
Denmark	35.918	598.630	34.329	572.147	32.644	544.070
Estonia	51	852	35	582	30	503
Finland	63.269	1.054.478	64.684	1.078.073	67.237	1.120.623
France	211.592	3.526.537	219.605	3.660.078	242.643	4.044.045
Germany	900.204	15.003.405	1.001.093	16.684.887	1.019.838	16.997.292
Greece	25.594	426.573	23.462	391.025	28.518	475.297
Hungary	17.058	284.297	14.576	242.930	14.617	243.608
Ireland	5.311	88.513	5.099	84.980	5.026	83.772
Italy	399.907	6.665.122	416.132	6.935.527	444.133	7.402.212
Latvia	1.828	30.473	2.168	36.130	2.139	35.645
Lithuania	186	3.093	264	4.400	264	4.400
Luxembourg	179	2.990	164	2.730	214	3.565
Malta	40	660	39	642	34	572
Netherlands	135.803	2.263.390	145.987	2.433.112	153.404	2.556.727
Poland	103.405	1.723.408	77.797	1.296.618	61.540	1.025.662
Portugal	39.897	664.953	41.310	688.492	42.983	716.382
Rumania	33.071	551.182	29.342	489.035	24.514	408.568
Slovakia	5.915	98.575	4.632	77.203	4.376	72.930
Slovenia	9.303	155.057	8.490	141.505	8.661	144.353
Spain	232.878	3.881.303	234.223	3.903.720	249.687	4.161.445
Sweden	102.547	1.709.110	110.031	1.833.842	109.554	1.825.905
United Kingdom	108.604	1.810.073	115.247	1.920.782	113.390	1.889.835
EU(27) total	***2.724.950***	***45.415.825***	***2.867.867***	***47.797.778***	***2.912.039***	***48.533.978***
Norway	37.408	623.463	35.769	596.149	38.688	644.800
Switzerland	89.843	1.497.233	73.702	1.228.367	91.785	1.529.750
Western Europe total	***2.852.200***	***47.536.521***	***2.977.338***	***49.622.294***	***3.042.512***	***50.708.528***
Albania	*4.049*	*67.480*	*5.098*	*84.961*		

Belarus	*12.554*	*209.231*	*6.000*	*100.000*	
Bosnia and Herzegovina	*22.075*	*367.923*	*24.648*	*410.800*	
Croatia	*23.496*	*391.600*	*24.247*	*404.122*	
Kazakhstan	*3.962*	*66.027*	*4.200*	*70.000*	
Macedonia	*8.158*	*135.962*	*7.933*	*132.212*	
Moldova	*680*	*11.326*	*950*	*15.836*	
Russian Federation	*200.006*	*3.333.433*	*207.670*	*3.461.165*	
Serbia and Montenegro	*39.187*	*653.116*	*36.788*	*613.136*	
Turkey	*28.346*	*472.433*	*25.326*	*422.097*	
Ukraine	*61.952*	*1.032.531*	*59.337*	*988.947*	
Central and Eastern Europe total	***404.464***	***6.741.062***	***402.197***	***6.703.276***	
Europe total	***3.256.664***	***54.277.583***	***3.379.534***	***56.325.570***	

Note: Figures show imports of green coffee, not decaffeinated, but some countries do not distinguish between decaffeinated and not-decaffeinated green coffee. Norway 2007 data provisional
Sources: Eurostat for EU, ICO for Central and Eastern Europe, external trade statistics for other countries.

In calendar year 2007 green coffee imports in Western Europe were 50,7 million bags, an increase of 2,2% compared to the 49,6 million bags in 2006. The Western European market is dominated by the EU. Green coffee imports into the EU(27) – including intra-EU trade - increased by 1,5% from 47,8 million bags in 2006 to 48,5 million bags in 2007. According to ICO data, Central and Eastern European imports in 2006 (the most recent year available) amounted close to 6,7 million bags, 0,6% lower than the year before.

The 'top 20' sources of EU(27) green coffee imports (excluding intra-EU trade) in 2005, 2006 and 2007 were as follows (listed in the order of 2007 imports):

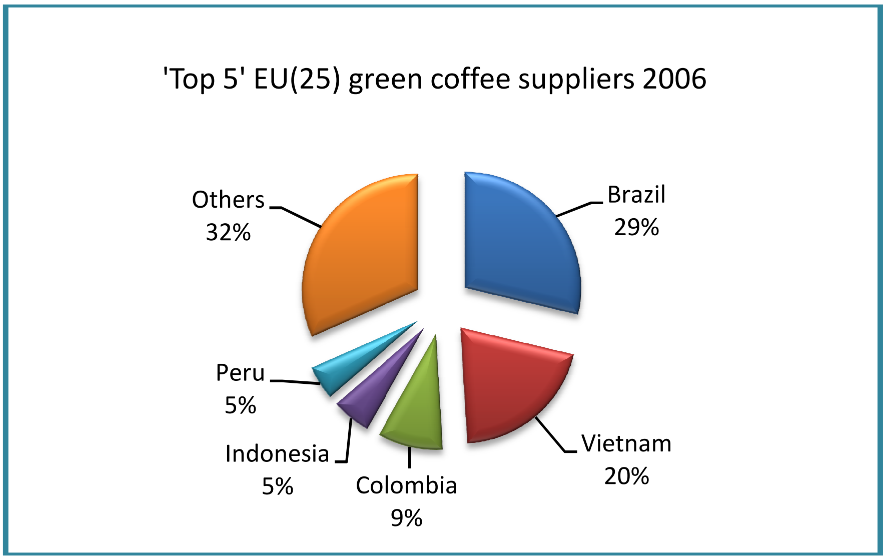
Imports of green, not decaffeinated coffee into the EU(27) (excluding intra-EU trade) by main origins

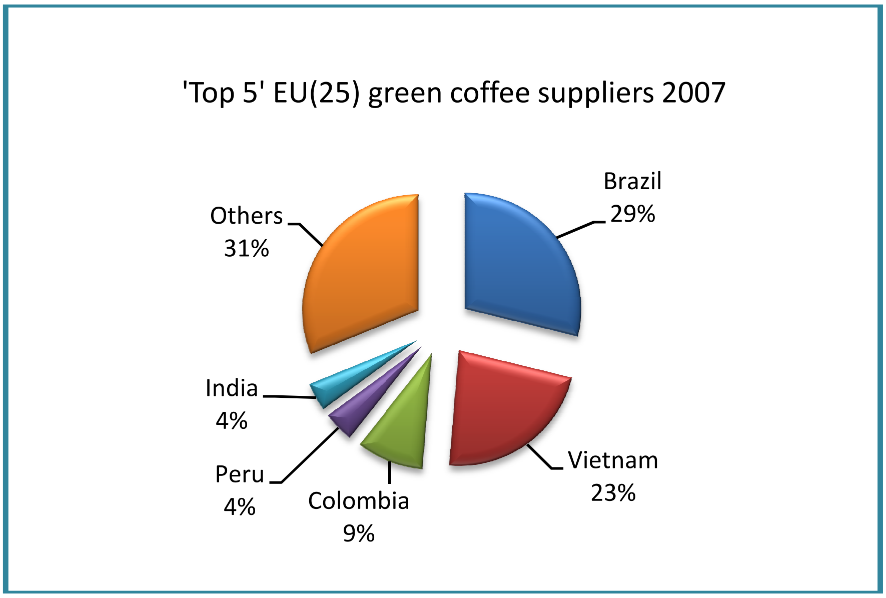
	2005		2006		2007	
	bags	%	bags	%	bags	%
Brazil	12.043.852	28,7	12.759.650	28,7	13.021.138	28,8
Vietnam	7.445.473	17,7	9.037.385	20,3	10.157.213	22,5
Colombia	3.674.575	8,8	4.043.115	9,1	4.209.438	9,3
Peru	1.595.825	3,8	2.106.802	4,7	1.939.345	4,3
India	1.511.145	3,6	1.888.663	4,3	1.781.507	3,9
Honduras	1.474.262	3,5	2.013.630	4,5	1.775.027	3,9
Indonesia	3.123.533	7,4	2.436.887	5,5	1.690.752	3,7
Uganda	1.637.275	3,9	1.305.480	2,9	1.287.973	2,9
Ethiopia	1.364.322	3,3	922.280	2,1	924.015	2,0
Guatemala	862.872	2,1	645.247	1,5	621.898	1,4
El Salvador	683.855	1,6	639.093	1,4	610.002	1,4
Kenya	608.592	1,5	365.648	0,8	601.935	1,3
Cameroon	662.677	1,6	500.552	1,1	579.915	1,3
Tanzania	486.825	1,2	359.597	0,8	565.417	1,3
Nicaragua	462.107	1,1	561.563	1,3	480.118	1,1
Mexico	335.148	0,8	482.088	1,1	402.803	0,9
Cote d'Ivoire	782.895	1,9	445.465	1,0	362.220	0,8
Costa Rica	501.590	1,2	330.082	0,7	213.977	0,5
Papua New Guinea	554.377	1,3	246.960	0,6	190.760	0,4
Burundi	470.227	1,1	107.270	0,2	163.503	0,4
Others	1.667.972	4,0	116.923	0,3	138.303	0,3
Total excl intra-EU	**41.949.397**	**100,0**	**44.432.208**	**100,0**	**45.173.983**	**100,0**

Source: Eurostat

The top-3 suppliers to the EU remained unchanged in 2007: Brazil, Vietnam and Colombia. In 2006 the top-5 was competed by Indonesia and Peru, in 2007 by Peru and India. Indonesia dropped out of the top-5 and became the 7th supplier to the EU in 2007. India moved from 7th place in 2006 to 5th in 2007. In recent years, Peru has become an increasingly important origin for the EU. From 6th place in 2005 and 5th in 2006, it is now the 4th largest origin. Brazil remained the major green coffee supplier to the EU. Its volume increased by more than 260.000 bags, and its market remained virtually unchanged: 28,7% in 2006 and 28,8% in 2007. Vietnam comfortably retained its position as second supplier, with a higher volume (+1,1 mln bags) and share (+2,1 percentage points). The imports from Colombia increased by over 166.000 bags in volume and 0,2 percentage points in share.

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





Because of its rapid economic development, there is always an interest in coffee imports from China. In 2005 this country supplied 10.133 bags to the EU27, in 2006 this increased marginally to 10.727 and in 2007 very significantly (by over 52%!) to 16.350 bags. In 2007 China was the EU's 23rd supplier. With this, China ranks higher than traditional coffee exporting countries like the Democratic Republic of Congo - formerly Zaire- (27th supplier in 2007) or Ecuador (31st).

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(27) imports and exports of green coffee and (semi)finished products from non-EU origins/to non-EU destinations - in tons -						
	2005		2006		2007	
	Import	Export	Import	Export	Import	Export
Green coffee (09011100)	2.516.856	13.616	2.665.933	14.668	2.710.439	16.369
Green coffee, decaffeinated (09011200)	2.169	84.896	2.079	89.834	1.754	90.429
Roasted coffee (09012100)	11.193	57.060	13.353	64.501	13.660	77.909
Roasted coffee, decaffeinated (09012200)	1.120	3.090	1.360	3.573	1.356	3.841
Soluble coffee (21011111+21011119)	41.340	50.621	42.970	50.172	41.267	52.139

Source: Eurostat

Compared to 2006 the (re)exports in 2007 of green coffee and green decaffeinated coffee both increased with respectively 12% and 1%. Exports of roasted coffee continued to rise and increased with 21% for regular and 7% for decaffeinated coffee. Green decaffeinated imports, modest in volume, dropped by 16% in 2007 compared to 2006. Imports of roasted coffee increased slightly by 2% for regular coffee. Imports of decaffeinated roasted coffee were virtually unchanged. Imports dropped somewhat by 4%.

Looking in some more detail at the EU exports of finished products, in the years 2005-2007 the twenty main destinations of roasted coffee (non-decaffeinated plus decaffeinated), listed according to their ranking in 2007, were:

EU(27) exports of roasted coffee (incl. decaf) to non-EU destinations - in tons and % -						
	2005		2006		2007	
	ton	%	ton	%	ton	%
United States	14.553	24,2	14.849	21,8	14.571	20,7
Russian Federation	6.138	10,2	7.995	11,7	8.745	12,4
Ukraine	8.772	14,6	7.933	11,7	8.242	11,7
Switzerland	4.786	8,0	8.730	12,8	8.129	11,5
Australia	2.238	3,7	3.058	4,5	3.720	5,3
Norway	3.003	5,0	2.861	4,2	2.852	4,0
Canada	1.700	2,8	1.950	2,9	2.176	3,1
Croatia	1.762	2,9	1.776	2,6	1.933	2,7
Iceland	1.597	2,7	1.331	2,0	1.392	2,0
Japan	1.141	1,9	1.474	2,2	1.288	1,8
Israel	981	1,6	1.060	1,6	1.167	1,7
Albania	767	1,3	956	1,4	1.110	1,6
Turkey	717	1,2	898	1,3	1.071	1,5
Bosnia and Herzegovina	936	1,6	1.052	1,5	1.052	1,5
South Africa	993	1,7	994	1,5	853	1,2
South Africa	993	1,7	994	1,5	853	1,2
United Arab Emirates	933	1,6	815	1,2	848	1,2
Serbia	396	0,7	745	1,1	785	1,1
Ceuta	475	0,8	679	1,0	721	1,0
Belarus	409	0,7	632	0,9	694	1,0
Others	6.863	11,4	7.292	10,7	8.302	11,8
Total external trade	**60.150**	**100,0**	**68.074**	**100,0**	**70.503**	**100,0**

Source: Eurostat

Once more it has to be emphasised that EU(27) data are not comparable to older EU figures. The export to non-EU destination includes less and less countries as the EU membership increases. In 2007 total exports of roasted coffee (including decaffeinated coffee) to non-EU destinations increased by 3,6% in volume compared to the previous year. The US remained by far the largest non-EU destination. Exports to the US decreased marginally in 2007, but its share in EU export destinations increased. A few years ago, Romania was the second largest non-EU destination. Obviously, it is now included in the intra-EU trade. The second largest destination is now the Russian Federation, closely followed by Ukraine and Switzerland.

Regarding the 2007 EU exports of soluble coffee to non-EU destinations, the total volume increased by 2,7%. In 2007 the three largest clients were the Russian Federation, Ukraine and Australia. Exports to the Russian Federation increased with 20% in volume and those to Ukraine with 31,7%. In contrast, exports to the United States were almost halved: they dropped by 47,2%. The weakness of the US dollar against the Euro will certainly have been a contributing factor. In volume terms, listed according to their 2007 ranking, the 15 largest destinations in the three most recent years were:

EU(27) exports of soluble coffee to non-EU destinations (HS 21011111 + 21011119)
- in tons and % -

	2005		2006		2007	
	tons	%	tons	%	tons	%
Russian Federation	14.812	29,3	15.218	30,3	18.266	35,5
Ukraine	4.789	9,5	5.635	11,2	7.421	14,4
Australia	5.792	11,4	4.502	9,0	3.628	7,0
United States	1.779	3,5	5.038	10,0	2.659	5,2
Turkey	3.150	6,2	2.942	5,9	2.433	4,7
Switzerland	1.508	3,0	2.546	5,1	1.985	3,9
Japan	1.920	3,8	1.415	2,8	1.373	2,7
United Arab Emirates	536	1,1	771	1,5	1.054	2,0
Saudi Arabia	972	1,9	928	1,9	1.028	2,0
Canada	654	1,3	1.395	2,8	990	1,9
Israel	970	1,9	1.077	2,1	778	1,5
Croatia	492	1,0	642	1,3	737	1,4
Norway	1.313	2,6	1.122	2,2	666	1,3
South Africa	670	1,3	796	1,6	502	1,0
Belarus	264	0,5	431	0,9	410	0,8
Others	10.999	21,7	5.716	11,4	7.595	14,7
Total external trade	**50.621**	**100,0**	**50.172**	**100,0**	**51.526**	**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 2007 Brazil remained the largest non-EU origin, with an increased volume but a slightly lower share. Ecuador maintained its second place with a higher volume and share. Switzerland lost its third place to Cote d'Ivoire. Colombia completed the top-5 with an almost unchanged volume.

EU(27) imports of soluble coffee from non-EU origins (HS 21011111 + 21011119)
- in tons and % -

	2005		2006		2007	
	ton	%	ton	%	ton	%
Brazil	14.191	34,3	13.405	31,2	14.403	30,3
Ecuador	8.625	20,9	8.657	20,1	10.000	21,1
Cote d'Ivoire	2.559	6,2	4.391	10,2	5.593	11,8
Switzerland	5.644	13,7	5.146	12,0	5.474	11,5
Colombia	4.295	10,4	3.899	9,1	3.869	8,1
Others	6.027	14,6	7.472	17,4	8.140	17,1
Total external trade	**41.340**	**100,0**	**42.970**	**100,0**	**47.480**	**100,0**

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

Value of EU(27) imports and exports of green, roasted and soluble coffee - in mln EUR -										
	Green		Green decaf		Roasted		Roasted decaf		Soluble	
Imports	**2006**	**2007**	**2006**	**2007**	**2006**	**2007**	**2006**	**2007**	**2006**	**2007**
From non-EU origins	4.230	4.529	5	6	117	248	17	34	245	265
Including intra-EU trade	4.578	4.905	77	86	1.560	1.825	111	124	1.062	1.156
Exports	**2006**	**2007**	**2006**	**2007**	**2006**	**2007**	**2006**	**2007**	**2006**	**2007**
To non-EU destinations	36	35	211	232	320	343	20	20	394	459
Including intra-EU trade	493	530	330	359	1.799	2.009	98	110	1.207	1.369

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 2007 was EUR 822 million, 12% higher than the EUR 734 million in 2006. At the same time the EU green coffee imports represent about half of the world trade, both in terms of volume and value, making the EU a significant trading partner of the coffee exporting countries.

2. PRODUCTION

The following table is a summary of the Eurostat Prodcom statistics over calendar years 2006 and 2007, summarising production of decaffeinated green, roasted, roasted decaffeinated and soluble coffee in volume and value.

Production of green decaffeinated, roasted and soluble coffee in selected EU and EFTA countries - in tons -										
	Decaffeinated coffee, not roasted		Roasted coffee, not decaffeinated		Roasted decaffeinated coffee		Extracts, essences and concentrates of coffee in solid form (including instant coffee)		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	
	2006	**2007**	**2006**	**2007**	**2006**	**2007**	**2006**	**2007**	**2006**	**2007**
Austria	0	0	41.320	25.693	177	172	0	0	0	0
Belgium	0	0	76.911	63.393	9.233	8.233	0	0	0	0
Bulgaria	0	0	19.372	7.963	0	0	0	0	0	0
Croatia	0	0	12.770	13.094	48	52	0	0	0	0
Denmark	0	0	18.449	18.822	0	0	90	96	172	174
Finland	0	0	53.676	55.817	0	0	9	5	0	0
France	0	0	179.055	192.653	10.143	7.258	0	0	0	1.383
Germany	204.275	217.559	462.356	466.624	74.706	80.804	112.895	114.407	28.589	30.153
Greece	0	0	10.296	10.665	0	0	0	0	0	0
Hungary	0	0	0	0	0	0	0	0	12.375	16.427
Iceland	0	0	708	0	0	0	0	0	0	0
Italy	17.719	15.046	348.814	419.766	15.493	16.429	0	674	124	201
Latvia	0	0	1.568	0	0	0	0	0	0	0
Lithuania	0	0	64	76	0	1	0	0	0	0
Netherlands	0	0	106.238	107.541	9.123	9.551	0	0	0	0
Norway	0	0	31.053	31.214	276	277	0	0	0	0
Poland	0	0	68.082	49.887	0	0	3.722	3.965	5.401	4.698
Portugal	0	0	31.864	39.586	1.870	1.783	0	0	0	0
Romania	0	0	26.238	21.904	0	0	0	0	0	0
Slovakia	0	0	0	3.605	0	0	0	0	0	0
Slovenia	0	0	0	0	0	0	0	0	0	0
Spain	15.401	16.752	107.683	107.791	13.942	15.041	37.335	41.269	3.072	3.706
Sweden	0	0	69.091	68.831	0	0	0	0	0	0
United Kingdom	0	0	17.576	19.062	3.530	3.613	0	59.283	113	0
EU(27) Total	**242.501**	**253.895**	**1.673.087**	**1.714.826**	**139.552**	**144.420**	**252.583**	**250.278**	**75.432**	**77.702**

Source: Eurostat

Production of green decaffeinated, roasted and soluble coffee in selected EU and EFTA countries - in mln EUR -										
	Decaffeinated coffee, not roasted		Roasted coffee, not decaffeinated		Roasted decaffeinated coffee		Extracts, essences and concentrates of coffee in solid form (including instant coffee)		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	
	2006	**2007**	**2006**	**2007**	**2006**	**2007**	**2006**	**2007**	**2006**	**2007**
Austria	0	0	113	83	1	1	0	0	0	0
Belgium	0	0	400	349	55	49	0	0	0	0
Bulgaria	0	0	28	28	0	0	0	0	0	0
Croatia	0	0	70	76	0	1	0	0	0	0
Denmark	0	0	102	109	0	0	1	2	1	1
Finland	0	0	226	257	0	0	0	0	0	0
France	0	0	1.198	1.690	68	62	0	0	0	24
Germany	108	117	1.268	1.307	140	146	681	718	100	106
Greece	0	0	72	66	0	0	0	0	0	0
Hungary	0	0	0	0	0	0	0	0	50	66
Iceland	0	0	7	0	0	0	0	0	0	0
Italy	16	14	2.345	2.626	133	154	0	9	1	1
Latvia	0	0	5	6	0	0	0	0	0	0
Lithuania	0	0	0	1	0	0	0	0	0	0
Netherlands	0	0	611	615	56	0	0	0	0	0
Norway	0	0	151	161	2	2	0	0	0	0
Poland	0	0	179	168	0	0	29	21	0	11
Portugal	0	0	225	275	14	14	0	0	0	0
Romania	0	0	83	103	0	0	0	0	0	0
Slovakia	0	0	0	15	0	0	0	0	0	0
Slovenia	0	0	0	0	0	0	0	0	0	0
Spain	27	33	471	527	64	75	232	260	5	7
Sweden	0	0	393	331	0	0	0	0	0	0
United Kingdom	0	0	230	250	35	36	1.077	0	1	0
EU(27) Total	**165**	**176**	**8.100**	**8.976**	**575**	**599**	**2.624**	**2.576**	**442**	**0**

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. The EU totals in several cases record a zero value. This does not mean zero production, but an incomplete data set that does not allow for the calculation of a total. In some cases the reporting is questionable: countries are mentioned as having soluble coffee production where industry sources do not indicate the existence of production facilities. Please note that the Prodcom categories are not the same as those of the Harmonised System used for external trade data.

AUSTRIA

3. IMPORTS OF GREEN COFFEE

Imports of not –decaffeinated green coffee in 2006 reached a volume of 1.024.000 bags of 60 kilos (61.423 tons). This is an increase of 27% in comparison with 2005, when 807.231 bags of 60 kilos were imported.
The import of decaffeinated green coffee amounted to 75.000 bags (4.500 tons) in 2006, an increase of 22,4% compared to 2005.This is the highest import of decaffeinated coffee on record.
Total green coffee imports amounted to 1.099.000 bags (65.940 tons), which is 26,6% higher than in 2005 (52.068 tons).

Imports of not-decaffeinated green coffee in 2007 reached a volume of 1.104.000 bags of 60 kilos (66.240 tons). This is an increase of 1% in comparison to 2006, when 1.094.000 bags of 60 kilos were imported.
The import of decaffeinated green coffee amounted to 49.200 bags (2.952 tons) in 2007, a decrease of 38% compared to 2006. In 2006 Austria had the highest import of decaffeinated coffee on record and this could be a reason for the reduced volume in 2007.
Total green coffee imports amounted to 1.153.0000 bags (69.200 tons), which is a decrease of 1,8% to 2006 (70.488 tons).

Austria: Imports of not-decaffeinated green coffee - in bags -			
Countries of Origin	**2005**	**2006**	**2007**
Vietnam	237.301	339.142	360.947
Brazil	208.438	309.533	320.835
Thailand	-	21.316	69.033
Colombia	47.761	59.485	67.643
Kenya	-	5.506	61.395
Peru	3.343	37.806	44.945
Honduras	25.256	23.501	26.383
El Salvador	-	12.295	20.783
Others	285.132	285.416	132.036
Total	**807.231**	**1.094.000**	**1.104.000**

Source: Statistics Austria

Vietnam kept its number one position. Brazil increased its export by 3,7%. Thailand, El Salvador and Kenya had the highest increase of all countries.

Austria: Percentage distribution of not-decaffeinated green coffee Imports by main sources in %			
Countries of origin	**2005**	**2006**	**2007**
Vietnam	29,4	31,0	32,7
Brazil	25,8	28,3	29,1
Thailand	-	1,9	6,3
Colombia	5,9	5,4	6,1
Kenya	-	0,5	5,6
Peru	0,4	3,5	4,1
Honduras	3,1	2,1	2,4
El Salvador	-	1,1	1,9
Others	35,3	26,1	12,0
Total	**100,0**	**100,0**	**100,0**

4. FOREIGN TRADE IN ALL FORMS

The total volume of the international coffee trade in all forms (green coffee, roasted coffee, instant coffee and instant specialities) in 2007 amounted to 162.000 tons in comparison to 160.000 tons in 2006, a plus of 1,1%. Imports have been 111.000 tons (plus 4,0%), exports 51.000 tons (minus 4,3%)

5. 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	8,0
2007	8,0

6. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

The prices in the retail market increased by 4,5% as a result of moderate price increases and the change to pads and capsules. In the gastronomic sector the prices increased by 12%.

7. INFORMATION ON THE AUSTRIAN COFFEE AND TEA ASSOCIATION

The membership of the association covers 75% of the national coffee market. In March 2007 the General Manager of Tchibo- Eduscho, Mr. Harald J. Mayer was elected as new president of the Austrian Coffee and Tea Association.

8. COMMENTS ON PARTICULAR SUBJECTS

The main highlight in Austria was again the Day of Coffee on the 1st of October 2007. The press conference on the 19th of September 2007 was visited by 50 journalists and more than 70 articles were in press.
An excellent event for our members was the celebration of the 55th anniversary of the Austrian association in September 2007.

9. VAT

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

BELGIUM-LUXEMBOURG

N.B.: BECAUSE THE UPDATED COUNTRY REPORT WAS NOT AVAILABLE IN TIME, THIS CHAPTER IS UNCHANGED FROM THE 2006 EDITION.

1. IMPORTS OF GREEN COFFEE

Imports of not-decaffeinated green coffee reached a volume of 3.588.623 bags (215.317 tons) in 2006. This is 13,9% more than the 2005 imports and 14,9% more than the 2004 imports. As to the imports of decaffeinated green coffee, 107.656 bags (6.459 tons) were imported in 2006. This is a decrease of 5,3% compared to 2005. Total green coffee imports amounted to 3.696.279 bags (221.777 tons) in 2006.

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

Countries of origin	2004	2005	2006
Brazil	619.931	650.744	694.489
Vietnam	316.807	267.597	530.614
France	397.487	292.018	433.792
Columbia	314.989	258.363	300.240
Honduras	143.838	177.004	209.885
Uganda	166.490	139.923	135.247
India	155.708	139.361	150.438
Ethiopia	81.705	123.515	135.153
Peru	106.281	116.176	136.696
Guatemala	90.364	105.914	101.762
Cameroon	80.501	93.531	82.309
Indonesia	55.224	56.893	80.184
Kenya	59.262	49.581	48.362
Costa Rica	51.471	33.230	34.570
Mexico	58.906	29.569	50.736
Others	424.990	616.625	464.146
Total	**3.123.954**	**3.150.044**	**3.588.623**

The most important country of origin remains Brazil with a total market share of 19,35%, which is slightly lower than its market share of 2005. Brazil is then followed by Vietnam, with a market share of 14,79%, which is significant higher than in 2005 (8,50%). France, on the third place, has a share of 12,09%, which is higher than its share in 2005 (9,27%).

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	2004	2005	2006
Brazil	19,84	20,66	19,35
Vietnam	10,14	8,50	14,79
France	12,72	9,27	12,09
Columbia	10,08	8,20	8,37
Honduras	4,60	5,62	5,85
India	4,98	4,42	4,19
Peru	3,40	3,69	3,81
Uganda	5,33	4,35	3,77
Ethiopia	2,62	3,92	3,77
Guatemala	2,89	3,36	2,84
Cameroon	2,58	2,97	2,29

Compared to 2005, France and Vietnam changed places. India increased (up to the 6^{th} place), as well as Peru (n° 7). Uganda and Ethiopia decreased, to place 8 and 9 and represent each 3,77% of the market. Guatemala's share deceased with 0,52%.

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	**2006**
Germany	10.892
Netherlands	6.898
France	3.119
Luxembourg	804
Italy	797
Austria	292
Switzerland	283
Poland	121
Others	57
UK	45
Total	**23.308**

Belgium-Luxembourg: Exports of roasted coffee - in tons -	
Countries of origin	2006
France	32.803
Netherlands	10.153
Italy	6.220
Germany	4.393
UK	3.627
Luxembourg	1.321
Others	910
USA	819
Russian Federation	354
Denmark	322
Greece	225
Poland	202
Total	**61.349**

The Belgian export has increased in relation to the import. For 2006 Belgian exports of roasted coffee were 2,6 times higher than its imports. This certainly remains 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
2006	12.775	98,7

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.

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
2006	49.473

For 2006 we notice a firm decrease of the Belgian consumption. Nevertheless, this figure can be explained by the fact that coffee roasters used more of their coffee stock, partially due to the increase of the green coffee prices. It should be mentioned that the impact of single serve cups, such as pads, is very significant. Belgian consumers probably drink as much coffee as before, but all coffee that is prepared is now actually drunk.

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
2006	March	7,33
	June	7,69
	September	7,71
	December	7,68

5. COMMENTS ON PARTICULAR SUBJECTS

The association still works on 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 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 32.644 tons (544.070 bags) in 2007, compared to 34.329 tons (572.147 bags) in 2006. This is a drop of 4,9%. In 2004 Denmark still imported over 900.000 bags. The strong decline in the following years was caused by the fact that two roasters discontinued production in Denmark. Conversely, the imports of roasted coffee have increased.

Denmark: Imports of green not-decaffeinated coffee - in bags -	
Year	**Volume**
2005	598.630
2006	572.147
2007	544.070

Source: Eurostat

Brazil and Colombia remained Denmark's most important suppliers in 2007. Vietnam retained the third spot. As was the case last year, Honduras and Peru completed the 'top 5', but they changed place. Some of the smaller suppliers showed very large swings, for instance Mexico (almost doubling its volume), Nicaragua (three times the 2006 volume) and China (four times the 2006 volume). In contrast, Ethiopia's volume was reduced by 2/3[rd].

Denmark: Imports of green not-decaffeinated coffee - in bags -			
Countries of origin	**2004**	**2005**	**2006**
Brazil	273.362	251.957	227.085
Colombia	70.185	70.965	51.557
Vietnam	52.607	49.595	44.812
Honduras	21.115	31.578	26.340
Peru	24.562	36.058	24.340
Uganda	15.803	14.570	24.245
Indonesia	13.720	11.885	11.452
Mexico	6.032	4.857	9.448
Kenya	5.245	9.213	8.427
Nicaragua	1.020	2.527	7.913
Papua New Guinea	6.640	5.610	5.395
Burundi	15.195	7.595	5.075
Rwanda	3.940	7.025	4.787
China	837	1.017	4.258
Ethiopia	12.923	8.227	2.905
Guatemala	3.248	1.067	1.823
Zambia	1.343	898	1.620
Tanzania	2.342	2.732	1.450
Venezuela	0	0	1.423
Zimbabwe	3.050	587	988
Others	65.462	54.185	78.727
Total	**598.630**	**572.147**	**544.070**

Source: Eurostat

In percentage terms all of the top 5 suppliers lost market share. Brazil's import share decreased by 2,3 percentage points to 41,7%. The import share of Colombia (9,5% in 2007) showed a decline of 2,9 percentage points. The import share of the third supplier, Vietnam, dropped with a modest 0,5 percentage point. Peru and Honduras could not sustain the increases recorded in 2006; their share dropped with 0,7 and 1,8 percentage points respectively.

Denmark: Percentage distribution of green not-decaffeinated coffee Imports by main sources - in % -			
Countries of origin	**2005**	**2006**	**2007**
Brazil	45,7	44,0	41,7
Colombia	11,7	12,4	9,5
Vietnam	8,8	8,7	8,2
Honduras	3,5	5,5	4,8
Peru	4,1	6,3	4,5
Uganda	2,6	2,5	4,5
Indonesia	2,3	2,1	2,1
Mexico	1,0	0,8	1,7
Kenya	0,9	1,6	1,5
Nicaragua	0,2	0,4	1,5
Papua New Guinea	1,1	1,0	1,0
Burundi	2,5	1,3	0,9
Rwanda	0,7	1,2	0,9
China	0,1	0,2	0,8
Ethiopia	2,2	1,4	0,5
Guatemala	0,5	0,2	0,3
Zambia	0,2	0,2	0,3
Tanzania	0,4	0,5	0,3
Venezuela	0,0	0,0	0,3
Zimbabwe	0,5	0,1	0,2
Others	10,9	9,5	14,5
Total	**100,0**	**100,0**	**100,0**

Source: Eurostat

Denmark: Percentage distribution of green not-decaffeinated coffee imports by type			
Types of coffee	2005	2006	2007
Arabicas	78	78	71
Colombian Milds	13	14	11
Other Milds	17	18	18
Brazilian Naturals	48	45	42
Robustas	14	14	15
Unknown	8	8	14

Source: Eurostat, ICO

The dominant market position of Arabica coffees remained unchanged in 2007. Within this group Brazilian Naturals have by far the largest share, even though it dropped gradually in the three most recent years. The percentage share of Colombian Milds decreased by 3 percentage points and that of Other Milds remained the same. Robustas increased by 1 percentage point.

2. FOREIGN TRADE IN COFFEE IN ALL FORMS

Denmark: Foreign trade in coffee including intra-EU27 trade - in tons actual weight -				
	Imports		Exports	
Forms of coffee	2006	2007	2006	2007
green not decaffeinated	34.329	32.644	37	87
green decaffeinated	464	440	0	0
roasted not decaffeinated	13.009	11.783	6.026	6.749
roasted decaffeinated	111	82	46	25
soluble coffee	2.278	2.555	1.002	1.244

Source: Eurostat

Imports of roasted coffee increased significantly in previous years following the closure of roasting facilities in Denmark. In 2007 this increase was halted and even a limited decline was recorded. Imports of soluble coffee increased by 12%.
Regarding imports of processed coffee in 2007, Germany was virtually the sole supplier (99%) of decaffeinated green coffee. Sweden remained the major supplier of roasted coffee imports (including decaffeinated) with a share of 81%. Germany was the second source with a share of 10,9%, followed by Belgium (2,9%).
In 2007 Switzerland was the most important supplier of soluble coffee (30,1%), followed by Germany (20,7%) France (17,3%), Sweden (11%), Colombia (7,5%), the Netherlands (5,4%) and the United Kingdom (4,5%).

3. COFFEE CONSUMPTION

According to revised data, the ICO calculated the Danish consumption in 2007 to be 793.192 bags of green coffee equivalent (2006: 822.494). Per capita consumption in 2007 was 8,76 kg (2006: 9,09 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 2007 Finland imported 1.120.611 bags of green coffee, an increase of 3,9% compared to 2006.

Finland: Imports of green coffee in 1996-2007 - in bags -	
Year	**Imports**
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
2006	1.077.847
2007	1.120.611

The most important origins by volume were:

Finland: Imports of green coffee by country of origin - in 1000 bags -			
Countries of origin	**2005**	**2006**	**2007**
Brazil	468,5	459,1	465,7
Colombia	196,7	236,4	261,0
Guatemala	49,7	75,2	86,2
Nicaragua	58,7	58,9	68,3
Kenya	50,8	56,7	62,7
Ethiopia	35,2	28,3	35,8
Honduras	36,2	42,0	34,4
Peru	32,5	32,4	21,8
Tanzania	10,9	12,1	18,8
Vietnam	10,1	15,2	17,4
Zambia	20,6	19,5	10,9
Burundi	12,5	5,0	7,5
India	6,8	0,3	5,2
Costa Rica	10,0	6,8	4,5
Cameron	2,2	4,3	4,1
Togo	8,5	0,0	3,6
Germany	0,0	0,0	2,6
El Salvador	8,3	4,9	2,4
Others	34,5	58,5	7,7
Total	**1.052,7**	**1.077,8**	**1.120,6**

The ‘top 5’ suppliers in 2007 were Brazil, Colombia, Guatemala, Nicaragua and Kenya. Imported volumes from all five countries increased.

Finland: Percentage distribution of green coffee imports by main sources 2005-2007 - in % -			
Countries of origin	**2005**	**2006**	**2007**
Brazil	44,5	42,6	41,6
Colombia	18,7	21,9	23,3
Guatemala	4,7	7,0	7,7
Nicaragua	5,6	5,5	6,1
Kenya	4,8	5,3	5,6
Ethiopia	3,3	2,6	3,2
Others	18,4	15,1	12,5
Total	**100,0**	**100,0**	**100,0**

2. FOREIGN TRADE OF COFFEE IN ALL FORMS

<u>Green coffee</u>
Imports of green coffee reached 67.237 tons in 2007. The imports increased by 3,9% from the previous year. The average C.I.F price was EUR 1,93/kg.

Exports of green coffee were 192 tons in 2007 (213 tons in 2006).

<u>Roasted coffee</u>
Imports of roasted coffee were 2.509 tons in 2007, a decrease of 10,5% from 2006.

Exports of roasted coffee increased from 2006 by 17,5% to 7.676 tons. The main export destination for roasted coffee was Estonia (97,2%).

Finland: Foreign trade in coffee 2005-2007 - in tons -						
	Imports			**Exports**		
Forms of coffee	**2005**	**2006**	**2007**	**2005**	**2006**	**2007**
Green coffee	63.160	64.685	67.237	3	213	192
Roasted coffee	3.681	2.802	2.509	2.625	6.531	7.676
Instant coffee	926	1.007	1.142	49	27	5

3. IMPORT RATES AND NATIONAL TAXES

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

4. COFFEE CONSUMPTION

The consumption of roasted coffee was 9,7 kg/person in 2007.

5. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

The consumer prices of roasted coffee increased in 2007. The average for 2007 was 5,24 EUR/kg.

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

1. IMPORTS

France: Total imports of green and processed coffee - in tons -			
	2007	**2006**	**2005**
Green coffee non decaf	244.353	219.494	211.503
Green coffee decaf	2.411	1.389	1.836
Roasted coffee non decaf (in green equivalent)	98.221	106.837	96.007
Roasted coffee decaf (in green equivalent)	3.960	2.699	2.958
Pure extracts (>95%) = soluble coffee (in green equivalent)	27.362	33.025	29.996
Other extracts (in green equivalent)	31.054	28.865	25.126
Total volume	**407.361**	**392.310**	**367.426**
Total value in 1.000 EUR	***976.081***	***885.514***	***744.453***

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

France: Imports of green, non-decaffeinated coffee by main origins - in tons and % -						
	2007		**2006**		**2005**	
Brazil	60.800	24,88%	59.375	27,05%	60.395	28,56%
Vietnam	47.333	19,37%	34.944	15,92%	31.620	14,95%
Colombia	16.315	6,68%	14.212	6,47%	12.587	5,95%
Ethiopia	10.193	4,17%	10.618	4,84%	10.537	4,98%
Uganda	6.972	2,85%	2.398	1,09%	5.758	2,72%
Peru	6.557	2,68%	6.537	2,98%	4.962	2,35%
Cameroon	5.838	2,39%	7.717	3,52%	6.068	2,87%
Honduras	5.624	2,30%	5.288	2,41%	6.036	2,85%
India	5.213	2,13%	5.316	2,42%	4.829	2,28%
Guinea	5.002	2,05%	4.247	1,93%	1.917	0,91%
Guatemala	4.828	1,98%	4.286	1,95%	3.992	1,89%
Mexico	3.874	1,59%	4.337	1,98%	2.664	1,26%
Ivory Coast	3.567	1,46%	6.747	3,07%	8.860	4,19%
Madagascar	2.849	1,17%	5.167	2,35%	3.161	1,49%
Indonesia	2.179	0,89%	3.112	1,42%	6.420	3,04%
EU	36.162	14,80%	24.392	11,11%	23.359	11,04%
Other	21.047	8,61%	20.801	9,48%	18.339	8,67%
Total	**244.353**	**100,00%**	**219.494**	**100,00%**	**211.504**	**100,00%**
	Change on previous year	11,33%	Change on previous year	3,78%	Change on previous year	-9,93%

Brazil somewhat strengthened its position as first supplier, despite a lower volume. Ivory Coast is now far down on the list and Uganda has taken its place as fifth supplier.

France: Percentage distribution of green non-decaffeinated coffee imports by types of coffee - in % -						
	2007		2006		2005	
Arabicas	51,48%		56,72%		55,65%	
Colombian Milds		7,21%		6,90%		6,93%
Other Milds		14,81%		17,73%		14,99%
Brazilian Naturals		29,46%		32,08%		33,73%
Robustas	30,18%		31,39%		32,54%	
Other, not specified (*)	18,34%		11,89%		11,81%	

(*) considered to be mainly Robusta

Prices of imported green coffee

The import values of non decaffeinated green coffee can be detailed as follows:

France: Average import price of green coffee - EUR per kilo -			
	2007	**2006**	**2005**
January	1,61	1,56	1,19
February	1,67	1,65	1,31
March	1,65	1,68	1,25
April	1,68	1,70	1,49
May	1,67	1,61	1,40
June	1,62	1,57	1,57
July	1,62	1,57	1,70
August	1,63	1,55	1,68
September	1,68	1,52	1,56
October	1,71	1,55	1,59
November	1,69	1,55	1,52
December	1,61	1,66	1,55
Year average	**1,65**	**1,60**	**1,48**

2. FOREIGN TRADE FOR ALL FORMS OF COFFEE

Exports of processed coffee (in green bean equivalent):

France: Exports of coffee - in tons -			
	2007	**2006**	**2005**
Green coffee non decaf	977	1.844	2.189
Green coffee decaf	6.903	8.952	16.358
Roasted coffee non decaf (in green equivalent)	12.384	13.623	14.961
Roasted coffee decaf (in green equivalent)	563	655	285
Pure extracts (>95%) = soluble coffee (in green equivalent)	29.466	28.218	25.433
Other extracts (in green equivalent)	7.434	7.570	5.314
Total exports of coffee in all forms	**57.726**	**60.861**	**64.540**

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:

2007: 349.600 tons → 5,51 kg per capita
2006: 331.400 tons → 5,26 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 evolution

Average annual consumer price index:

Basis 100 in 1998
2007 = 99.65
2006 = 98.26
2005 = 93.38

5. COMMENTS ON PARTICULAR ASPECTS

The year 2007 has seen the confirmation of the increasing consumption trend started in 2006. The reasons for this remain unchanged:

- France is today one of the main European markets for espresso machines with single-serve portions and, therefore, for the availability of coffee in single-serve portions. This very easy preparation method, associated with the good quality of the beverage, is expected to grow exponentially.
- The French market offers a large range of pure origins coffee, responding to the particular awareness of the consumers to the concepts of soil and origin (or *terroir* to use a French word which has begun appearing in English).
- New solidarities have been created by initiating partnerships with producing countries to offer sustainable development labels (organic coffees, fairly traded coffees and such).

France has continued its information program on the positive health effects of coffee consumption. In particular, the sector has supported the publication of a newsletter "Health & Coffee". The intended audience is the medical profession and this publication reports on independent and objective research results found by medical teams. For the past two years, the profession has started a PR campaign to inform the general public on the health impact of coffee.

The sector has also initiated the website www.toutsurlecafe.fr providing general information about coffee. The content of this website is inspired by educational documents created in partnership with French Education bodies for training purposes in "caféologie" in hospitality schools.

France has also started to run a national barista championship.

GERMANY

1. IMPORTS OF GREEN COFFEE

According to German foreign trade statistics the gross imports of not-decaffeinated green coffee into the Federal Republic of Germany in 2007 reached around 16,99 million bags, compared to around 16,67 million bags in 2006.
The list of the countries of origin has remained fairly stable. Brazil remained the largest supplier. Vietnam is placed second and Colombia is placed third.

Germany: Imports of not-decaffeinated green coffee - in bags and % -				
	bags		%	
	2006	2007	2006	2007
Brazil	4.747.490	4.794.380	28,47	28,21
Vietnam	3.102.566	3.904.659	18,60	22,97
Columbia	1.527.795	1.471.539	9,16	8,66
Peru	1.247.366	1.036.461	7,48	6,10
Honduras	973.675	901.932	5,84	5,31
Indonesia	1.032.175	789.565	6,19	4,65
Ethiopia	655.231	578.720	3,93	3,40
El Salvador	428.156	447.749	2,57	2,63
Uganda	254.251	367.435	1,52	2,16
Papua New Guinea	385.353	324.654	2,31	1,91
Tanzania	153.385	313.565	0,92	1,84
Mexico	143.342	295.605	0,86	1,74
Guatemala	294.270	265.468	1,76	1,56
India	364.352	236.514	2,18	1,39
Kenya	216.937	208.026	1,30	1,22
Burundi	78.434	175.883	0,47	1,03
Costa Rica	169.537	164.958	1,02	0,97
Nicaragua	154.075	161.365	0,92	0,95
Rwanda	156.449	116.337	0,94	0,68
Others	541.579	442.847	3,25	3,84
Total *	**16.676.234**	**16.997.671**	**100,00**	**100,00**

Source: Federal Statistical Office Germany
* Excluding declared volumes for inward processing: in 2007 a total of 209 bags and in 2006 a total of 99 bags.

The 2007 distribution of green coffee imports according to ICO coffee groups showed a small shift from Arabicas to Robustas.

Germany: Percentage distribution of not-decaffeinated green coffee imports by type						
	2005		2006		2007	
Arabicas	71		71		68	
Colombian Milds	13		11		12	
Other Milds	25		27		25	
Brazilian Naturals	33		33		31	
Robustas	29		29		31	
Unknown	-		-		1	

Source: Eurostat, ICO

2. FOREIGN TRADE IN COFFEE

Germany: Imports and exports of coffee in all forms in 2007 - in tons -							
	Green coffee, not decaffeinated	Green coffee, decaffeinated	Roasted coffee, not decaffeinated	Roasted coffee, decaffeinated	Extracts, essences and concentrates of coffee in solid form	Extracts, essences and concentrates of coffee in liquid form	Preparations with a basis of extracts, essences and concentrates of coffee
Customs code	*0901 11 00*	*0901 12 00*	*0901 21 00*	*0901 22 00*	*2101 11 11*	*2101 11 19*	*2101 12 92*
Import	1.019.873	2.288	53.098	1.449	25.094	7.243	8.016
Export	165.571	136.991	134.183	8.306	58.911	4.850	14.406

Source: Federal Statistical Office Germany

According to Eurostat data, the 2007 import of decaffeinated green coffee was dominated by Italy (75,1%), followed by the Netherlands (19,5%). The main suppliers of roasted coffee (incl. decaffeinated) were Austria (35,6%), Italy (28,8%) and the Netherlands (13,5%). Soluble coffee (solid) was mainly sourced from Belgium (29,4%), Ecuador (15,9%) and Brazil (11,6%).
The main export destinations of decaffeinated green coffee in 2007 were the United States (59%), the Netherlands (8%) and Spain (8%). Exports of roasted coffee (incl. decaffeinated) were mainly destined to the Netherlands (15,9%), France (14,9%) and Poland (12,1%). In 2007 the three largest export destinations for soluble coffee (solid) were the Russian Federation (16,2%), the United Kingdom (12,3%), and Ukraine (9,9%).

3. COFFEE CONSUMPTION

Import figures, production statistics or even tax revenue data on their own no longer provide reliable information regarding the size or development of the domestic market for coffee products. As a consequence since 1992 a working group of the German Coffee Association ("Working Group Market Research") evaluates all available data. Relevant information is gathered through the "Coffee Registration Pool" of the German Coffee Association through a trustee, which covers about 85% of coffee sales on a four-monthly basis.

The turnover of the German coffee industry reached EUR 4,25 billion in 2007, and stayed unchanged compared to 2006.

The statistical per capita consumption in Germany remained unchanged at 6,2 kg (green coffee).

Germany: Green coffee usage and per capita consumption		
	Green coffee processed for internal consumption - in tons -	**Per capita consumption** - in kilo green coffee -
1953	75.417	1,5
1960	191.005	3,5
1965	271.100	4,6
1970	295.789	4,9
1975	344.999	5,6
1980	410.748	6,7
1985	419.306	6,9
1986	448.699	7,4
1987	484.429	7,9
1988	485.744	7,9
1989	489.407	7,9
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	551.480	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
2006	510.420	6,2
2007	512.020	6,2

Source: German Coffee Association
* Since 1990: including the 'new' federal states of the former eastern Germany.
** estimated total market volume.

Converted into green coffee equivalent, the volume of coffee sales reached 512.020 tons of green coffee that were processed into roasted and soluble coffee.

Roasted coffee sales increased to a volume of 394.000 tons of roasted coffee in 2007, compared to 392.000 tons in 2006. Soluble coffee sales reached 16.600 tons in 2007.

Germany: Total market volume roasted and soluble coffee - in tons green coffee equivalent -		
	2006	**2007**
Total market volume green coffee	***510.420***	***512.020***
Green coffee used for roasted coffee production	466.480	468.860
Green coffee used for soluble coffee production	43.940	43.160

Source: Deutscher Kaffeeverband

Germany: Coffee market segments - in tons of product -		
	2006	**2007**
Roasted coffee	***392.000***	***394.000***
Of which:		
Roasted coffee, not decaffeinated	357.000	361.000
Roasted coffee, decaffeinated	35.000	33.000
Included in roasted coffee:		
Espresso/caffè crema	30.000	36.000
Coffee pads/capsules	14.000	21.000
Soluble coffee*	***16.900***	***16.600***
Of which:		
Soluble coffee, not decaffeinated*	16.000	15.800
Soluble coffee, decaffeinated*	900	800
Of which:		
Pure soluble coffee	11.900	12.000
Soluble coffee in mixes for beverages	5.000	4.600

Source: Deutscher Kaffeeverband
*Soluble coffee beverages are calculated on the basis of their coffee content.

The market share of the segments single portions and espresso/caffè crema kept increasing.
In 2007 36.000 tons of espresso and caffè crema were supplied to the total market. 2007 was the first year in which the internal German production of espresso (20.500 tons) was higher than imports from Italy (15.500 tons).

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

4. DEVELOPMENTS OF PRICES FOR ROASTED COFFEE

The annual average for 500 grams roasted coffee for 2007 was EUR 3,76. In March 2006 the annual average was EUR 3,79.

Comparing the development of prices for roasted coffee in the last years with the development of prices for green coffee, one can see that the significant increase in green coffee prices has only been passed on to the consumers in a limited manner. Even if the fluctuations in exchange rates from Dollar to Euro, national coffee taxes as well as other cost factors have to be taken into account when making comparisons, the comparison of world market prices for green coffee to prices for roasted coffee in Germany give an impression of the market tendency.

Germany:
Retail prices of roasted coffee 1970-2006

Year	Roasted coffee EUR/500 g	Year	Roasted coffee EUR/500 g
1970	4,24	1997	3,97
1975	4,10	1998	4,02
1980	4,94	1999	3,56
1985	5,46	2000	3,43
1990	3,70	2001	3,27
1991	3,57	2002	3,06
1992	3,55	2003	3,00
1993	3,43	2004	2,91
1994	3,82	2005	3,61
1995	4,08	2006	3,79
1996	3,58	2007	3,76

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

5. ASSOCIATION MEMBERSHIP

The German Coffee Association is the representation of all interests of the German coffee trade and industry. Its 108 members and 33 affiliated members represent the whole spectrum of German coffee business.

6. COMMENTS ON PARTICULAR ASPECTS

On September 28th 2007 the German Coffee Day was celebrated for the second time with great success. 107 companies organised different activities in order to promote coffee and demonstrate its diversity.

In 2007 the German Coffee Association elaborated the strategy and design of a national Healthcare Professions Coffee Education Programme. The aim is to counteract the prejudices against the health effects of coffee among the target group of opinion leaders in health questions. Activities start in 2008.

7. VAT, EXCISE DUTIES

VAT on coffee is 7% (in retail). Germany has a specific excise duty on coffee. This is EUR 2,19 for 1 kg roasted coffee and EUR 4,78 for 1 kg soluble coffee.

GREECE

1. IMPORTS OF GREEN COFFEE

In 2007 imports of green, not decaffeinated coffee from all sources into Greece were 28.518 tons (475.297 bags). In calendar year 2006 a volume of 23.462 tons (391.025 bags) was imported. This represents an increase of 21,6%.

Greece: Imports of green, not –decaffeinated coffee from all sources			
	2005	2006	2007
ton	25.594	23.462	28.518
bags	426.573	391.025	475.297

Source: Eurostat

The most important origins in the most recent three years were (listed in the 2007 order):

Greece: Imports of green, not-decaffeinated coffee by origin - in bags -			
Countries of origin	2005	2006	2007
Brazil	327.390	293.457	327.360
India	34.623	38.473	46.400
Vietnam	29.027	25.238	44.782
Indonesia	697	765	15.797
Colombia	10.950	9.468	8.382
Ethiopia	7.205	6.895	6.715
Thailand	0	0	2.100
Cameroon	80	75	1.848
Uganda	652	1.033	1.513
Cote d'Ivoire	1.867	0	1.215
Papua New Guinea	0	320	960
Costa Rica	853	598	900
Nicaragua	683	612	775
Kenya	330	675	550
Others	12.217	13.415	16.000
Total	**426.573**	**391.025**	**475.297**

Source: Eurostat

In 2007 Brazil remained by far the most important supplier, with an increased 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, 2006 and 2007. Colombia, fourth supplier in 2006, dropped to fifth place. The fourth position in 2007 was taken by Indonesia thanks to a 20-fold (!) increased volume. In general it can be observed that – except for the major origins – imports can fluctuate strongly from year to year.

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

Greece: Imports of green, not-decaffeinated coffee by origin - in % -			
Countries of origin	2004	2005	2006
Brazil	76,7	75,0	68,9
India	8,1	9,8	9,8
Vietnam	6,8	6,5	9,4
Indonesia	0,2	0,2	3,3
Colombia	2,6	2,4	1,8
Ethiopia	1,7	1,8	1,4

Thailand	0,0	0,0	0,4
Cameroon	0,0	0,0	0,4
Uganda	0,2	0,3	0,3
Cote d'Ivoire	0,4	0,0	0,3
Papua New Guinea	0,0	0,1	0,2
Costa Rica	0,2	0,2	0,2
Nicaragua	0,2	0,2	0,2
Kenya	0,1	0,2	0,1
Others	2,9	3,4	3,4
Total	**100,0**	**100,0**	**100,0**

Source: Eurostat

Despite a larger import volume, Brazil's share dropped from around 3/4th of the imports into Greece to just over 2/3rd. India's market share remained unchanged; that of Vietnam increased.

2. COFFEE CONSUMPTION

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	826
2003	929
2004	871
2005	870
2006	857
2007	1015

Source: ICO; some data have been revised

Greece: Per capita consumption - in kg green coffee equivalent -	
Year	**Consumption**
1990	3,75
1995	2,20
2000	4,69
2001	3,47
2002	4,49
2003	5,06
2004	4,73
2005	4,70
2006	4,61
2007	5,46

IRELAND

1. IMPORTS OF GREEN COFFEE

In 2007 imports of green, not decaffeinated coffee from all sources into Ireland were 5.026 tons (83.772 bags) compared to 5.099 tons (84.980 bags) in 2006. This means that 2007 imports were 1,4% lower in volume than the previous year.

Ireland: Imports of green, not –decaffeinated coffee			
	2005	2006	2007
tons	5.311	5.099	5.026
bags	88.513	84.980	83.772

Source: Eurostat

Almost 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 provides the most important producing country origins in the three most recent years (in 2006 order):

Ireland: Imports of green, not-decaffeinated coffee by origin - in bags -			
Countries of origin	2005	2006	2007
Indonesia	6.217	5.102	9.027
Colombia	9.730	10.030	6.757
Brazil	7.942	9.447	5.120
Honduras	4.112	5.670	2.825
Nicaragua	0	0	2.473
China	635	163	1.613
Costa Rica	2.210	1.263	1.578
Kenya	4.137	1.823	1.538
Uganda	0	677	338
Congo	0	318	322
Others	53.532	50.487	52.180
Total	**88.513**	**84.980**	**83.772**

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:	2004	2005	2006
Indonesia	7,0	6,0	10,8
Colombia	11,0	11,8	8,1
Brazil	9,0	11,1	6,1
Honduras	4,6	6,7	3,4
Nicaragua	0,0	0,0	3,0
China	0,7	0,2	1,9
Costa Rica	2,5	1,5	1,9
Kenya	4,7	2,1	1,8
Uganda	0,0	0,8	0,4
Congo	0,0	0,4	0,4
Others	60,5	59,4	62,3
Total	**100,0**	**100,0**	**100,0**

2. FOREIGN TRADE IN ALL FORMS

Ireland: Foreign trade in coffee including intra-EU(27) trade - in tons actual weight -				
Forms of coffee	**Imports**		**Exports**	
	2006	2007	2006	2007
green non decaf	5.099	5.026	846	59
green decaf	23	6	0	0
roasted non decaf	1.536	1.692	1.646	500
roasted decaf	29	36	0	40
soluble	3.117	3.992	120	79

Source: Eurostat

This table illustrates the high percentage finished coffee imports into Ireland. Expressed in green coffee equivalent, 2007 green coffee imports were half of finished product imports. Total coffee imports of all forms into Ireland increased significantly with close to 16% from 15.087 tons (green coffee equivalent) in 2006 to 17.468 tons in 2007. Total exports dropped by almost 3/4th from 3.117 tons (green coffee equivalent) in 2006 to 907 tons in 2007. The vast majority of Irelands soluble coffee imports (81% in 2007) come from the United Kingdom. The Netherlands supplied most of the remainder: 16%. In 2007 the UK represented 79% of Irelands roasted coffee imports. The second largest supplier – at a considerable distance - is Germany (9% in 2007).

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	146
2002	136
2003	151
2004	225
2005	223
2006	203
2007	244

Source: ICO; some data revised

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	3,31
2005	3,23
2006	2,88
2007	3.47

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 2007 was 7.402.301 bags (444.138 tons), an increase of 6,73% compared to 2006. This sizeable increase should be ascribed to the consistent growth of processed coffee exports, that show a rise of over 12%; particularly significant was the export of preparations containing coffee.
The annual data for green coffee imports however show that, for a number of reasons, import activity does not directly result from changes in demand of the coffee processing industry. In order to provide a more accurate and realistic analysis of the activity in this sector, it is worthwhile taking into consideration data related to the import and export of coffee in all forms in the last seven years.
This comparison shows that the annual growth in the coffee processing sector for the period in consideration is about 3,23%. 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 3,26%, exports by 9,98% and disappearance in the same period increased only by 1,60%.

Italy: Imports of green coffee - in bags -							
Country of origin	**2001**	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**
Brazil	1.772.565	2.061.996	2.428.847	2.330.265	2.408.309	2.555.270	2.622.152
Vietnam	862.754	904.563	830.764	902.292	982.050	1.118.287	1.364.225
India	569.415	634.778	699.153	844.969	748.934	893.873	944.361
Colombia	226.897	236.270	246.345	253.460	352.293	399.286	414.546
Indonesia	245.581	253.914	377.106	371.521	484.097	466.671	325.940
Uganda	255.383	298.117	339.275	249.554	245.459	146.067	284.747
Cameroon	635.266	397.014	277.270	338.578	299.654	251.930	252.029
Guatemala	206.152	150.208	197.506	209.282	153.635	174.292	183.669
Honduras	151.935	155.608	124.212	123.754	89.880	128.815	128.775
Ethiopia	72.832	91.426	104.803	108.052	141.412	105.468	125.381
Ivory Coast	364.729	230.069	178.151	173.254	143.407	128.354	114.729
Tanzania	36.163	35.482	33.331	49.153	95.299	73.174	79.280
Costa Rica	163.874	195.701	163.232	119.442	101.525	73.606	75.112
Congo	29.188	46.305	57.906	57.491	24.522	30.109	71.003
Nicaragua	30.187	28.204	34.005	40.995	35.735	42.301	56.772
Peru	9.735	17.857	15.002	25.173	38.556	29.448	50.813
Congo Dem Rep	135.608	64.138	66.325	81.030	85.292	68.367	47.890
Togo	38.345	30.752	20.413	28.299	36.137	40.758	44.807
El Salvador	18.335	22.497	29.227	24.138	39.230	25.215	41.820
Dominican Rep	29.832	26.848	21.372	21.622	16.682	16.805	19.010
Mexico	12.721	12.818	10.616	13.966	11.888	13.028	17.234
Kenya	18.682	11.571	10.197	8.681	9.938	10.628	10.699
Burundi	2.370	2.386	3.639	4.689	43.081	40.856	6.490
Haiti	8.302	6.694	4.581	5.489	3.845	3.760	4.651
Others	181.110	124.451	108.816	72.357	74.191	99.112	116.166
Total	**6.077.961**	**6.039.667**	**6.382.094**	**6.457.506**	**6.665.051**	**6.935.480**	**7.402.301**

The data for the year 2007 contained in the above table compared with the previous year show that:

- Brazil, with a further increased volume, maintains with a large margin its position as the number one supplier of coffee for the Italian market;
- Imports from Vietnam have reached a new record; this country has consolidated its position of second supplier of the Italian market;
- Imports from Uganda, India, El Salvador, Peru and Congo have shown a sizeable growth;
- Imports from Burundi and Indonesia have decreased considerably;

- Customs clearance of coffee from Congo Democratic Republic and Ivory Coast continued the downward trend of the last years;
- In terms of percentage, the origins that in 2007 have shown the greatest improvement in the Italian market are Vietnam and Uganda.

Italy: Imports of green coffee - in % -							
Country of origin	**2001**	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**
Brazil	29,16	34,14	38,06	36,09	36,13	36,84	35,43
Vietnam	14,19	14,98	13,02	13,98	14,74	16,04	18,43
India	9,37	10,51	10,96	13,09	11,24	12,89	12,76
Colombia	3,73	3,91	3,86	3,93	5,29	5,76	5,60
Indonesia	4,04	4,20	5,91	5,76	7,26	6,73	4,41
Uganda	4,20	4,94	5,32	3,87	3,68	2,10	3,85
Cameroon	10,45	6,57	4,34	5,25	4,50	3,64	3,41
Guatemala	3,39	2,49	3,09	3,24	2,31	2,51	2,49
Ethiopia	1,20	1,51	1,64	1,67	2,12	1,52	1,70
Ivory Coast	6,00	3,81	2,79	2,69	2,15	1,85	1,55
Costa Rica	2,70	3,24	2,56	1,85	1,52	1,07	1,02
Others	11,57	9,70	8,45	8,58	9,06	9,04	9,35
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, there are no significant movements; Colombian Mild and Other Mild coffees maintain substantially their position, Robusta imports are growing by 1% and Brazilian Naturals are down by the same figure.

Italy: Imports of green coffee - distribution by coffee type -							
Type	**2001**	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**
Colombian Milds	4,71	4,75	4,59	4,85	6,90	6,99	6,89
Other Milds	20,67	21,46	20,93	22,58	19,66	21,07	21,10
Brazilian Naturals	30,84	36,14	40,13	37,96	38,47	38,51	37,51
Robustas	43,78	37,65	34,35	34,61	34,97	33,43	34,50
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 was 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 imports of roasted decaffeinated coffee and exports of green decaffeinated coffee, the data both for imports and exports 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**			
	2004	**2005**	**2006**	**2007**	**2004**	**2005**	**2006**	**2007**
Green coffee	387.450	399.903	416.129	444.138	4.199	4.851	5.472	5.635
Green decaffeinated coffee	7.240	8.278	7367	7.740	891	807	875	764
Roasted coffee	14.364	14.838	14.383	14.366	70.497	72.002	87.711	97.565
Roasted decaffeinated coffee	311	338	505	440	2.406	2.803	2.816	3.143
Coffee Extracts	3.673	3.781	4.174	4,510	473	437	445	652
Preparations with coffee	822	1.077	1.348	1.611	2.567	2.976	4.634	7.448

Exports 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, reaching nearly 2 million bags green coffee equivalent. Thanks to this growth, Italian coffee roasting firms have strengthened their position in the group of major coffee exporters, consolidating the second place held for several years.

3. COFFEE CONSUMPTION

In 2007 the total home coffee market in Italy has decreased in sales volume by 1% compared to the previous year. If the market segmentation is analysed in detail, it has to be pointed out that the decrease of the market is concentrated in the two main segments: the mocha segment (coffee with caffeine for coffee pot machines – about 72% of total household consumption in volume) by -2% and the espresso segment (coffee blends for espresso machines – about 10% of total household consumption in volume) by -1%, The decaffeinated segment (7% of total household consumption in volume) is stable, whereas the whole beans segment (6% of total household consumption in volume) is growing by 4%. Finally, the pods segment, that represents a share of 0,9% of the total market, increased by 40%.

Total packaged coffee (total market without the instant segment): sales location in percentage by type of client and point of sale (year 2007):

Type of Client	%	**Type of Sales Outlet**	%
Large Distributors	48	Supermarkets & Hypermarkets	67
Volunteer Union and Purchasing Groups	52	Self Services &Groceries	23
		Discount	10

In the "out of Home" consumption the part of Food Service is decreasing in the immediate, and it is due to the crisis that also speeds up a switch between Foodservice sector and Automatic Distribution business.

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

In 2007 the average price of the total regular coffee was EUR 7,64/kg and it increased by 2,9% compared to 2006. The average price of the mocha segment was EUR 7,05/kg and it rose by 3,3%. The price of the decaffeinated segment slightly increased compared to the previous year: EUR 9,07/kg (+0,7%); the average price of the espresso segment decreased by 2,3% to EUR 9,40/kg.

5. COMMENTS ON PARTICULAR SUBJECTS

The *Consorzio Promozione Caffè* continued its public relations campaign and communication in 2008, 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 fifth year a large part of the budget was destined to the 'Healthcare Professions Coffee Education Programme', co-financed by Positively Coffee.

6. VAT LEVELS

Coffee is subject to 20% Value Added Tax; soluble coffee is subject to 10% Value Added Tax.

THE NETHERLANDS

1. IMPORTS OF GREEN COFFEE

In 2007 imports of green coffee into the Netherlands reached a volume of 2.598.590 bags (155.915 tons), an increase compared to the previous year when 2.55.817 bags (153.349 tons) were imported. The table below shows the most important countries of origin.

The Netherlands: Imports of green coffee - in bags -		
Countries of origin	**2006**	**2007**
Brazil	602.317	718.895
Vietnam	488.867	471.011
Colombia	214.483	227.285
Honduras	284.517	206.536
Uganda	148.350	180.574
Peru	242.267	155.513
Ethiopia	41.283	77.812
Tanzania	36.233	68.367
Kenya	43.267	55.280
India	44.817	48.718
Others	409.417	388.599
Total	**2.555.818**	**2.598.590**

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	**2006**	**2007**
Brazil	23,6	27,7
Vietnam	19,1	18,1
Colombia	8,4	8,7
Honduras	11,1	7,9
Uganda	5,8	6,9
Peru	9,5	6,0
Ethiopia	1,6	3,0
Tanzania	1,4	2,6
Kenya	1,7	2,1
India	1,8	1,9
Others	16,0	15,0

Source: HPA

The figures in the tables above show that:

1. Brazil remains the main supplier of the Netherlands. Imports are up compared to 2006 with a total share of imports reaching 27,7% or 718.895 bags.
2. In 2007 imports from Colombia are up by 6%, totalling 227.285 bags.
3. The imports from Uganda increase with 32.224 bags; whilst imports from Ethiopia and Tanzania nearly doubled compared to 2006.
4. Kenya has joined the top ten with 55.280 bags imported in 2007.

The Netherlands: breakdown of net green coffee imports by type of coffee - in % -					
Type of coffee	2005		2006		2007
Arabicas	64		66		67
Colombian Milds	12		12		14
Other Milds	26		29		22
Brazilian Naturals	26		25		31
Robustas	28		28		28
Not defined	8		6		5

Source: HPA

2. FOREIGN TRADE IN COFFEE IN ALL FORMS

Forms of coffee	Imports		Exports	
	2006	2007	2006	2007
Green coffee (including decaffeinated)	153.349.058	155.915.423	8.448.924	6.989.341
Roasted coffee (including decaffeinated)	29.792.127	32.835.853	25.210.201	33.380.101

Figures imports green coffee (including decaffeinated) from HPA, other figures from CBS
Source: HPA and CBS (Central Bureau for Statistics)

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 2007 reached a volume of 113.580 tons, compared to 110.235 tons in 2006. The average annual per capita consumption in 2007 was 6,9 kg or 145 litres, compared to 6,7 kg or 141 liters in 2006.

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
2005	110.132	141
2006	110.235	141
2007	113.580	145

Source: CBS, HPA and private estimates

Per capita coffee consumption in the Netherlands			
	Kg	Litre	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
2005	6,8	141	3,1
2006	6,7	141	3,1
2007	6,9	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 a large number of questions on coffee and tea from consumers, students, and companies. Moreover, information material, such as brochures, posters and cd-roms can be ordered by phone, e-mail or via the website 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 2007 the association continued its activities in the field of the ICO/Health Care Professions Coffee Education Programme. Some of the Information Bureau's main activities in 2007 were the creation of a brochure on coffee, heart and blood vessels and two flyers dealing with cholesterol and diabetes type 2. The Information Bureau also participated in a GP and Nutrition and Health congress. 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

N.B.: BECAUSE THE UPDATED COUNTRY REPORT WAS NOT AVAILABLE IN TIME, THIS CHAPTER IS UNCHANGED FROM THE 2006 EDITION.

1. IMPORTS OF GREEN COFFEE

In 2006 Norway imported 596.149 bags (ca. 35.770 tons) of not-decaffeinated green coffee.
This is a 4,4% decrease compared to 2005.

The top-three suppliers remained unchanged. Also this year Brazil strengthened its first position. Colombia and Guatemala remained the second and third suppliers; Guatemala with a small increase. Peru is the country with most dramatic decrease since 2005 and 2004.

Norway: Imports of not-decaffeinated green coffee - in bags -			
	2004	**2005**	**2006**
Brazil	226.950	265.387	278.103
Colombia	176.280	142.049	139.494
Guatemala	50.570	59.873	64.700
Kenya	24.341	28.999	27.218
India	19.848	16.108	15.190
Ethiopia	16.315	21.306	13.936
Honduras	21.626	31.129	13.907
Mexico	9.212	11.730	11.402
Peru	36.298	23.548	10.775
Nicaragua	5.469	4.190	6.887
Vietnam	2.634	1.447	5.759
Tanzania	1.367	3.844	3.916
Indonesia	3.092	3.244	2.775
Djibouti	0	0	600
Costa Rica	4.459	4.942	404
Bolivia	30	87	379
Rwanda	0	0	300
El Salvador	627	545	169
Dom. Rep.	0	2	129
USA	322	19	70
Italy	113	0	16
Ivory coast Republic	0	0	12
Others	1.118	5.014	8
Total	**600.671**	**623.463**	**596.149**

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 continued to decrease.

Norway: Percentage distribution of not-decaffeinated green coffee imports by main sources - in % -			
Countries of origin	**2004**	**2005**	**2006**
Brazil	37,8	42,6	46,6
Colombia	29,3	22,5	23,4
Guatemala	8,4	9,6	10,9
Kenya	4,1	4,7	4,6
India	3,3	2,6	2,5
Ethiopia	2,7	3,4	2,3
Honduras	3,6	5,0	2,3
Mexico	1,5	1,9	1,9
Peru	6,0	3,8	1,8
Others	3,2	3,9	3,7
Total	**100,0**	**100,0**	**100,0**

2. FOREIGN TRADE IN ALL FORMS

In 2006 imports of not-decaffeinated green coffee decreased by 4,4 % from 37.409 tons to 35.770 tons. Imports of decaffeinated green coffee decreased from 205 tons to 186 tons.
The imports of roasted coffee, not de-caffeinated were quite stable. The small increase in the total import of roasted coffee came from the de-caffeinated coffee.

The most important suppliers of not-decaffeinated roasted coffee were Sweden (1.212 tons), the Netherlands (566 tons), Germany (342 tons), Italy (339 tons), Brazil (282 tons), Colombia (191 tons) and Denmark (112 tons).

Imports of soluble coffee were slightly higher. Switzerland remained by far the most important supplier with 520 tons, but the Netherlands is taking a larger market share (414 tons).

Norway: Foreign trade in coffee - in tons-				
Forms of coffee	**Imports**		**Exports**	
	2005	**2006**	**2005**	**2006**
green coffee	37.409	35.769	84	141
green coffee, decaff	205	186	1	0
green coffee, total	37.614	35.955	85	141
roasted coffee	3.186	3.170	323	293
roasted coffee, decaff	22	63	3	0
Roasted coffee, total	3.208	3.233	326	293
Soluble coffee	1.449	1.569	39	38
coffee extracts, essences	315	332	8	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 2006 was 44.482 tons green bean equivalent (2005 43.369 tons).
The per capita consumption in Norway was 9,5 kg in 2006, 0,1 kg up from 2005.

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	2006	9,5 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 10,8% in 2006 (10,5 in 2005).
The share of espresso coffee was about 2%.

Coffee drinking habits
Market research performed by the Norwegian Coffee Association every third year were last run in January 2006. The survey 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

VAT rates on coffee

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 2007 were 42.983 tons (716.382 bags), an increase of 4% compared to the 2006 imports of 41.319 tons (688.492 bags). The fifteen major suppliers were (ranked in order of 2007 imports):

Portugal: Imports of green not-decaffeinated coffee - in bags -			
Countries of origin	**2003**	**2004**	**2005**
Brazil	104.553	113.810	121.695
Vietnam	94.522	85.418	107.773
Uganda	58.777	57.525	67.328
Cote d'Ivoire	63.430	63.732	63.498
Cameroon	56.657	65.370	62.620
India	52.008	55.125	58.645
Honduras	44.070	52.578	45.985
Colombia	18.503	25.973	43.728
Guatemala	23.748	24.535	22.528
Costa Rica	20.035	30.903	21.107
Indonesia	21.373	20.313	20.417
Laos	11.867	9.198	12.060
Nicaragua	12.983	5.690	12.025
Peru	3.638	3.645	6.510
Panama	900	1.500	4.530
Others	78.788	74.675	50.462
Total	**664.953**	**688.492**	**716.382**

Source: Eurostat

In 2007 Brazil continued to be the most important supplier. Vietnam remained second origin in 2007 with a higher volume. The third supplier in 2006, Cameroon, dropped to the fifth position. Third supplier is now Uganda and fourth is Cote d'Ivoire. Previous years increase of imports from Honduras and Costa Rica could not be sustained, but the import share of Colombia increased significantly.

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	15,7	16,5	17,0
Vietnam	14,2	12,4	15,0
Uganda	8,8	8,4	9,4
Cote d'Ivoire	9,5	9,3	8,9
Cameroon	8,5	9,5	8,7
India	7,8	8,0	8,2
Honduras	6,6	7,6	6,4
Colombia	2,8	3,8	6,1
Guatemala	3,6	3,6	3,1
Costa Rica	3,0	4,5	2,9
Indonesia	3,2	3,0	2,8
Laos	1,8	1,3	1,7
Nicaragua	2,0	0,8	1,7

Peru	0,5	0,5	0,9
Panama	0,1	0,2	0,6
Others	11,8	10,8	7,0
Total	**100,0**	**100,0**	**100,0**

Source: Eurostat

2. FOREIGN TRADE

Portugal: Foreign trade in coffee including intra-EU27 trade - in tons actual weight -				
	Imports		**Exports**	
	2006	**2007**	**2006**	**2007**
Green coffee not decaffeinated	41.310	42.983	36	115
Green coffee decaffeinated	1.716	1.941	5	1
Roasted coffee not decaffeinated	5.031	5.564	5.223	6.524
Roasted coffee decaffeinated	258	305	433	560
Soluble coffee	850	1.003	17	173

Source: Eurostat

The pattern of imports and exports of the various forms of coffee has been relatively stable in the last two years. In 2007 imports increased for all forms of coffee. Exports increased particularly for roasted coffee. Exports of soluble coffee, although small in volume, increased tenfold. On the import side, for decaffeinated green coffee the main source by far was Germany (72,8%), followed by Spain (21%) and Colombia (6%). In 2007 the main sources of roasted coffee (incl. decaffeinated) were Italy (37%), Spain (36,6%) and Germany (18,4%). Spain was by far the most important export destination for roasted coffee (incl. decaffeinated) with 71,6% of the total volume. The main sources for imported soluble coffee in 2007 were Spain (59,2%) and France (20,5%).

3. COFFEE CONSUMPTION

The International Coffee Organization 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	646
2001	745
2002	720
2003	656
2004	681
2005	655
2006	679
2007	758

Portugal: Per capita consumption - in kg green coffee equivalent -	
Year	**Consumption**
1998	4,30
1999	4,84
2000	4,08
2001	4,48
2002	4,17
2003	3,78
2004	3,90
2005	3,74
2006	3,85
2007	4,30

Source: ICO; some data revised

SPAIN

1. IMPORTS OF GREEN COFFEE

In 2007 Spain imported 4.370.450 bags of green coffee (262.227 tons) which represents an increase of 8,63% compared to the previous year. In the year 2006 a total volume of 241.387 tons was imported.

Spain: Imports of green coffee 1996 – 2007 - in bags -	
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
2006	4.023.116
2007	4.370.450

Source: Spanish Coffee Federation

The main suppliers were:

Spain: Imports of green coffee by origin - in bags -		
Countries of origin	**2006**	**2007**
Vietnam	1.577.550	1.758.083
Brazil	738.720	860.183
Uganda	228.170	256.000
Colombia	288.050	319.116
Cote d'Ivoire	208.050	215.316
India	161.230	171.183
Germany	252.630	209.583
Honduras	77.280	79.916
Nicaragua	91.780	103.016
Peru	25.083	47.850
Others	306.486	350.204
Total	**4.023.116**	**4.023.116**

Source: Spanish Coffee Federation

Since 2000 Vietnam is Spain's main supplier representing 40% of total imports, therefore Spain's coffee imports are mainly made of robusta beans representing 60% of total imports. This figure is partially explained by the fact that Spain is an important base for soluble coffee production in Europe. Up to an estimated 30% of green coffee imports are absorbed by the soluble coffee industry with a considerable share of its production being exported to other EU countries. Brazil is the second largest supplier but its market share remains below 20%, being the main supplier of Arabica coffee to the Spanish market.
During 2007 all of Spain's top coffee suppliers (except Germany) have increased their export volume, among them Brazil (16,44%) and Vietnam (+11,44%). Other suppliers such as Peru have made it to the top 10, after increasing their exports by 90,76%!

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

Spain: Percentage distribution of green coffee imports by main sources - in % -					
Countries of origin	**2003**	**2004**	**2005**	**2006**	**2007**
Vietnam	25,4	34,29	35,5	39,21	40,23
Brazil	22,3	17,59	18,9	18,36	19,68
Uganda	13,1	9,34	8,1	5,67	5,86
Colombia	7,3	6,35	5,9	7,16	7,30
Cote d'Ivoire	6,2	6,12	7,7	5,17	4,93
India	n.a	6,15	4,3	4,01	3,92
Germany	n.a	3,44	5,4	6,28	4,80
Honduras	n.a	2,35	1,9	1,92	1,83
Indonesia	n.a.	2,21	2,8	2,28	0,70
Nicaragua	n.a.	3,02	2,1	2,20	2,36
Others	**25,7**	**9,14**	**7,4**	**7,73**	**8,41**

Source: Spanish Coffee Federation

Spain: Percentage distribution of green coffee imports by types of coffee - in % -					
Types of coffee	2003	2004	2005	2006	2007
Arabicas	**45,49**	**39,22**	**38,88**	**39,18**	**40,39**
1. Colombian Milds	7,74	6,72	6,45	8,99	7,78
2. Other Milds	13,08	12,21	8,76	6,73	9,17
3. Brazilian Naturals	24,67	20,29	23,67	23,46	23,44
Robustas	**54,51**	**60,78**	**61,12**	**60,82**	**59,61**
Others	0	0	0	0	0

Source: Spanish Coffee Federation

2. FOREIGN TRADE IN COFFEE IN ALL FORMS

Spain: Foreign trade in coffee - in tons -				
Forms of coffee	Imports		Exports	
	2006	2007	2006	2007
Green coffee	241.387	262.227	15.697	14.668
Roasted	15.001	15.211	9.186	12.548
Soluble	5.024	6.318	24.145	24.178

During year 2007 green coffee imports increased with 8,63%. Imports of soluble coffee experienced a 25,76% increase whilst roasted coffee imports remained virtually constant (+1,4%). Green coffee exports experienced a new drop (6,56%) while roasted coffee exports have increased substantially (+36,60%). Exports of soluble coffee remained constant.

3. COFFEE CONSUMPTION

Spain: Coffee consumption 2005/2006 - in tons -		
	2006	**2007**
Home consumption		
- Roasted	63.580	63.600
- Soluble	9.840	10.200
Food service		
- Roasted	61.875	61.500
- Soluble	2.000	1.920

Green coffee equivalent		
- Roasted	146.781	146.367
- Soluble	29.600	30.300
Total Green coffee equivalent	**176.381**	**176.667**

Even though green coffee imports have risen during 2007, coffee consumption has remained stable at around 4 kg per person per year. Higher green coffee imports respond to stocks increases by roasters who foresee further rises in green coffee prices.

Within the Spanish coffee market there were no significant variations during 2007 compared to the previous year. Home consumption remained stable with a slight increase (+3,66%) in soluble coffee consumption, whilst in the food service sector, soluble coffee usage continuous to drop, this year by 4%.

Distribution between home consumption and food service gives a result of 53,78% of total consumption to the former sector and 46,22% to the latter. Concerning different forms and destinations of coffee, roasted coffee continues to gain market share with 91,17% of the total market, whilst soluble coffee accounts for the remaining 8,83%, following a similar trend as previous years.

It is also interesting to note the steady increase of decaffeinated ground roasted coffee figures, representing 19% of total home roasted coffee consumption, in the year 2007.

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

Retail roasted coffee prices have increased by 7,8% during year 2007. Source: Spanish Ministry of Agriculture

5. INFORMATION ON ASSOCIATION MEMBERSHIP

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

- Spanish Coffee Roasters Association. AETC – Represents 85% of the industry
- Spanish Green coffee Association. ANCAFE – Represents 92% of the industry
- Spanish Soluble coffee Manufacturers Association AEFCS – Represents 100% of the industry

6. STATUS NATIONAL COFFEE AND HEALTH PROGRAMME

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

So far FEC has set up an Advisory Board composed of three members (a GP, a nutritionist and a neurologist), has published its first quarterly newsletter to be distributed by email to a medical database, has participated in several seminars on coffee and neurology and has participated in the Spanish Neurology Society's annual congress held in Canary Islands, providing information on coffee and health.

FEC has also sponsored a research grant in collaboration with the Spanish Nutrition Foundation and is currently preparing a paper with six chapters (Coffee & Alzheimer/Parkinson/Hydration/Cancer/Diabetes/Liver function) to be published in Medicina Clinica, the most prestigious Spanish medical weekly printed publication.

Our new website www.cicas.es (Coffee and Health Information Centre) will provide health care professionals with scientifically based information on coffee and health.

7. DUTIES AND VAT LEVELS

Regarding fiscal matters, there are no excise duties imposed on coffee in Spain, and during 2007 the VAT rate, which for coffee is 7%, has not changed.

SWEDEN

1. IMPORTS OF GREEN COFFEE

According to the 2007 Statistics Sweden, the imports of not-decaffeinated coffee reached 1.755.433 bags (105.326 tons). This is an decrease of 2,6% compared to 2006. In that year the imports were 1.802.500 bags (108.150 tons), increasing 8%.

Sweden: Imports of not-decaffeinated green coffee from origin countries 2005- 2007 - in bags -					
Countries of origin	**2005**	**Change**	**2006**	**Change**	**2007**
Brazil	772.633	6%	815.383	-6%	767.867
Colombia	290.667	8%	314.017	1%	316.033
Peru	127.550	-2%	125.267	18%	147.433
Kenya	107.550	-2%	105.300	24%	130.117
Ethiopia	85.267	15%	98.383	-11%	87.117
Guatemala	28.317	15%	32.467	72%	55.850
Honduras	57.267	37%	78.300	-29%	55.700
Vietnam	31.983	63%	52.000	-37%	32.733
Burundi	19.933	5%	20.900	30%	27.233
Indonesia	18.533	60%	29.700	-35%	19.350
Nicaragua	26.433	-27%	19.283	-7%	18.017
El Salvador	20.583	2%	21.050	-23%	16.150
Uganda	6.683	100%	13.367	10%	14.683
Mexico	16.500	-19%	13.383	-7%	12.417
Rwanda	9.667	-22%	7.500	5%	7.900
Costa Rica	13.967	56%	21.833	-68%	6.967
Papua New Guinea	18.867	-25%	14.150	-62%	5.333
Tanzania	0	(new)	2.000	118%	4.350
Others	16.067	13%	18.200	66%	30.200
Total	**1.668.467**	**8%**	**1.802.500**	**-3%**	**1.755.433**

Source: Statistics Sweden

As usual Brazil and Colombia are the main suppliers. Together they account for nearly to two thirds of Swedish imports. Brazil however decreased its volume in 2007, while Colombia strengthened its position a little bit. Generally you can see a tendency towards fewer origins and increased volumes from the biggest supply countries.

Among the other of the top five origins, Peru, Kenya and Ethiopia, only Ethiopia decreased its volumes and share of market. The previous year, however, Ethiopia was the only one of these three origins increasing its volumes. Guatemala increased its volume 72% in 2007 and gained the number six position from decreasing Honduras.

The Robusta origins Vietnam and Indonesia decreased their volumes in 2007 after a few years of good increases. These Robusta volumes however do not reflect any a big change in the Swedish consumption pattern but substantially increased export volumes of roasted coffee. Sweden is still an almost 100% Arabica market.

Sweden: Imports of not decaffeinated green coffee from origin countries 2005 - 2007 - percentage distribution by main sources -			
Countries of origin	**2005**	**2006**	**2007**
Brazil	46,3%	45,2%	43,7%
Colombia	17,4%	17,4%	18,0%
Peru	7,6%	6,9%	8,4%
Kenya	6,4%	5,8%	7,4%
Ethiopia	5,1%	5,5%	5,0%

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

Source: Statistics Sweden

Sweden: Imports of not decaffeinated green coffee 2005 - 2007 - percentage distribution by types of coffee -						
Type of coffee	**2005**		**2006**		**2007**	
Arabica	96%		94%		95%	
Colombian Milds		24%		23%		26%
Other Milds		21%		20%		21%
Brazilian Naturals		51%		51%		49%
Robusta	3%		5%		3%	
Others	1%		1%		2%	
Total	**100%**		**100%**		**100%**	

Source: Statistics Sweden and the Swedish National Coffee Association

These data are not available in any official statistics but estimated on the basis of the origins. The shares are very stable and a decrease of one origin is most often balanced by an increase of another one within the same group. After some years in which Brazilian Naturals increased to the cost of Colombian and Other Milds, this trend was broken in 2007 with Milds increasing and Naturals decreasing as well as Robusta. The shares of Robusta reflect increases in exports, mainly to Denmark and the Baltic countries (and to a small extent the espresso trend in Sweden).

2. FOREIGN TRADE IN ALL FORMS OF COFFEE

Sweden: Foreign trade in coffee 2005 - 2007 - in tons actual weight -						
	Imports			**Exports**		
	2005	**2006**	**2007**	**2005**	**2006**	**2007**
Green coffee	102.545	110.028	109.538	238	99	63
Green coffee (decaf)	1.495	716	686	0	4	288
Roasted coffee	8.315	7.633	7.564	23.758	23.228	23.596
Roasted coffee (decaf)	924	423	87	1.210	1.153	1.122
Instant coffee	2.838	2.338	2.476	527	436	496

Source: Statistics Sweden and the Swedish National Coffee Association

The higher level of exports of roasted coffee since 2005 is mainly an effect of structural changes in the Scandinavian coffee industry. Two roasting plants were closed in Denmark and these volumes were moved to Swedish plants. Since 2005 Denmark is thus the biggest export market with about 45% of the volume.

In 2007 the export volume was more or less unchanged. The largest destination after Denmark was the USA (25% of total exports), followed by the Baltic countries (11% and increasing), Norway (7%), Finland and Great Britain (3% respectively).

Imports of roasted coffee have decreased the last three years with about 22% and came in 2007 mainly from the Netherlands and Denmark (51% and 15% respectively). Imports from Italy increased to 12% of the total volume, reflecting the espresso trend.

Net imports of instant coffee (only pure instant is registered), is about 2.000 tons yearly and changes are supposed to reflect changes in stocks.

3. COFFEE CONSUMPTION

The total size of the Swedish market in 2007 was 84.245 tons *roasted coffee equivalent*, giving a total per capita consumption of all forms of coffee of 9,17 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 9% was instant coffee.

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

The consumption of ecological coffee is about 7% and increasing well (+44%). The certification programs for responsibility or sustainability (Fair Trade, Utz Certified and Rain Forest Alliance) have gained market and their total market share was well above 9%. Double certifying is common and at least 50% of these certified coffees are certified as ecological as well.

Espresso is doing well too, increasing to a share well above 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 2007 with 1,1%, which probably reflects decreased stocks more than lower consumption, which now seems to be back on the relatively high level of the very 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 quite stable. The figures *cups/day* are calculated as 7,5 grams coffee/cup of 0,125 litre.

Sweden: Per capita consumption of coffee 2005 – 2007				
		2005	2006	2007
Roast&ground coffee	kg/capita	8.01	8,52	8,31
Instant	gr/capita	255	209	216
All coffee as roasted	kg/capita	9,04	9,35	9,17
	cups/day	3.3	3,4	3,4
- as an average of three latest years	kg/capita	9,01	9,27	9,19
	cups/day	3.3	3,4	3,4

Source: Statistics Sweden and the Swedish National Coffee Association

4. DEVELOPMENT OF RETAIL PRICES FOR ROASTED COFFEE

According to Statistics Sweden data, the average retail price for roasted coffee was SEK 52,50 per kilo in 2007 and SEK 51,12 in 2006. However the official statistics underestimate discounts and campaign prices which are very frequent in Sweden and a weighted average price per kilo is 10-15% lower. The table does reflect the trend of price level, which has been decreasing since 1999. 2006 was the first year since 1998 when the average price increased, a shift which was confirmed in 2007 (even if the increase of about 2% this year seems to be an overestimate).

Sweden: Retail prices roasted ground coffee 1998 - 2007			
Year	SEK/kg	Year	SEK/kg
1998	77,20	2003	52,30
1999	63,80	2004	49,90
2000	61,00	2005	49,18

2001	57,60	2006	51,12
2002	54,60	2007	52,20

Source: Statistics Sweden

5. COMMENTS ON PARTICULAR SUBJECTS

The Swedish National Coffee Association (*Svensk Kaffeinformation*), the organization of coffee roasters and importers, is working towards the public mainly with its website www.kaffeinformation.se (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

RéserveSuisse reports that green not-decaffeinated coffee imports into Switzerland reached a total of 1.529.750 bags in 2007. This is an increase of almost 24,5% compared to the 1.228.367 bags imported in 2006.

According to F.O. Licht data, the main supplying and countries of origin (2007 ranking) were:

Switzerland: Imports of green not-decaffeinated coffee - in % -		
	2006	**2007**
Brazil	25,6	32,2
Colombia	14,5	13,9
Vietnam	9,4	10,9
India	6,8	6,6
Honduras	5,6	5,0
Guatemala	5,5	4,7
Costa Rica	4,7	4,4
Indonesia	3,4	2,7
Mexico	2,6	2,4
Togo	0,9	1,0
Others	21,0	16,2
Total	**100,0**	**100,0**

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

In 2007, Brazil gained market share compared to 2006. The second supplier, Colombia, lost 0,6 percentage points market share. Of the other 'top-5' suppliers, the share of Vietnam increased somewhat while that of India and Honduras fell.

2. FOREIGN TRADE IN COFFEE IN ALL FORMS

Switzerland: Foreign trade in coffee - in tons-						
	Imports			**Exports**		
	2006	**2007**	**% change**	**2006**	**2007**	**% change**
Green coffee	73.702	91.785	24,5	719	943	31,2
Green coffee, decaffeinated	2.782	3.517	26,4	234	76	-67,5
Roasted coffee	8.910	8.388	-5,9	11.795	15.344	30,1
Soluble coffee*	1.556	1.586	1,9	8.980	11.184	24,5

* pure extracts only
Source: RéserveSuisse

On the export side, the continued increase of roasted and soluble coffee exports (+30,1% and +24,5% respectively) is notable.

3. COFFEE CONSUMPTION

Domestic coffee consumption in Switzerland in 2007 was an estimated 56.000 tons green coffee equivalent according to data of RéserveSuisse. This compares to 58.000 tons in 2006.
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 (2/3rd) 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 2007 the average retail price of roasted coffee was CHF 4,22 per 250 grams. In December 2007 this figure had risen slightly to CHF 4,30.

5. PROMOTION CAMPAIGN

PROCAFE is continuing its generic promotion activities with a budget of CHF 141.000 in 2007.

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	3,75
Green coffee, decaffeinated:	0,00	0,00	0	3,75
roasted coffee:	63,00*	46,75**	0	4,50
roasted coffee, decaffeinated:	63,00*	46,75**	0	4,50
soluble coffee:	182,00*	127,50**	0	8,85

*: 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 2007 of non-decaffeinated green coffee showed an increase of almost 2,4%.

United Kingdom: Imports of green coffee non-decaffeinated - in bags -		
Countries of origin	**2006**	**2007**
Vietnam	553.936	589.825
Colombia	378.413	465.603
Brazil	244.554	243.297
Indonesia	228.862	148.731
Peru	78.009	102.829
Kenya	34.316	38.715
Ethiopia	27.446	36.743
Honduras	40.411	33.784
Costa Rica	22.660	19.928
Uganda	16.831	19.918
Guatemala	22.324	18.909
Ghana	0	14.167
El Salvador	15.696	13.630
India	14.164	13.437
Nicaragua	29.327	13.189
Mexico	8.179	8.220
Tanzania	7.754	7.809
Papua New Guinea	3.019	3.356
Zimbabwe	2.489	3.228
Others/Unknown	72.618	48.493
Total	**1.801.008**	**1.843.811**

Source: British Coffee Association

The major suppliers remain unchanged. Vietnam, continuing as the leading supplier of non-decaffeinated green coffee again increased its share of the market, this year up from 30,76% to 31,99%. Although remaining in fourth place, Indonesia once again suffered a notable drop in imports from 19,3% in 2005 to 12,71% in 2006 and now down to 8,07%. Colombia continues in second place, this year increasing its share from 21,01% to 25,25%. Imports from Brazil were quite steady, decreasing slightly from 13,58% to 13,19%. Imports from Peru are increasingly significant, whilst the remainder of the suppliers continue to consist of other Centrals plus East Africans and India and Papua New Guinea.

United Kingdom Percentage distribution of green coffee non-decaffeinated imports by main origin - in % -		
Countries of Origin	**2006**	**2007**
Vietnam	30,76	31,99
Colombia	21,01	25,25
Brazil	13,58	13,19
Indonesia	12,71	8,07
Peru	4,33	5,58
Kenya	1,91	2,10
Ethiopia	1,52	1,99
Honduras	2,24	1,83

Costa Rica	1,26	1,08
Uganda	0,90	1,08
Guatemala	1,24	1,03
Ghana	0,00	0,77
El Salvador	0,87	0,74
India	0,79	0,72
Nicaragua	1,63	0,72
Mexico	0,45	0,46
Tanzania	0,43	0,42
Papua New Guinea	0,17	0,19
Zimbabwe	0.14	0,17
Others/Unknown	4,06	2,62
Total	**100,00**	**100,00**

Source: British Coffee Association

United Kingdom: Imports by types of coffee (ICO)
- in % -

Types of coffee	2005	2006	2007
Arabicas	52	52	56
Colombian Milds	23	23	28
Other Milds	14	14	13
Brazilian Naturals	15	15	15
Robustas	47	47	42
Others/Unknown	1	1	2

Source: British Coffee Association

The share of arabicas increased from 52% to 56% basically due to the larger share of Colombian coffee.

2. FOREIGN TRADE IN ALL FORMS

United Kingdom: Foreign Trade in Coffee
- tons -

	Imports		Exports	
	2006	2007	2006	2007
Green	108.060	110.629	3.266	2.495
Green Decaf	278	212	102	71
Roasted	1.138	1.061	2.898	3.675
Roasted Decaf	142	228	203	339
Soluble/Extracts	7.676	10.388	18.062	18,944

Source: British Coffee Association

Imports of soluble/extracts were again higher, mainly due to an increase in non solids. Brazil continued as the major supplier of soluble, although again with a reduced share of the market from 2.870 tons to 2.680 tons. Ecuador significantly increased its share of soluble from 922 tons to 1.634 tons, whilst Colombia's share again fell, from 818 tons to 541 tons.

Exports of soluble/extracts increased by 4,9%. The major markets continued as the EU followed by Russia.

Roasted imports fell whilst exports increased. Imports of roasted decaffeinated were very much higher as were exports.

Imports of green decaffeinated fell as did exports.

3. COFFEE CONSUMPTION

According to the data of the International Coffee Organization (ICO), total consumption in 2007 equated to 2.823.689 bags of green coffee and per capita consumption (in kg green coffee equivalent) was 2.80.

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

No information on the development of prices for roasted coffee is currently available.

5. INFORMATION ON ASSOCIATION MEMBERSHIP

During 2007 the two key coffee organisations in the UK, the British Coffee Association (BCA) and the Coffee Trade Federation (CTF), progressed their co-operative working relationship and a merger was agreed. This has taken effect as of 1 January 2008 under the name of the British Coffee Association, whose aim will be to provide a representative voice for the UK coffee trade and industry and to promote and safeguard members' interests in all matters relating to the growth, preparation, shipment, warehousing, transport, insurance, manufacture, distribution and consumption of coffee.

6. HEALTH

Work continues with strong communication programmes aimed at both Healthcare Professionals and Consumers in order to overcome the negative perception of coffee and health and with the objective of halting the decline in coffee consumption. Figures at the end of 2007 show a small decrease in the number of coffee reducers demonstrating a trend in the right direction.

The UK media continue to write prolifically on health and coffee/caffeine is frequently mentioned across all national, regional, consumer, broadcast and online media. The targeted PR campaign in the UK has seen an increase in positive information written about coffee and a reduction in negative coffee/caffeine and health mentions.

7. EXCISE DUTIES AND VAT LEVEL

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

SELECTED OTHER EU MEMBERS

1. KEY IMPORT DATA

Bulgaria					
Green Coffee (Incl Decaf)		**Roasted Coffee (Incl Decaf)**		**Soluble Coffee**	
Vietnam	5.466	Italy	1.697	Brazil	421
Indonesia	3.261	Romania	424	Germany	183
Greece	2.044	Hungary	298	Romania	97
Netherlands	1.018	Greece	85	France	93
India	737	Germany	83	United Kingdom	38
Others	4.071	Others	250	Others	109
Total	16.596	Total	2.837	Total	940
Czech Republic					
Green Coffee (Incl Decaf)		**Roasted Coffee (Incl Decaf)**		**Soluble Coffee**	
Belgium	3.132	Austria	6.249	Germany	2.994
Vietnam	3.036	Slovakia	5.174	Hungary	1.328
Brazil	2.562	Poland	3.561	Poland	1.290
Germany	1.843	Germany	3.316	Slovakia	964
Peru	1.582	Hungary	769	France	348
Others	4.558	Others	1.276	Others	730
Total	16.713	Total	20.345	Total	7.654
Hungary					
Green Coffee (Incl Decaf)		**Roasted Coffee (Incl Decaf)**		**Soluble Coffee**	
Vietnam	6.016	Austria	5.393	Germany	4.685
Brazil	2.580	Germany	4.760	Spain	1.415
Uganda	1.379	Italy	801	India	1.011
Germany	824	Poland	417	Poland	609
Honduras	780	United Kingdom	212	United Kingdom	442
Others	3.038	Others	737	Others	793
Total	14.617	Total	12.319	Total	8.955
Poland					
Green Coffee (Incl Decaf)		**Roasted Coffee (Incl Decaf)**		**Soluble Coffee**	
Vietnam	17.075	Germany	17.763	Germany	3.871
Germany	16.685	Czech Republic	1.500	Hungary	3.122
Laos	4.860	Italy	1.489	Ecuador	2.984
Uganda	4.610	Hungary	343	United Kingdom	2.049
Brazil	3.832	Austria	210	Israel	977
Others	15.705	Others	668	Others	4.828
Total	62.766	Total	21.972	Total	17.830
Romania					
Green Coffee (Incl Decaf)		**Roasted Coffee (Incl Decaf)**		**Soluble Coffee**	
Vietnam	8.321	Germany	7.964	Germany	1.016
Indonesia	5.292	Austria	1.483	Israel	710
Brazil	2.384	Italy	1.359	Spain	660
Colombia	2.313	Bulgaria	1.124	France	576
Uganda	918	Slovakia	458	Brazil	561
Others	5.521	Others	821	Others	389

Total	24.748	Total	13.210	Total	3.912
Slovenia					
Green Coffee (Incl Decaf)		**Roasted Coffee (Incl Decaf)**		**Soluble Coffee**	
Brazil	3.569	Italy	1.282	Austria	237
Vietnam	1.859	Austria	384	Italy	66
Italy	901	Bosnia And Herzegovina	239	Germany	45
Colombia	772	Germany	154	Sweden	25
India	482	Croatia	113	Poland	5
Others	1.123	Others	95	Others	4
Total	8.707	Total	2.266	Total	381
Slovakia					
Green Coffee (Incl Decaf)		**Roasted Coffee (Incl Decaf)**		**Soluble Coffee**	
Germany	2.402	Czech Republic	4.231	United Kingdom	1.018
Vietnam	543	Austria	4.142	Poland	610
Belgium	460	Germany	2.618	Hungary	474
Peru	193	Poland	1.929	Germany	452
Poland	183	Italy	1.133	Czech Republic	210
Others	626	Others	717	Others	172
Total	4.406	Total	14.769	Total	2.935

Source: Eurostat

2. CONSUMPTION

	Total consumption			Per capita consumption		
	2005	**2006**	**2007**	**2005**	**2006**	**2007**
Bulgaria	430.014	420.380	363.961	3,3	3,3	2,8
Czech Republic	656.466	631.014	678.961	3,9	3,7	4,0
Hungary	569.902	598.018	517.198	3,4	3,6	3,1
Poland	2.267.430	1.952.651	1.530.781	3,6	3,1	2,4
Romania	857.063	835.126	823.573	2,4	2,3	2,3
Slovenia	181.472	175.688	194.959	5,4	5,3	5,9
Slovakia	293.237	280.903	356.335	3,3	3,1	4,0

Source: ICO

EU VAT AND EXCISE DUTIES

ROASTED, NON-DECAFFEINATED COFFEE, UNLESS INDICATED OTHERWISE		
COUNTRY	**VAT%**	**EXCISE DUTIES**
Austria	10,0	
Belgium	6,0	Green: EUR 0,1983/kg; roasted EUR 0,2479/kg
Bulgaria	20,0	
Cyprus	0,0	
Czech Republic	19,0	
Denmark	25,0	DKK 6,54/kg
Estonia	18,0	
Finland	17,0	
France	5,5	
Germany	7,0	Roasted: EUR 2,19/kg; soluble EUR 4,78/kg
Greece	9,0	
Hungary	20,0	
Ireland	0,0	
Italy	20,0	
Latvia	18,0	LVL 50/100 kg pure coffee
Lithuania	18,0	
Luxembourg	3,0	
Malta	0,0	
Netherlands	6,0	
Poland	22,0	
Portugal	12,0	
Romania	19,0	EUR 675/ton
Slovakia	19,0	
Slovenia	8,5	
Spain	7,0	
Sweden	12,0	
United Kingdom	0,0	

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.

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