European Coffee Report 2008

European Coffee Federation

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INTRODUCTION

This is the thirtieth issue of the 'European Coffee Report'. The European Coffee Federation (ECF) continues this series with the report over 2008. 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. New is the information on stocks, covering both terminal market and other stocks in the major European coffee ports. This information is collected with the highly appreciated assistance of the warehouse and port communities in the ports concerned. The information for most of the country chapters has again been provided by the ECF member associations. Their contribution to this series is invaluable and has enabled the European Coffee Report to develop into a unique and convenient single source of basic information on the European coffee market. The European Coffee Report is available only in electronic format on the ECF website.
For the sake of a uniform presentation and for ease of comparison, not all the details of the national reports could be incorporated, given that they vary widely in volume and contents. In order to give a more complete overview, the national reports were in part complemented with statistical material from other sources. This applies as well to those countries whose coffee associations are not members of ECF, but on which this report gives some information for the sake of completeness.
On the closing page of this report a list of the member associations of ECF can be found.
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This report was finalised in August 2009

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 (,)

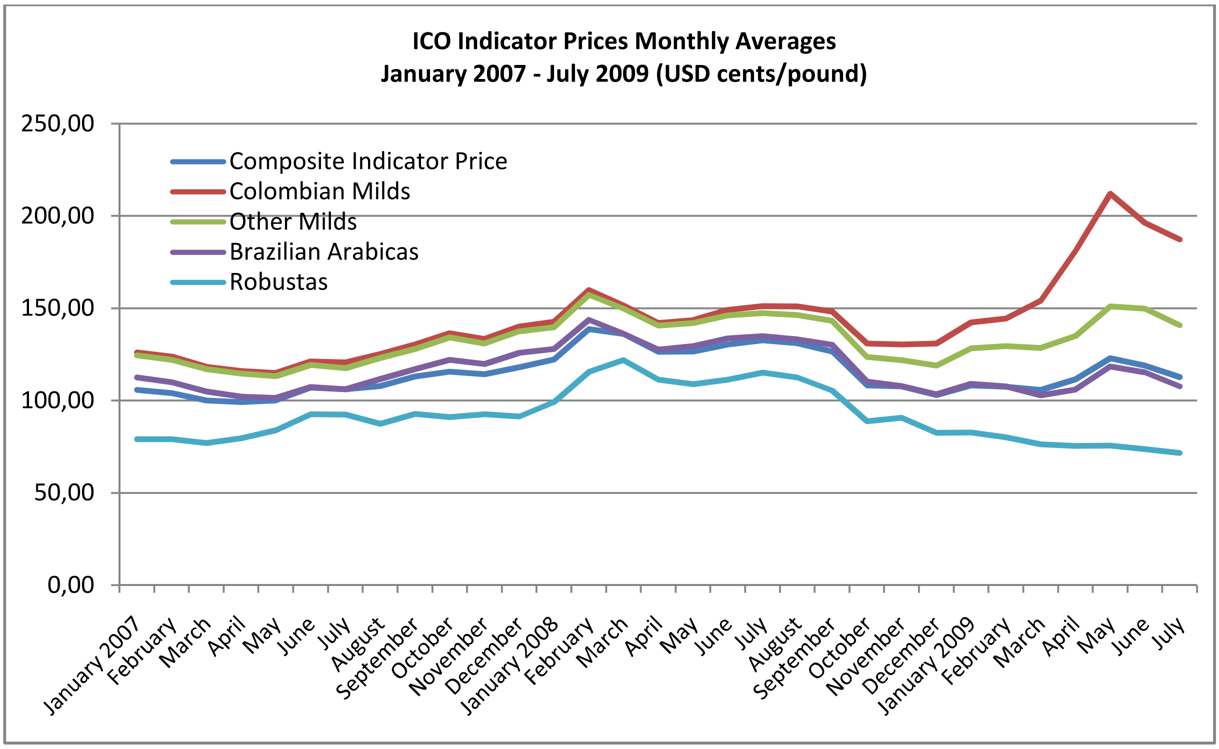
Abbreviations of currencies are those used for international banking purposes, based on ISO standards.

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



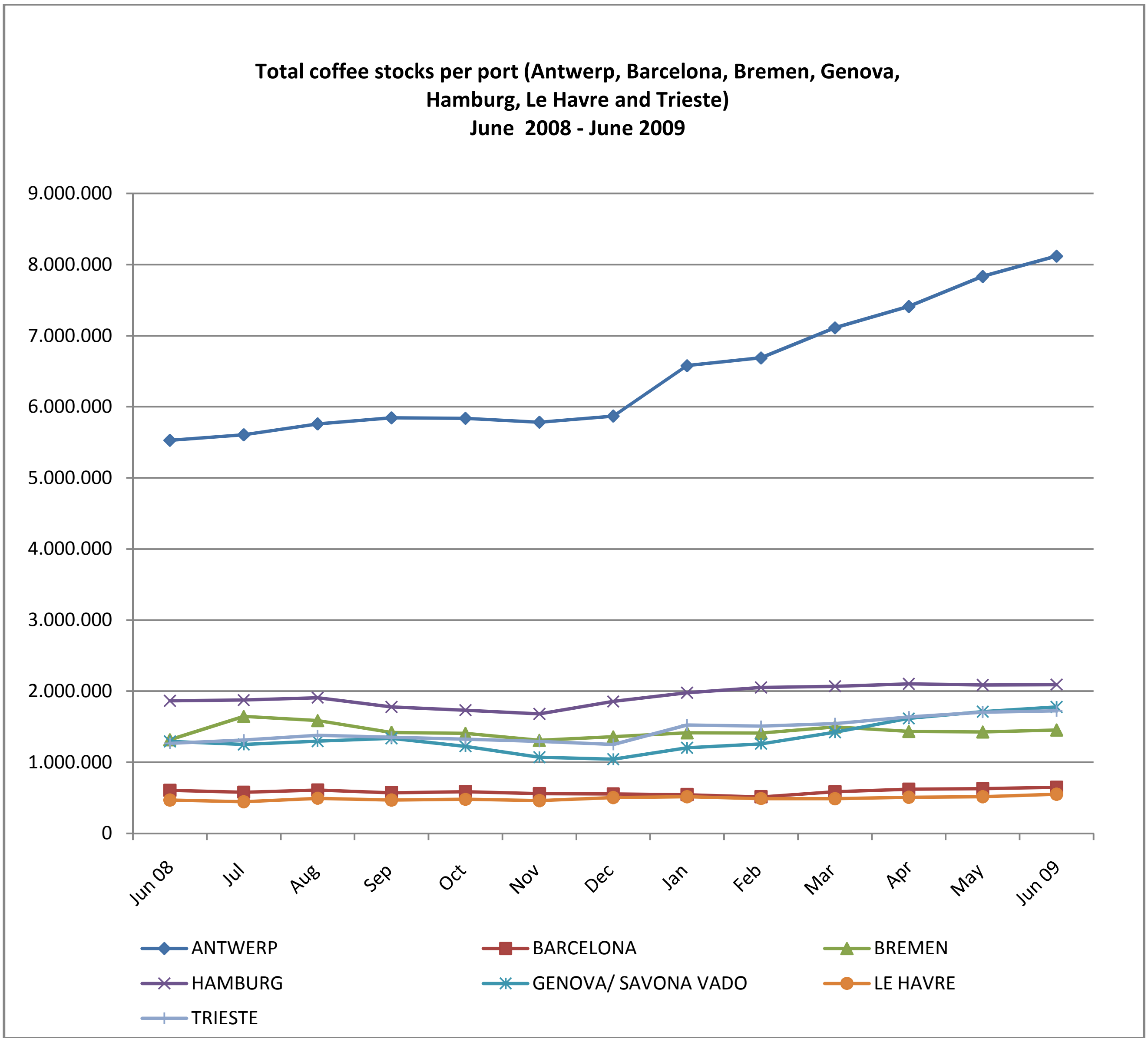
As from 1 October 2005 the calculation of the ICO composite indicator price is weighted as follows:

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%

GREEN COFFEE STOCKS IN MAJOR EUROPEAN COFFEE PORTS



Volumes are in bags of 60 kilos.
The ports covered are: Antwerp, Barcelona, Bremen, Hamburg, Genova/Savona Vado, Le Havre and Trieste. Stocks include LIFFE and ICE certified stocks as well as non-exchange stocks. The data are supplied by warehousing and port organisations in the listed port areas and have been compiled by ECF.

THE EUROPEAN COFFEE MARKET IN 2008

1. IMPORTS AND EXPORTS

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

	2006		2007		2008	
	tons	bags	tons	bags	tons	bags
Austria	65.619	1.093.653	66.204	1.103.395	62.488	1.041.460
Belgium	214.909	3.581.812	186.035	3.100.587	356.596	5.943.258
Bulgaria	19.250	320.825	16.284	271.398	22.058	367.627
Cyprus	1.692	28.200	1.697	28.287	1.718	28.633
Czech Republic	17.691	294.850	16.388	273.130	15.794	263.233
Denmark	34.329	572.147	32.644	544.070	33.271	554.515
Estonia	35	582	31	510	42	705
Finland	64.684	1.078.073	67.237	1.120.623	70.970	1.182.828
France	219.605	3.660.078	244.711	4.078.522	218.523	3.642.052
Germany	1.001.093	16.684.887	1.040.125	17.335.410	1.051.452	17.524.193
Greece	23.462	391.025	28.518	475.297	27.241	454.023
Hungary	14.576	242.930	14.617	243.608	12.932	215.527
Ireland	5.099	84.980	5.062	84.358	3.081	51.350
Italy	416.132	6.935.527	444.160	7.402.672	448.633	7.477.222
Latvia	2.168	36.130	2.139	35.645	2.296	38.263
Lithuania	264	4.400	264	4.398	314	5.238
Luxembourg	164	2.730	224	3.733	365	6.085
Malta	40	663	26	425	38	635
Netherlands	145.987	2.433.112	153.804	2.563.402	64.557	1.075.945
Poland	77.797	1.296.618	62.595	1.043.245	59.666	994.438
Portugal	41.310	688.492	42.983	716.383	41.782	696.358
Rumania	29.342	489.035	24.492	408.203	22.051	367.520
Slovakia	4.632	77.203	4.379	72.975	4.549	75.822
Slovenia	8.490	141.505	8.676	144.597	9.358	155.973
Spain	234.223	3.903.720	249.994	4.166.562	245.194	4.086.565
Sweden	110.031	1.833.842	109.611	1.826.843	109.636	1.827.260
United Kingdom	115.247	1.920.782	113.390	1.889.835	117.104	1.951.733
EU(27) total	*2.867.868*	*47.797.800*	*2.936.287*	*48.938.113*	*3.001.708*	*50.028.463*
Norway	35.777	596.287	38.448	640.798	34.336	572.262
Switzerland	76.482	1.274.700	95.304	1.588.400	103.644	1.727.400
Western Europe total	*2.980.127*	*49.668.787*	*3.070.039*	*51.167.311*	*3.139.687*	*52.328.125*
Albania	6.201	103.342	6.763	112.721		
Belarus	12.654	210.897	15.459	257.644		
Bosnia and Herzegovina	24.648	410.800	24.605	410.080		
Croatia	24.247	404.122	24.826	413.765		
Kazakhstan	6.704	111.727	9.823	163.717		

Macedonia	7.933	132.212	8.589	143.142	
Moldova	950	15.836	1.501	25.012	
Russian Federation	207.670	3.461.165	259.052	4.317.533	
Serbia and Montenegro	36.788	613.136	37.190	619.835	
Turkey	30.561	509.354	31.800	530.006	
Ukraine	59.337	988.947	65.077	1.084.621	
Central and Eastern Europe total	*417.692*	*6.961.538*	*484.685*	*8.078.076*	
Europe total	***3.397.820***	***56.630.325***	***3.530.475***	***58.841.257***	

Notes: Figures show imports of green coffee, not decaffeinated. Figures for the Central and Eastern European countries relate to imports of coffee in all forms.
Sources: Eurostat for EU, ICO for Central and Eastern Europe, F.O. Licht's for Switzerland and external trade statistics for Norway.

In calendar year 2008 green coffee imports in Western Europe were 52,3 million bags, an increase of 2,3% compared to the 51,2 million bags in 2007 (revised data). The Western European market is dominated by the EU. Green coffee imports into the EU(27) – including intra-EU trade - increased by 2,2% from 48,9 million bags in 2007 (revised data) to 50,0 million bags in 2008. Looking at individual countries, we have to point out the striking increase in imports in Belgium and an almost corresponding decrease in the Netherlands. The likely explanation is that arrivals in the port of Antwerp are recorded as Belgian imports. The final destination of a significant part of those arrivals has probably been the Netherlands, but the coffee has not been recorded as Dutch imports.
According to ICO data, Central and Eastern European imports of coffee in all forms in 2007 (the most recent year available for most of these countries) amounted to 8 million bags, 16% higher than the year before.

The 'top 20' sources of EU(27) green coffee imports (excluding intra-EU trade) in 2006, 2007 and 2008 were as follows (listed in the order of 2008 imports):

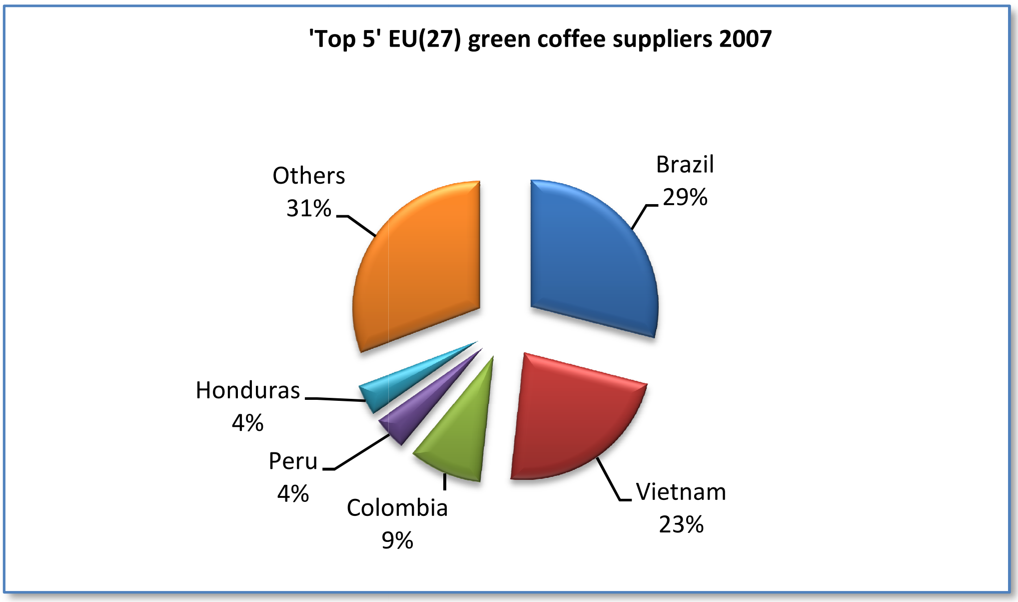
Imports of green, not decaffeinated coffee into the EU(27) (excluding intra-EU trade) by main origins

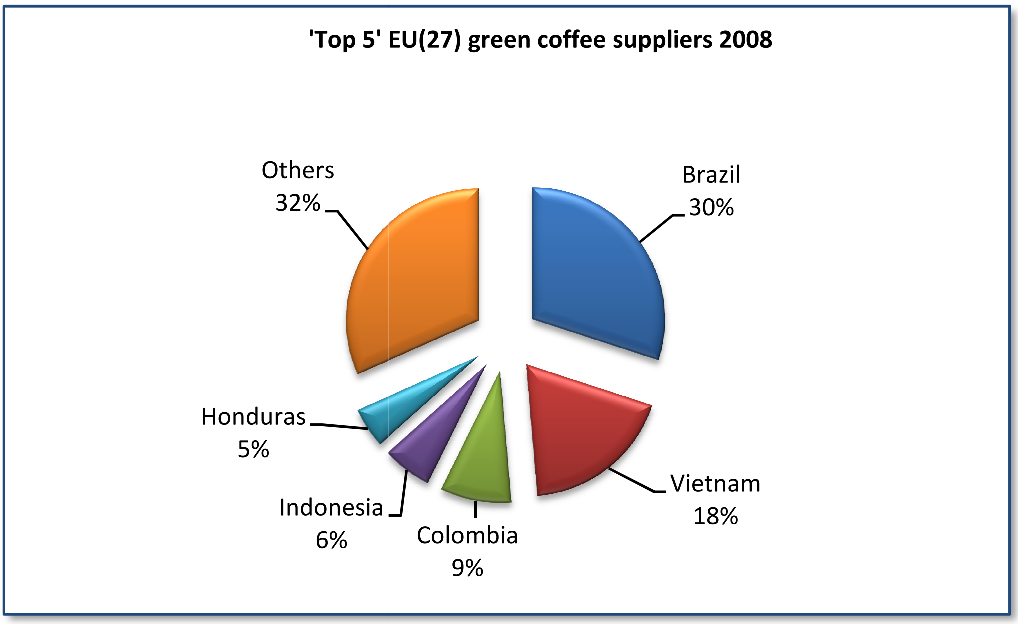
	2006		2007		2008	
	bags	%	bags	%	bags	%
Brazil	12.759.650	28,7	13.094.682	28,8	13.703.425	30,0
Vietnam	9.037.385	20,3	10.253.520	22,5	8.497.963	18,6
Colombia	4.043.115	9,1	4.209.455	9,2	3.956.343	8,7
Indonesia	2.436.887	5,5	1.710.813	3,8	2.763.825	6,1
Honduras	2.013.630	4,5	1.788.630	3,9	2.257.008	4,9
Peru	2.106.802	4,7	1.950.227	4,3	2.203.273	4,8
Uganda	1.174.438	2,6	1.562.125	3,4	1.995.980	4,4
India	1.888.663	4,3	1.781.433	3,9	1.599.923	3,5
Ethiopia	1.305.480	2,9	1.287.663	2,8	1.463.188	3,2
Guatemala	922.280	2,1	939.350	2,1	1.008.587	2,2
El Salvador	645.247	1,5	621.895	1,4	704.928	1,5
Papua New Guinea	445.465	1,0	362.470	0,8	587.902	1,3
Nicaragua	500.552	1,1	580.222	1,3	568.003	1,2
Kenya	584.672	1,3	625.782	1,4	495.172	1,1
Cameroon	639.093	1,4	625.348	1,4	481.128	1,1
Mexico	359.597	0,8	566.038	1,2	444.923	1,0
Costa Rica	482.088	1,1	414.897	0,9	425.912	0,9
Tanzania	365.648	0,8	617.860	1,4	372.662	0,8
Cote d'Ivoire	561.563	1,3	481.247	1,1	305.943	0,7
Rwanda	330.082	0,7	228.817	0,5	243.428	0,5
Others	1.829.872	4,1	1.813.593	4,0	1.559.745	3,4
Total excl intra-EU	**44.432.208**	**100,0**	**45.516.067**	**100,0**	**45.639.263**	**100,0**

Source: Eurostat
Note: the 2007 aggregate extra-EU data have been revised by Eurostat since our previous publication.

The top-3 suppliers to the EU remained unchanged in 2008: Brazil, Vietnam and Colombia. In 2007 the top-5 was completed by Peru and India, in 2008 by Indonesia and Honduras. Indonesia rose from 7th supplier of the EU in 2007 to its 4th supplier in 2008. India dropped from 5th supplier in 2007 to 8th in 2008. The steady rise of Peru's share of EU imports was not continued in 2008, but with its 6th place (4th in 2007) it remains a significant origin. Brazil continued to be the major green coffee supplier to the EU. Its volume increased by more than 600.000 bags, and its market share grew with 1,3 percentage point to 30%. Vietnam retained its position as second supplier, but with a lower volume (- 1,7 million bags) and market share (- 3,9 percentage points). The imports from Colombia dropped with around 250.000 bags and its share in EU imports with 0,6 percentage points.

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





Because of its rapid – if recently somewhat stalled - economic development, there is always an interest in coffee imports from China. In 2005 this country supplied 101.330 bags to the EU27, in 2006 this increased marginally to 107.270 and in 2007 significantly (by 52%!) to 163.143 bags. The pattern continued in 2008 with a larger volume of 217.725 bags (+ 33%). In 2008 China was the EU's 21st supplier. With this, China ranks higher than traditional coffee exporting countries like Burundi (23rd supplier in 2008), the Democratic Republic of Congo - formerly Zaire- (28th) or Ecuador (30th).

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 -

	2006		2007		2008	
	Import	Export	Import	Export	Import	Export
Green coffee (09011100)	2.665.933	14.668	2.710.439	16.369	2.738.356	12.456
Green coffee, decaffeinated (09011200)	2.079	89.834	1.754	90.429	3.053	92.280
Roasted coffee (09012100)	13.353	64.501	13.660	77.909	21.156	71.238
Roasted coffee, decaffeinated (09012200)	1.360	3.573	1.356	3.841	2.338	3.359
Soluble coffee (21011111+21011119)	42.970	50.172	41.267	52.139	43.786	39.077

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

Compared to 2007 the re-exports in 2008 of green coffee decreased by 24%. The exports of green decaffeinated coffee grew modestly (+2%). Exports of roasted coffee dropped with 9% for regular and 13% for decaffeinated coffee. Soluble coffee imports also dropped (-25%), although some caution is advised because the change in customs code may mean that the data are not fully comparable. Green decaffeinated imports increased strongly with 74% in 2008 compared to 2007. Imports of roasted coffee increased significantly: +55% for regular and +72% for decaffeinated roasted coffee. Imports of soluble grew with 6%. These comparisons are tentative since the 2007 extra trade data may be subject to change.

Looking in some more detail at the EU exports of finished products, in the years 2006-2008 the twenty main destinations of roasted coffee (non-decaffeinated plus decaffeinated), listed according to their ranking in 2008, were:

EU(27) exports of roasted coffee (incl. decaf) to non-EU destinations
- in tons and % -

	2006		2007		2008	
	tons	%	tons	%	tons	%
United States	14.849	21,8	14.575	20,7	13.298	17,8
Ukraine	7.933	11,7	8.242	11,7	9.632	12,9
Russian Federation	7.995	11,7	8.743	12,4	9.325	12,5
Switzerland	8.730	12,8	8.122	11,5	8.758	11,7
Australia	3.058	4,5	3.720	5,3	3.838	5,1
Norway	2.861	4,2	2.852	4,0	3.087	4,1
Canada	1.950	2,9	2.173	3,1	2.440	3,3
Croatia	1.776	2,6	1.933	2,7	1.972	2,6
Japan	1.474	2,2	1.275	1,8	1.376	1,8
Albania	956	1,4	1.103	1,6	1.252	1,7
Israel	1.060	1,6	1.167	1,7	1.248	1,7
Iceland	1.331	2,0	1.392	2,0	1.222	1,6
Bosnia and Herzegovina	1.052	1,5	1.052	1,5	998	1,3
Turkey	898	1,3	1.071	1,5	995	1,3
United Arab Emirates	815	1,2	848	1,2	975	1,3

Belarus	632	0,9	693	1,0	970	1,3
South Africa	994	1,5	853	1,2	910	1,2
South Korea	441	0,6	486	0,7	818	1,1
Ceuta	679	1,0	721	1,0	802	1,1
Serbia	745	1,1	786	1,1	771	1,0
Others	7.845	11,5	8.679	12,3	9.912	13,3
Total external trade	**68.074**	**100,0**	**70.483**	**100,0**	**74.598**	**100,0**

Source: Eurostat

Once more it has to be emphasised that recent 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 2008 total exports of roasted coffee (including decaffeinated coffee) to non-EU destinations increased by 5,8% in volume compared to the previous year. The US remained by far the largest non-EU destination, even though exports to the US decreased both in volume (-8,8%) and in share. The second largest destination in 2008 was Ukraine (3rd in 2007), closely followed by the Russian Federation and Switzerland.

Regarding the 2008 EU exports of soluble coffee to non-EU destinations, comparisons with previous years are tentative because of the changes in the customs code. Assuming comparability, the total volume dropped 24%. In 2008 the three largest clients were the Russian Federation, Ukraine and Turkey. Exports to the Russian Federation decreased with 38% in volume. In contrast, those to Ukraine increased with 17%. Turkey completes the top-three with a reduced volume but unchanged share. Exports to the United States halved for the second year in a row. The weakness of the US dollar against the Euro will certainly have been a contributing factor. In volume terms, listed according to their 2008 ranking, the 10 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 % -

	2006		2007		2008	
	tons	%	tons	%	tons	%
Russian Federation	15.218	30,3	18.266	35,5	11.300	28,9
Ukraine	5.635	11,2	7.421	14,4	8.682	22,2
Turkey	2.942	5,9	2.433	4,7	1.817	4,7
Switzerland	2.546	5,1	1.985	3,9	1.475	3,8
Canada	1.395	2,8	990	1,9	1.343	3,4
Croatia	642	1,3	737	1,4	1.320	3,4
United States	5.038	10	2.659	5,2	1.315	3,4
United Arab Emirates	771	1,5	1.054	2	1.119	2,9
Israel	1.077	2,1	778	1,5	945	2,4
Saudi Arabia	928	1,9	1.028	2	771	2,0
Others	13.980	11,4	14.175	14,7	8.989	23,0
Total external trade	**50.172**	**100**	**51.526**	**100**	**39.077**	**100,0**

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

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. Overall volume dropped by close to 8% (but please note the cautionary remark made before regarding the change in customs code). In 2008 the composition and order of the top-five non-EU suppliers remained unchanged. Brazil retained its first position albeit with a lower volume and share. Ecuador maintained its second place with a slightly higher volume and share. Cote d'Ivoire lost some volume, but kept the same market share. Imports from Switzerland dropped with 22,5%; those from Colombia increased slightly.

EU(27) imports of soluble coffee from non-EU origins - in tons and % -						
	2006		2007		2008	
	tons	%	tons	%	tons	%
Brazil	13.405	31,2	14.403	30,3	12.016	27,4
Ecuador	8.657	20,1	10.000	21,1	10.436	23,8
Cote d'Ivoire	4.391	10,2	5.593	11,8	5.173	11,8
Switzerland	5.146	12,0	5.474	11,5	4.242	9,7
Colombia	3.899	9,1	3.869	8,1	3.968	9,1
Others	7.472	17,4	8.140	17,1	7.952	18,2
Total external trade	**42.970**	**100**	**47.480**	**100**	**43.786**	**100,0**

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

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	**2007**	**2008**	**2007**	**2008**	**2007**	**2008**	**2007**	**2008**	**2007**	**2008**
From non-EU origins	4.529	5.156	6	7	248	377	34	55	265	268
Including intra-EU trade	4.905	5.704	86	105	1.825	2.160	124	147	1.156	1.178
Exports	**2007**	**2008**	**2007**	**2008**	**2007**	**2008**	**2007**	**2008**	**2007**	**2008**
To non-EU destinations	35	39	232	251	343	374	20	20	459	363
Including intra-EU trade	530	887	359	399	2.009	2.269	110	123	1.369	1.241

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

These data underline the economic relevance of the coffee sector for the EU food and drinks industry and trade balance. The value of the intra-EU trade of finished coffee products (roasted and soluble coffee) in 2008 was EUR 2,8 billion. In comparison, the value of exports to non-EU destinations of finished coffee products was much smaller, but still represents a serious contribution to the EU export performance: EUR 756 million. At the same time the EU green coffee imports represent about half of the world trade, both in terms of volume and value, making the EU a significant trading partner of the coffee exporting countries.

2. PRODUCTION

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

Production of green decaffeinated, roasted and soluble coffee in selected EU and EFTA countries - in tons -								
	PRCCODE - 10831130 - Decaffeinated coffee, not roasted.		PRCCODE - 10831150 - Roasted coffee, not decaffeinated.		PRCCODE - 10831170 - Roasted decaffeinated coffee.		PRCCODE - 10831240 - Extracts, essences and concentrates, of coffee, and preparations with a basis of these extracts, essences or concentrates or with a basis of coffee.	
	2007	**2008**	**2007**	**2008**	**2007**	**2008**	**2007**	**2008**
Austria	0	0	35.767	35.189	168	131	0	9.464
Belgium	0	0	63.393	63.230	8.233	6.233	0	0
Bulgaria	0	0	12.365	12.446	329	0	0	0
Croatia	0	0	13.096	12.465	52	46	0	0
Denmark	0	0	18.822	28.879	0	0	270	255
Finland	0	0	55.817	57.089	0	0	5	6
France	0	0	192.653	143.922	7.258	0	0	12.184
Germany	217.559	284.603	466.624	495.331	80.804	39.704	144.560	120.254
Greece	0	0	9.929	9.809	0	0	0	0
Hungary	0	0	0	0	0	0	16.427	22.657
Iceland	0	0	728	0	0	0	0	0
Italy	15.046	27.683	419.766	397.946	16.429	20.287	875	559
Latvia	0	0	0	0	0	0	0	0
Lithuania	0	0	76	93	1	1	0	0
Netherlands	0	0	107.541	109.126	9.551	8.430	0	0
Norway	0	0	31.214	31.849	277	261	0	0
Poland	0	0	49.887	49.040	0	0	8.663	8.194
Portugal	0	0	38.299	35.755	1.775	1.728	0	0
Romania	0	0	57.949	28.756	0	0	0	0
Slovakia	0	0	3.605	3.226	0	0	0	0
Spain	16.752	30.481	107.791	108.760	15.041	15.115	44.975	46.992
Sweden	0	0	68.831	86.816	0	0	0	0
United Kingdom	0	0	19.062	41.592	3.613	5.527	59.283	0
EU27 totals	**253.892**	**346.498**	**1.762.498**	**1.742.133**	**145.131**	**98.567**	**327.907**	**318.133**

Source: Eurostat

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

Production of green decaffeinated, roasted and soluble coffee in selected EU and EFTA countries - in mln EUR -								
	PRCCODE - 10831130 - Decaffeinated coffee, not roasted.		PRCCODE - 10831150 - Roasted coffee, not decaffeinated.		PRCCODE - 10831170 - Roasted decaffeinated coffee.		PRCCODE - 10831240 - Extracts, essences and concentrates, of coffee, and preparations with a basis of these extracts, essences or concentrates or with a basis of coffee.	
	2007	**2008**	**2007**	**2008**	**2007**	**2008**	**2007**	**2008**
Austria	0	0	98	103	1	1	0	19
Belgium	0	0	349	365	49	46	0	0
Bulgaria	0	0	37	43	1	0	0	0
Croatia	0	0	76	78	1	0	0	0
Denmark	0	0	109	158	0	0	2	2
Finland	0	0	257	272	0	0	0	0
France	0	0	1.690	1.176	62	0	0	311
Germany	117	380	1.307	1.481	146	114	824	755
Greece	0	0	79	79	0	0	0	0
Hungary	0	0	0	0	0	0	66	117
Iceland	0	0	8	0	0	0	0	0
Italy	14	25	2.626	2.760	154	196	11	7
Latvia	0	0	6	0	0	0	0	0
Lithuania	0	0	1	1	0	0	0	0
Netherlands	0	0	615	647	0	0	0	0
Norway	0	0	161	168	2	2	0	0
Poland	0	0	168	189	0	0	31	42
Portugal	0	0	270	234	14	13	0	0
Romania	0	0	164	143	0	0	0	0
Slovakia	0	0	15	16	0	0	0	0
Spain	33	68	527	562	75	78	267	291
Sweden	0	0	331	380	0	0	0	0
United Kingdom	0	0	250	237	36	27	0	0
EU27 totals	**176**	**477**	**9.075**	**9.031**	**600**	**533**	**2.940**	**2.995**

Source: Eurostat

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

The Prodcom statistics need to be used with care. For a number of countries data are unavailable for reasons of confidentiality. Absence of a country or 'zero' reporting therefore can mean 'unavailable' as well as 'no production'. Only those countries for which at least some data are available have been included. Occasionally, a country reported values, but not volumes (Latvia). 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

1. IMPORTS OF GREEN COFFEE

Imports of not –decaffeinated green coffee in 2008 reached a volume of 1.046.262 bags (62.775 tons). This is a decrease of 5,2 % in comparison to 2007, when 1.104.000 bags were imported.
The imports of decaffeinated green coffee amounted to 46.983 bags (2.819 tons) in 2008,an increase of 2% compared to 2007.
Total green coffee imports amounted to 1.093.245 bags (65.595 tons), which is a decrease of 5,0 % in relation to 2007, when 68.998 tons were imported.

Austria: Imports of not-decaffeinated green coffee - in bags -			
Countries of Origin	**2006**	**2007**	**2008**
Vietnam	339.142	360.947	355.888
Brazil	309.533	320.835	237.078
Kenya	5.506	61.395	95.008
Colombia	59.485	67.643	61.828
Thailand	21.316	69.033	46.940
Peru	37.806	44.945	36.978
Indonesia	-	18.790	33.300
Honduras	23.501	26.383	32.997
India	-	19.315	26.905
Cameroon	-	15.565	17.540
El Salvador	12.295	20.783	-
Others	285.416	78.366	148.783
Total	**1.094.000**	**1.104.000**	**1.093.245**

Source: Statistics Austria

Vietnam kept its number one position. Brazil's exports decreased by 26%. Of all suppliers, Indonesia, Kenya and India showed the highest increase.

Austria: Percentage distribution of not-decaffeinated green coffee Imports by main sources in %			
Countries of origin	**2006**	**2007**	**2008**
Vietnam	33,1	32,7	34.0
Brazil	30,2	32,1	22,7
Kenya	0,5	5,6	9,1
Colombia	5,8	6,1	5,9
Thailand	2,1	6,3	4,5
Peru	5,1	4,1	3.5
Indonesia	-	1,7	3,2
Honduras	2,3	2,4	3,1
India	-	1,5	2,6
Others	19,7	8,8	11,4
Total:	**100,0**	**100,0**	**100,0**

2. 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) amounted to 156.000 tons. In comparison to the 2007 volume (162.000 tons) this means a decline of 3,7%. Imports were 105.000 tons (- 5.4%), exports 51.000 tons (± 0 %).

3. COFFEE CONSUMPTION

Austria: per capita consumption of green coffee in kilos	
Year	**Per capita consumption**
1950	0,6
1960	1,9
1970	3,8
1980	6,9
1990	8,0
2000	7,9
2004	8,1
2005	8,0
2007	8,0
2008	8,0

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

The prices in the retail market increased by 6,8% as a result of moderate price increases and the ongoing change to pads and capsules. In the gastronomic area, the prices remained stable. This was caused by a slowing down of the trend towards special coffee drinks.

5. INFORMATION ON THE AUSTRIAN COFFEE AND TEA ASSOCIATION

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

6. COMMENTS ON PARTICULAR SUBJECTS

The main highlight in Austria was again the Day of Coffee. The 7th Day of Coffee was held on the 1st of October 2008. Instead of a press-conference, representatives of all important newspapers were invited for a visit to a coffee-bar. The resulting press articles (140) was the best so far.

7. VAT

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

BELGIUM

1. IMPORTS OF GREEN COFFEE

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

Imports of not-decaffeinated green coffee reached a volume of 5.943.258 bags (356.596 tons) in 2008. This is 91,7% more than the 2007 imports. Looking at individual origins, the differences are even larger. Imports from Brazil more than doubled, those from Vietnam and Honduras tripled and those from Uganda quadrupled. Such fluctuations are unexpected and there must be some statistical anomaly. As stated before, one likely explanation is that coffee arrivals in the port of Antwerp have been classified as Belgian imports and that trade with for instance the Netherlands has not been taken into account in the same manner as in previous years.

Belgium: Imports of green not-decaffeinated coffee - in bags -			
Countries of origin	**2006**	**2007**	**2008**
Brazil	694.215	675.188	1.549.073
Vietnam	530.613	368.633	1.081.113
Honduras	209.847	166.532	504.238
Colombia	300.673	314.825	484.315
Uganda	135.248	108.373	426.993
Peru	136.700	173.162	421.828
Ethiopia	135.203	172.032	165.518
Indonesia	80.182	53.650	137.998
India	150.433	130.013	127.665
Guatemala	101.813	97.613	117.380
Mexico	50.740	106.547	114.988
Nicaragua	48.032	55.697	77.822
Rwanda	51.062	19.432	69.198
Kenya	48.362	53.023	63.280
El Salvador	58.670	63.408	60.340
Others	850.018	542.458	541.507
Total all origins	**3.581.812**	**3.100.587**	**5.943.258**

Source: Eurostat

Taking the 2008 data as they are now available, the most important country of origin remains Brazil with a total market share of 26,1%. Brazil is followed by Vietnam, with a market share of 18,2% and Honduras with a share of 8,5%. Given the tentative nature of the 2008 data, we refrain from making comparisons with previous years.

The top ten suppliers were the following countries:

Belgium: Percentage distribution of green not-decaffeinated coffee Imports by main sources - in % -			
Countries of origin	**2006**	**2007**	**2008**
Brazil	19,4	21,8	26,1
Vietnam	14,8	11,9	18,2
Honduras	5,9	5,4	8,5
Colombia	8,4	10,2	8,1
Uganda	3,8	3,5	7,2
Peru	3,8	5,6	7,1
Ethiopia	3,8	5,5	2,8
Indonesia	2,2	1,7	2,3
India	4,2	4,2	2,1
Guatemala	2,8	3,1	2,0

Source: Eurostat

2. FOREIGN TRADE IN ALL FORMS

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

Belgium: international trade in green, roasted and soluble coffee
- in tons -

	Green		Green decaf		Roasted		Roasted decaf		Soluble	
Imports	**2007**	**2008**	**2007**	**2008**	**2007**	**2008**	**2007**	**2008**	**2007**	**2008**
From non-EU origins	178.699	351.792	0	49	451	579	111	112	n.a.	2.687
Intra-EU trade	7.336	4.804	7.361	6.037	18.513	17.615	2.652	3.623	n.a.	4.329
Exports	**2007**	**2008**	**2007**	**2008**	**2007**	**2008**	**2007**	**2008**	**2007**	**2008**
To non-EU destinations	444	1.883	5	3	1.468	1.634	135	243	n.a.	543
Intra-EU trade	95.630	263.208	427	243	41.073	40.209	2.333	2.203	n.a.	16.750

Source: Eurostat; n.a.= not available

Please note the cautionary remarks made in section 1 of this chapter, especially regarding green coffee. The finished coffee data seem to be more consistent.

3. COFFEE CONSUMPTION

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

Belgium: total consumption
- in 1000 bags -

2000	1.133
2001	884
2002	1.484
2003	1.579
2004	1.396
2005	1.158
2006	1.537
2007	1.103
2008	650

Source: ICO

Belgium: per capita coffee consumption
- in kilos -

2004	8,09
2005	6,67
2006	8,81
2007	6,29
2008	3,68

Source: ICO

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

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

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

Belgium: retail prices for roasted coffee - EUR/kilo -	
2000	7,68
2001	7,38
2002	7,11
2003	7,01
2004	6,86
2005	7,27
2006	7,58
2007	7,90
2008	8,18

Source: ICO. The original dollar values have been converted to Euro using the ECB reference rate annual averages

5. 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 33.271 tons (554.515 bags) in 2008, compared to 32.644 tons (544.070 bags) in 2007. This is an increase of 1,9%. 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**
2006	572.147
2007	544.070
2008	554.515

Source: Eurostat

Brazil and Colombia remained Denmark's most important suppliers in 2008. Vietnam retained the third spot. As was the case last year, Honduras and Peru completed the 'top 5', both with a significant increase in volume (+ 31% and +25% respectively). Some of the smaller suppliers showed very large swings, for instance Uganda, which saw its imports almost halved and – in contrast - Tanzania, with a two-and-a-half fold increase. Nicaraguan imports were about 1/8th of those in the previous year. Newcomers in the top-20 include Cameroon and Timor-Leste, countries which had recorded nil or low imports in the two previous years.

Denmark: Imports of green not-decaffeinated coffee - in bags -			
Countries of origin	**2006**	**2007**	**2008**
Brazil	251.957	227.085	238.177
Colombia	70.965	51.557	44.447
Vietnam	49.595	44.812	37.250
Honduras	31.578	26.340	34.540
Peru	36.058	24.340	30.330
Uganda	14.570	24.245	12.450
Mexico	4.857	9.448	9.883
Indonesia	11.885	11.452	9.402
Kenya	9.213	8.427	6.600
Papua New Guinea	5.610	5.395	5.022
Tanzania	2.732	1.450	3.840
Ethiopia	8.227	2.905	2.978
Burundi	7.595	5.075	2.237
Zambia	898	1.620	2.017
Guatemala	1.067	1.823	1.815
China	1.017	4.258	1.700
Cameroon	303	0	1.398
Timor-Leste	0	0	1.280
Nicaragua	2.527	7.913	1.020
Malawi	1.497	285	915
Others	59.997	85.640	107.215
Total	**572.147**	**544.070**	**554.515**

Source: Eurostat

In percentage terms the share of the major supplier, Brazil, increase somewhat from 41,7% in 2007 to 43% in 2008. The import shares of both Colombia (9,5% in 2007, 8% in 2008) and Vietnam (8,2% in 2007, 6,7% in 2008) dropped. Honduras and Peru both recorded higher import shares: 1,4 and 1 percentage points respectively.

Denmark: Percentage distribution of green not-decaffeinated coffee Imports by main sources - in % -			
Countries of origin	**2006**	**2007**	**2008**
Brazil	44,0	41,7	43,0
Colombia	12,4	9,5	8,0
Vietnam	8,7	8,2	6,7
Honduras	5,5	4,8	6,2
Peru	6,3	4,5	5,5
Uganda	2,5	4,5	2,2
Mexico	0,8	1,7	1,8
Indonesia	2,1	2,1	1,7
Kenya	1,6	1,5	1,2
Papua New Guinea	1,0	1,0	0,9
Tanzania	0,5	0,3	0,7
Ethiopia	1,4	0,5	0,5
Burundi	1,3	0,9	0,4
Zambia	0,2	0,3	0,4
Guatemala	0,2	0,3	0,3
China	0,2	0,8	0,3
Cameroon	0,1	0,0	0,3
Timor-Leste	0,0	0,0	0,2
Nicaragua	0,4	1,5	0,2
Malawi	0,3	0,1	0,2
Others	10,5	15,7	19,3
Total	**100,0**	**100,0**	**100,0**

Source: Eurostat

Denmark: Percentage distribution of green not-decaffeinated coffee imports by type						
Types of coffee	2006		2007		2008	
Arabicas	78		71		71	
Colombian Milds		14		11		10
Other Milds		18		18		17
Brazilian Naturals		45		42		44
Robustas	14		15		11	
Unknown	8		14		18	

Source: Eurostat, ICO

The dominant market position of Arabica coffees remained unchanged in 2008. Within this group Brazilian Naturals have by far the largest share, recovering a bit from a gradual decline in previous years. The percentage share of Colombian Milds and of Other Milds decreased by 1 percentage point. Robustas dropped by 4 percentage points.

2. FOREIGN TRADE IN COFFEE IN ALL FORMS

Denmark: international trade in green, roasted and soluble coffee
- in tons -

	Green		Green decaf		Roasted		Roasted decaf		Soluble	
Imports	**2007**	**2008**	**2007**	**2008**	**2007**	**2008**	**2007**	**2008**	**2007**	**2008**
From non-EU origins	28.258	27.042	4	0	94	182	2	8	n.a.	0
Intra-EU trade	4.386	6.229	436	1.175	11.686	13.509	80	228	n.a.	0
Exports	**2007**	**2008**	**2007**	**2008**	**2007**	**2008**	**2007**	**2008**	**2007**	**2008**
To non-EU destinations	85	25	0	0	1.617	1.462	5	5	n.a.	298
Intra-EU trade	1	0	0	0	4.811	5.459	20	22	n.a.	1.029

Source: Eurostat; n.a.= not available

Comparisons are made difficult because of the non-availability of intra- and extra-EU totals for soluble coffee in 2007. A tentative observation is that imports of processed coffee appear to be increasing.
Regarding imports of processed coffee in 2008, Sweden and Germany covered the quasi-totality of Denmark's of decaffeinated green coffee imports with a share of 59% and almost 41%. The remaining 0,05% was supplied by Italy. Sweden remained the major supplier of roasted non-decaffeinated coffee imports with a share of 81%. Germany was the second source with a share of 9,4%, followed by the Netherlands (3,2%) and Belgium (3,1%). Sweden and Germany are also the major suppliers of roasted decaffeinated coffee, with a share of 72% and 24% respectively.
It is unexpected to see zero figures for imports of soluble coffee in 2008. Unless this is caused by confidentiality requirements, this may be a statistical anomaly which will be corrected later.

3. COFFEE CONSUMPTION

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

Denmark: total consumption
- in 1000 bags -

2000	791
2001	868
2002	805
2003	724
2004	849
2005	795
2006	822
2007	774
2008	702

Source: ICO

Denmark: per capita coffee consumption
- in kilos -

2004	9,4
2005	8,8
2006	9,1
2007	8,5
2008	7,7

Source: ICO

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 2008 Finland imported 1.182.799 bags of green coffee, an increase of 5,5 % compared to 2007.

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
2008	1.182.799

The most important origins by volume were:

Finland: Imports of green coffee by country of origin - in 1000 bags -			
Countries of origin	**2006**	**2007**	**2008**
Brazil	459,1	465,7	500,6
Colombia	236,4	261,0	238,3
Guatemala	75,2	86,2	78,2
Nicaragua	58,9	68,3	92,0
Kenya	56,7	62,7	59,2
Ethiopia	28,3	35,8	37,6
Honduras	42,0	34,4	75,2
Peru	32,4	21,8	28,6
Tanzania	12,1	18,8	9,3
Vietnam	15,2	17,4	17,1
Zambia	19,5	10,9	3,3
Burundi	5,0	7,5	4,2
India	0,3	5,2	3,7
Costa Rica	6,8	4,5	11,1
Cameron	4,3	4,1	0
Togo	0,0	3,6	0
Germany	0,0	2,6	0
El Salvador	4,9	2,4	10,4
Others	58,5	7,7	14,0
Total	**1.077,8**	**1.120,6**	**1.182,8**

The ‘top 5’ suppliers in 2008 were Brazil, Colombia, Guatemala, Nicaragua and Kenya. Imported volumes increased for the top two and for Nicaragua. Those of Guatemala and Kenya dropped.

Finland: Percentage distribution of green coffee imports by main sources 2005-2007 - in % -			
Countries of origin	**2006**	**2007**	**2008**
Brazil	42,6	41,6	42,3
Colombia	21,9	23,3	20,1
Guatemala	7,0	7,7	6,6
Nicaragua	5,5	6,1	7,8
Kenya	5,3	5,6	5,0
Ethiopia	2,6	3,2	3,2
Others	15,1	12,5	15
Total	**100,0**	**100,0**	**100,0**

2. FOREIGN TRADE OF COFFEE IN ALL FORMS

Green coffee

Imports of green coffee reached 70.968 tons in 2008. The imports increased by 5,5 % from the previous year. The average C.I.F price was € 2,12/kg.

There were no *exports* of green coffee 2008 (192 tons in 2007).

Roasted coffee

Imports of roasted coffee were 3.517 tons in 2008, a increase of 40% from 2007.

Exports of roasted coffee increased from 2007 by 11,5% to 8.551 tons. The main export destination for roasted coffee was Baltic Countries and Russia (99,5%).

Finland: Foreign trade in coffee 2005-2007 - in tons -						
	Imports			**Exports**		
Forms of coffee	**2006**	**2007**	**2008**	**2006**	**2007**	**2008**
Green coffee	64.685	67.237	70.968	213	192	0
Roasted coffee	2.802	2.509	3.517	6.531	7.676	8.551
Instant coffee	1.007	1.142	1.327	27	5	9

3. IMPORT RATES AND NATIONAL TAXES

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

4. COFFEE CONSUMPTION

The consumption of roasted coffee was 9,9 kg/person in 2008.

5. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

The consumer prices of roasted coffee increased in 2008. The average for 2008 was 5,58 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 the entire coffee sector. All the figures below are extracted from national official statistics provided by French customs and the French Economics Ministry.

1. IMPORTS

Total non-decaffeinated green coffee imports into France from all origins in 2008 were 219.475 tons (3.657.917 bags). This was 10% lower than the 244.353 tons (4.072.550 bags) imported in 2007. 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 % -

	2008		2007		2006	
Brazil	53.370	24,32%	60.800	24,88%	59.375	27,05%
Vietnam	31.780	14,48%	47.333	19,37%	34.944	15,92%
Colombia	16.557	7,54%	16.315	6,68%	14.212	6,47%
Ethiopia	9.200	4,19%	10.193	4,17%	10.618	4,84%
Uganda	7.779	3,54%	6.972	2,85%	3.112	1,42%
Peru	7.340	3,34%	6.557	2,68%	5.288	2,41%
Cameroon	6.419	2,92%	5.838	2,39%	2.398	1,09%
Honduras	5.629	2,56%	5.624	2,30%	6.537	2,98%
India	5.161	2,35%	5.213	2,13%	5.316	2,42%
Guinea	4.542	2,07%	5.002	2,05%	4.286	1,95%
Guatemala	4.280	1,95%	4.828	1,98%	7.717	3,52%
Mexico	3.711	1,69%	3.874	1,59%	5.167	2,35%
Côte d'Ivoire	2.062	0,94%	3.567	1,46%	4.337	1,98%
Madagascar	1.763	0,80%	2.849	1,17%	4.247	1,93%
Indonesia	1.745	0,79%	2.179	0,89%	6.747	3,07%
EU	39.926	18,19%	36.162	14,80%	24.392	11,11%
Others	18.211	8,33%	21.047	8,61%	20.801	9,48%
Total	**219.475**	**100,00%**	**244.353**	**100,00%**	**219 494**	**100,00%**

Brazil retained its position of first supplier. The volume was 7.430 tons lower, but the market share remained virtually unchanged. Vietnam remained the second supplier, but with a volume that was 15.500 tons lower than the previous year. Imports from Colombia increased slightly in volume.

Imports split according to the types of coffee showed a slight increase of the Arabica share and a modest drop of that of Robustas.

France: Percentage distribution of green non-decaffeinated coffee imports by types of coffee
- in % -

	2008		2007		2006	
Arabicas	52,86		51,48		56,72	
Colombian Milds		8,61		7,21		6,90
Other Milds		15,54		14,81		17,73
Brazilian Naturals		28,71		29,46		32,08
Robustas	28,17		30,18		31,39	
Other, not specified	18,97		18,34		11,89	

2. FOREIGN TRADE FOR ALL FORMS OF COFFEE

Exports of processed coffee (in green bean equivalent):

France: Exports of coffee - in tons -			
	2008	**2007**	**2006**
Coffee, green not decaffeinated	1.839	977	1.844
Coffee, green decaffeinated	7.034	6.903	8.952
Coffee, roasted not decaffeinated	15.447	12.384	13.623
Coffee, roasted decaffeinated	765	563	655
Extracts, essences and concentrates	32.069	32.791	28.218
Other	5.638	4.106	7.570
Total	**62.792**	**57.724**	**60.862**

Total exports of coffee in all forms increased by 8,8% in 2008. Of the processed products, especially the exports of roasted and roasted decaffeinated coffee showed a strong performance: +25 and +36% respectively. The exports of coffee extracts dropped slightly with 2,2%.

3. COFFEE CONSUMPTION

France : market value and size				
		2008	**2007**	**2006**
Value (turnover before tax)	EUR million	1.968	1.941	1.788
Volume (green coffee equivalent)	Tons	330.000	349.600	331.400

For 2008, the per capita consumption is calculated to be 5,48 kg.

5. OTHER ASPECTS

- In 2008 soluble coffee represented 13% of coffee (green bean equivalent) consumed in France
- The espresso method of preparation is becoming increasingly popular: annually 16,7 million cups are consumed in this form
- Of the roasted coffee, over 80% of sales take place in medium-sized and larger supermarkets. The remaining 20% is divided between cafés/hotels/restaurants, other out-of-home, vending and speciality shops.
- The share of decaffeinated coffee is estimated to be 7% of consumption.
- The share of ethically traded and sustainably produced coffee It is estimated to be 2,5%.

GERMANY

1. IMPORTS OF GREEN COFFEE

According to Eurostat data, imports of not-decaffeinated green coffee into the Federal Republic of Germany in 2008 reached a volume of 17,5 million bags, an increase of 3,1% compared to the almost 17 million bags imported in 2007.

Germany: Imports of not-decaffeinated green coffee - in bags and % -				
	bags		%	
	2007	2008	2007	2008
Brazil	4.808.893	28,3	4.914.443	28,0
Vietnam	3.990.752	23,5	2.809.103	16,0
Indonesia	809.033	4,8	1.533.217	8,7
Colombia	1.466.602	8,6	1.290.757	7,4
Peru	1.045.750	6,2	1.124.408	6,4
Honduras	915.188	5,4	1.054.670	6,0
Ethiopia	605.795	3,6	786.475	4,5
Papua New Guinea	324.648	1,9	552.028	3,2
El Salvador	447.665	2,6	518.597	3,0
Uganda	367.093	2,2	472.875	2,7
Guatemala	278.688	1,6	339.007	1,9
India	236.398	1,4	247.925	1,4
Mexico	295.563	1,7	246.450	1,4
Tanzania	327.827	1,9	171.180	1,0
Costa Rica	177.057	1,0	148.298	0,8
Others	900.339	5,3	1.314.760	7,5
Total all origins*	**16.997.292**	**100,0**	**17.524.193**	**100,0**

Source: Eurostat

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

The list of the countries of origin has remained fairly stable. Brazil remained the largest supplier. Vietnam is placed second and Colombia third. However, this brief summary hides significant shifts in volumes. Imports from Vietnam in particular dropped with 1,2 million bags, minus 30% compared to 2007. This lower volume appears to have been picked up by other robusta suppliers like Indonesia (+724.000 bags, an increase of 90% compared to 2007) and Uganda (+ over 100.000 bags, an increase of 29%).

The 2008 distribution of green coffee imports according to ICO coffee groups maintained the overall pattern, with modest shifts within the Arabica group.

Germany: Percentage distribution of not-decaffeinated green coffee imports by type					
	2006		2007		2008
Arabicas	71		69		69
Colombian Milds	11		12		9
Other Milds	27		26		27
Brazilian Naturals	33		32		33
Robustas	29		31		28
Other/Unknown	-		0		3

Source: Eurostat, ICO. Due to rounding total may differ from sum of components

2. FOREIGN TRADE IN COFFEE

Germany: Imports and exports of coffee in all forms - in tons -					
	Customs Code	Imports 2007	Imports 2008	Exports 2007	Exports 2008
Green coffee (not decaffeinated)	0901 11 00	1.019.873	1.051.458	165.571	145.808
Green coffee (decaffeinated)	0901 12 00	2.288	3.229	136.991	140.459
Roasted coffee (not decaffeinated)	0901 21 00	53.098	55.178	134.183	145.399
Roasted coffee (decaffeinated)	0901 22 00	1.449	1.032	8.306	9.460
Coffee extracts in dry and liquid form*	2101 11 00	32.328	25.063	63.761	57.671
Preparations**	2101 12 92	8.016	10.203	14.406	14.737

Source: Statistisches Bundesamt
*previously listed separately as dry coffee extracts (Customs code 2101 11 11) & liquid essences and concentrates (Customs code 2101 11 19)
**on the basis of extracts, essences and concentrates of coffee

According to Eurostat data, the 2008 import of decaffeinated green coffee was dominated by the Netherlands (47,3%) followed by Italy (24,4%) and Spain (13,6%). The main suppliers of roasted coffee were Austria (37,9%), Italy (26,9%) and the Netherlands (12,9%). The main sources for roasted decaffeinated coffee the Netherlands (32,4%), the Czech Republic (29,3%) and Austria (20,5%). Coffee extracts were mainly sourced from Belgium (25,9%), Ecuador (15,9%) and the United Kingdom (14,3%).
The main export destinations of decaffeinated green coffee in 2008 were the United States (55,9%), Spain (8,8%) and the Netherlands (8,7%). Exports of roasted non-decaffeinated coffee were mainly destined to France (16,3%), the Netherlands (15,2%), and Poland (12,9%). In 2008 the three largest export destinations for roasted decaffeinated coffee were France (27%), the Netherlands (16,2%) and Belgium (14,7%). Coffee extracts were mainly destined for the United Kingdom (12,5%), France (11,2%) and the Russian Federation (11%).

3. COFFEE CONSUMPTION

In 2008, the statistical total consumption increased slightly with 1,4%, as did the per capita consumption: from 6,2 kilo (green coffee equivalent) to 6,3 kilo.

Germany: total and per capita consumption		
	Green coffee * - in tons -	Per capita consumption - in kilo green coffee equivalent -
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
2008	519.160	6,3

Source: Deutscher Kaffeeverband

* Green coffee processed for consumption on the German market; ** from 1990: including inhabitants of the new Bundesländer; ***from 1992: estimated total market volume (Deutscher Kaffeeverband)

Germany: coffee market segments - in tons -		
	2007	**2008**
Roasted coffee	**394.000**	**400.000**
Of which:		
Roasted coffee, not decaffeinated	361.000	367.000
Roasted coffee, decaffeinated	33.000	33.000
Included in roasted coffee:		
Espresso/Caffè Crema	36.000	43.000
Coffee pads/-capsules	21.000	26.000
Soluble coffee*	**16.600**	**16.600**
Of which:		
Soluble coffee, not decaffeinated*	15.800	15.820
Soluble coffee, decaffeinated*	800	780
Of which:		
Soluble coffee in pure form	12.000	12.200
Soluble coffee in mixes*	4.600	4.400

Source: Deutscher Kaffeeverband

*For soluble coffee only the coffee component has been included in the calculations.

The market share of the segments single portions and espresso/caffè crema kept increasing. In 2008 43.000 tons of espresso and caffè crema were supplied to the total market.

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

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

Germany: retail prices for roasted coffee - Euro/500g -	
1970	4,24
1980	4,94
1990	3,70
2000	3,43
2001	3,27
2002	3,06
2003	3,00
2004	2,91

2005	3,61
2006	3,79
2007	3,76
2008	3,84

Source: ICO, Deutscher Kaffeeverband

5. ASSOCIATION MEMBERSHIP

As at end of March 2008, the membership of the German Coffee Association consisted of:

Coffee Agents and Brokers:	8
Green coffee importers:	12
Warehousing companies:	4
Producers of decaffeinated coffee:	3
Producers of soluble coffee and soluble coffee beverages:	8
Coffee roasters:	67
Supporting members:	40

6. COMMENTS ON PARTICULAR ASPECTS

On September 26th 2008 the German Coffee Day was celebrated for the third time with great success. Around 200 companies organised different activities in order to promote coffee and demonstrate its diversity.
In 2008 the German Coffee Association started 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.

7. VAT, EXCISE DUTIES

VAT on coffee is 7% (in retail). Germany has a specific excise duty on coffee. This is EUR 2,19 for 1 kg roasted coffee and EUR 4,78 for 1 kg soluble coffee. For products containing coffee the following excise duties apply:

Germany: excise duty for products containing coffee - in EUR -		
Volume of roasted or soluble coffee per kilo product	Roasted coffee	Soluble coffee
10 g to 100 g per kg	0,12	0,26
> 100 g to 300 g per kg	0,43	0,94
> 300 g to 500 g per kg	0,86	1,91
> 500 g to 700 g per kg	1,32	2,86
> 700 g to 900 g per kg	1,76	3,83

Source: Kaffeesteuergesetz (coffee tax law)

GREECE

1. IMPORTS OF GREEN COFFEE

In 2008 imports of green, not decaffeinated coffee from all sources into Greece were 27.241 tons (454.023 bags). In calendar year 2007a volume of 28.518 tons (475.297 bags) was imported. This represents a decline of 4,5%.

Greece: Imports of green, not –decaffeinated coffee from all sources			
	2006	2007	2008
tons	23.462	28.518	27.241
bags	391.025	475.297	454.023

Source: Eurostat

The most important origins in the most recent three years were (listed in the 2008 order):

Greece: Imports of green, not-decaffeinated coffee by origin - in bags -			
Countries of origin	2006	2007	2008
Brazil	293.457	327.360	300.130
India	38.473	46.400	42.242
Vietnam	25.238	44.782	35.980
Indonesia	765	15.797	19.805
Colombia	9.468	8.382	9.410
Ethiopia	6.895	6.715	7.105
Uganda	1.033	1.513	5.860
Cote d'Ivoire	0	1.215	1.892
Cameroon	75	1.848	1.623
China	0	0	1.612
Madagascar	0	0	937
Costa Rica	598	900	783
Nicaragua	612	775	417
Guatemala	1.060	205	365
Mexico	302	110	358
Others	13.048	19.295	25.505
Total	**391.025**	**475.297**	**454.023**

Source: Eurostat

In 2008 Brazil remained by far the most important supplier, be it with a lower volume. In recent years, India and Vietnam have contested the second place. In 2004 India overtook Vietnam, which became the third supplier. This ranking was maintained since. The fourth position in 2008 was again taken by Indonesia. In 2007 imports from this origin increased 20-fold (!) increased volume and in 2008 again an important increase could be recorded (+25%) . Colombia remained fifth supplier. In general it can be observed that imports can fluctuate strongly from year to year. See for instance the entry of China as 10th supplier, from zero imports in the two previous years.

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

Greece: Imports of green, not-decaffeinated coffee by origin - in % -			
Countries of origin	2006	2007	2008
Brazil	75,0	68,9	66,1
India	9,8	9,8	9,3
Vietnam	6,5	9,4	7,9
Indonesia	0,2	3,3	4,4

Colombia	2,4	1,8	2,1
Ethiopia	1,8	1,4	1,6
Uganda	0,3	0,3	1,3
Cote d'Ivoire	0,0	0,3	0,4
Cameroon	0,0	0,4	0,4
China	0,0	0,0	0,4
Madagascar	0,0	0,0	0,2
Costa Rica	0,2	0,2	0,2
Nicaragua	0,2	0,2	0,1
Guatemala	0,3	0,0	0,1
Mexico	0,1	0,0	0,1
Others	3,3	4,1	5,6
Total	**100,0**	**100,0**	**100,0**

Source: Eurostat

Brazil's share dropped from around 3/4th of the imports into Greece two years ago to a fraction below 2/3rd in 2008. India's market share remained largely unchanged; that of Vietnam was lower.

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	687
2001	548
2002	827
2003	929
2004	871
2005	870
2006	857
2007	1015
2008	978

Source: ICO; some data 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	4,72
2006	4,63
2007	5,48
2008	5,27

IRELAND

1. IMPORTS OF GREEN COFFEE

In 2008 imports of green, not decaffeinated coffee from all sources into Ireland were 3.081 tons (51.350 bags) compared to 5.062 tons (84.358 bags) in 2007. This means that 2008 imports were 39% lower in volume than the previous year.

Ireland: Imports of green, not –decaffeinated coffee			
	2006	2007	2008
Tons	5.099	5.062	3.081
Bags	84.980	84.358	51.350

Source: Eurostat

About 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 2008 order):

Ireland: Imports of green, not-decaffeinated coffee by origin - in bags -			
Countries of origin	2006	2007	2008
Brazil	9.447	5.120	6.468
Nicaragua	0	2.473	3.685
Indonesia	5.102	9.027	3.620
Colombia	10.030	6.757	3.185
Honduras	5.670	2.825	2.537
Kenya	1.823	1.538	1.260
Papua New Guinea	6.337	-	1.240
Uganda	677	338	653
Costa Rica	1.263	1.578	630
China	163	1.613	315
Others	44.468	53.088	27.757
Total	**84.980**	**84.358**	**51.350**

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:	2006	2007	2008
Brazil	11,1	6,1	12,6
Nicaragua	0,0	2,9	7,2
Indonesia	6,0	10,7	7,0
Colombia	11,8	8,0	6,2
Honduras	6,7	3,3	4,9
Kenya	2,1	1,8	2,5
Papua New Guinea	7,5	0,0	2,4
Uganda	0,8	0,4	1,3
Costa Rica	1,5	1,9	1,2
China	0,2	1,9	0,6
Others	52,3	62,9	54,1
Total	**100,0**	**100,0**	**100,0**

2. FOREIGN TRADE IN ALL FORMS

Ireland: international trade in green, roasted and soluble coffee - in tons -										
	Green		Green decaf		Roasted		Roasted decaf		Soluble	
Imports	**2007**	**2008**	**2007**	**2008**	**2007**	**2008**	**2007**	**2008**	**2007**	**2008**
From non-EU origins	2.016	1.434	0	0	86	108	0	0	0	2
Intra-EU trade	3.046	1.647	7	27	1.618	1.325	43	33	0	1.063
Exports	**2007**	**2008**	**2007**	**2008**	**2007**	**2008**	**2007**	**2008**	**2007**	**2008**
To non-EU destinations	1	0	0	0	0	2	0	0	0	5
Intra-EU trade	58	149	0	3	506	384	41	1	0	54

Source: Eurostat

This table illustrates the high percentage finished coffee imports into Ireland. Expressed in green coffee equivalent, 2008 green coffee imports were 2/3rd of finished product imports. Total coffee imports of all forms into Ireland increased from 7.147 tons (green coffee equivalent) in 2007 to 7.621 tons in 2008 (+6,6%). The vast majority of Irelands soluble coffee imports (90% in 2008) came from the United Kingdom. Italy (3,8%) and Poland (3,0%) supplied most of the remainder. In 2008 the UK represented 73% of Irelands roasted coffee imports. The second largest supplier – at a considerable distance - was Germany (15% in 2008).

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	
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
2008	115

Ireland: Per capita consumption - in kg green coffee equivalent -	
Years	
1998	1,49
1999	2,16
2000	1,31
2001	2,30
2002	2,08
2003	2,27
2004	3,29
2005	3,19
2006	2,85
2007	3,36
2008	1,56

Source: ICO; some data revised

The apparent large drop in total and per capita consumption is unexpected and not consistent with Eurostat data on imports in coffee in all forms reported in the previous paragraph. At the moment no explanation is available.

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 2008 was 7.477.166 bags (448.630 tons), which is an increase of 1,01% compared to 2007. This relatively low increase should be ascribed to the slowing of the growth of processed coffee exports. This category showed a rise of only 2,4%.
The annual data for green coffee imports, however, show that - for a number of reasons - import activity does not directly result from changes in demand of the coffee processing industry. In order to provide a more accurate and realistic analysis of the activity in this sector it is worthwhile taking into consideration data related to the import and export of coffee in all forms in the last six years.
This comparison shows that the annual growth in the coffee processing sector for the period in consideration is about 3,31%. 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 3,62%, exports by 9,76% and disappearance only by 2,02% annually .

Italy: Imports of green coffee
- in bags -

Country of origin	2002	2003	2004	2005	2006	2007	2008
Brazil	2.061.996	2.428.847	2.330.265	2.408.309	2.555.270	2.622.211	2.641.027
Vietnam	904.563	830.764	902.292	982.050	1.118.287	1.363.381	1.322.550
India	634.778	699.153	844.969	748.934	893.873	943.971	772.120
Uganda	298.117	339.275	249.554	245.459	146.067	284.722	487.329
Colombia	236.270	246.345	253.460	352.293	399.286	414.546	405.018
Indonesia	253.914	377.106	371.521	484.097	466.671	325.940	399.754
Guatemala	150.208	197.506	209.282	153.635	174.292	183.956	210.752
Cameroon	397.014	277.270	338.578	299.654	251.930	251.971	203.219
Ethiopia	91.426	104.803	108.052	141.412	105.468	125.381	137.081
Honduras	155.608	124.212	123.754	89.880	128.815	128.775	116.432
Ivory Coast	230.069	178.151	173.254	143.407	128.354	114.729	90.842
Peru	17.857	15.002	25.173	38.556	29.448	50.813	85.263
Tanzania	35.482	33.331	49.153	95.299	73.174	79.280	80.538
Costa Rica	195.701	163.232	119.442	101.525	73.606	75.112	76.483
Congo	46.305	57.906	57.491	24.522	30.109	71.003	61.062
Congo D.R.	64.138	66.325	81.030	85.292	68.367	47.890	59.062
Nicaragua	28.204	34.005	40.995	35.735	42.301	56.772	50.478
Togo	30.752	20.413	28.299	36.137	40.758	44.502	50.351
El Salvador	22.497	29.227	24.138	39.230	25.215	41.820	33.686
Dominican Rep.	26.848	21.372	21.622	16.682	16.805	19.010	13.516
Kenya	11.571	10.197	8.681	9.938	10.628	10.699	10.847
Mexico	12.818	10.616	13.966	11.888	13.028	17.234	10.155
Burundi	2.386	3.639	4.689	43.081	40.856	6.490	8.835
Haiti	6.694	4.581	5.489	3.845	3.760	4.651	4.341
Others	124.451	108.816	72.357	74.191	99.112	117.764	146.425
Total	**6.039.667**	**6.382.094**	**6.457.506**	**6.665.051**	**6.935.480**	**7.402.623**	**7.477.166**

The data for the year 2008 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 present a slight reduction ; nevertheless this country has consolidated its position of second supplier of the Italian market;
- imports from Uganda, Indonesia, Peru and Congo Democratic Republic have shown a sizeable growth;
- imports from India and Ivory Coast have decreased considerably;

- customs clearance of coffee from Mexico, Dominican Republic, Cameroon and Ivory Coast continued the downward trend of the last years;
- in terms of percentage, the origins that in 2008 have shown the greatest improvement within the Italian market are Uganda and Indonesia.

Italy: Imports of green coffee
- in % -

Country of origin	2002	2003	2004	2005	2006	2007	2008
Brazil	34,14	38,06	36,09	36,13	36,84	35.42	35,32
Vietnam	14,98	13,02	13,98	14,74	16,04	18.42	17,69
India	10,51	10,96	13,09	11,24	12,89	12,75	10,33
Colombia	3,91	3,86	3,93	5,29	5,76	5,60	5,42
Indonesia	4,20	5,91	5,76	7,26	6,73	4.40	5,35
Uganda	4,94	5,32	3,87	3,68	2,10	3.85	6,40
Cameroon	6,57	4,34	5,25	4,50	3,64	3,40	2,72
Guatemala	2,49	3,09	3,24	2,31	2,51	2,49	2,82
Ethiopia	1,51	1,64	1,67	2,12	1,52	1,69	1,83
Ivory Coast	3,81	2,79	2,69	2,15	1,85	1,55	1,21
Costa Rica	3,24	2,56	1,85	1,52	1,07	1,01	1,02
Others	9,70	8,45	8,58	9,06	9,04	9,42	9,89
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 Milds' and 'Brazilian Naturals' largely maintained their position. 'Robusta' imports grew by 2,2% and 'Other Milds' are down by nearly the same figure.

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

Type	2002	2003	2004	2005	2006	2007	2008
Colombian Milds	4,75	4,59	4,85	6,90	6,99	6,87	6,72
Other Milds	21,46	20,93	22,58	19,66	21,07	21,20	18,95
Brazilian Naturals	36,14	40,13	37,96	38,47	38,51	37.43	37,62
Robustas	37,65	34,35	34,61	34,97	33,43	34,50	36,71
Total	**100,00**	**100,00**	**100,00**	**100,00**	**100,00**	**100,00**	**100,00**

2. FOREIGN TRADE IN ALL FORMS

The year under analysis is characterised by an unusually poor growth of green coffee imports and by the further sizeable expansion of the foreign trade of processed coffee.
As can be seen from the following table - with the exception of exports of green coffee soluble coffee and preparations with coffee - the data both for imports and export of coffee in all forms show a positive trend.
The trade of coffee with countries in the European Union is particularly active.

Italy: Foreign trade in coffee
- in tons -

	Imports				Exports			
	2005	2006	2007	2008	2005	2006	2007	2008
Green coffee	399.903	416.129	444.157	448.630	4.851	5.472	5.950	5.748
Green decaffeinated coffee	8.278	7367	7.740	7.970	807	875	764	827
Roasted coffee	14.838	14.383	14.366	16.712	72.002	87.711	98.446	101.618
Roasted decaf. coffee	338	505	440	700	2.803	2.816	3.177	3.279
Coffee extracts	3.781	4.174	4.513	4.841	437	445	647	320
Preparations with coffee	1.077	1.348	1.616	1.864	2.976	4.634	7.401	6.681

Export of roasted coffee, which in recent years has represented the major positive factor of the activity in our sector - since the increase in internal consumption is rather contained – has further increased, reaching nearly 2.1 million bags green equivalent.
Thanks to this growth, Italian coffee roasting firms have strengthened their position in the group of major coffee exporters, consolidating the second place held by this country for several years.

3. COFFEE CONSUMPTION

In 2008 the sales volume of the total home coffee market in Italy was stable (-0,2%) compared to the previous year. When the market segmentation is analysed in detail, it has to be pointed out that the segments have different trends: the Moka segment (coffee with caffeine for coffee pot machines – about 70% of total household consumption in volume) has decreased by 1,5% and the Espresso segment (coffee blends for espresso machines – about 12% of total household consumption in volume) is stable (-0,2%), whereas the Beans segment (7% of total household consumption in volume) has grown by 4% and the Decaffeinated segment (7% of total household consumption in volume) by 0,7%. Finally, the Pods segment, which reached a share of 1,5% of the total market, rose by more than 50%.

Total packaged coffee (total market without the instant segment): sales location in percentage by type of client and point of sale (year 2008):

Type of Client	%	**Type of Sales Outlet**	%
Large Distributors	50,3	Supermarkets & Hypermarkets	68
Volunteer Union and Purchasing Groups	49,7	Self Services &Groceries	23
		Discount	9

In the ‘out of home’ consumption Food Service is decreasing due to:
- the economic crisis which encouraged a switch between the Food Service sector and Automatic Distribution business;
- food solution migration into new non-traditional, unconventional points of sale where at the moment coffee is not offered.

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

In 2008 the average price of the total regular coffee was EUR 7,95/kg and it increased by 5,4% compared to 2007. The average price of the Moka segment was EUR 7,30/kg and it rose by 4,8%. The price of the decaffeinated segment slightly increased compared to the previous year: EUR 9,13/kg (+1,5%); the average price of the Espresso segment decreased by 0,9% to EUR 9,49/kg.

5. COMMENTS ON PARTICULAR SUBJECTS

During 2008 the *Consorzio Promozione Caffè* continued its public relations campaign and communication campaign, aimed at consolidating the positive effects generated throughout the campaign in preceding years. This activity is focused primarily towards consumer reassurance through public relations and communication initiatives targeted at opinion leaders, the media and the world of consumerism.
For the fifth year a large part of the budget was destined to the ‘Healthcare Professions Coffee Education Programme’, co-financed by the Institute for Scientific Information on Coffee (ISIC). All these activities will be carried out in 2009.

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 2008 imports of green coffee into the Netherlands reached a volume of 2.661.140 bags (159.668 tons), an increase compared to the previous year when 2.598.590 bags (155.519 tons) were imported. The table below shows the most important countries of origin.

The Netherlands: Imports of green coffee - in bags -		
Countries of origin	**2007**	**2008**
Brazil	718.985	812.866
Vietnam	471.011	485.205
Peru	242.267	259.862
Honduras	284.517	209.109
Uganda	180.574	198.683
Colombia	227.285	190.114
Kenya	55.280	54.193
India	48.718	37.855
Guatemala	30.796	36.111
Central African Republic	33.187	35.017
Others	305.970	342.125
Total	**2.598.590**	**2.661.140**

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	**2007**	**2008**
Brazil	27,7	30,5
Vietnam	18,1	18,2
Peru	6,0	9,8
Honduras	7,9	7,9
Uganda	6,9	7,5
Colombia	8,7	7,1
Kenya	2,1	2,0
India	1,8	1,4
Guatemala	1,3	1,4
Central African Republic	1,2	1,3
Others	18,3	12,9

Source: HPA

The figures in the tables above show that:

1. Brazil remains the main supplier of the Netherlands. Imports are up compared to 2007 with a total share of imports reaching 30,5% or 812.866 bags.
2. In 2008 imports from Peru are up by 3,8%, totalling 259.862 bags.
3. The imports from Uganda increase with 18.109 bags; whilst imports from Colombia are down with a total of 37.177 bags.
4. Guatemala and the Central African Republic joined the top ten with 36.111 and 35.017 bags imported in 2008 respectively.

The Netherlands: breakdown of net green coffee imports by type of coffee - in % -					
Type of coffee	**2006**		**2007**		**2008**
Arabicas	66		67		66
Colombian Milds	12		14		12
Other Milds	29		22		22
Brazilian Naturals	25		31		32
Robustas	28		28		29
Not defined	6		5		5

Source: HPA

2. FOREIGN TRADE IN COFFEE IN ALL FORMS

Forms of coffee	Imports		Exports	
	2007	**2008**	**2007**	**2008**
Green coffee (including decaffeinated)	155.915.423	159.668.253	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 2008 reached a volume of 117.113 tons, compared to 113.580 tons in 2007. The average annual per capita consumption in 2008 was 7,1 kg or 148 litres, compared to 6,9 kg or 148 litres in 2008.

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
2008	117.113	150

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
2008	7,1	148	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 2008 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 2008 include the creation of a flyer with general information on coffee and health, the launch of a newly designed website and the organisation of a mini symposium on coffee and metabolic syndrome. Also the Information Bureau participated with a stand at a Health Fair and a congress for nurse practitioners. Objective and scientifically based information on coffee and health can be found on the website www.koffieengezondheid.nl. Primary target audiences of this campaign are general practitioners, dieticians, nutritionists, academic specialists and medical media.

NORWAY

1. IMPORTS OF GREEN COFFEE

In 2008 Norway imported 572.262 bags (34.336 tons) of not-decaffeinated green coffee. This is a 10,7% decrease compared to 2007.

The top-three suppliers remained unchanged, even though the top-two dropped in volume: Brazil – 11% and Colombia -13%. Volume from Guatemala and Kenya changed modestly. Of the major origins, Mexico recorded the biggest increase (close to 50%) and thus became the fifth supplier.

Norway: Imports of not-decaffeinated green coffee - in bags -			
	2006	**2007**	**2008**
Brazil	278.026	294.826	262.109
Colombia	139.494	172.577	139.328
Guatemala	64.700	69.536	69.236
Kenya	27.218	26.674	25.602
Mexico	11.402	13.196	19.758
India	15.190	18.198	12.210
Ethiopia	13.936	8.686	9.976
Peru	10.775	8.300	9.202
Nicaragua	6.887	4.113	6.300
Tanzania	3.916	4.453	4.854
Vietnam	5.759	5.964	4.404
Indonesia	2.774	4.043	4.367
Honduras	13.907	6.678	1.958
Bolivia	597	1.037	1.304
Costa Rica	404	374	410
Rwanda	300	3	345
Papua New Guinea	7	1	300
El Salvador	169	173	175
Panama	0	42	87
Ecuador	0	0	21
Others	825	1.923	318
Total	**596.287**	**640.798**	**572.262**

Source: Statistics Norway

The developments noted above are also reflected in the percentage distribution.
Of the top-three, Brazil's market share remained about unchanged, that of Colombia dropped and that of Guatemala increased.

Norway: Percentage distribution of not-decaffeinated green coffee imports by main sources - in % -			
Countries of origin	**2006**	**2007**	**2008**
Brazil	46,6	46,0	45,8
Colombia	23,4	26,9	24,3
Guatemala	10,9	10,9	12,1
Kenya	4,6	4,2	4,5
Mexico	1,9	2,1	3,5
India	2,5	2,8	2,1
Ethiopia	2,3	1,4	1,7
Peru	1,8	1,3	1,6
Nicaragua	1,2	0,6	1,1
Tanzania	0,7	0,7	0,8
Others	4,1	3,2	2,4
Total	**100,0**	**100,0**	**100,0**

2. FOREIGN TRADE IN ALL FORMS

In 2008 imports of not-decaffeinated green coffee decreased by 10,7 % from 38.448 tons in 2007 to 34.336 tons in 2008. Imports of decaffeinated green coffee increased from 237 tons to 461 tons.
The import of roasted, not decaffeinated coffee was quite stable. Together with decaffeinated roasted coffee, imports of all roasted coffee increased by 4%.

The most important suppliers of not-decaffeinated roasted coffee were Sweden (37,9%), the Netherlands (14,1%), Italy (11,2%), Brazil (10,4%) and Germany (6,6%).

Imports of instant coffee were marginally higher. Switzerland remained by far the most important supplier with 30,1%, followed by the Netherlands (27,6%), and Germany (11,2%).

Norway: Foreign trade in coffee - in tons-				
Forms of coffee	**Imports**		**Exports**	
	2007	**2008**	**2007**	**2008**
green coffee	38.448	34.336	150	73
green coffee, decaf	237	461	0	1
green coffee, total	*38.685*	*34.797*	*150*	*74*
roasted coffee	3.243	3.390	228	226
roasted coffee, decaf	39	22	0	0
roasted coffee, total	*3.282*	*3.412*	*228*	*226*
instant coffee	1.614	1.681	32	35
coffee extracts, essences	391	368	5	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 2008 was 45.668.898 kg green bean equivalent. This represents an increase of 1,4% compared to the 45.060.052 kg recorded in 2007. Expressed in green coffee equivalent, espresso coffee had an estimated share of around 2% and instant/liquid 11,4%.
The per capita consumption in Norway was 9,6 kg in 2008, unchanged compared to 2007 because of a significant increase in population.

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	2007	9,6 kg
1968	9,4 kg	1978	9,6 kg	1988	10,0 kg	1998	9,5 kg	2008	9,6 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.

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. ASSOCIATION MEMBERSHIP

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

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

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

The association is composed of:

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

5. VAT AND DUTIES

Data supplied by the Norwegian Board of Customs and Excise (as at 30th of April 2009):
Roasted and green coffee imported to Norway are charged with a Food production fee (Foodstuffs Duty – FSD) as follows: 1,14 % + 14% value added tax (VAT)
Instant and Liquid coffee is charged with a Food production fee (Foodstuffs Duty – FSD) as follows: 0,71% + 14% value added tax (VAT)

PORTUGAL

1. IMPORTS OF GREEN COFFEE

Portuguese imports of green not-decaffeinated coffee from all sources in 2008 were 41.782 tons (696.358 bags), compared to 42.983 tons (716.383 bags) in 2007. This is a decrease of 2,8%. The ten major suppliers were (ranked in order of 2008 imports):

Portugal: Imports of green not-decaffeinated coffee - in bags -			
Countries of origin	**2006**	**2007**	**2008**
Vietnam	85.418	107.773	101.832
Brazil	113.810	121.695	95.017
Uganda	57.525	67.328	80.825
Cameroon	65.370	62.622	61.365
India	55.125	58.645	52.920
Honduras	52.578	45.985	48.362
Cote d'Ivoire	63.732	63.498	38.112
Colombia	25.973	43.728	36.060
Costa Rica	30.903	21.107	34.055
Guatemala	24.535	22.528	25.213
Others	113.522	101.473	122.598
Total	**688.492**	**716.383**	**696.358**

Source: Eurostat

In 2008 Vietnam became the biggest supplier. Brazil dropped to second place with 2008 imports that were 26.678 bags or 21,9% lower than in 2007. Imports to Uganda continued to increase in the three most recent years, resulting in a 20% larger volume in 2008 and the position of third supplier. Cameroon and India completed the top-five. Cote d'Ivoire, fourth supplier in 2007, is now ranked ninth.

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	**2006**	**2007**	**2008**
Vietnam	12,4	15,0	14,6
Brazil	16,5	17,0	13,6
Uganda	8,4	9,4	11,6
Cameroon	9,5	8,7	8,8
India	8,0	8,2	7,6
Honduras	7,6	6,4	6,9
Cote d'Ivoire	9,3	8,9	5,5
Colombia	3,8	6,1	5,2
Costa Rica	4,5	2,9	4,9
Guatemala	3,6	3,1	3,6
Others	16,5	14,2	17,6
Total	**100,0**	**100,0**	**100,0**

Source: Eurostat

2. FOREIGN TRADE

Portugal: international trade in green, roasted and soluble coffee - in tons -										
	Green		Green decaf		Roasted		Roasted decaf		Extracts	
Imports	**2007**	**2008**	**2007**	**2008**	**2007**	**2008**	**2007**	**2008**	**2007**	**2008**
From non-EU origins	41.705	39.644	117	57	383	710	61	107	0	0
Intra-EU trade	1.278	2.138	1.824	1.474	5.182	4.354	244	177	0	1.222
Exports	**2007**	**2008**	**2007**	**2008**	**2007**	**2008**	**2007**	**2008**	**2007**	**2008**
To non-EU destinations	94	59	0	0	626	736	17	15	0	13
Intra-EU trade	20	20	1	0	5.912	5.735	543	555	0	106

Source: Eurostat

The pattern of imports and exports of the various forms of coffee has been relatively stable in the last two years. In 2008 imports of most forms of processed coffee dropped, except imports of roasted and decaffeinated roasted coffee from non-EU origins. Processed coffee exports remained fairly close to the 2007 volumes. The 2007 soluble coffee data need to be considered with some caution because of the change in customs code, which may cause incompatibility with 2008 data. On the import side, for decaffeinated green coffee the main source by far was Germany (60,9% in 2008), followed by Spain (35,3%) and Colombia (2,5%). In 2008 the main sources of roasted coffee (incl. decaffeinated) were Italy (35,1%), Spain (29,8%) and Germany (18,9%). The main sources for imported coffee extracts in 2008 were Spain (52,2%), the United Kingdom (29,3%) and France (14,9%). Spain was by far the most important export destination for roasted coffee (incl. decaffeinated) with 71,4% of the total volume.

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	657
2004	685
2005	656
2006	671
2007	723
2008	736

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	3,92
2005	3,73
2006	3,80
2007	4,07
2008	4,14

Source: ICO; some data revised

SPAIN

1. IMPORTS OF GREEN COFFEE

In 2008 Spain imported 4.284.350 bags of green coffee (257.061 tons) which represents an approximate 2% drop compared to the previous year. In year 2007 a total volume of 262.227 tons were 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
2008	4.284.350

Source: Spanish Coffee Federation

The main suppliers were:

Spain: Imports of green coffee by origin - in bags -		
Countries of origin	**2007**	**2008**
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 approximately 40% of total imports, therefore Spain's' coffee imports mainly consist 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.
As for Arabica green coffee imports, Brazil has experienced a 15,43% rise, representing 23,18% of total imports.
We also may stress that for two years in a row, Peru has made it to the top 10, after increasing their exports by 90,76% in 2007
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	**2004**	**2005**	**2006**	**2007**	**2008**
Vietnam	34,29	35,5	39,21	40,23	36,16
Brazil	17,59	18,9	18,36	19,68	23,18
Uganda	9,34	8,1	5,67	5,86	7,21
Colombia	6,35	5,9	7,16	7,30	7,55
Cote d'Ivoire	6,12	7,7	5,17	4,93	2,97
India	6,15	4,3	4,01	3,92	3,84
Germany	3,44	5,4	6,28	4,80	4,36
Honduras	2,35	1,9	1,92	1,83	2,50
Indonesia	2,21	2,8	2,28	0,70	0,86
Nicaragua	3,02	2,1	2,20	2,36	2,28
Others	9,14	7,4	7,73	8,41	9,09

Source: Spanish Coffee Federation

Spain: Percentage distribution of green coffee imports by types of coffee - in % -					
Types of coffee	**2004**	**2005**	**2006**	**2007**	**2008**
Arabicas	**39,22**	**38,88**	**39,18**	**40,39**	**39,59**
1. Colombian Milds	6,72	6,45	8,99	7,78	7,99
2. Other Milds	12,21	8,76	6,73	9,17	8,72
3. Brazilian Naturals	20,29	23,67	23,46	23,44	22,88
Robustas	**60,78**	**61,12**	**60,82**	**59,61**	**60,41**
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**	
	2007	2008	2007	2008
Green coffee	262.227	257.061	14.668	17.251
Roasted	15.211	16.548	12.548	10.048
Soluble	6.318	8.159	24.178	22.621

During year 2008 green coffee imports have fallen by 1,9%, in contrast to previous years when imports have been growing continuously. In year 2007 Spanish imports increased by 8,63%. Furthermore, Imports of soluble coffee have experienced a 29% increase vs. the 25,76% increase experienced during year 2007. In addition, roasted coffee imports have remained virtually constant during the past years, having grown during year 2008 by 8,7%.

As for green coffee exports, these have experienced a substantial increase (17,6%) after having known several years of decrease (6,56% fall in year 2007). On the other hand, roasted coffee exports experienced a 19% fall, following a 36,60% growth from the previous year. As for soluble coffee, exports these have slightly dropped by 6,4%.

3. COFFEE CONSUMPTION

Spain: Coffee consumption 2007/2008 - in tons -		
	2007	**2008**
Home consumption		
- Roasted	63.600	64.300

- Soluble	10.200	10.300
Food service		
- Roasted	61.500	65.284
- Soluble	1.920	2.337
Green coffee equivalent		
- Roasted	146.367	151.613
- Soluble	30.300	31.593
Total Green coffee equivalent	**176.667**	**183.206**

Even though green coffee imports have risen during the past years (although they experienced a 2% drop in 2008), coffee consumption has remained stable at around 4,00 kg. per person per year. Higher green coffee imports respond to stocks increase by roasters who foresee further rises in green coffee prices.

Within the Spanish coffee market (always in green coffee equivalent), there is a 7% increase in out of home consumption in relation to the previous year, having consumed more soluble coffee (21,72% increase). It is important to stress that it is only since June 2007 that the Ministry is providing official and consistent out of home consumption data, as up until then the line item included coffee and tea. In any case, the current market distribution assigns 55,12% of the market share to home consumption and the remaining 44,88% to the food service industry.

Concerning roasted and soluble coffee market distribution, roasted coffee represents (in green coffee equivalent) 82,76% of the market, whilst soluble coffee accounts for the remaining 17,24%, following a similar trend to previous years.

As for different forms of consuming coffee, when at home, blended coffee (natural & *torrefacto*) accounts for 44,95% of total consumption, whilst natural coffee (no added sugars) account for 34,75% of the market share. When enjoying a cup of coffee out of home Spaniards also prefer their coffee blended with *torrefacto* (45,75%) or otherwise natural (41,50%).

Finally it is interesting to note the steady increase of decaffeinated ground roasted coffee figures, representing approximately 19% of total home roasted coffee consumption, and 11,34% of food service industry consumption.

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

Retail coffee prices have increased by 6.8% during year 2008. Source: Spanish Ministry of Agriculture

5. INFORMATION ON ASSOCIATION MEMBERSHIP

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

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

6. STATUS NATIONAL COFFEE AND HEALTH PROGRAMME

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

Up until now FEC has set up and Advisory Board integrated by four members (GP, Nutritionist, Dietician & Neurologist), has published up to six quarterly newsletters to be distributed by email to a medical data base, has participated in several seminars on coffee and neurology, and has participated in congresses organized by the Spanish Neurology Society's (SEN) and the Spanish Primary Attention Association (SEMERGEN) providing information on coffee and health.

FEC also sponsors a research grant in collaboration with the Spanish Nutrition Foundation (II edition) and has recently published six articles (Coffee & Alzheimer/Parkinson/Hydration/Cancer/Diabetes/Liver function) in 'Medicina Clinica', the most prestigious medical weekly Spanish printed publication. FEC will also be publishing several articles in 'Atención Primaria' edited by the Spanish Family and Community Medicine Society (SEMFYC) with over 10.000 members.

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

7. DUTIES AND VAT LEVELS

Regarding fiscal matters, there are no excise duties imposed on coffee in Spain, and during 2008 the VAT rate, which for coffee is 7%, has not changed.

SWEDEN

1. IMPORTS OF GREEN COFFEE

According to the 2008 Statistics Sweden, the import of non-decaffeinated coffee reached 109.563 tons (1.826.050 bags). This is more or less the same level as in 2007. In that year the imports were 109.610 tons (1.826.833 bags).

Sweden: Imports of not-decaffeinated green coffee from origin countries - in tons actual weight -					
Countries of origin	**2006**	**Change**	**2007**	**Change**	**2008**
Brazil	48.923	-6%	46.072	-2%	45.133
Colombia	18.841	1%	18.949	-5%	17.943
Peru	7.516	18%	8.846	36%	12.024
Kenya	6.318	23%	7.749	-11%	6.862
Ethiopia	5.903	-11%	5.227	7%	5.613
Honduras	4.698	-29%	3.342	66%	5.543
Guatemala	1.948	72%	3.351	-22%	2.600
Nicaragua	1.157	-7%	1.081	102%	2.187
Vietnam	3.120	-37%	1.964	4%	2.045
Uganda	802	10%	881	31%	1.157
Indonesia	1.782	-35%	1.161	-13%	1.009
Mexico	803	-7%	745	21%	905
Burundi	1.254	30%	1.634	-45%	900
El Salvador	1.263	-23%	969	-47%	517
Tanzania	120	118%	261	51%	395
India	186	8%	200	97%	394
Dominican Republic	58	134%	136	174%	373
Others*	5.336	32%	7.042	-44%	3.963
Total	**110.028**	**0%**	**109.610**	**0%**	**109.563**

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

As usual Brazil and Colombia are the main suppliers, both however decreasing their shares the last years. Together they now account for 57% of the Swedish imports. A few years ago their share was about two thirds of Swedish imports. Generally you can see a tendency towards fewer origins and increased volumes from the remaining supply countries.

Among the other of the top five origins, Peru, Kenya and Ethiopia, only Kenya decreased its volumes and share of market. Most spectacular is how imports from Peru have developed the last years to 11% of total imports. Guatemala increased its volumes 72% in 2007 and gained the number six position from decreasing Honduras. In 2008 however Honduras hit back, increased 62% and recaptured the number six position. More than doubled their exports to Sweden did Nicaragua, now number eight, and Dominican Republic.

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

Sweden: Imports of not decaffeinated green coffee from origin countries - percentage distribution by main sources -			
Countries of origin	**2006**	**2007**	**2008**
Brazil	44,5%	42,0%	41,2%
Colombia	17,1%	17,3%	16,4%
Peru	6,8%	8,1%	11,0%

Kenya	5,7%	7,1%	6,3%
Ethiopia	5,4%	4,8%	5,1%
Honduras	4,3%	3,0%	5,1%
Guatemala	1,8%	3,1%	2,4%
Nicaragua	1,1%	1,0%	2,0%
Vietnam	2,8%	1,8%	1,9%
Uganda	0,7%	0,8%	1,1%
Indonesia	1,6%	1,1%	0,9%
Mexico	0,7%	0,7%	0,8%
Burundi	1,1%	1,5%	0,8%
El Salvador	1,1%	0,9%	0,5%
Tanzania	0,1%	0,2%	0,4%
India	0,2%	0,2%	0,4%
Dominican Republic	0,1%	0,1%	0,3%
Others*	4,8%	6,4%	3,6%
Total	**100,0**	**100,0**	**100,0**

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

Source: Statistics Sweden

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

Type of coffee	2006		2007		2008	
Arabica	94%		95%		93,2%	
Colombian Milds		23%		26%		23,0%
Other Milds		20%		21%		24,0%
Brazilian Naturals		51%		49%		46,3%
Robusta	5%		3%		3,5%	
Others	1%		2%		3,3%	
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. In 2008 this development continues with Brazilian Naturals losing volume. Other Milds increased to the cost of Colombian Milds. The share of Robusta reflects exports, mainly to Denmark and the Baltic countries (and to a small extent the espresso trend in Sweden).

2. FOREIGN TRADE IN ALL FORMS OF COFFEE

Sweden: Foreign trade in coffee
- in tons actual weight -

	Imports			Exports		
	2006	**2007**	**2008**	**2006**	**2007**	**2008**
Green coffee	110.028	109.610	109.563	99	63	553
Green coffee (decaf)	716	1.074	659	4	288	2
Roasted coffee	7.633	8.309	8.169	23.228	23.720	24.088
Roasted coffee (decaf)	423	87	19	1.153	1.122	835
Instant coffee	2.355	2.847	~3.050	436	496	~500

Source: Statistics Sweden and the Swedish National Coffee Association

The higher level of exports of roasted coffee since 2005 is mainly an effect of structural changes in the Scandinavian coffee industry. Two roasting plants were closed in Denmark and these volumes were moved to Swedish plants. Thus Denmark since 2005 is the biggest export market with about 46% of the volume.
In 2008 the export volume was more or less unchanged. The largest destination after Denmark was the USA (23% of total exports), followed by the Baltic countries (10%), Norway (7%), Germany and Great Britain (4% and 3% respectively).

Imports of roasted coffee seem to stabilise just above 8.000 tons and came in 2008 mainly from the Netherlands, Denmark and Germany (49%, 16% and 14% respectively). Imports from Italy were 9% of the total volume, reflecting the espresso trend.

Net imports of instant coffee (only pure instant is registered), increased and are now about 2.500 tons. The figures from 2008 are best estimates based on internal statistics since official figures from 2008 are not available.

3. COFFEE CONSUMPTION

The total size of the Swedish market in 2008 was 87.047 tons *roasted coffee equivalent*, giving a total per capita consumption of all forms of coffee of 9,4 kilos. (Roasted coffee is calculated as 85% of green coffee weight. A multiple of 4 is used in Sweden to calculate instant coffee as roasted.). Of coffee consumed, calculated this way, about 12% was instant coffee.

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 8% and increasing well (+21%). The certification programs for responsibility or sustainability (Fair Trade, Utz Certified and Rain Forest Alliance) have gained market and their total market share was well above 10%. Double certifying is common and at least 50% of these certified coffees are certified as ecological as well.

Espresso is doing well too, stabilizing its 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 imports are very stable and bigger changes probably reflect changes in stocks more than changes in consumption, which now seems to be back on the relatively high level of the very early nineties. As a matter of fact, net imports last years have increased just enough to deliver the per capita consumption to the population growth. Total consumption was slightly decreasing during the nineties but has recovered since 2001. Since changes in stocks cannot be captured, moving average figures are presented as well, which also show that the per capita consumption now is quite stable. The figures *cups/day* are calculated as 7,5 grams coffee/cup of 0,125 litre.

Sweden: Per capita consumption of coffee				
		2006	2007	2008
Roast&ground coffee	kg/capita	8,60	8,39	8,30
Instant	gr/capita	208	256	276
All coffee as roasted	kg/capita	9,43	9,41	9,40
	cups/day	3,4	3,4	3,4
- as an average of three latest years	kg/capita	9,19	9,29	9,42
	cups/day	3,4	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 54,10 per kilo in 2008 and SEK 52,20 in 2007. However the official statistics underestimate discounts and campaign prices which are very frequent in Sweden and a weighted average price per kilo is at least 10% 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 the following years.

Sweden: Retail prices roasted ground coffee			
Year	SEK/kg	Year	SEK/kg
1999	63,80	2004	49,90
2000	61,00	2005	49,18
2001	57,60	2006	51,12
2002	54,60	2007	52,20
2003	52,30	2008	54,10

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

According to F.O. Licht's International Coffee Report data green coffee imports into Switzerland reached a total of 1.727.400 bags in 2008. This is an increase of almost 8,8% compared to the 1.588.400 bags imported in 2007.

The main supplying countries of origin (2008 ranking) were:

Switzerland: Imports of green coffee - in bags -		
	2007	**2008**
Brazil	511.400	478.100
Colombia	220.000	242.300
Vietnam	173.500	169.500
India	104.800	116.300
Honduras	79.600	93.500
Costa Rica	70.000	91.300
Guatemala	75.100	84.400
Peru	35.200	75.000
Ethiopia	44.900	61.600
Nicaragua	8.100	59.800
Others	265.800	255.600
Total	**1.588.400**	**1.727.400**

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

Of the top-five suppliers, volumes from Brazil and Vietnam dropped while those of the other three (Colombia, India and Honduras) increased. Remarkable are the doubling of imports from Peru and the over six-fold increase of imports from Nicaragua.

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

Switzerland: Imports of green coffee - in % -		
	2007	**2008**
Brazil	32,2	27,7
Colombia	13,9	14,0
Vietnam	10,9	9,8
India	6,6	6,7
Honduras	5,0	5,4
Costa Rica	4,4	5,3
Guatemala	4,7	4,9
Peru	2,2	4,3
Ethiopia	2,8	3,6
Nicaragua	0,5	3,5
Others	16,7	14,8
Total	**100,0**	**100,0**

2. FOREIGN TRADE IN COFFEE IN ALL FORMS

Switzerland: Coffee trade - in 1000 bags green bean equivalent -						
	Imports			Exports		
	2007	2008	% change	2007	2008	% change
Green coffee	1.588,4	1.727,4	1,4	20,8	18,1	0,0
Roasted coffee	166,7	181,3	0,1	342,9	452,6	1,1
Soluble coffee	95,2	95,2	0,0	511,4	519,2	0,1

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

On the whole, changes in imported and exported volumes were modest.

3. COFFEE CONSUMPTION

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

Switzerland: Total consumption of green coffee - in 1000 bags -	
Years	
2000	827
2001	816
2002	821
2003	852
2004	722
2005	1.099
2006	932
2007	989
2008	1.149

Switzerland: Per capita consumption - in kg green coffee equivalent -	
Years	
2004	5,86
2005	8,87
2006	7,48
2007	7,90
2008	9,15

Source: ICO

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

Switzerland: retail prices roasted coffee - In CHF per 250 gram -	
2000	3,81
2001	3,80
2002	3,83
2003	3,80
2004	3,89
2005	4,02

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

5. VAT AND OTHER DUTIES

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

	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 2008 of non-decaffeinated green coffee showed a marginal increase.

United Kingdom: Imports of green coffee non-decaffeinated - in bags of 60 kilos -			
Countries of origin	**2006**	**2007**	**2008**
Vietnam	553.936	589.825	465.314
Colombia	378.413	465.603	446.211
Brazil	244.554	243.297	313.922
Indonesia	228.862	148.731	240.667
Peru	78.009	102.829	63.301
Kenya	34.316	38.715	53.357
Ethiopia	27.446	36.743	48.504
Honduras	40.411	33.784	38.125
Costa Rica	22.660	19.928	26.508
Guatemala	22.324	18.909	21.223
Nicaragua	29.327	13.189	21.199
El Salvador	15.696	13.630	18.547
India	14.164	13.437	17.930
Tanzania	7.754	7.809	11.363
Uganda	16.831	19.918	10.769
Mexico	8.179	8.220	7.589
Papua New Guinea	3.019	3.356	4.875
Zimbabwe	2.489	3.228	2.873
Others/Unknown	72.618	48.493	34.774
Total	**1.801.008**	**1.843.811**	**1.847.051**

Source: British Coffee Association

The main suppliers remain unchanged. Vietnam, although continuing as the leading supplier of non-decaffeinated green coffee of the market, declined by 5,5%. Indonesia showed a substantial increase in imports, rising by 5%. Colombia remains in second place with a marginal decrease in volume. Imports from Brazil increased from 13,19% to 17% where as imports from Peru decreased from 5,58% to 3,43%. 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**	**2008**
Vietnam	30,76	31,99	25,19
Colombia	21,01	25,25	24,16
Brazil	13,58	13,19	17,00
Indonesia	12,71	8,07	13,03
Peru	4,33	5,58	3,43
Kenya	1,91	2,10	2,89
Ethiopia	1,52	1,99	2,63
Honduras	2,24	1,83	2,06
Costa Rica	1,26	1,08	1,44
Guatemala	1,24	1,03	1,15
Nicaragua	1,63	0,72	1,15
El Salvador	0,87	0,74	1,00
India	0,79	0,72	0,97

Tanzania	0,43	0,42	0,62
Uganda	0,90	1,08	0,58
Mexico	0,45	0,46	0,41
Papua New Guinea	0,17	0,19	0,26
Zimbabwe	0.14	0,17	0,16
Others/Unknown	4,06	2,62	1,88
Total	100,00	100,00	100.00

Source: British Coffee Association

United Kingdom: Imports by types of coffee - in % -				
Types of coffee	**2005**	**2006**	**2007**	**2008**
Arabicas	52	52	56	60
Colombian Milds	23	23	28	28
Other Milds	14	14	13	13
Brazilian Naturals	15	15	15	19
Robustas	47	47	42	39
Others/Unknown	1	1	2	1

Source: British Coffee Association

The share of arabicas increased from 56% to 60% due to the larger share of Brazilian naturals, whereas robustas fell 3%.

2. FOREIGN TRADE IN ALL FORMS

United Kingdom: Foreign Trade in Coffee - in tons -						
	Imports			**Exports**		
	2006	**2007**	**2008**	**2006**	**2007**	**2008**
Green	108.060	110.629	110.803	3.266	2.495	3.199
Green Decaf	278	212	303	102	71	157
Roasted	1.138	1.061	1.066	2.898	3.675	5.482
Roasted Decaf	142	228	194	203	339	234
Soluble/Extracts	7.676	10.388	8.123	18.062	18.944	15.572

Source: British Coffee Association

Imports of soluble/extracts decreased both in import and export. Brazil continues as the major supplier of soluble, with increase of the market from 2.680 tons to 4.736 tons. Ecuador marginally decreased its share of soluble from 1.634 tons to 1.538 tons. Colombia's share made a small gain during the year.

Exports of soluble/extracts fell by 17%. The major markets continued as the EU followed by Russia.

Roasted imports remained similar whilst exports increase. Imports and exports of roasted decaffeinated fell considerably, while imports of green decaffeinated increased during the year.

3. COFFEE CONSUMPTION

UK consumption statistics show a stable market of approximately 3kg per capita. Expectation remains that a small but steady increase will continue.

Overall instant coffee represents 85% of the market with roast and ground occupying the balance.

Decaffeinated consumption has shown a marginal increase during the year. Research shows consumption is predominantly between 25 and 45 years with younger and older consumers tending to consume less.

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

During 2008 little change in the market took place, towards the end of the year concern on Colombian prices will inevitably lead to increases during 2009.

5. INFORMATION ON ASSOCIATION MEMBERSHIP

The BCA now represents all aspects of the coffee industry in the UK. A small increase in membership has taken place and is expected to continue.

6. HEALTH

The successful programme aimed at both Health Care Professionals and Consumers continues to develop with the aim to overcome the negative perception of coffee and health and with the objective of preventing any further decline in coffee consumption.

The UK media continues to write prolifically on health and coffee/caffeine, frequently mentioned across all types of UK publications and media. The targeted PR campaign continues to show an increase in positive information written about coffee and a reduction in negative coffee/caffeine and health.

7. EXCISE DUTIES AND VAT LEVEL

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

SELECTED OTHER EU MEMBERS

1. KEY IMPORT DATA 2008

Bulgaria					
Green Coffee (Incl Decaf)		**Roasted Coffee (Incl Decaf)**		**Extracts, essences**	
Vietnam	6.773	Italy	2.272	Brazil	473
Indonesia	5.430	Romania	561	Germany	202
Germany	1.678	Germany	334	France	114
Brazil	1.475	Greece	182	Romania	69
Greece	1.332	Hungary	147	Hungary	67
Others	5.516	Others	356	Others	153
Total	22.205	Total	3.851	Total	1.078
Czech Republic					
Green Coffee (Incl Decaf)		**Roasted Coffee (Incl Decaf)**		**Extracts, essences**	
Brazil	4.460	Slovakia	5.196	Germany	2.971
Vietnam	2.598	Austria	728	Poland	1.178
Germany	1.552	Poland	581	Slovakia	1.044
Belgium	1.515	Germany	251	Hungary	808
Indonesia	1.187	Hungary	207	France	444
Others	4.850	Others	12.611	Others	1.660
Total	16.162	Total	19.572	Total	8.105
Hungary					
Green Coffee (Incl Decaf)		**Roasted Coffee (Incl Decaf)**		**Extracts, essences**	
Germany	12.202	Germany	4.968	Germany	1.526
Austria	129	Austria	4.724	Spain	810
Vietnam	105	Italy	570	India	390
Ecuador	24	United Kingdom	394	United Kingdom	318
Belgium	2	Netherlands	191	Brazil	313
Others	470	Others	694	Others	4.614
Total	12.932	Total	11.541	Total	7.971
Poland					
Green Coffee (Incl Decaf)		**Roasted Coffee (Incl Decaf)**		**Extracts, essences**	
Germany	24.251	Germany	13.394	Germany	5.461
Belgium	11.793	Italy	1.581	Ecuador	3.885
Vietnam	5.943	Czech Republic	1.526	Hungary	2.114
Laos	4.947	Austria	503	United Kingdom	1.987
Netherlands	2.416	Denmark	170	Colombia	1.240
Others	10.500	Others	1.231	Others	4.402
Total	59.850	Total	18.405	Total	19.090
Romania					
Green Coffee (Incl Decaf)		**Roasted Coffee (Incl Decaf)**		**Extracts, essences**	
Vietnam	6.301	Germany	7.698	Spain	741
Indonesia	4.346	Bulgaria	2.454	Brazil	642
Brazil	2.674	Italy	1.741	France	280
Colombia	1.999	Netherlands	890	India	206
Germany	1.998	Austria	477	Poland	60
Others	5.084	Others	1.016	Others	919

Total	22.403	Total	14.276	Total	2.848
Slovenia					
Green Coffee (Incl Decaf)		**Roasted Coffee (Incl Decaf)**		**Extracts, essences**	
Brazil	4.564	Italy	1.113	Austria	207
Vietnam	1.679	Austria	466	Germany	99
Italy	1.104	Bosnia and Herzegovina	375	Italy	34
Colombia	796	Croatia	190	Sweden	19
India	467	Germany	133	Croatia	10
Others	808	Others	136	Others	9
Total	9.418	Total	2.413	Total	377
Slovakia					
Green Coffee (Incl Decaf)		**Roasted Coffee (Incl Decaf)**		**Extracts, essences**	
Germany	2.957	Germany	8.993	Poland	864
Belgium	665	Austria	3.418	United Kingdom	455
Vietnam	352	Czech Republic	2.424	Hungary	405
Brazil	104	Hungary	2.406	Germany	305
India	81	Poland	2.232	Czech Republic	297
Others	439	Others	1.180	Others	231
Total	4.597	Total	20.653	Total	2.558

Source: Eurostat

Note: data are in tons and refer to imports from all origins

2. CONSUMPTION

	Total consumption			Per capita consumption		
	2006	**2007**	**2008**	**2006**	**2007**	**2008**
Bulgaria	420	364	445	3,28	2,86	3,52
Czech Republic	631	679	621	3,70	3,97	3,61
Hungary	598	522	494	3,57	3,12	2,96
Poland	1.953	1.531	1.190	3,07	2,41	1,87
Romania	835	824	807	2,33	2,30	2,27
Slovakia	281	356	341	3,13	3,97	3,79
Slovenia	176	195	194	5,24	5,82	5,77

Source: ICO

Note: total consumption is in 1000 bags, per capita consumption in kg

EU COFFEE IMPORT DUTIES

Import duties for green and processed coffee into the EU from the 20 most important EU suppliers listed alphabetically - in % -					
	Green 0901110000	Green decaffeinated 0901120000	Roasted 0901210000	Roasted decaffeinated 0901220000	Extracts, essences 2101110000
Brazil	0,0	4,8*	2,6*	3,1*	9,0
Cameroon	0,0	0,0**	0,0**	0,0**	0,0**
Colombia	0,0	0,0*	0,0*	0,0*	0,0*
Costa Rica	0,0	0,0*	0,0*	0,0*	0,0*
Cote d'Ivoire	0,0	0,0**	0,0**	0,0**	0,0**
El Salvador	0,0	0,0*	0,0*	0,0*	0,0*
Ethiopia	0,0	0,0*	0,0*	0,0*	0,0*
Guatemala	0,0	0,0*	0,0*	0,0*	0,0*
Honduras	0,0	0,0*	0,0*	0,0*	0,0*
India	0,0	4,8*	2,6*	3,1*	3,1*
Indonesia	0,0	4,8*	2,6*	3,1*	3,1*
Kenya	0,0	0,0**	0,0**	0,0**	0,0**
Mexico	0,0	0,0***	0,0***	0,0***	0,0***
Nicaragua	0,0	0,0*	0,0*	0,0*	0,0*
Papua New Guinea	0,0	0,0**	0,0**	0,0**	0,0**
Peru	0,0	0,0*	0,0*	0,0*	0,0*
Rwanda	0,0	0,0**	0,0**	0,0**	0,0**
Tanzania	0,0	0,0**	0,0**	0,0**	0,0**
Uganda	0,0	0,0**	0,0**	0,0**	0,0**
Vietnam	0,0	4,8*	2,6*	3,1*	3,1*

Source: DG External Trade Export Helpdesk website
* Generalised System of Preferences
** Economic Partnership Agreements
*** Bilateral Trade Agreement

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

Interested in an origin not mentioned in this table or in more details, such as links to the applicable import regime? Please see the European Commission Export Helpdesk website http://exporthelp.europa.eu/ .

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	9,0	
Denmark	25,0	DKK 6,54/kg
Estonia	20,0	
Finland	17,0	
France	5,5	
Germany	7,0	Roasted: EUR 2,19/kg; soluble EUR 4,78/kg
Greece	9,0	
Hungary	25,0	
Ireland	0,0	
Italy	20,0	
Latvia	21,0	LVL 100/100 kg pure coffee
Lithuania	19,0	
Luxembourg	3,0	
Malta	0,0	
Netherlands	6,0	
Poland	22,0	
Portugal	12,0	
Romania	19,0	Green: EUR 306/ton; roasted: EUR 450/ton; soluble: EUR 1800/ton
Slovakia	19,0	
Slovenia	8,5	
Spain	7,0	
Sweden	12,0	
United Kingdom	0,0	

Source: DG External Trade Export Helpdesk website

Up-to-date information on 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 obtained from consultation of their official sources.

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