European Coffee Report 2009

European Coffee Federation

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INTRODUCTION

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

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

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

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This report was finalised in August 2010

EUROPEAN COFFEE FEDERATION

NOTE ON THE TABLES

Bags are bags of 60 kilos
Tons are metric tons

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

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

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

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

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

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

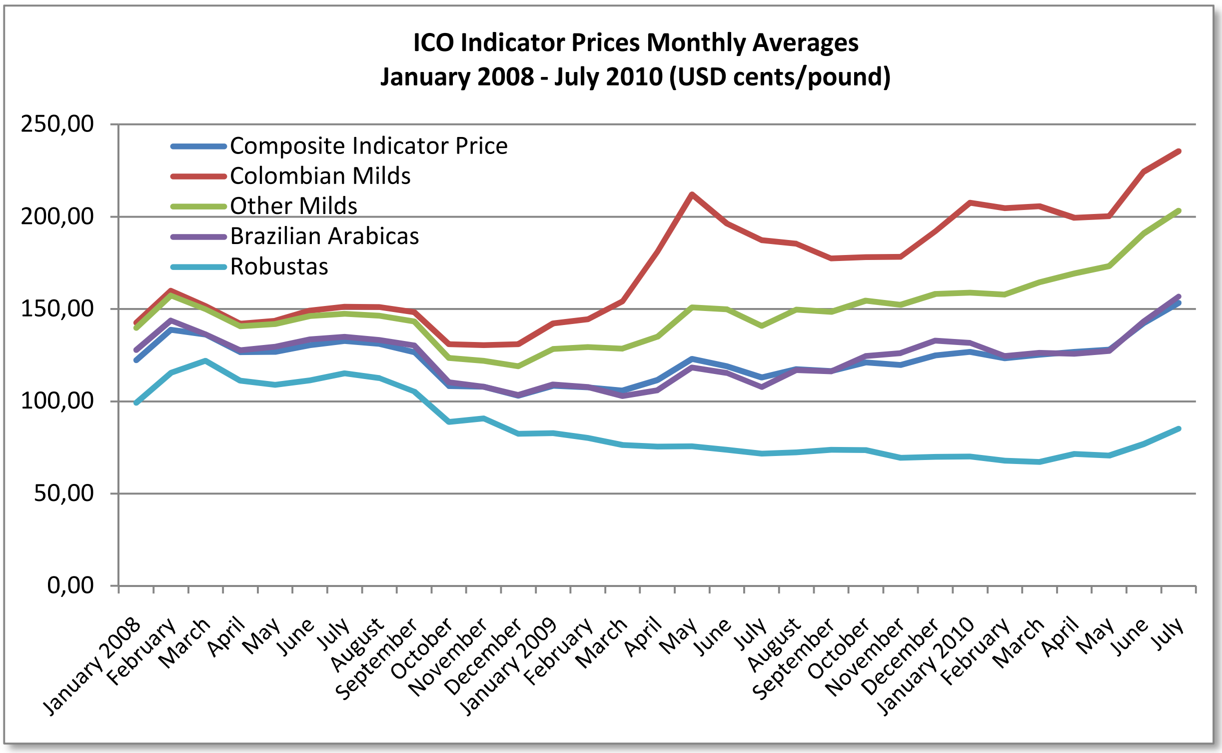
Abbreviations of currencies are those used for international banking purposes, based on ISO standards.

Eurostat import figures may differ from those from national sources

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

	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:

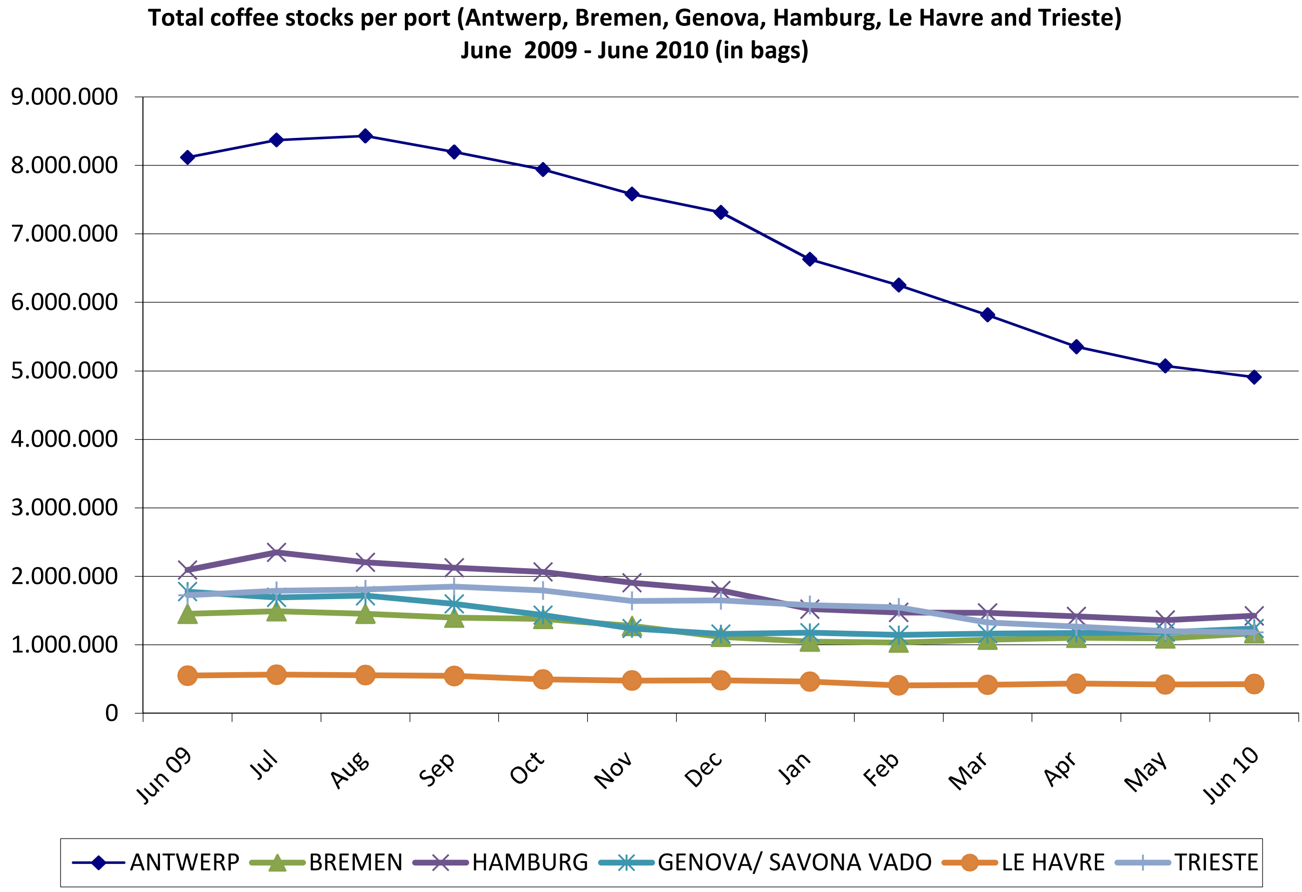
Colombian Milds:	14%
Other Milds:	20%
Brazilian Naturals:	31%
Robustas:	35%

As from 1 October 2009 the weighting is as follows:

Colombian Milds:	13%
Other Milds:	23%
Brazilian Naturals:	30%
Robustas:	34%

GREEN COFFEE STOCKS IN MAJOR EUROPEAN COFFEE PORTS

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



THE EUROPEAN COFFEE MARKET IN 2009

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'.

Imports of green coffee into European countries from 2007 to 2009
- in tons and in bags of 60 kilos -

	2007		2008		2009	
	tons	bags	tons	bags	tons	bags
Austria	66.204	1.103.395	62.488	1.041.460	24.782	413.027
Belgium	185.960	3.099.333	356.558	5.942.625	307.279	5.121.317
Bulgaria	16.284	271.398	22.167	369.445	22.505	375.075
Cyprus	1.697	28.287	1.718	28.633	1.350	22.495
Czech Republic	16.388	273.130	15.795	263.242	15.669	261.152
Denmark	33.246	554.093	33.747	562.447	34.709	578.482
Estonia	31	510	42	705	87	1.452
Finland	67.237	1.120.623	70.970	1.182.828	67.410	1.123.493
France	244.204	4.070.067	218.457	3.640.943	248.087	4.134.780
Germany	1.040.125	17.335.410	1.067.446	17.790.770	1.050.594	17.509.905
Greece	28.518	475.297	27.238	453.970	27.752	462.528
Hungary	14.617	243.608	12.932	215.528	11.724	195.393
Ireland	5.062	84.358	3.085	51.412	2.473	41.208
Italy	444.160	7.402.672	448.496	7.474.933	448.909	7.481.810
Latvia	2.139	35.645	2.296	38.263	3.295	54.913
Lithuania	264	4.398	314	5.238	291	4.842
Luxembourg	262	4.368	540	8.992	510	8.503
Malta	26	425	38	635	20	332
Netherlands	153.804	2.563.402	65.803	1.096.708	70.445	1.174.080
Poland	62.595	1.043.245	67.053	1.117.552	93.054	1.550.902
Portugal	42.983	716.383	41.782	696.358	41.983	699.715
Rumania	24.492	408.203	22.247	370.777	22.102	368.370
Slovakia	4.379	72.975	4.549	75.822	3.791	63.177
Slovenia	8.676	144.597	9.358	155.973	10.257	170.953
Spain	249.994	4.166.562	248.253	4.137.553	242.363	4.039.387
Sweden	109.611	1.826.843	109.636	1.827.265	106.765	1.779.412
United Kingdom	113.390	1.889.835	117.105	1.951.747	123.851	2.064.187
EU(27) total	*2.936.344*	*48.939.063*	*3.030.110*	*50.501.825*	*2.982.053*	*49.700.888*
Norway	38.448	640.798	34.336	572.262	34.377	572.943
Switzerland	95.304	1.588.400	103.644	1.727.400	110.262	1.837.700
Western Europe total	*3.070.096*	*51.168.261*	*3.168.089*	*52.801.487*	*3.126.692*	*52.111.531*
Albania	6.763	112.721	6.921	115.349		
Belarus	15.459	257.644	17.454	290.905		
Bosnia and Herzegovina	24.605	410.080	24.460	407.662		
Croatia	24.826	413.765	24.320	405.326		
Kazakhstan	9.823	163.717	8.160	136.000		

Macedonia, FYR	8.670	144.501	8.184	136.402	
Moldova	1.501	25.012	1.622	27.026	
Russian Federation	259.052	4.317.533	243.426	4.057.098	
Serbia	37.190	619.835	41.404	690.064	
Turkey	31.800	530.006	29.979	499.656	
Ukraine	65.077	1.084.621	109.738	1.828.961	
Central and Eastern Europe total	*484.766*	*8.079.435*	*515.667*	*8.594.449*	
Europe total	***3.554.862***	***59.247.696***	***3.683.756***	***61.395.936***	

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 2009 green coffee imports in Western Europe were 52,1 million bags, a decrease of 1,3% compared to the 52,8 million bags in 2008. The Western European market is dominated by the EU. Green coffee imports into the EU(27) – including intra-EU trade - decreased by 1,6% from 50,5 million bags in 2008 to 49,7 million bags in 2008. Please note that there are some slight variations with the data in last year's report. Eurostat commonly corrects its data after initial publication. Looking at individual countries, we have to point out the large drop (-60%) of imports into Austria. This is caused by closure of a roasting facility, so that less green coffee is imported. Major shifts (in percentage terms) in smaller markets are not surprising. In a market like Estonia, one container load of around 20 tons represents roughly half of the imports in 2008 and one quarter of the imports in 2009. It makes a big difference if importation takes place just before the end of one calendar year or in the beginning of a new year.
According to ICO data, Central and Eastern European imports of coffee in all forms in 2008 (the most recent year available for most of these countries) amounted to 8,6 million bags, 6,4% higher than the year before.

The 'top 20' sources of EU(27) green coffee imports (excluding intra-EU trade) in 2007, 2008 and 2009 were as follows (listed in the order of 2009 imports):

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

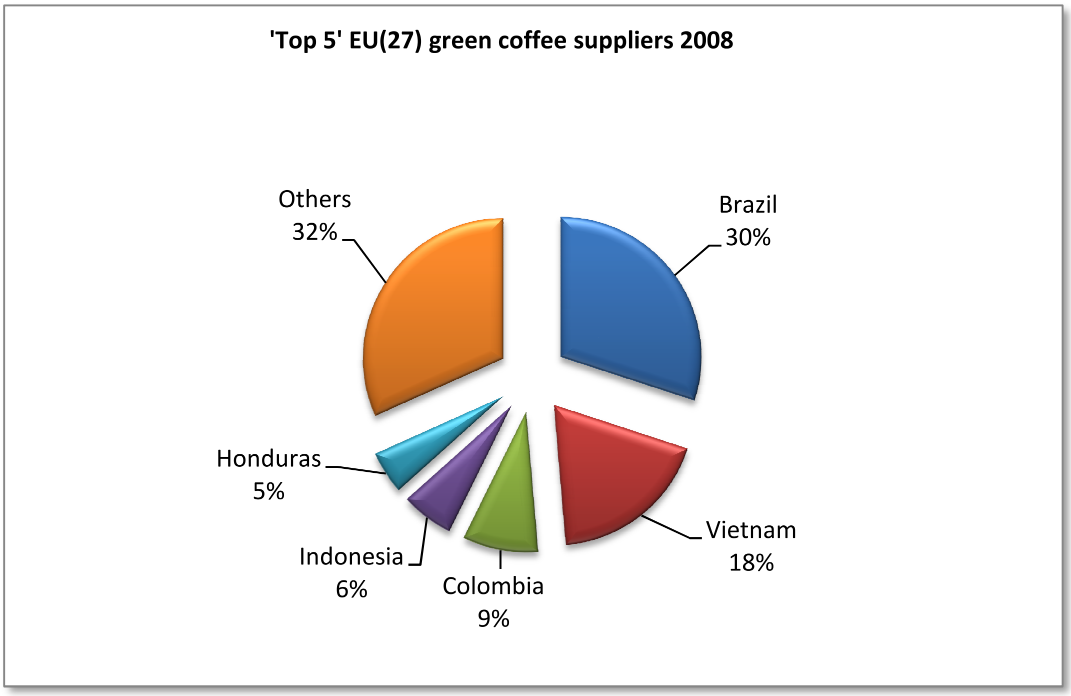
	2007		2008		2009	
	bags	%	bags	%	bags	%
Brazil	13.093.722	28,8	13.708.290	30,0	14.604.177	32,6
Vietnam	10.254.418	22,5	8.499.700	18,6	8.417.947	18,8
Indonesia	1.710.813	3,8	2.763.910	6,1	2.969.125	6,6
Honduras	1.788.630	3,9	2.257.012	4,9	2.389.678	5,3
Peru	1.950.227	4,3	2.205.725	4,8	2.195.500	4,9
Colombia	4.209.857	9,2	3.956.898	8,7	2.193.555	4,9
Uganda	1.562.125	3,4	1.996.485	4,4	2.154.335	4,8
Ethiopia	1.287.663	2,8	1.463.378	3,2	1.320.863	3,0
India	1.781.433	3,9	1.599.763	3,5	1.295.962	2,9
Guatemala	939.350	2,1	1.008.697	2,2	784.427	1,8
El Salvador	621.733	1,4	704.937	1,5	740.037	1,7
Kenya	625.782	1,4	497.440	1,1	640.645	1,4
Tanzania	617.860	1,4	372.303	0,8	548.868	1,2
Nicaragua	580.222	1,3	568.010	1,2	525.320	1,2
Mexico	566.038	1,2	444.922	1,0	494.162	1,1
Papua New Guinea	362.470	0,8	587.900	1,3	448.070	1,0
Cameroon	625.348	1,4	481.038	1,1	375.430	0,8
China	163.143	0,4	217.728	0,5	323.033	0,7
Costa Rica	414.897	0,9	425.918	0,9	319.688	0,7
Côte d'Ivoire	481.247	1,1	305.943	0,7	311.512	0,7

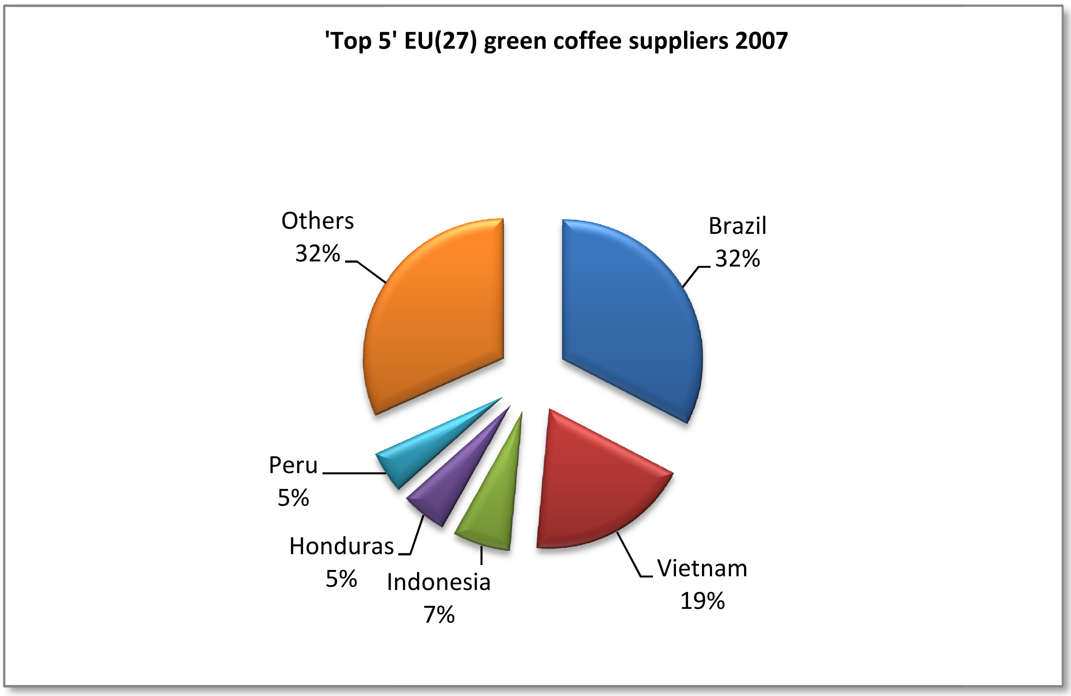
Others	1.880.555	4,1	1.586.378	3,5	1.703.827	3,8
EU(27) excl. intra-EU	**45.517.533**	**100,0**	**45.652.377**	**100,0**	**44.756.160**	**100,0**

Source: Eurostat
Note: 2007 and 2008 data have been revised by Eurostat since our previous publication.

In the past years Brazil, Vietnam and Colombia were consistently the top-3 suppliers to the EU. That changed in 2009, with Indonesia replacing Colombia as third-largest origin. Brazil continued to be the major green coffee supplier to the EU. Its volume increased with close to 900.000 bags, and its market share grew with 2,6 percentage point to 32,6%. Vietnam retained its position as second supplier, with a slightly lower volume (-82.000 bags) and a marginally higher import share (+0,2 percentage points). The share of Indonesia in EU imports increased from 3,8% in 2007 to 6,1% in 2008 and 6,6% in 2009. Colombia dropped to 6th place with a market share of 4,9%, down from 8,7% in 2008, and with a volume that was 1,7 million bags lower. This is caused by significantly reduced crops in Colombia, due to adverse weather conditions and the temporary effects of the national rejuvenation programme. Older trees are replaced by new ones, which in the longer term assures an improved productivity, but it takes a few years before the new coffee trees are fully productive. In 2009 the top-5 was completed by Honduras and Peru. Both countries have replaced some of the volume traditionally sourced from Colombia. In the last three years imports from Honduras have shown a steady increase both in volume and share. The steady rise of Peru's share of EU imports in previous years has levelled off and this country is currently a stable top-5 source.

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





Because of its economic development and rapidly increasing impact on the global economy, there is always an interest in coffee imports from China. In 2005 this country supplied 101.330 bags to the EU27, in 2006 this increased marginally to 107.270 and in 2007 significantly (by 52%!) to 163.143 bags. The pattern continued in 2008 (217.728 bags, + 33% compared to the previous year) and 2009 (323.033 bags, +48%). In 2009 China entered the top-20 of EU suppliers at number 18. With this, China overtook the numbers 19 and 20 of the 2009 ranking, respectively Costa Rica and Côte d'Ivoire.

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

EU(27) imports and exports of green coffee and (semi)finished products from non-EU origins/to non-EU destinations
- in tons -

	2007		2008		2009	
	Import	Export	Import	Export	Import	Export
Green coffee (09011100)	2.731.052	11.398	2.739.143	12.469	2.685.370	15.931
Green coffee, decaffeinated (09011200)	2.454	91.391	3.019	92.226	2.511	81.016
Roasted coffee (09012100)	16.926	67.171	21.182	71.305	24.564	70.510
Roasted coffee, decaffeinated (09012200)	1.833	3.551	2.338	3.350	2.530	3.220
Soluble coffee (21011100)	47.482	51.535	43.816	39.050	41.066	39.229

Source: Eurostat
Note (1): Eurostat revised its 2007 and 2008 data since our previous publication
Note (2): in 2008 the customs code 21011100 (coffee extracts in dry and liquid form) replaced the earlier separate codes 21011111 (dry coffee extracts) and 21011119 (liquid essences and concentrates)

Compared to 2008 the re-exports in 2009 of green coffee increased by 28%. The **exports** of green decaffeinated coffee dropped (-12%). Exports of roasted coffee were lower, both for regular (-1%) and for decaffeinated coffee (-4%). Soluble coffee exports remained virtually unchanged. Comparison of soluble coffee trade data with 2007 should take into account the change in customs code; data may not be fully comparable. Green decaffeinated **imports** decreased with 17% in 2009 compared to 2008. Imports of roasted coffee increased for both regular (+16%) and for decaffeinated roasted coffee (+8%). Imports of soluble dropped with 6%.

Looking in some more detail at the EU exports of finished products, in the years 2007-2009 the twenty main destinations of roasted coffee (non-decaffeinated plus decaffeinated), listed according to their ranking in 2009, were:

EU(27) exports of roasted coffee (incl. decaf) to non-EU destinations - in tons and % -						
	2007		2008		2009	
	tons	%	tons	%	tons	%
United States	14.575	20,6	13.146	17,6	11.691	15,9
Switzerland	8.122	11,5	8.749	11,7	9.971	13,5
Russian Federation	8.743	12,4	9.325	12,5	9.187	12,5
Ukraine	8.242	11,7	9.601	12,9	8.885	12,1
Australia	3.720	5,3	3.838	5,1	3.810	5,2
Norway	2.852	4,0	3.087	4,1	2.810	3,8
Canada	2.173	3,1	2.440	3,3	2.161	2,9
Croatia	1.933	2,7	1.971	2,6	1.881	2,6
Albania	1.103	1,6	1.236	1,7	1.410	1,9
Israel	1.167	1,7	1.253	1,7	1.199	1,6
Bosnia and Herzegovina	1.052	1,5	998	1,3	1.140	1,5
United Arab Emirates	848	1,2	961	1,3	1.097	1,5
Iceland	1.392	2,0	1.221	1,6	1.063	1,4
Japan	1.275	1,8	1.376	1,8	1.041	1,4
Turkey	1.071	1,5	994	1,3	1.011	1,4
Belarus	693	1,0	970	1,3	960	1,3
South Africa	853	1,2	907	1,2	901	1,2
Ceuta	721	1,0	802	1,1	872	1,2
Serbia	786	1,1	772	1,0	821	1,1
South Korea	486	0,7	819	1,1	819	1,1
Others	8.917	12,6	10.191	13,7	11.001	14,9
Total external trade	**70.722**	**100,0**	**74.655**	**100,0**	**73.730**	**100,0**

Source: Eurostat

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

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

EU(27) exports of soluble coffee to non-EU destinations (HS 21011100) - in tons and % -				
	2008		2009	
	tons	%	tons	%
Ukraine	8.663	22,2	8.951	22,8
Russian Federation	11.355	29,1	7.724	19,7
Turkey	1.810	4,6	2.132	5,4
United States	1.283	3,3	2.103	5,4
Switzerland	1.476	3,8	1.337	3,4
Canada	1.343	3,4	1.254	3,2

Israel	946	2,4	1.173	3,0
Croatia	1.320	3,4	1.091	2,8
Australia	763	2,0	744	1,9
United Arab Emirates	1.119	2,9	706	1,8
Others	8.973	23,0	12.014	30,6
Total	**39.050**	**100,0**	**39.229**	**100,0**

Source: Eurostat

Several coffee-producing countries have a sizeable production and export of soluble coffee. The following table, giving EU imports of soluble coffee from the five main non-EU origins in the two most recent years, illustrates this: all of the five largest suppliers in volume terms are coffee producing countries. Overall volume dropped by close to 6,3%. In 2009 Brazil retained its first position albeit with a lower volume and share. Ecuador maintained its second place with a slightly lower volume but higher share. Cote d'Ivoire lost some volume, but maintained its third position. Switzerland dropped out of the top-five and was replaced by India. Although India's volume and share was lower in 2009, that of Switzerland dropped even more.

EU(27) imports of soluble coffee from non-EU origins (HS 21011100)
- in tons and % -

	2008		2009	
	tons	%	tons	%
Brazil	12.029	27,5	11.125	27,1
Ecuador	10.436	23,8	10.178	24,8
Côte d'Ivoire	5.173	11,8	4.219	10,3
Colombia	3.967	9,1	3.521	8,6
India	3.732	8,5	3.303	8,0
Others	8.478	19,4	8.720	21,2
Total	**43.816**	**100,0**	**41.066**	**100,0**

Source: Eurostat

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

Value of EU(27) imports and exports of green, roasted and soluble coffee
- in mln EUR -

	Green		Green decaf		Roasted		Roasted decaf		Soluble	
Imports	**2008**	**2009**	**2008**	**2009**	**2008**	**2009**	**2008**	**2009**	**2008**	**2009**
From non-EU origins	5.158	4.701	7	5	377	486	55	67	269	246
Including intra-EU trade	5.752	5.284	107	111	2.170	2.235	148	153	1.200	1.126
Exports	**2008**	**2009**	**2008**	**2009**	**2008**	**2009**	**2008**	**2009**	**2008**	**2009**
To non-EU destinations	39	42	250	217	375	365	20	20	362	369
Including intra-EU trade	934	846	424	351	2.329	2.338	126	128	1.253	1.325

Source: Eurostat

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

2. PRODUCTION

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

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.	
	2008	**2009**	**2008**	**2009**	**2008**	**2009**	**2008**	**2009**
Austria	0	0	35.226	19.542	131	98	9.464	10.475
Belgium	0	0	63.230	63.382	6.233	6.242	0	0
Bulgaria	0	0	12.643	14.668	195	0	0	0
Croatia	0	0	12.465	13.284	46	34	0	0
Denmark	0	0	28.879	29.253	0	0	255	184
Finland	0	0	57.089	57.740	0	0	6	3
France	181	181	132.858	123.172	5.250	4.295	11.982	15.617
Germany	284.603	217.583	495.331	511.415	39.704	26.080	120.254	107.629
Greece	0	0	13.699	13.506	0	0	0	0
Hungary	0	0	0	0	0	0	22.657	19.305
Iceland	0	0	0	0	0	0	0	0
Italy	27.683	18.446	397.946	383.547	20.287	23.126	559	583
Latvia	0	0	0	0	0	0	0	0
Lithuania	0	0	93	91	1	1	0	0
Netherlands	0	0	109.126	109.631	8.430	8.132	0	0
Norway	0	0	31.849	31.639	261	265	0	0
Poland	0	0	49.040	48.773	0	0	8.194	8.224
Portugal	0	0	35.755	38.059	1.728	1.563	0	0
Romania	0	0	28.764	0	0	0	0	0
Slovakia	0	0	3.226	2.690	0	0	0	0
Spain	30.481	24.314	108.760	115.000	15.115	14.413	46.992	43.741
Sweden	0	0	86.816	102.061	0	0	0	0
United Kingdom	0	0	22.638	24.118	2.683	1.730	0	50.804
EU27 totals	**344.740**	**261.905**	**1.716.424**	**1.702.026**	**101.081**	**86.802**	**317.964**	**293.435**

Source: Eurostat

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

Production of green decaffeinated, roasted and soluble coffee in selected EU and EFTA countries - in million EUR -								
	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.	
	2008	**2009**	**2008**	**2009**	**2008**	**2009**	**2008**	**2009**
Austria	0	0	103	75	1	1	19	20
Belgium	0	0	365	368	46	46	0	0
Bulgaria	0	0	44	49	1	0	0	0
Croatia	0	0	78	80	0	0	0	0
Denmark	0	0	158	157	0	0	2	1
Finland	0	0	272	246	0	0	0	0
France	1	1	1.097	853	33	26	311	430
Germany	380	189	1.481	1.319	114	93	755	642
Greece	0	0	95	98	0	0	0	0
Hungary	0	0	0	0	0	0	117	83
Iceland	0	0	0	0	0	0	0	0
Italy	25	20	2.760	2.710	196	193	7	8
Latvia	0	0	0	0	0	0	0	0
Lithuania	0	0	1	1	0	0	0	0
Netherlands	0	0	647	662	0	0	0	0
Norway	0	0	168	171	2	2	0	0
Poland	0	0	189	163	0	0	42	42
Portugal	0	0	234	264	13	13	0	0
Romania	0	0	143	0	0	0	0	0
Slovakia	0	0	16	15	0	0	0	0
Spain	68	53	562	527	78	73	291	281
Sweden	0	0	380	372	0	0	0	0
United Kingdom	0	0	233	183	26	14	0	675
EU27 totals	**477**	**264**	**8.965**	**8.319**	**565**	**514**	**2.990**	**2.650**

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

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

AUSTRIA

1. IMPORTS OF GREEN COFFEE

Imports of not –decaffeinated green coffee in 2009 reached a volume of 413.027 bags (24.782 tons). This is a decrease of 60% in comparison to 2008, when 1.041.460 bags (62.488 tons) were imported. This very large drop is caused by the closure of a major processing facility.

Austria: Imports of not-decaffeinated green coffee - in bags and % -						
	2007		2008		2009	
Countries of Origin	bags	%	bags	%	bags	%
Brazil	46.228	4,2	49.897	4,8	46.027	11,1
India	18.522	1,7	25.453	2,4	28.185	6,8
Vietnam	27.153	2,5	34.415	3,3	21.083	5,1
Cameroon	14.695	1,3	15.493	1,5	11.325	2,7
Peru	4.032	0,4	4.695	0,5	8.955	2,2
Guatemala	7.343	0,7	3.985	0,4	6.183	1,5
Honduras	5.928	0,5	10.043	1,0	5.353	1,3
Costa Rica	6.872	0,6	9.232	0,9	4.978	1,2
El Salvador	1.925	0,2	2.642	0,3	4.090	1,0
Côte d'Ivoire	0	0,0	0	0,0	2.745	0,7
Nicaragua	2.450	0,2	2.065	0,2	2.645	0,6
Colombia	7.995	0,7	5.610	0,5	2.292	0,6
Uganda	2.365	0,2	2.142	0,2	2.160	0,5
China	3.358	0,3	2.912	0,3	2.132	0,5
Ecuador	950	0,1	1.267	0,1	1.267	0,3
Others	953.578	86,4	871.610	83,7	263.607	63,8
Total all origins	**1.103.395**	**100,0**	**1.041.460**	**100,0**	**413.027**	**100,0**

Source: Eurostat

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

2. FOREIGN TRADE IN ALL FORMS

Austria: international trade in green, roasted and soluble coffee - in tons -										
	Green		Green decaf		Roasted		Roasted decaf		Soluble	
Imports	**2008**	**2009**	**2008**	**2009**	**2008**	**2009**	**2008**	**2009**	**2008**	**2009**
From non-EU origins	11.098	9.222	0	0	1.702	1.837	180	153	649	559
From EU origins	51.390	15.559	2.949	2.278	29.765	31.183	1.141	1.265	3.064	1.913
Total	62.488	24.782	2.949	2.278	31.467	33.020	1.321	1.418	3.714	2.471
Exports	**2008**	**2009**	**2008**	**2009**	**2008**	**2009**	**2008**	**2009**	**2008**	**2009**
To non-EU destinations	21	32	0	11	4.159	2.447	119	325	266	277
To EU destinations	2.060	1.350	12	29	41.232	15.947	362	88	274	253
Total	2.081	1.382	12	40	45.390	18.394	481	413	540	530

Source: Eurostat

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

3. COFFEE CONSUMPTION

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

Austria: total coffee consumption - in bags -	
2000	874.731
2001	1.012.664
2002	926.027
2003	719.572
2004	995.824
2005	772.066
2006	612.471
2007	846.816
2008	907.887
2009	885.716

Source: ICO

Austria: per capita coffee consumption - in kilos -	
2005	5,63
2006	4,44
2007	6,11
2008	6,53
2009	6,37

Source: ICO

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

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

Austria: retail prices for roasted coffee - EUR/kilo -	
2000	7,27
2001	7,22
2002	6,66
2003	6,20
2004	5,90
2005	6,67
2006	7,25
2007	6,87
2008	7,11
2009	10,99

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

The increase in 2009 is remarkable. In the ICO's Monthly Coffee Report of June 2010, there is a footnote indicating a change in type of coffee product, but no further details are given.

5. INFORMATION ON THE AUSTRIAN COFFEE AND TEA ASSOCIATION

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

6. VAT

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

BELGIUM

1. IMPORTS OF GREEN COFFEE

Please note that the sources for the data for Belgium are now mostly Eurstat and ICO. Comparability with earlier versions is not assured.
In our previous report we observed that total imports of not-decaffeinated green coffee in 2008 were 91,7% higher than in 2007. For the current report we took the latest available 2007 data from the Eurostat website, but the statistical anomaly remains. Volumes from individual origins are unrealistically different from the 2008 and 2009 volumes. Between 2008 and 2009 the pattern is more 'as usual'. While there are changes, these are of an order of magnitude that can be considered normal.

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

	2007		2008		2009	
Countries of origin	**bags**	**%**	**bags**	**%**	**bags**	**%**
Brazil	674.228	21,8	1.549.073	26,1	1.455.275	28,4
Vietnam	369.532	11,9	1.080.953	18,2	761.932	14,9
Honduras	173.162	5,6	421.828	7,1	395.710	7,7
Colombia	108.373	3,5	426.993	7,2	378.627	7,4
Uganda	166.532	5,4	504.238	8,5	375.222	7,3
Peru	315.227	10,2	484.397	8,2	284.295	5,6
Ethiopia	106.547	3,4	114.988	1,9	158.637	3,1
Indonesia	172.032	5,6	165.675	2,8	128.652	2,5
India	53.650	1,7	137.998	2,3	114.968	2,2
Guatemala	97.613	3,1	117.422	2,0	110.930	2,2
Mexico	53.023	1,7	63.280	1,1	108.505	2,1
Nicaragua	19.432	0,6	69.198	1,2	103.293	2,0
Rwanda	63.247	2,0	60.340	1,0	84.078	1,6
Kenya	48.320	1,6	51.887	0,9	69.972	1,4
El Salvador	130.013	4,2	127.665	2,1	68.092	1,3
Others	548.403	17,7	566.688	9,5	523.130	10,2
Total all origins	**3.099.333**	**100,0**	**5.942.625**	**100,0**	**5.121.317**	**100,0**

Source: Eurostat

In 2009 the total non-decaffeinated green coffee imports from all origins were almost 14% lower than in 2008. In 2009 the most important country of origin remained Brazil with a share in imports of 28,4%. Brazil was followed by Vietnam (14,9%) and Honduras (7,7%).

2. FOREIGN TRADE IN ALL FORMS

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

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

	Green		Green decaf		Roasted		Roasted decaf		Soluble	
Imports	**2008**	**2009**	**2008**	**2009**	**2008**	**2009**	**2008**	**2009**	**2008**	**2009**
From non-EU origins	351.818	302.131	49	19	579	736	112	117	2.687	2.438
From EU origins	4.739	5.149	5.965	6.227	17.401	17.891	3.580	2.397	4.275	3.626
Total	*356.558*	*307.279*	*6.014*	*6.245*	*17.980*	*18.627*	*3.692*	*2.513*	*6.962*	*6.064*

Exports	2008	2009	2008	2009	2008	2009	2008	2009	2008	2009
To non-EU destinations	1.864	1.813	3	9	1.645	949	243	60	543	307
To EU destinations	260.169	220.546	241	240	39.764	41.104	2.177	2.842	16.254	8.403
Total	*262.032*	*222.359*	*243*	*249*	*41.409*	*42.053*	*2.420*	*2.901*	*16.797*	*8.710*

Source: Eurostat

3. COFFEE CONSUMPTION

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

Belgium: total coffee consumption - in bags -	
2000	1.133.361
2001	884.233
2002	1.484.301
2003	1.579.419
2004	1.396.235
2005	1.158.038
2006	1.537.413
2007	1.103.118
2008	649.931
2009	934.293

Source: ICO

Belgium: per capita coffee consumption - in kilos -	
2005	6,67
2006	8,81
2007	6,29
2008	3,68
2009	5.29

Source: ICO

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

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

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

Belgium: retail prices for roasted coffee - 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	8,19
2009	8,32

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

5. EXCISE DUTIES AND VAT LEVEL

Belgium applies the following excise duties:

- Green coffee: EUR 0,1983 / kg net weight
- Roasted coffee: EUR 0,2479 / kg net weight
- Soluble coffee: EUR 0,6941 / kg dry matter

The Belgian VAT rate remains at 6%.

DENMARK

1. IMPORTS OF GREEN COFFEE

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

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

Denmark: Imports of green not-decaffeinated coffee - in bags and % -						
	2007		2008		2009	
Countries of origin	**bags**	**%**	**bags**	**%**	**bags**	**%**
Brazil	227.085	41,0	238.176	42,3	103.593	17,9
Vietnam	44.812	8,1	37.251	6,6	33.808	5,8
Uganda	24.245	4,4	12.447	2,2	22.843	3,9
Colombia	24.340	4,4	44.441	7,9	22.831	3,9
Peru	11.452	2,1	30.327	5,4	20.045	3,5
Indonesia	1.450	0,3	9.398	1,7	12.332	2,1
Tanzania	26.340	4,8	3.836	0,7	11.771	2,0
Honduras	5.075	0,9	34.541	6,1	10.713	1,9
Burundi	5.395	1,0	2.235	0,4	4.150	0,7
Papua New Guinea	9.448	1,7	5.021	0,9	3.873	0,7
Mexico	5.588	1,0	9.883	1,8	3.742	0,6
Kenya	8.427	1,5	6.600	1,2	2.323	0,4
Guatemala	1.823	0,3	1.816	0,3	1.980	0,3
Malawi	285	0,1	914	0,2	900	0,2
Ethiopia	2.905	0,5	2.976	0,5	857	0,1
Others	155.423	28,1	122.871	21,8	322.573	55,8
Total	**554.093**	**100,0**	**562.733**	**100,0**	**578.334**	**100,0**

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

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

2. FOREIGN TRADE IN COFFEE IN ALL FORMS

Denmark: international trade in green, roasted and soluble coffee - in tons -										
	Green		Green decaf		Roasted		Roasted decaf		Soluble	
Imports	**2008**	**2009**	**2008**	**2009**	**2008**	**2009**	**2008**	**2009**	**2008**	**2009**
From non-EU origins	27.042	15.848	0	1	182	256	8	13	0	0
From EU origins	6.705	18.861	1.397	1.338	15.284	13.214	258	155	0	0
Total	33.747	34.709	1.397	1.340	15.466	13.470	266	168	0	0

Exports	**2008**	**2009**	**2008**	**2009**	**2008**	**2009**	**2008**	**2009**	**2008**	**2009**
To non-EU destinations	25	8	0	0	1.462	1.452	5	4	298	236
To EU destinations	0	28	0	0	5.956	5.788	23	0	1.131	675
Total	25	36	0	0	7.418	7.240	27	4	1.428	911

Source: Eurostat;

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

3. COFFEE CONSUMPTION

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

Denmark: total coffee consumption - in bags -	
2000	790.644
2001	868.401
2002	804.592
2003	724.039
2004	848.846
2005	794.550
2006	822.494
2007	773.536
2008	694.690
2009	719.223

Source: ICO

Denmark: per capita coffee consumption - in kilos -	
2005	8,8
2006	9,1
2007	8,5
2008	7,6
2009	7,9

Source: ICO

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

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

Denmark: retail prices for roasted coffee - EUR/kilo -	
2000	8,23
2001	7,85
2002	7,21

2003	6,96
2004	7,01
2005	7,58
2006	7,78
2007	7,75
2008	8,09
2009	8,36

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

5. COMMENTS ON PARTICULAR ASPECTS

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

6. EXCISE DUTIES AND VAT LEVEL

VAT is unchanged at 25% and the excise duties are DKK 5,45 per kilo for green coffee, DKK 6,54 for roasted coffee and DKK 14,17 for coffee extracts.

FINLAND

1. IMPORTS OF GREEN COFFEE

Unless otherwise indicated, the data in this chapter were supplied by the Finnish Coffee Roasters Association. In 2009 Finland imported 1.123.491 bags of green coffee, a decrease of 5% compared to 2008.

Finland: Imports of green coffee in 2000-2009 - in bags -	
Year	**Imports**
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
2009	1.123.491

The most important origins by volume were:

Finland: Imports of green coffee by country of origin - in 1000 bags -			
Countries of origin	**2007**	**2008**	**2009**
Brazil	465,7	500,6	467,1
Colombia	261,0	238,3	112,5
Guatemala	86,2	78,2	80,0
Nicaragua	68,3	92,0	87,4
Kenya	62,7	59,2	91,1
Ethiopia	35,8	37,6	18,6
Honduras	34,4	75,2	98,4
Peru	21,8	28,6	23,6
Tanzania	18,8	9,3	38,8
Vietnam	17,4	17,1	19,9
Zambia	10,9	3,3	2,4
Burundi	7,5	4,2	11,1
India	5,2	3,7	7,3
Costa Rica	4,5	11,1	5,7
Cameron	4,1	0,0	1,0
Togo	3,6	0,0	0,0
Germany	2,6	0,0	2,2
El Salvador	2,4	10,4	14,0
Others	7,7	14,0	45,6
Total	**1.120,6**	**1.182,8**	**1.123,5**

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

Finland: Percentage distribution of green coffee imports by main sources 2007-2009 - in % -			
Countries of origin	**2007**	**2008**	**2009**
Brazil	41,6	42,3	42
Colombia	23,3	20,1	10
Guatemala	7,7	6,6	7,1

Nicaragua	6,1	7,8	8,1
Kenya	5,6	5,0	8,1
Ethiopia	3,2	3,2	1,7
Others	12,5	15	23
Total	**100,0**	**100,0**	**100,0**

2. FOREIGN TRADE OF COFFEE IN ALL FORMS

Green coffee

Imports of green coffee reached 67.409 tons in 2009. The imports decreased by 5% from the previous year. The average C.I.F price was EUR 2,10/kg.

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

Roasted coffee

Imports of roasted coffee were 5.200 tons in 2009, an increase of 48% from 2008.

Exports of roasted coffee increased from 2008 by 8,2% to 9.150 tons. The main export destination for roasted coffee were the Baltic Countries and Russia (98,7%).

Finland: Foreign trade in coffee 2007-2009 - in tons -						
	Imports			Exports		
Forms of coffee	**2007**	**2008**	**2009**	**2007**	**2008**	**2009**
Green coffee	67.237	70.968	67.409	192	0	122
Roasted coffee	2.509	3.517	5.200	7.676	8.551	9.150
Instant coffee	1.142	1.327	0,838	5	9	48

3. IMPORT RATES AND NATIONAL TAXES

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

4. COFFEE CONSUMPTION

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

5. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

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

Finland: retail prices for roasted coffee - EUR/kilo -	
2000	5,47
2001	4,87
2002	4,29
2003	4,15
2004	4,14
2005	5,03
2006	5,16
2007	5,23
2008	5,58
2009	5,55

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

6. EXCISE DUTIES AND VAT LEVEL

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

FRANCE

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

1. IMPORTS

Total non-decaffeinated green coffee imports into France from all origins in 2009 were 248.261 tons (4.137.683 bags). This was 13,1% more than the 219.473 tons (3.657.883 bags) imported in 2008. The main green coffee suppliers in terms of volumes and percentages were:

France: Imports of green, non-decaffeinated coffee by main origins - in tons and % -						
	2007		2008		2009	
	bags	%	bags	%	bags	%
Brazil	1.030.000	25,29	889.500	24,32	978.883	23,66
Vietnam	788.883	19,37	529.667	14,48	644.683	15,58
Colombia	271.917	6,68	275.950	7,54	247.933	5,99
Honduras	93.733	2,30	122.333	3,34	195.067	4,71
Ethiopia	169.883	4,17	153.333	4,19	174.800	4,22
Indonesia	36.317	0,89	129.650	3,54	172.717	4,17
Peru	109.283	2,68	93.817	2,56	86.883	2,10
Uganda	116.200	2,85	106.983	2,92	78.017	1,89
Nicaragua	69.633	1,71	34.383	0,94	58.550	1,41
El Salvador	25.067	0,62	41.000	1,12	57.500	1,39
India	86.883	2,13	86.017	2,35	52.567	1,27
Guinea	83.367	2,05	29.383	0,80	49.567	1,20
Cameroon	97.300	2,39	71.333	1,95	46.533	1,12
Guatemala	80.467	1,98	75.700	2,07	45.283	1,09
Mexico	64.567	1,59	34.367	0,94	42.733	1,03
Congo Dem Rep	8.250	0,20	12.300	0,34	30.050	0,73
Sierra Leone	7.933	0,19	11.283	0,31	29.683	0,72
Côte d'Ivoire	59.450	1,46	29.083	0,80	27.767	0,67
Togo	23.867	0,59	21.467	0,59	26.083	0,63
China	14.617	0,36	19.933	0,54	24.967	0,60
Burundi	28.433	0,70	9.733	0,27	21.650	0,52
Madagascar	47.483	1,17	61.850	1,69	20.900	0,51
Costa Rica	24.400	0,60	32.417	0,89	20.550	0,50
Rwanda	16.867	0,41	20.350	0,56	19.750	0,48
EU	602.700	14,80	665.433	18,19	865.550	20,92
Others	115.067	2,82	100.617	2,76	119.017	2,89
Total all origins	**4.072.567**	**100,00**	**3.657.883**	**100,00**	**4.137.683**	**100,00**

Source: Eurostat

Brazil retained its position of first supplier. Its market share remained fairly stable, but this still represented an import volume increase of over 89.000 bags. Vietnam remained the second supplier, with a volume that was close to 115.000 bags larger and a 1,1 percentage points higher share of imports. Import volumes from Colombia dropped by 10%. The fourths and fifth suppliers, respectively Honduras and Ethiopia, both recorded large volume increases: Honduras 59% and Ethiopia 14%.

Imports split according to the types of coffee showed a slight decrease of both the Arabica and Robusta share. This is only possible because the 'unspecified' category increased, making it more difficult to have a precise idea of the percentage distribution per type of coffee.

France: Percentage distribution of green non-decaffeinated coffee imports by types of coffee - in % -						
	2007		2008		2009	
Arabicas	51,48		52,68		49,78	
Colombian Milds		7,21		8,61		6,75
Other Milds		14,81		15,54		14,86
Brazilian Naturals		29,46		28,71		28,17
Robustas	30,18		28,17		27,95	
Other, not specified	18,34		18,97		22,27	

2. FOREIGN TRADE FOR ALL FORMS OF COFFEE

Exports of processed coffee (in green bean equivalent):

France: Exports of coffee - in tons -			
	2007	2008	2009
Coffee, green not decaffeinated	977	1.839	2.272
Coffee, green decaffeinated	6.903	7.034	4.847
Coffee, roasted not decaffeinated	12.384	15.447	17.710
Coffee, roasted decaffeinated	563	765	823
Extracts, essences and concentrates	32.791	32.069	34.344
Other	4.109	5.638	6.757
Total	**57.727**	**62.792**	**66.753**

Total exports of coffee in all forms increased by 6,3% in 2009. Of the processed products, especially the exports of roasted not decaffeinated coffee showed a strong performance: +15%. The exports of green decaffeinated coffee dropped with 31%.

3. COFFEE CONSUMPTION

France : market value and size				
		2007	2008	2009
Value (turnover before tax)	EUR million	1.946	1.933	1.873
Volume (green coffee equivalent)	Tons	349.600	330.000	343.300

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

5. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

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

France: retail prices for roasted coffee - EUR/kilo -	
2000	6,76
2001	6,48
2002	6,36
2003	6,20
2004	5,89
2005	7,20
2006	7,59
2007	7,54
2008	7,69

2009	7,51

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

6. OTHER ASPECTS

- In 2009 soluble coffee represented 15% of coffee (green bean equivalent) consumed in France
- The espresso method of preparation is becoming increasingly popular: annually 16,7 milliard cups are consumed in this form
- Of the roasted coffee, over 80% of sales take place in medium-sized and larger supermarkets. The remaining 20% is divided between cafés/hotels/restaurants, other out-of-home, vending and speciality shops.
- The share of decaffeinated coffee is estimated to be 7% of consumption.
- The share of ethically traded and sustainably produced coffee. It is estimated to be 2,5%.

GERMANY

1. IMPORTS OF GREEN COFFEE

According to Eurostat data, imports of not-decaffeinated green coffee into the Federal Republic of Germany in 2009 reached a volume of 17,5 million bags (1.050.594 tons), a slight decrease of 1,6% compared to the 17,8 million bags (1.067.446 tons) imported in 2008.

Germany: Imports of not-decaffeinated green coffee - in bags and % -						
	2007		2008		2009	
	bags	%	bags	%	bags	%
Brazil	4.808.893	27,7	4.914.440	27,6	5.881.318	33,6
Vietnam	3.990.752	23,0	2.809.103	15,8	2.855.978	16,3
Indonesia	809.033	4,7	1.533.213	8,6	1.390.622	7,9
Peru	1.045.750	6,0	1.124.445	6,3	1.190.290	6,8
Honduras	915.188	5,3	1.054.673	5,9	1.074.133	6,1
Ethiopia	605.795	3,5	786.490	4,4	750.673	4,3
Uganda	367.093	2,1	472.865	2,7	621.263	3,5
Colombia	1.466.602	8,5	1.290.802	7,3	494.272	2,8
El Salvador	447.665	2,6	518.605	2,9	482.138	2,8
Papua New Guinea	324.648	1,9	552.027	3,1	412.750	2,4
China	98.097	0,6	137.380	0,8	244.513	1,4
Mexico	295.563	1,7	246.450	1,4	217.125	1,2
Guatemala	278.688	1,6	339.007	1,9	209.162	1,2
Kenya	218.358	1,3	138.422	0,8	191.183	1,1
India	236.398	1,4	247.935	1,4	154.980	0,9
Others	1.426.885	8,2	1.624.913	9,1	1.339.503	7,6
Total all origins	**17.335.410**	**100,0**	**17.790.770**	**100,0**	**17.509.905**	**100,0**

Source: Eurostat

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

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

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

Germany: Percentage distribution of not-decaffeinated green coffee imports by type			
	2007	2008	2009
Arabicas	68	68	68
Colombian Milds	12	9	5
Other Milds	25	27	25
Brazilian Naturals	31	32	38
Robustas	31	28	29
Other/Unknown	1	4	3

Source: derived from Eurostat and 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 2008**	**Imports 2009**	**Exports 2008**	**Exports 2009**
Green coffee (not decaffeinated)	0901 11 00	1.051.458	1.050.505	145.808	174.023
Green coffee (decaffeinated)	0901 12 00	3.229	2.099	140.459	123.951
Roasted coffee (not decaffeinated)	0901 21 00	55.178	39.902	145.399	158.281
Roasted coffee (decaffeinated)	0901 22 00	1.032	755	9.460	9.188
Coffee extracts in dry and liquid form*	2101 11 00	25.063	23.036	57.671	56.933
Preparations**	2101 12 92	10.203	13.388	14.737	14.617

Source: Statistisches Bundesamt
*until 31.12.2008 listed separately: dry coffee extracts (Customs code 2101 11 11) & liquid essences and concentrates (Customs code 2101 11 19)
**on the basis of extracts, essences and concentrates of coffee

According to Eurostat data, the 2009 import of decaffeinated green coffee was dominated by three countries: Italy (40,4%) followed by the Netherlands (33,4%) and Spain (13,9%). The main suppliers of roasted non-decaffeinated coffee were Italy (33,3%) and Poland (15,9%) and the Netherlands (14,8%). The main sources for roasted decaffeinated coffee were the Netherlands (43,0%), the Czech Republic (29,1%) and Belgium (10,4%). Coffee extracts were mainly sourced from Belgium (32,8%), Ecuador (18,4%) and Spain (10,8%).
The main export destinations of decaffeinated green coffee in 2009 were the United States (55,2%), Spain (11,7%) and the Netherlands (7,8%). Exports of roasted non-decaffeinated coffee were mainly destined to Poland (15,6%), France (15,0%), the Netherlands (14,8%), and Austria (6,7%). In 2009 the three largest export destinations for roasted decaffeinated coffee were France (21,5%), the Netherlands (17,3%) and Belgium (15,1%). Coffee extracts were mainly destined for the United Kingdom (14,9%), Poland (13,0), France (11,9%) and Ukraine (9,1%).

3. COFFEE CONSUMPTION

In 2009, the statistical total consumption increased slightly with 1,4%, as did the per capita consumption: from 6,2 kilo (green coffee equivalent) to 6,3 kilo.

Germany: 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
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
2009	527.160	6,4

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

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
2009	3,76

Source: ICO, Deutscher Kaffeeverband

5. ASSOCIATION MEMBERSHIP

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

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

6. COMMENTS ON PARTICULAR ASPECTS

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

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

7. VAT, EXCISE DUTIES

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

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 2009 imports of green, not decaffeinated coffee from all sources into Greece were 27.752 tons (462.528 bags). In calendar year 2008 a volume of 27.238 tons (453.970 bags) was imported. This represents a modest increase of 1,9%.

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

Greece: Imports of green, not-decaffeinated coffee by origin - in bags -						
	2007		2008		2009	
Countries of origin	**bags**	**%**	**bags**	**%**	**bags**	**%**
Brazil	327.360	68,9	300.130	66,1	311.788	67,4
Vietnam	44.782	9,4	35.980	7,9	42.833	9,3
India	46.400	9,8	42.242	9,3	41.755	9,0
Indonesia	15.797	3,3	19.805	4,4	17.288	3,7
Colombia	8.382	1,8	9.410	2,1	7.340	1,6
Ethiopia	6.715	1,4	7.105	1,6	6.638	1,4
Uganda	1.513	0,3	5.860	1,3	2.082	0,5
Tanzania	335	0,1	0	0,0	1.170	0,3
Costa Rica	900	0,2	783	0,2	1.105	0,2
Cameroon	1.848	0,4	1.623	0,4	918	0,2
Guatemala	205	0,0	365	0,1	652	0,1
Congo Dem Rep	0	0,0	0	0,0	650	0,1
Nicaragua	775	0,2	417	0,1	523	0,1
Madagascar	0	0,0	937	0,2	350	0,1
Kenya	550	0,1	310	0,1	228	0,0
Others	19.735	4,2	29.003	6,4	27.207	5,9
Total all origins	**475.297**	**100,0**	**453.970**	**100,0**	**462.528**	**100,0**

Source: Eurostat

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

2. FOREIGN TRADE IN ALL FORMS

Greece: international trade in green, roasted and soluble coffee - in tons -										
	Green		Green decaf		Roasted		Roasted decaf		Soluble	
Imports	**2008**	**2009**	**2008**	**2009**	**2008**	**2009**	**2008**	**2009**	**2008**	**2009**
From non-EU origins	25.783	26.183	0	3	91	44	6	0	5.211	4.296
From EU origins	1.456	1.569	165	119	8.974	10.400	304	165	3.864	4.139
Total	27.238	27.752	166	122	9.065	10.444	309	165	9.075	8.435
Exports	**2008**	**2009**	**2008**	**2009**	**2008**	**2009**	**2008**	**2009**	**2008**	**2009**

To non-EU destinations	113	269	1	0	244	236	0	0	92	83
To EU destinations	2.510	2.089	0	10	345	190	3	1	409	464
Total	2.623	2.358	1	10	589	426	3	1	501	547

Source: Eurostat

This table illustrates the high percentage finished coffee imports into Greece. Expressed in green coffee equivalent, the volume of the 2009 finished coffee imports (roasted + soluble) was 1/4th larger than the green coffee imports. Total coffee imports of all forms into Greece increased marginally (+0,4%) from 62.154 tons green coffee equivalent in 2008 to 62.428 tons in 2009. Greece's roasted coffee imports (regular + decaffeinated) came from Italy (39,4%), Germany (33,4%) and Portugal (7,4%). In 2009 Côte d'Ivoire (49,9%) and Spain (31,5%) were the main sources for soluble coffee.

3. COFFEE CONSUMPTION

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

Greece: Total coffee consumption - in bags -	
Years	**Total consumption**
2000	687.436
2001	547.851
2002	826.549
2003	928.563
2004	871.045
2005	870.119
2006	856.589
2007	1.014.597
2008	978.073
2009	973.876

Source: ICO; some data revised

Greece: Per capita consumption - in kg green coffee equivalent -	
Year	**Consumption**
2005	4,72
2006	4,63
2007	5,48
2008	5,27
2009	5,25

4. VAT, EXCISE DUTIES

In Greece, the VAT on roasted and soluble coffee is 11%. There are no excise duties.

IRELAND

1. IMPORTS OF GREEN COFFEE

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

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

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

	2007		2008		2009	
Countries of origin	**bags**	**%**	**bags**	**%**	**bags**	**%**
Nicaragua	2.473	2,9	3.685	7,2	1.498	3,6
Indonesia	9.027	10,7	3.620	7,0	1.493	3,6
Colombia	6.757	8,0	3.185	6,2	960	2,3
Brazil	5.120	6,1	6.468	12,6	320	0,8
Costa Rica	1.578	1,9	630	1,2	317	0,8
Malaysia	0	0,0	0	0,0	83	0,2
Others	59.403	70,4	33.823	65,8	36.537	88,7
Total all origins	**84.358**	**100,0**	**51.412**	**100,0**	**41.208**	**100,0**

Source: Eurostat

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	**2008**	**2009**	**2008**	**2009**	**2008**	**2009**	**2008**	**2009**	**2008**	**2009**
From non-EU origins	1.434	281	0	0	111	90	0	2	2	0
From EU origins	1.651	2.192	27	101	1.315	1.341	34	49	1.068	1.686
Total	3.085	2.473	27	101	1.426	1.431	34	51	1.070	1.687
Exports	**2008**	**2009**	**2008**	**2009**	**2008**	**2009**	**2008**	**2009**	**2008**	**2009**
To non-EU destinations	0	0	0	0	2	1	0	0	5	0
To EU destinations	149	114	3	1	384	229	1	1	54	38
Total	149	114	3	1	386	230	1	1	59	38

Source: Eurostat

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

3. COFFEE CONSUMPTION

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

Ireland: Total coffee consumption - in bags -	
Years	
2000	83.158
2001	146.240
2002	136.116
2003	150.926
2004	224.743
2005	222.892
2006	202.660
2007	244.346
2008	115.107
2009	134.496

Source: ICO

Ireland: Per capita consumption - in kg green coffee equivalent -	
Years	
2005	3,19
2006	2,85
2007	3,36
2008	1,56
2009	1,82

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

ITALY

1. IMPORTS OF GREEN COFFEE

According to official data from the National Institute of Statistics (ISTAT), the quantity of green coffee imported into Italy in the year 2009 was 7.484.143 bags (449.049 tons), an increase of 0,12% compared to 2008.

This relatively low increase should be ascribed to the reduction of processed coffee exports by 1,29%. The annual data for green coffee imports however show that, for a number of reasons, import activity does not directly result from changes in demand of the coffee processing industry. In order to provide a more accurate and realistic analysis of the activity in this sector it is worthwhile taking into consideration data related to the import and export of coffee in all forms in the last six years.

This comparison shows that the annual growth in the coffee processing sector for the period in consideration is about 2,61%. On the other hand, if movement of all forms of coffee is used as the basis for calculation, within the same period coffee imports have increased by 2,50%, exports by 7,40%.

Italy: Imports of green coffee
- in bags -

Country of Origin	2003	2004	2005	2006	2007	2008	2009
Brazil	2.428.847	2.330.265	2.408.309	2.555.270	2.622.211	2.632.506	2.629.697
Vietnam	830.764	902.292	982.050	1.118.287	1.363.381	1.322.467	1.367.306
India	699.153	844.969	748.934	893.873	943.971	769.871	729.856
Uganda	339.275	249.554	245.459	146.067	284.722	486.046	548.246
Indonesia	377.106	371.521	484.097	466.671	325.940	399.499	519.597
Colombia	246.345	253.460	352.293	399.286	414.546	402.951	214.159
Guatemala	197.506	209.282	153.635	174.292	183.956	208.262	193.137
Tanzania	33.331	49.153	95.299	73.174	79.280	79.993	186.111
Honduras	124.212	123.754	89.880	128.815	128.775	116.246	183.080
Cameroon	277.270	338.578	299.654	251.930	251.971	202.079	164.355
Ethiopia	104.803	108.052	141.412	105.468	125.381	135.231	134.898
Peru	15.002	25.173	38.556	29.448	50.813	84.119	99.291
Costa Rica	163.232	119.442	101.525	73.606	75.112	76.140	65.356
Congo Dem. Rep.	66.325	81.030	85.292	68.367	47.890	59.062	55.226
Côte d'Ivoire	178.151	173.254	143.407	128.354	114.729	90.842	53.881
Nicaragua	34.005	40.995	35.735	42.301	56.772	50.163	45.253
El Salvador	29.227	24.138	39.230	25.215	41.820	33.185	45.045
Togo	20.413	28.299	36.137	40.758	44.502	50.351	30.157
Congo	57.906	57.491	24.522	30.109	71.003	61.062	25.147
Kenya	10.197	8.681	9.938	10.628	10.699	10.212	18.882
Mexico	10.616	13.966	11.888	13.028	17.234	8.024	17.051
Dominican Rep.	21.372	21.622	16.682	16.805	19.010	13.516	13.928
Burundi	3.639	4.689	43.081	40.856	6.490	8.430	13.440
Haiti	4.581	5.489	3.845	3.760	4.651	3.833	3.856
Others	108.816	72.357	74.191	99.112	117.764	170.791	127.188
Total	**6.382.094**	**6.457.506**	**6.665.051**	**6.935.480**	**7.402.623**	**7.474.879**	**7.484.143**

The data for the year 2009 contained in the above table compared with the previous year show that:

- Brazil, with a slight decrease, maintains with a large margin its position as the number one supplier of coffee for the Italian market.
- imports from Vietnam have increased; this country has consolidated its position of second supplier of the Italian market;
- imports from Uganda, Indonesia, Tanzania, Honduras, Kenya and Mexico have shown a sizeable growth;
- imports from India, Colombia and Congo have decreased considerably;
- in terms of percentage, the origins that in 2009 have shown the greatest improvement within the Italian market are: Uganda, Indonesia and Tanzania.

Italy: Imports of green coffee
- in % -

Country	2003	2004	2005	2006	2007	2008	2009
Brazil	38,06	36,09	36,13	36,84	1,49	35,32	35,14
Vietnam	13,02	13,98	14,74	16,04	0,78	17,69	18,27
India	10,96	13,09	11,24	12,89	12,75	10,33	9,75
Uganda	5,32	3,87	3,68	2,10	0,18	6,40	7,32
Indonesia	5,91	5,76	7,26	6,73	0,19	5,35	6,94
Colombia	3,86	3,93	5,29	5,76	5,60	5,42	2,86
Guatemala	3,09	3,24	2,31	2,51	2,49	2,82	2,58
Cameroon	4,34	5,25	4,50	3,64	3,40	2,72	2,20
Ethiopia	1,64	1,67	2,12	1,52	1,69	1,83	1,80
Costa Rica	2,56	1,85	1,52	1,07	1,01	1,02	0,87
Ivory Coast	2,79	2,69	2,15	1,85	1,55	1,21	0,72
Others	8,45	8,58	9,06	9,04	9,42	9,89	11,55
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 significant movements only for "Colombian Milds" which are decreasing by 15,8%; "Brasilian Naturals" coffees maintain substantially their position, "Robusta" imports are growing by 2,8%, Other Milds" by 1,6%.

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

Type	2003	2004	2005	2006	2007	2008	2009
Colombian Milds	4,59	4,85	6,90	6,99	6,87	6,72	5,66
Other Milds	20,93	22,58	19,66	21,07	21,20	18,95	19,25
Brazilian Naturals	40,13	37,96	38,47	38,51	37.43	37,62	37,33
Robustas	34,35	34,61	34,97	33,43	34,50	36,71	37,76
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 the import of green coffee and the export of roasted coffee show a positive trend.

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

Italy: Foreign trade in coffee in all forms - in tons-								
	Imports				Exports			
	2006	2007	2008	2009	2006	2007	2008	2009
Green coffee	416.129	444.157	448.630	449.049	5.472	5.950	5.748	5.819
Green decaffeinated coffee	7367	7.740	7.970	8.078	875	764	827	720
Roasted coffee	14.383	14.366	16.712	12.401	87.711	98.446	101.618	102.145
Roasted decaffeinated coffee	505	440	700	630	2.816	3.177	3.279	3.002
Coffee Extracts	4.174	4.513	4.841	4.401	445	647	320	606
Preparations with coffee	1.348	1.616	1.864	2.657	4.634	7.401	6.681	5.958

Exports of roasted coffee, which in recent years has represented the major positive factor of the activity in the Italian coffee sector - since the increase in internal consumption is rather contained - has further increased reaching nearly 2,1 million bags green equivalent.
Thanks to this growth, Italian coffee roasting firms have strengthened their position in the group of major coffee exporters, consolidating the second place held for several years.

3. COFFEE CONSUMPTION

In 2009 the sales volume of the total home coffee market in Italy is stable (+0,2%) compared to the previous year.
If the market segmentation is analysed in detail, it has to be pointed out that the segments have different trends: the Moka segment (coffee with caffeine for coffee pot machines – about 70% of total household consumption in volume) is stable whereas the Espresso segment (coffee blends for espresso machines – about 12% of total household consumption in volume), the Beans segment (7% of total household consumption in volume) and the Decaffeinated segment (7% of total household consumption in volume) are decreasing by 1%.
Finally, the Pods segment, which reached a share of 3% on the total market, rose by more than 50%.

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

Type of Client	%	Type of Sales Outlet	%
Large Distributors	50,6	Supermarkets & Hypermarkets	67
Volunteer Union and Purchasing Groups	49,4	Self Services &Groceries	22
		Discount	11

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

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

In 2009 the average price of the total regular coffee was EUR 8,23/kg and it increased by 3,1% compared to 2008.

The average price of the Moka segment was EUR 7,34/kg and it decreased by 1,4%.
The price of the decaffeinated segment increased slightly compared to the previous year: EUR 9,19/kg (+0,3%); the average price of the Espresso segment decreased by 2,7% to EUR 9,33/kg.

5. COMMENTS ON PARTICULAR SUBJECTS

During 2009 the *Consorzio Promozione 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.

A large part of the budget was destined to the “Education program on coffee, caffeine and health for the healthcare professionals”, co-financed by ISIC. All these activities will be carried out in 2010.

6. VAT LEVELS

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

THE NETHERLANDS

1. IMPORTS OF GREEN COFFEE

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

The Netherlands: Imports of green coffee - in bags -		
Countries of origin	**2008**	**2009**
Brazil	814.117	1.301.688
Vietnam	485.205	442.542
Uganda	198.683	269.785
Honduras	209.109	268.827
Peru	260.562	238.745
Colombia	204.850	133.825
Kenya	54.689	82.299
Guatemala	59.091	62.058
Mexico	18.826	61.806
Rwanda	22.574	47.455
Others	448.493	325.425
Total	**2.776.200**	**3.234.456**

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	**2008**	**2009**
Brazil	29,3	40,2
Vietnam	17,5	13,7
Uganda	7,2	8,3
Honduras	7,5	8,3
Peru	9,4	7,4
Colombia	7,4	4,1
Kenya	2,0	2,5
Guatemala	2,1	1,9
Mexico	0,7	1,9
Rwanda	0,8	1,5
Others	16,2	10,1

Source: HPA

The figures in the tables above show that:

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

The Netherlands: breakdown of net green coffee imports by type of coffee - in % -					
Type of coffee	2007		2008		2009
Arabicas	67		66		73
Colombian Milds	14		12		8
Other Milds	22		22		24
Brazilian Naturals	31		32		41
Robustas	28		29		25
Not defined	5		5		2

Source: HPA

2. FOREIGN TRADE IN COFFEE IN ALL FORMS

Forms of coffee	Imports		Exports	
	2008	2009	2008	2009
Green coffee (including decaffeinated)	166.572.000	194.067.335	6.989.341	6.635.587
Roasted coffee (including decaffeinated)	37.381.100	43.266.000	33.380.101	38.876.057

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

3. COFFEE CONSUMPTION

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

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

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	15	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	7,0	147	3,2
2009	7,1	148	3,3

Source: CBS, HPA and private estimates

4. 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. In 2009 the website www.koffiethee.nl was replaced by two new websites www.koffie.info and www.thee.info. These websites provide ample information about history, production and the processing of coffee and tea. Also they contain information on health and sustainability.

Information Bureau on Coffee and Health

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

5. 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.

NORWAY

6. IMPORTS OF GREEN COFFEE

In 2009 Norway imported 572.943 bags (34.377 tons) of not-decaffeinated green coffee, a marginal increase of 0,1% compared to the 572.262 bags (34.336 tons) imported in 2008.

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

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

	2007		2008		2009	
	bags	%	bags	%	bags	%
Brazil	294.826	46,0	262.109	45,8	267.848	46,7
Colombia	172.577	26,9	139.328	24,3	108.705	19,0
Guatemala	69.536	10,9	69.236	12,1	58.439	10,2
Mexico	13.196	2,1	19.758	3,5	35.946	6,3
Kenya	26.674	4,2	25.602	4,5	33.134	5,8
Peru	8.300	1,3	9.202	1,6	17.179	3,0
Honduras	6.678	1,0	1.958	0,3	11.986	2,1
India	18.198	2,8	12.210	2,1	11.154	1,9
Vietnam	5.964	0,9	4.404	0,8	5.991	1,0
Tanzania	4.453	0,7	4.854	0,8	4.990	0,9
Nicaragua	4.113	0,6	6.300	1,1	4.167	0,7
El Salvador	173	0,0	175	0,0	3.233	0,6
Indonesia	4.043	0,6	4.367	0,8	3.156	0,6
Ethiopia	8.686	1,4	9.976	1,7	2.055	0,4
Uganda	0	0,0	0	0,0	969	0,2
Others	3.380	0,5	2.783	0,5	3.991	0,7
Total all origins	**640.798**	**100,0**	**572.262**	**100,0**	**572.943**	**100,0**

Source: Statistics Norway

7. FOREIGN TRADE IN ALL FORMS

In 2009 imports of not-decaffeinated green coffee were 34.377 tons, virtually unchanged (+0,1%) compared to 2008. Imports of decaffeinated green coffee dropped from 461 to 286 tons (-38%).
The imports of roasted, not decaffeinated coffee was quite stable. Together with decaffeinated roasted coffee, imports of all roasted coffee increased by 6,7%.

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

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

Norway: Foreign trade in coffee
- in tons-

Forms of coffee	Imports			Exports		
	2007	2008	2009	2007	2008	2009
green coffee	38.448	34.336	34.377	150	55	254
green coffee, decaf	237	461	286	0	1	1
green coffee, total	*38.685*	*34.797*	*34.663*	*150*	*56*	*255*
roasted coffee	3.220	3.387	3.612	232	232	168
roasted coffee, decaf	39	22	25	0	0	0

roasted coffee, total	*3.259*	*3.408*	*3.637*	*232*	*232*	*168*
coffee extracts, essences	1.613	1.677	1.712	33	35	25

Source: Statistics Norway

8. COFFEE CONSUMPTION

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

Norway: Total coffee consumption - in bags -	
Years	
2000	657.201
2001	709.939
2002	692.248
2003	683.002
2004	708.938
2005	743.416
2006	721.267
2007	771.422
2008	714.560
2009	715.224

Norway: Per capita consumption - in kg green coffee equivalent -	
Years	
2005	9,61
2006	9,25
2007	9,81
2008	8,99
2009	9,00

Source: ICO

9. ASSOCIATION MEMBERSHIP

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

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

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

The association is composed of:

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

10. VAT AND DUTIES

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

PORTUGAL

1. IMPORTS OF GREEN COFFEE

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

Portugal: Imports of green not-decaffeinated coffee - in bags -						
	2007		2008		2009	
Countries of origin	**bags**	**%**	**bags**	**%**	**bags**	**%**
Vietnam	107.773	15,0	101.832	14,6	119.760	17,1
Brazil	121.695	17,0	95.017	13,6	98.158	14,0
Uganda	67.328	9,4	80.825	11,6	89.877	12,8
Cameroon	62.622	8,7	61.365	8,8	77.465	11,1
India	58.645	8,2	52.920	7,6	48.798	7,0
Honduras	45.985	6,4	48.362	6,9	47.975	6,9
Côte d'Ivoire	63.498	8,9	38.112	5,5	26.593	3,8
Indonesia	20.417	2,8	14.968	2,1	25.300	3,6
Colombia	43.728	6,1	36.060	5,2	22.830	3,3
Costa Rica	21.107	2,9	34.055	4,9	22.363	3,2
Guatemala	22.528	3,1	25.213	3,6	20.093	2,9
Laos	12.060	1,7	22.153	3,2	15.175	2,2
Nicaragua	12.025	1,7	18.317	2,6	14.695	2,1
Timor-Leste	1.053	0,1	3.760	0,5	7.180	1,0
Tanzania	1.900	0,3	1.772	0,3	5.520	0,8
Others	252.335	35,2	256.038	36,8	217.682	31,1
Total all origins	**716.383**	**100,0**	**696.358**	**100,0**	**699.715**	**100,0**

Source: Eurostat

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

2. FOREIGN TRADE

Portugal: International trade in green, roasted and soluble coffee - in tons -										
	Green		Green decaf		Roasted		Roasted decaf		Extracts	
Imports	**2008**	**2009**	**2008**	**2009**	**2008**	**2009**	**2008**	**2009**	**2008**	**2009**
From non-EU origins	39.644	40.203	57	0	710	950	107	132	0	1
From EU origins	2.138	1.780	1.474	2.043	4.354	3.698	177	178	1.222	1.163
Total	41.782	41.983	1.530	2.043	5.064	4.648	284	310	1.222	1.164
Exports	**2008**	**2009**	**2008**	**2009**	**2008**	**2009**	**2008**	**2009**	**2008**	**2009**
To non-EU destinations	59	75	0	0	736	809	15	28	13	19
To EU destinations	20	22	0	0	5.735	6.398	555	541	106	151
Total	78	96	0	0	6.471	7.207	570	569	119	170

Source: Eurostat

The pattern of imports and exports of the various forms of coffee has been relatively stable in the last two years. In 2009 imports of roasted non-decaf coffee dropped with 8% and exports increased with 11%. Imports of soluble coffee deceased with 4,8% and exports increased with 42%, albeit on a modest volume. On the import side, for decaffeinated green coffee the main source by far was Germany (70,1% in 2009), followed by Spain (29,2%). In 2009 the main sources of roasted coffee (incl. decaffeinated) were Italy (36,4%), Spain (22,4%), Switzerland (21,4%) and Germany (16,9%). The main sources for imported coffee extracts in 2009 were Spain (50,6%), the United Kingdom (32,7%) and France (11,1%). Spain was by far the most important export destination for roasted coffee (incl. decaffeinated) with 61,3% of the total volume, followed by Greece (10,2%) and Germany (6,5%).

3. COFFEE CONSUMPTION

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

Portugal: Total coffee consumption - in bags -	
Years	Total consumption
2000	646.394
2001	745.496
2002	719.582
2003	657.369
2004	685.402
2005	655.544
2006	671.447
2007	716.861
2008	691.735
2009	721.363

Portugal: Per capita consumption - in kg green coffee equivalent -	
Year	Consumption
2005	3,73
2006	3,80
2007	4,04
2008	3,89
2009	4,05

Source: ICO

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

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

Portugal: Retail prices for roasted coffee - EUR/kilo -	
2000	9,44
2001	9,45
2002	8,98
2003	8,88
2004	8,59
2005	8,54
2006	8,32
2007	8,23
2008	8,58
2009	8,44

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

7. EXCISE DUTIES AND VAT LEVEL

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

SPAIN

1. IMPORTS OF GREEN COFFEE

In 2009 Spain imported 4.252.616 bags of green coffee (255.157 tons) which represents an approximate 1% drop compared to the previous year. In year 2008 a total volume of 257.061 tons was imported.

Spain: Imports of green coffee 1996 – 2009 - in bags of 60 kilos -	
Year	**Volume**
1996	3.270.741
1997	3.490.161
1998	3.483.274
1999	3.633.701
2000	3.511.108
2001	3.772.666
2002	3.681.934
2003	3.785.850
2004	3.770.856
2005	4.020.600
2006	4.023.116
2007	4.370.450
2008	4.284.350
2009	4.252.616

Source: Spanish Coffee Federation

The main suppliers were:

Spain: Imports of green coffee by origin - in bags -				
Countries of origin	**2006**	**2007**	**2008**	**2009**
Vietnam	1.577.550	1.758.083	1.549.168	1.578.233
Brazil	738.720	860.183	992.933	907.283
Uganda	228.170	256.000	309.016	297.250
Colombia	288.050	319.116	323.650	231.066
Côte d'Ivoire	208.050	215.316	127.066	148.116
India	161.230	171.183	164.600	115.250
Germany	252.630	209.583	186.733	280.983
Honduras	77.280	79.916	107.100	65.116
Nicaragua	91.780	103.016	97.566	98.466
Peru	25.083	47.850	62.666	31.349
Others	306.486	350.204	363.850	499.504
Total	**4.023.116**	**4.023.116**	**4.284.350**	**4.252.616**

Source: Spanish Coffee Federation

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

As for Arabica green coffee imports, in general they have experienced a slight drop (3,61%), even though Brazil still accounts for 21,33% of total imports.

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

Spain: Percentage distribution of green coffee imports by main sources - in % -							
Countries of origin	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**
Vietnam	25,4	34,29	35,5	39,21	40,23	36,16	37,11
Brazil	22,3	17,59	18,9	18,36	19,68	23,18	21,33
Uganda	13,1	9,34	8,1	5,67	5,86	7,21	6,99
Colombia	7,3	6,35	5,9	7,16	7,30	7,55	5,43
Cote d'Ivoire	6,2	6,12	7,7	5,17	4,93	2,97	3,48
India	n.a	6,15	4,3	4,01	3,92	3,84	2,71
Germany	n.a	3,44	5,4	6,28	4,80	4,36	6,61
Honduras	n.a	2,35	1,9	1,92	1,83	2,50	1,53
Indonesia	n.a	2,21	2,8	2,28	0,70	0,86	4,65
Nicaragua	n.a	3,02	2,1	2,20	2,36	2,28	2,32
Others	25,7	9,14	7,4	7,73	8,41	9,09	7,84

Source: Spanish Coffee Federation

Spain: Percentage distribution of green coffee imports by types of coffee - in % -							
Types of coffee	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**
Arabicas	**45,49**	**39,22**	**38,88**	**39,18**	**40,39**	**39,59**	**35,98**
1. Colombian Milds	7,74	6,72	6,45	8,99	7,78	7,99	6,10
2. Other Milds	13,08	12,21	8,76	6,73	9,17	8,72	8,70
3. Brazilian Naturals	24,67	20,29	23,67	23,46	23,44	22,88	21,18
Robustas	**54,51**	**60,78**	**61,12**	**60,82**	**59,61**	**60,41**	**64,02**
Others	0	0	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**	**2009**	**2007**	**2008**	**2009**
Green coffee	262.227	257.061	255.157	14.668	17.251	25.632
Roasted	15.211	16.548	17.436	12.548	10.048	7.361
Soluble	6.318	8.159	8.081	24.178	22.621	22.008

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

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

3. COFFEE CONSUMPTION

Spain: Coffee consumption 2007/2009 - in tons -			
	2007	2008	2009
Home consumption			
- Roasted	63.600	64.300	63.722
- Soluble	10.200	10.300	10.286
Food service			
- Roasted	61.500	65.284	62.770
- Soluble	1.920	2.337	2.020
Green coffee equivalent			
- Roasted	146.367	151.613	147.996
- Soluble	30.300	31.593	30.765
Total Green coffee equivalent	**176.667**	**183.206**	**178.761**

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

Within the Spanish coffee market (always in green coffee equivalent), there is a slight drop during 2009, affected of course by the general economic situation but fortunately, not as much as other food and drink manufactured products. There is an approximate 1% drop in home consumption roasted coffee and a 3,85% fall in out of home consumption. On the contrary soluble coffee has experienced, in out of home consumption, a much sharper drop (13,56%).

It is important to stress that it is only since June 2007 that the Ministry is providing official and consistent out of home consumption data, as up until then the line item included coffee and tea. In any case, the current market distribution assigns 56,10% of the market share to home consumption and the remaining 43,90% to the food service industry.

Concerning roasted and soluble coffee market distribution, roasted coffee (in green coffee equivalent) accounts for 82,79% of the market, whilst soluble coffee accounts for the remaining 17,21%, following an identical trend to previous years.

As for different forms of consuming coffee, when at home, blended coffee (natural & *torrefacto*) accounts for 41,20% of total consumption, whilst natural coffee (no added sugars) account for 36,60% of the market share. When enjoying a cup of coffee out of home Spaniards also prefer their coffee blended with *torrefacto* (44,57%) or otherwise natural (40,43%). Finally it is interesting to note the steady increase of decaffeinated ground roasted coffee figures, representing approximately 20% of total home roasted coffee consumption, and 13,5% of food service industry consumption.

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

Retail coffee prices for roasted coffee have increased by 5,75% during year 2009, as for soluble retail prices these have remained constant. Source: Spanish Ministry of Agriculture

5. INFORMATION ON ASSOCIATION MEMBERSHIP

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

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

6. STATUS NATIONAL COFFEE AND HEALTH PROGRAMME

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

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

FEC also sponsors since 2008 a research grant in collaboration with the Spanish Nutrition Foundation (III edition) and has recently published several articles (Coffee & Alzheimer/Parkinson/Hydration/Cancer/Diabetes/Liver function) in "Medicina Clinica" and "Atención Primaria" edited by SEMFYC with over 10.000 members.

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

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

7. DUTIES AND VAT LEVELS

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

SWEDEN

1. IMPORTS OF GREEN COFFEE

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

Sweden: Imports of not-decaffeinated green coffee from origin countries - in tons actual weight -					
Countries of origin	**2007**	**Change**	**2008**	**Change**	**2009**
Brazil	46.228	-3%	44.762	-4%	43.174
Colombia	18.756	-8%	17.283	-28%	12.403
Peru	8.664	33%	11.563	-28%	8.374
Kenya	7.435	-7%	6.922	10%	7.601
Honduras	3.276	63%	5.342	19%	6.340
Burundi	1.610	-51%	789	320%	3.315
Nicaragua	1.100	97%	2.168	30%	2.825
Ethiopia	5.227	6%	5.532	-60%	2.215
Vietnam	1.998	2%	2.045	-2%	2.006
Mexico	745	21%	905	75%	1.581
Guatemala	3.310	-19%	2.676	-60%	1.065
Indonesia	1.060	3%	1.088	-20%	869
Uganda	878	22%	1.073	-27%	785
Tanzania	261	51%	395	79%	707
El Salvador	969	-47%	517	-2%	505
Dominican Republic	136	174%	373	-18%	307
Papua New Guinea	320	-89%	36	731%	299
Costa Rica	417	-59%	170	44%	245
Rwanda	474	-74%	125	89%	236
India	199	89%	377	-41%	221
Others*	6.546	-16%	5492	111%	11.614
Total	**109.610**	**0%**	**109.635**	**-3%**	**106.686**

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

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

Among the other of the top five origins, Peru, Kenya and Ethiopia, only Kenya decreased its volumes and share of market. Most spectacular is how imports from Ethiopia decreased 60% and moved this origin from number five to number eight. New on position five is Honduras after two years of increasing exports to Sweden. Another runner up is Burundi, increasing 320% and now the sixth most important origin. Also Nicaragua is strengthening its position.
The Robusta origins Vietnam and Indonesia decreased their volumes in 2007 after a few years of good increases. In 2008 and 2009 they have more or less unchanged shares of total volume (2% and 1% respectively). These Robusta volumes however do not reflect any big change in the Swedish consumption pattern but substantially increased export volumes of roasted coffee of different qualities. Sweden is still an almost 100% Arabica market.

Sweden: Imports of not decaffeinated green coffee from origin countries - percentage distribution by main sources -			
Countries of origin	**2007**	**2008**	**2009**
Brazil	42,2%	40,8%	40,5%
Colombia	17,1%	15,8%	11,6%
Peru	7,9%	10,5%	7,8%
Kenya	6,8%	6,3%	7,1%
Honduras	3,0%	4,9%	5,9%
Burundi	1,5%	0,7%	3,1%
Nicaragua	1,0%	2,0%	2,6%
Ethiopia	4,8%	5,0%	2,1%
Vietnam	1,8%	1,9%	1,9%
Mexico	0,7%	0,8%	1,5%
Guatemala	3,0%	2,4%	1,0%
Indonesia	1,0%	1,0%	0,8%
Uganda	0,8%	1,0%	0,7%
Tanzania	0,2%	0,4%	0,7%
El Salvador	0,9%	0,5%	0,5%
Dominican Republic	0,1%	0,3%	0,3%
Papua New Guinea	0,3%	0,0%	0,3%
Costa Rica	0,4%	0,2%	0,2%
Rwanda	0,4%	0,1%	0,2%
India	0,2%	0,3%	0,2%
Others*	6,0%	5,0%	10,9%
Total	**100,0%**	**100,0%**	**100,0%**

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

Sweden: Imports of not decaffeinated green coffee - percentage distribution by types of coffee -						
Type of coffee	**2007**		**2008**		**2009**	
Arabica	95%		93,2%		86,0%	
Colombian Milds		26%		23,0%		19,4%
Other Milds		21%		24,0%		24,0%
Brazilian Naturals		49%		46,3%		42,5%
Robusta	3%		3,5%		3,1%	
Not specified	2%		3,3%		10,9%	
Total	**100%**		**100,0%**		**100,0%**	

Source: Statistics Sweden and the Swedish National Coffee Association

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

2. FOREIGN TRADE IN ALL FORMS OF COFFEE

Sweden: Foreign trade in coffee - in tons actual weight -						
	Imports			Exports		
	2007	2008	2009	2007	2008	2009
Green coffee	109.610	109.635	106.686	63	574	1.715
Green coffee (decaf)	1.074	659	741	288	2	0
Roasted coffee	8.309	8.169	8.809	23.720	24.088	22.830
Roasted coffee (decaf)	87	19	11	1.122	835	744
Instant coffee	2.847	≈3.050	≈3.250	496	≈500	≈550

Source: Statistics Sweden and the Swedish National Coffee Association

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

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

Imports of roasted coffee seem to stabilize around 8.000 – 9.000 tons and came in 2009 mainly from the Netherlands, Denmark and Germany (52%, 13% and 13% respectively). Imports from Italy were 12% of the total import volume, reflecting the espresso trend.

Net imports of instant coffee (only pure instant is registered), increased and are now about 2.700 tons. The figures from 2008 and 2009 are best estimates based on internal statistics, since official figures after 2007 are not available.

3. COFFEE CONSUMPTION

The total size of the Swedish market in 2009 was 85.922 tons *roasted coffee equivalent*, giving a total per capita consumption of all forms of coffee of 9,2 kilos. (Roasted coffee is calculated as 85% of green coffee weight. A multiple of 4 is used in Sweden to calculate instant coffee as roasted.). Of coffee consumed, calculated this way, about 13% was instant coffee.

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

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

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

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

Sweden: Per capita consumption of coffee				
		2007	2008	2009
Roast&ground coffee	kg/capita	8,42	8,27	8,04
Instant	gr/capita	256	276	290

All coffee as roasted	kg/capita	9,45	9,37	9,19
	cups/day	3,5	3,4	3,4
- as an average of three latest years	kg/capita	9,28	9,39	9,34
	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 59,54 per kilo in 2009 and SEK 54,10 in 2008. However the official statistics underestimate discounts and campaign prices which are frequent in Sweden and a weighted average price per kilo is about 10% lower. The table does reflect the trend of price levels, which was decreasing the first half of this decade. 2006 was the first year since 1998 when the average price increased, a shift which was confirmed the following years.

Sweden: Retail prices roasted ground coffee			
Year	**SEK/kg**	**Year**	**SEK/kg**
2000	61,00	2005	49,18
2001	57,60	2006	51,12
2002	54,60	2007	52,20
2003	52,30	2008	54,10
2004	49,90	2009	59,54

Source: Statistics Sweden

5. COMMENTS ON PARTICULAR SUBJECTS

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

6. DUTIES AND VAT LEVELS

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

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 1.837.100 bags in 2009. This is an increase of almost 6,4% compared to the 1.727.400 bags imported in 2008.

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

Switzerland: Imports of green coffee - in bags -		
	2008	**2009**
Brazil	478.100	593.100
Colombia	242.300	259.600
Vietnam	169.500	162.500
India	116.300	138.200
Guatemala	84.400	91.900
Honduras	93.500	89.600
Costa Rica	91.300	78.600
Indonesia	42.700	62.500
Ethiopia	61.600	61.800
Mexico	36.700	43.000
Others	311.000	256.300
total	**1.727.400**	**1.837.100**

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

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

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

Switzerland: Imports of green coffee - in % -		
	2008	**2009**
Brazil	27,7	32,3
Colombia	14,0	14,1
Vietnam	9,8	8,8
India	6,7	7,5
Guatemala	4,9	5,0
Honduras	5,4	4,9
Costa Rica	5,3	4,3
Indonesia	2,5	3,4
Ethiopia	3,6	3,4
Mexico	2,1	2,3
Others	18,0	14,0
Total	**100,0**	**100,0**

2. FOREIGN TRADE IN COFFEE IN ALL FORMS

Switzerland: Coffee trade - in 1000 bags green bean equivalent -						
	Imports			Exports		
	2008	2009	% change	2008	2009	% change
Green coffee	1.727,4	1.837,1	6,4	18,1	18,5	2,2
Roasted coffee	181,3	185,1	2,1	452,6	540,9	19,5
Soluble coffee	95,2	100,4	5,5	519,2	526,9	1,5

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

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

3. COFFEE CONSUMPTION

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

Switzerland: Total coffee consumption - in bags -	
Years	
2000	826.930
2001	816.090
2002	821.026
2003	852.430
2004	722.016
2005	1.099.332
2006	931.889
2007	988.974
2008	1.149.302
2009	965.545

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
2009	7,68

Source: ICO

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

Switzerland: retail prices roasted coffee - In CHF per kg -	
2000	5,34
2001	5,34
2002	6,32
2003	8,40
2004	10,09
2005	10,38

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 2009 of non-decaffeinated green coffee showed a marked increase.

United Kingdom: Imports of green coffee non-decaffeinated - in bags of 60 kilos -				
Countries of origin	**2006**	**2007**	**2008**	**2009**
Vietnam	553.936	589.825	465.314	457.423
Brazil	244.554	243.297	313.922	431.071
Colombia	378.413	465.603	446.211	306.781
Indonesia	228.862	148.731	240.667	260.700
Honduras	40.411	33.784	38.125	128.679
Peru	78.009	102.829	63.301	61.566
Kenya	34.316	38.715	53.357	44.370
Ethiopia	27.446	36.743	48.504	35.345
Guatemala	22.324	18.909	21.223	22.896
Costa Rica	22.660	19.928	26.508	19.678
El Salvador	15.696	13.630	18.547	18.953
Uganda	16.831	19.918	10.769	17.059
Côte d'Ivoire	-	-	-	16.683
Nicaragua	29.327	13.189	21.199	15.989
India	14.164	13.437	17.930	10.391
Tanzania	7.754	7.809	11.363	7.913
Mexico	8.179	8.220	7.589	5.833
Papua New Guinea	3.019	3.356	4.875	3.362
Zimbabwe	2.489	3.228	2.873	1.521
Others/Unknown	72.618	48.493	34.774	75.217
Total	**1.801.008**	**1.843.811**	**1.847.051**	**1.971.434**

Source: British Coffee Association

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

United Kingdom Percentage distribution of green coffee non-decaffeinated imports by main origin - in % -				
Countries of Origin	**2006**	**2007**	**2008**	**2009**
Vietnam	30,76	31,99	25,19	24,72
Brazil	13,58	13,19	17,00	21,86
Colombia	21,01	25,25	24,16	15,56
Indonesia	12,71	8,07	13,03	13,22
Honduras	2,24	1,83	2,06	6,53
Peru	4,33	5,58	3,43	3,12
Kenya	1,91	2,10	2,89	2,25
Ethiopia	1,52	1,99	2,63	1,79
Costa Rica	1,26	1,08	1,44	1,00
Guatemala	1,24	1,03	1,15	1,16
El Salvador	0,87	0,74	1,00	0,96
Uganda	0,90	1,08	0,58	0,86
Côte d'Ivoire	-	-	-	0,85
Nicaragua	1,63	0,72	1,15	0,81

India	0,79	0,72	0,97	0,53
Tanzania	0,43	0,42	0,62	0,40
Mexico	0,45	0,46	0,41	0,30
Papua New Guinea	0,17	0,19	0,26	0,17
Zimbabwe	0.14	0,17	0,16	0,08
Others/Unknown	4,06	2,62	1,88	3,83
Total	**100,00**	**100,00**	**100,00**	**100,00**

Source: British Coffee Association

United Kingdom: Imports by types of coffee (ICO) - in % -									
Types of coffee	**2005**		**2006**		**2007**		**2008**		**2009**
Arabicas	52		52		56		60		56
Colombian Milds	23		23		28		28		16
Other Milds	14		14		13		13		16
Brazilian Naturals	15		15		15		19		24
Robustas	47		47		42		39		40
Others/Unknown	1		1		2		1		4

Source: British Coffee Association

Arabicas share declined marginally with Robustas maintaining a similar position to 2008. Colombian Milds fell significantly due to supply issues, whereas Brazilian naturals rose significantly.

2. FOREIGN TRADE IN ALL FORMS

United Kingdom: Foreign Trade in Coffee - in tons -								
	Imports				**Exports**			
	2006	**2007**	**2008**	**2009**	**2006**	**2007**	**2008**	**2009**
Green	108.060	110.629	110.803	118.256	3.266	2.495	3.199	3.327
Green Decaf	278	212	303	281	102	71	157	115
Roasted	1.138	1.061	1.066	1.064	2.898	3.675	5.482	8.978
Roasted Decaf	142	228	194	205	203	339	234	295
Soluble/Extracts	7.676	10.388	8.123	10.051	18.062	18.944	15.572	11.270

Source: British Coffee Association

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

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

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

3. COFFEE CONSUMPTION

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

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

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

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

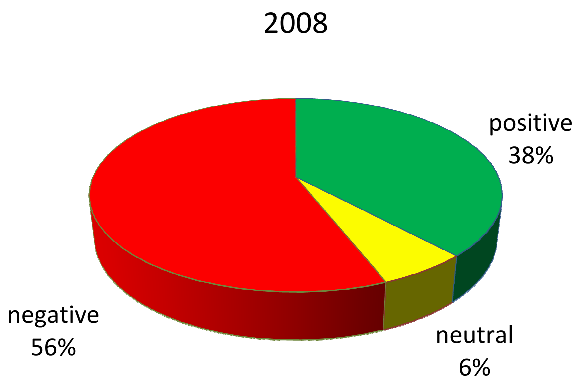
5. INFORMATION ON ASSOCIATION MEMBERSHIP

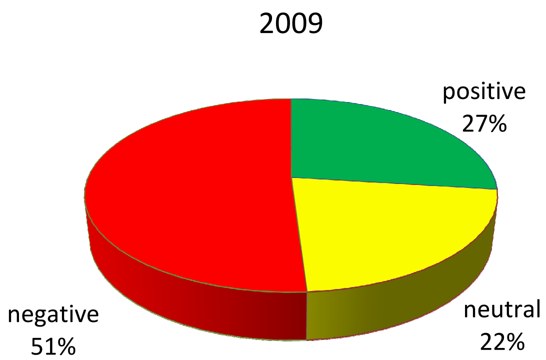
The BCA continues to represent all aspects of the coffee industry in the UK. 2009 was an exceptional year; we gained 12 new members, 4 Full and 8 Associate Members. We expect membership to grow during 2010 but at a slower rate than 2009.

6. HEALTH

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

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





7. EXCISE DUTIES AND VAT LEVEL

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

SELECTED OTHER EU MEMBERS

1. KEY IMPORT DATA 2009

Bulgaria					
Green Coffee (Incl Decaf)		**Roasted Coffee (Incl Decaf)**		**Extracts, essences**	
Vietnam	5.035	Italy	1.521	Brazil	488
Indonesia	4.418	Romania	581	Germany	217
Honduras	2.153	Germany	435	Poland	163
Peru	2.137	Greece	241	Hungary	135
Brazil	2.073	Hungary	197	France	81
Others	6.856	Others	311	Others	215
Total	22.672	Total	3.285	Total	1.298
Czech Republic					
Green Coffee (Incl Decaf)		**Roasted Coffee (Incl Decaf)**		**Extracts, essences**	
Brazil	4.603	Poland	9.202	Spain	1.338
Vietnam	2.846	Slovakia	4.611	Poland	1.107
Indonesia	2.655	Germany	3.336	Slovakia	1.066
Peru	1.033	Italy	895	Germany	1.059
Honduras	994	Hungary	726	France	531
Others	3.742	Others	1.504	Others	639
Total	15.872	Total	20.275	Total	5.739
Hungary					
Green Coffee (Incl Decaf)		**Roasted Coffee (Incl Decaf)**		**Extracts, essences**	
Germany	10.748	Germany	7.614	Germany	1.511
Austria	455	Austria	2.368	India	1.105
Italy	213	Slovakia	1.645	Spain	700
Belgium	163	Italy	334	Brazil	591
Netherlands	155	United Kingdom	239	Poland	445
Others	26	Others	663	Others	1.026
Total	11.760	Total	12.863	Total	5.377
Poland					
Green Coffee (Incl Decaf)		**Roasted Coffee (Incl Decaf)**		**Extracts, essences**	
Germany	70.881	Germany	24.044	Germany	7.868
Netherlands	4.995	Italy	1.579	Ecuador	3.641
Vietnam	4.605	Czech Republic	1.036	United Kingdom	2.266
Laos	3.570	Austria	531	Spain	1.022
Brazil	2.246	Netherlands	287	France	864
Others	7.892	Others	1.941	Others	3.836
Total	94.189	Total	29.418	Total	19.497
Romania					
Green Coffee (Incl Decaf)		**Roasted Coffee (Incl Decaf)**		**Extracts, essences**	
Indonesia	5.193	Germany	6.443	Germany	949
Vietnam	4.962	Bulgaria	4.572	Brazil	572
Brazil	2.787	Italy	1.815	Israel	567
Colombia	1.276	Netherlands	774	Spain	542
Uganda	1.235	Austria	601	France	221
Others	6.927	Others	939	Others	354

Total	22.381	Total	15.143	Total	3.204
Slovenia					
Green Coffee (Incl Decaf)		**Roasted Coffee (Incl Decaf)**		**Extracts, essences**	
Brazil	5.321	Italy	1.218	Austria	377
Vietnam	1.519	Austria	424	Germany	93
Italy	1.114	Bosnia and Herzegovina	332	Italy	8
India	698	Croatia	201	Indonesia	2
Colombia	492	Germany	114	Netherlands	2
Others	1.189	Others	112	Others	3
Total	10.334	Total	2.401	Total	484
Slovakia					
Green Coffee (Incl Decaf)		**Roasted Coffee (Incl Decaf)**		**Extracts, essences**	
Germany	1.924	Germany	7.713	Poland	628
Belgium	933	Czech Republic	3.094	Czech Republic	350
Vietnam	470	Poland	2.047	Spain	325
Brazil	131	Austria	1.575	Switzerland	139
Hungary	95	Italy	421	Germany	128
Others	285	Others	684	Others	130
Total	3.838	Total	15.533	Total	1.700

Source: Eurostat

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

2. CONSUMPTION

	Total coffee consumption			**Per capita consumption**		
	2007	**2008**	**2009**	**2007**	**2008**	**2009**
Bulgaria	364.190	444.718	409.276	2,86	3,52	3,24
Czech Republic	678.961	621.413	525.168	3,97	3,61	3,05
Hungary	522.203	493.978	445.286	3,12	2,96	2,67
Poland	1.530.781	1.189.631	969.693	2,41	1,87	1,53
Romania	823.573	806.767	774.945	2,30	2,27	2,18
Slovakia	356.335	341.035	212.745	3,97	3,79	2,36
Slovenia	194.959	194.170	198.275	5,82	5,77	5,89

Source: ICO

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

EU COFFEE IMPORT DUTIES

Import duties for green and processed coffee into the EU from the 20 most important EU suppliers listed alphabetically - 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**
China	0,0	4,8**	2,6**	3,1**	3,1*
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*
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 as at 19 August 2010
* Generalised System of Preferences
** Economic Partnership Agreements
*** Bilateral Trade Agreement

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

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

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 0,2479/kg; soluble 0,6941/kg
Bulgaria	20,0	
Cyprus	0,0	
Czech Republic	10,0	
Denmark	25,0	Roasted: DKK 6,54/kg; soluble DKK 14,17/kg
Estonia	20,0	
Finland	13,0	
France	5,5	
Germany	7,0	Roasted: EUR 2,19/kg; soluble EUR 4,78/kg
Greece	11,0	
Hungary	25,0	
Ireland	0,0	
Italy	20,0	
Latvia	21,0	LVL 100/100 kg pure coffee
Lithuania	21,0	
Luxembourg	3,0	
Malta	0,0	
Netherlands	6,0	
Poland	22,0	
Portugal	13,0	
Romania	24,0	Green: EUR 153/ton; roasted: EUR 225/ton; soluble: EUR 1800/ton
Slovakia	19,0	
Slovenia	8,5	
Spain	8,0	
Sweden	12,0	
United Kingdom	0,0	

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

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

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