European Coffee Report 2011/12

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European Coffee Federation

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European Coffee Federation

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INTRODUCTION

This is the thirty-third issue of the 'European Coffee Report'. It is an updated preliminary edition, now including the new chapters on Belgium and Germany. One or two country chapters are still awaited and will be added as soon as available.

The European Coffee Federation (ECF) continues this series with the report over 2011/12. As usual, the European Coffee Report 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. 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.

The European Coffee Report is available only in electronic format on the ECF website.

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This report was finalised in September 2012 and updated in November 2012

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 as approved under the International Coffee Agreement 2007 (ED 2123/11 of 20 October 2011):

- from roasted to green: multiply by 1,19
- from soluble to green: multiply by 2,6
- from green decaffeinated to green: multiply by 1,05

Green coffee equivalent is the sum total of the volume of green, green decaffeinated, 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

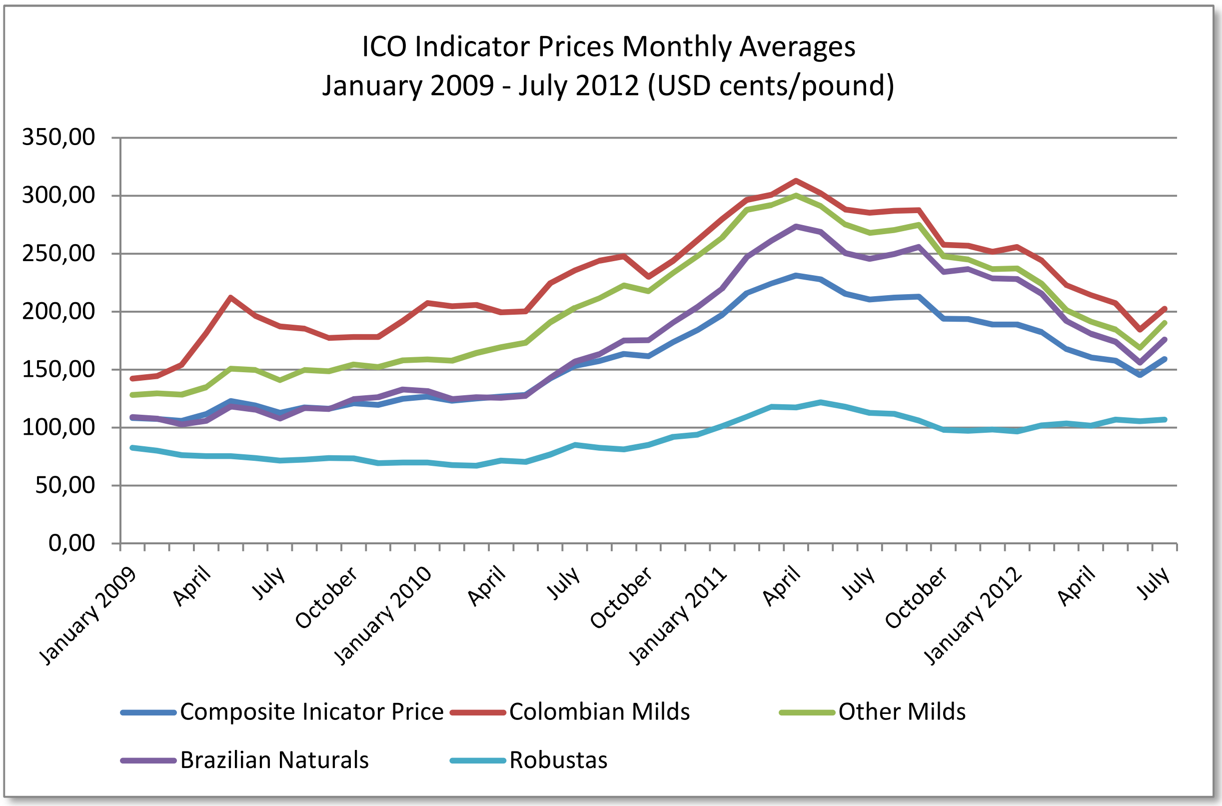
Abbreviations of currencies are those used for international banking purposes, based on ISO standards.

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

ICO INDICATOR PRICES



As from 1 October 2009 the weighting is as follows:

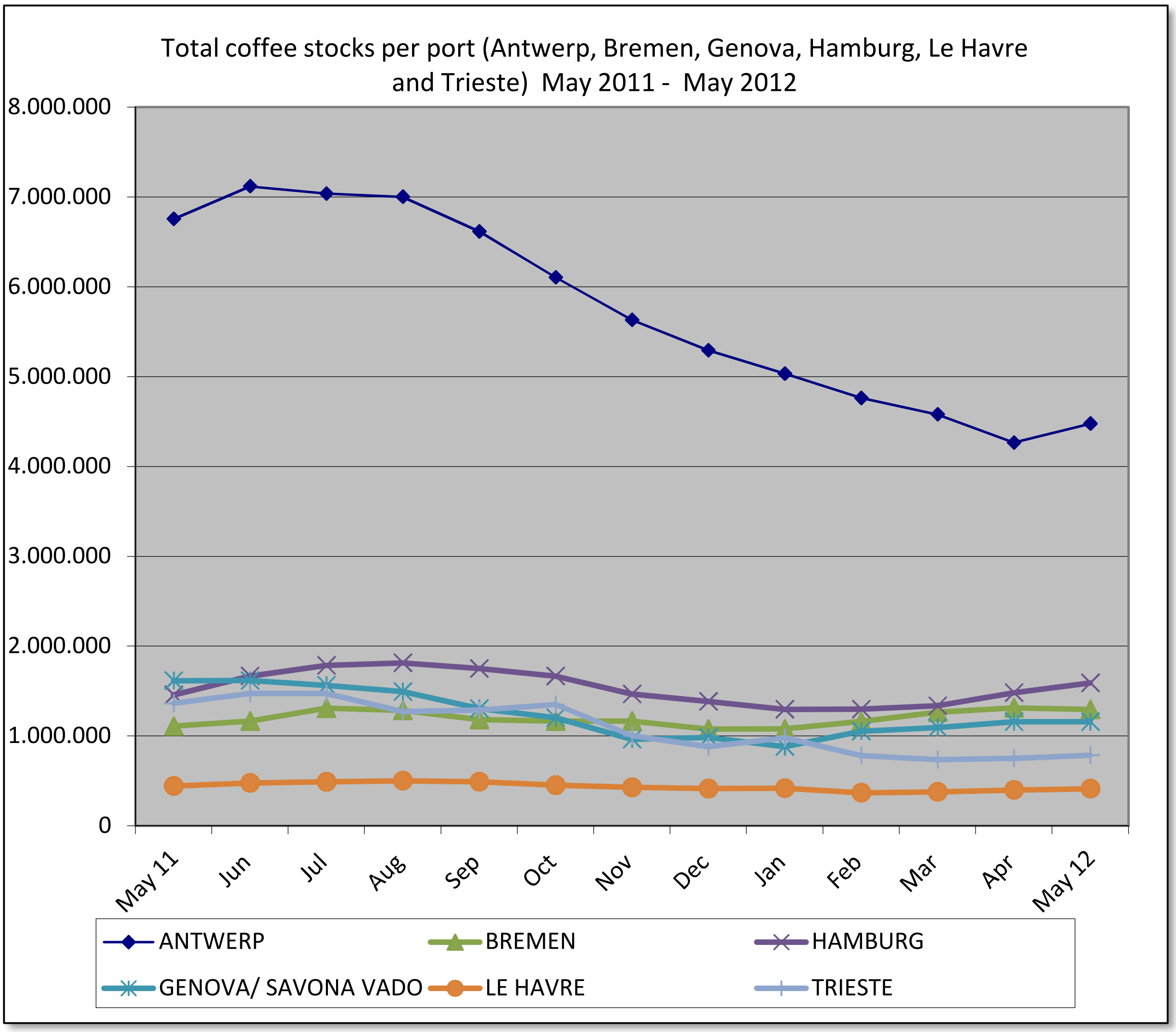
Colombian Milds:	13%
Other Milds:	23%
Brazilian Naturals:	30%
Robustas:	34%

As from March 2011 the weighting is as follows (ICO document ICC 105-17):

Colombian Milds:	12%
Other Milds:	23%
Brazilian Naturals:	31%
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 2011

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 2008 to 2010
- in tons and in bags of 60 kilos -

	2009		2010		2011	
	tons	bags	tons	bags	tons	bags
Austria	24.694	411.562	29.831	497.177	34.028	567.138
Belgium	307.746	5.129.102	304.887	5.081.457	295.494	4.924.905
Bulgaria	22.505	375.075	23.017	383.617	20.635	343.915
Cyprus	1.350	22.495	1.606	26.758	1.466	24.432
Czech Republic	15.669	261.157	17.742	295.693	17.626	293.762
Denmark	34.431	573.853	36.069	601.148	22.074	367.897
Estonia	87	1.452	128	2.138	60	1.003
Finland	67.410	1.123.493	66.463	1.107.720	63.905	1.065.085
France	258.629	4.310.477	252.520	4.208.660	240.438	4.007.302
Germany	1.063.596	17.726.593	1.097.905	18.298.422	1.104.465	18.407.748
Greece	27.895	464.917	25.231	420.523	30.505	508.420
Hungary	12.920	215.338	13.114	218.563	7.129	118.813
Ireland	2.473	41.210	2.495	41.587	4.813	80.210
Italy	448.909	7.481.810	461.201	7.686.690	465.365	7.756.082
Latvia	3.305	55.078	3.209	53.490	2.779	46.322
Lithuania	293	4.888	428	7.128	347	5.787
Luxembourg	900	14.997	601	10.020	880	14.670
Malta	32	530	48	803	32	537
Netherlands	72.437	1.207.278	73.667	1.227.787	77.621	1.293.682
Poland	96.037	1.600.622	102.063	1.701.045	106.885	1.781.423
Portugal	46.194	769.905	43.312	721.868	47.204	786.735
Rumania	22.102	368.365	21.299	354.978	20.147	335.775
Slovakia	3.791	63.177	3.948	65.802	5.519	91.988
Slovenia	10.257	170.953	10.677	177.947	9.156	152.603
Spain	242.434	4.040.570	253.453	4.224.223	240.657	4.010.955
Sweden	106.755	1.779.253	116.671	1.944.508	102.744	1.712.395
United Kingdom	123.824	2.063.730	133.254	2.220.902	141.550	2.359.173
EU27 total (incl intra-EU)	*3.016.673*	*50.277.880*	*3.094.839*	*51.580.655*	*3.063.525*	*51.058.757*
Norway	34.380	572.997	35.664	594.393	36.615	610.250
Switzerland	110.226	1.837.100	120.906	2.015.100	131.100	2.185.000
Western Europe total	*3.161.279*	*52.687.977*	*3.251.409*	*54.190.148*	*3.231.240*	*53.854.006*
Albania	7.320	122.000	6.840	114.000		
Belarus	10.260	171.000	10.800	180.000		
Bosnia and Herzegovina	20.520	342.000	19.020	317.000	22.380	373.000

Croatia	23.640	394.000	23.640	394.000	23.460	391.000
Kazakhstan	11.040	184000	9.000	150000		
Macedonia, FYR	8.760	146.000	7.980	133.000	8.100	135.000
Moldova	1.680	28.000	2.100	35.000		
Russian Federation	209.220	3.487.000	239.460	3.991.000	242.040	4.034.000
Serbia	34.680	578.000	33.360	556.000	33.240	554.000
Turkey	29.979	534.000	30.000	500.000	32.040	534.000
Ukraine	92.460	1.541.000	95.280	1.588.000	82.320	1.372.000
Central and Eastern Europe total	*449.559*	*7.527.000*	*477.480*	*7.958.000*		
Europe total	***3.610.838***	***60.214.977***	***3.728.889***	***62.148.148***		

Note: Figures show imports of green coffee, not decaffeinated for the EU and imports of coffee in all forms for other countries.
Sources: Eurostat for EU; ICO, national statistics and F.O. Licht for other countries.

In calendar year 2011 green coffee imports in Western Europe were 53,9 million bags, a very minor drop of 0,6% compared to the 54,2 million bags in 2010. The Western European market is dominated by the EU. Green coffee imports into the EU27 – including intra-EU trade - decreased slightly by 1% from 51,6 million bags in 2010 to 51,1 million bags in 2011. Please note that there are some slight variations with the data in last year's report. Eurostat commonly corrects its data after initial publication.
According to ICO data, Central and Eastern European imports of coffee in all forms in 2010 (the most recent year available for most of these countries) amounted to almost 8 million bags, 5,7% higher than the year before.

The 'top 20' sources of EU27 green coffee imports (excluding intra-EU trade) in 2009, 2010 and 2011 were as follows (listed in the order of 2011 imports):

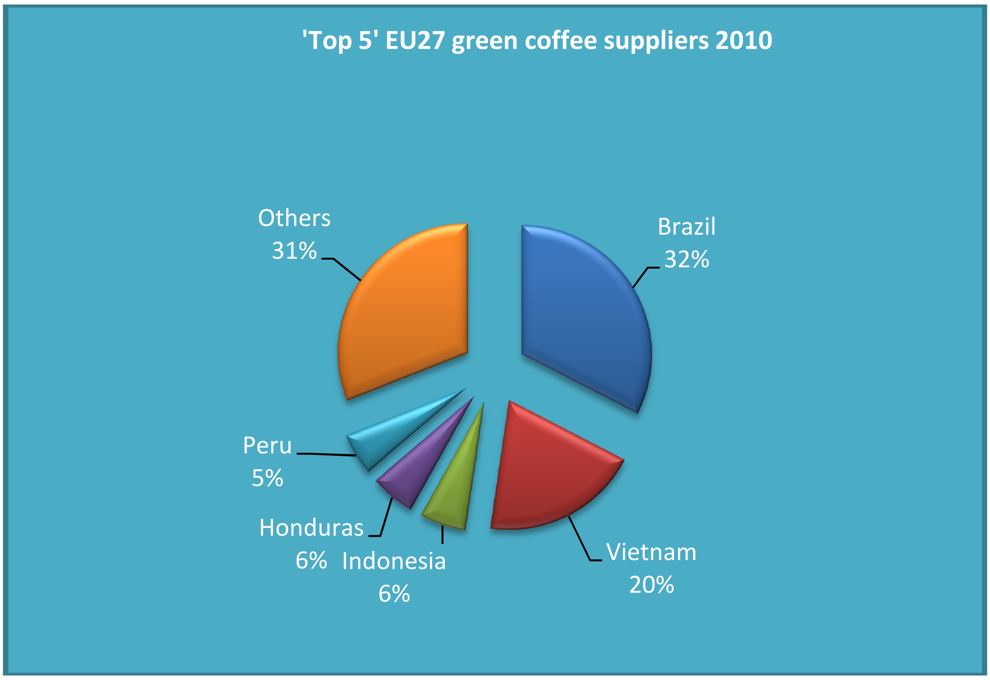
Imports of green, not decaffeinated coffee into the EU27 (excluding intra-EU trade) by main origins

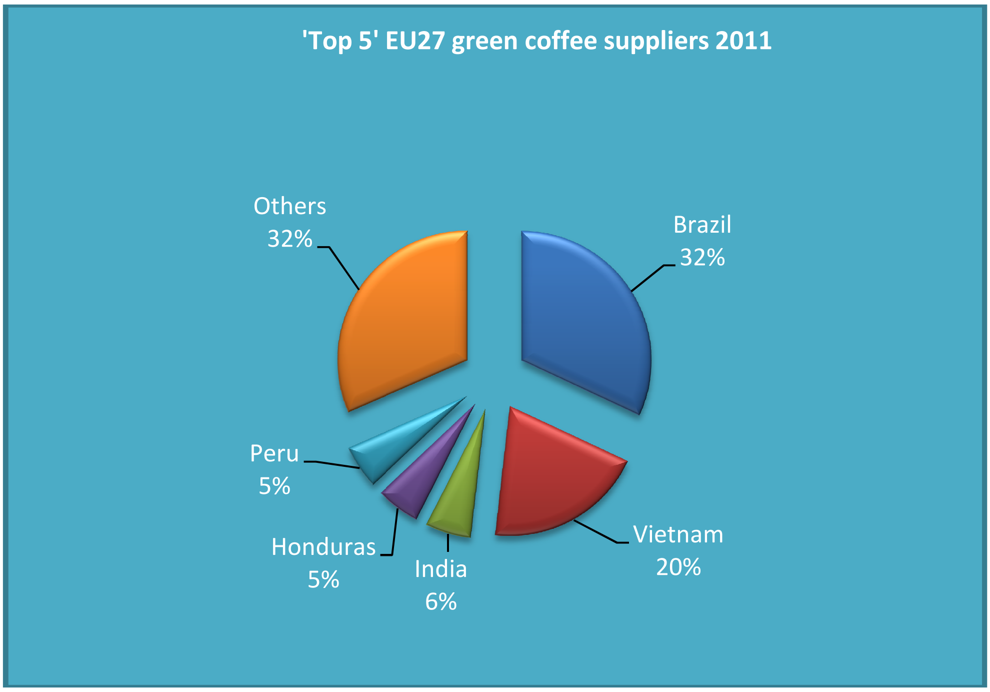
	2009		2010		2011	
	bags	**%**	**bags**	**%**	**bags**	**%**
Brazil	14.619.558	32,7	14.938.293	32,6	14.543.388	32,0
Vietnam	8.421.188	18,8	9.032.193	19,7	9.033.387	19,9
India	1.297.863	2,9	1.814.827	4,0	2.577.397	5,7
Honduras	2.390.300	5,3	2.589.897	5,7	2.496.858	5,5
Peru	2.195.433	4,9	2.414.587	5,3	2.489.265	5,5
Indonesia	2.966.900	6,6	2.652.785	5,8	1.986.412	4,4
Uganda	2.154.350	4,8	1.752.312	3,8	1.838.477	4,0
Colombia	2.193.445	4,9	1.503.543	3,3	1.782.807	3,9
Ethiopia	1.321.458	3,0	1.685.012	3,7	1.743.895	3,8
El Salvador	739.613	1,7	642.302	1,4	761.792	1,7
Guatemala	784.875	1,8	907.802	2,0	740.288	1,6
Papua New Guinea	448.067	1,0	405.475	0,9	544.548	1,2
Togo	154.802	0,3	412.362	0,9	529.823	1,2
Tanzania	548.862	1,2	357.620	0,8	486.368	1,1
Cameroon	375.420	0,8	525.485	1,1	477.837	1,1
Kenya	640.640	1,4	529.637	1,2	458.550	1,0
Nicaragua	525.138	1,2	605.377	1,3	447.558	1,0
Côte d'Ivoire	399.243	0,9	358.715	0,8	388.883	0,9
Mexico	311.453	0,7	432.012	0,9	343.612	0,8
China	492.575	1,1	480.570	1,0	335.160	0,7
Others	1.792.097	4,0	1.787.263	3,9	1.501.370	3,3
EU(27) excl intra-EU	**44.773.282**	**100,0**	**45.828.067**	**100,0**	**45.507.675**	**100,0**

Source: Eurostat; some data changed compared to previous edition

In past years Brazil, Vietnam and Colombia were consistently the top-3 suppliers to the EU. While the two main origins, Brazil and Vietnam, remained the same in the 2009-2011 period, the third position changed from Colombia to Indonesia in 2009 and from Indonesia to India in 2011. In 2011 Brazil continued to be the major green coffee supplier to the EU even though its volume dropped with 395.000 bags and its market share with 0,7 percentage points to 32%. Vietnam retained its position as second supplier, with a slightly higher volume (almost +1.200 bags) and a virtually unchanged import share of 19,9%. As mentioned, India took third spot in 2011 with a seriously larger volume: +763.000 bags. The top-five was completed by Honduras and Peru. Both origins filled part of the gap left by the reduced availability of Colombian coffee. This origin seems to be regaining some of the lost ground with an increased import volume in 2011 of close to 280.000 bags. It is worth observing to what extent two origins dominate EU imports: Brazil and Vietnam together represent roughly half of EU imports. This is more than the numbers three to twenty combined.

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





Imports by type of coffee for the EU are now included in the European chapter. This is because data for each individual country are becoming less easy to determine. For intra-EU trade, the Eurostat country statistics do not reveal the country of production of green coffee. When arriving from the countries with major coffee ports, the origin may be recorded in the statistics as - say - Germany or Belgium. In many cases the share of the intra-EU trade is so high that no meaningful assessment can be made of the types of coffee imported. In order to have some idea of development in the EU as a whole, the following table has been added to this chapter:

EU27 imports per type of coffee
- in % -

	2010	2011
Arabicas	65,9	66,9
Brazilian Naturals	36,5	35,8
Colombian Milds	5,2	6,0
Other Milds	24,2	25,1
Robustas	34,0	33,0
Other/Unknown	0,2	0,2
Total	100,0	100,0

Source: Eurostat; due to rounding the total may differ from the sum of the items.

The overall ratio Arabicas/Robustas has not changed much in the past year, but within the Arabica group, there has been a shift towards Colombian Milds and Other Milds.

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 coffee extracts (soluble coffee) are fairly evenly matched.

EU27 imports and exports of green coffee and (semi)finished products from non-EU origins/to non-EU destinations
- in tons -

	2009		2010		2011	
	Import	Export	Import	Export	Import	Export
Green coffee (09011100)	2.686.397	15.902	2.749.684	19.186	2.730.461	20.646
Green coffee, decaffeinated (09011200)	2.508	81.192	2.088	84.862	2.911	101.306
Roasted coffee (09012100)	24.548	70.259	31.609	76.987	35.318	82.388
Roasted coffee, decaffeinated (09012200)	2.530	3.209	3.309	3.322	3.526	3.543
Coffee extracts (21011100)	41.061	39.224	43.620	39.075	41.206	41.026

Source: Eurostat

Compared to 2010 the re-exports in 2011 of green coffee increased by 8%. The **exports** of green decaffeinated coffee increased (+19%). Exports of roasted coffee were higher for both regular (+7%) and decaffeinated (+6,6%). Soluble coffee exports also increased (+5%). Green decaffeinated **imports** increased significantly with close to 40% in 2011 compared to 2010. Imports of roasted coffee increased for regular (+11,7%) and decaffeinated (+6,6%). Imports of soluble coffee decreased with 5,5%.

Looking in some more detail at the EU exports of finished products, in the years 2009-2011 the twenty main destinations of roasted coffee (non-decaffeinated plus decaffeinated), listed according to their ranking in 2011, were:

EU27 exports of roasted coffee (incl. decaf) to non-EU destinations
- in tons and % -

	2009		2010		2011	
	tons	%	tons	%	tons	%
United States	11.712	15,9	12.013	15,0	12.481	14,5

Russian Federation	9.185	12,5	11.328	14,1	11.400	13,3
Ukraine	8.863	12,1	9.153	11,4	9.864	11,5
Switzerland	9.967	13,6	8.458	10,5	8.711	10,1
Australia	3.810	5,2	3.774	4,7	4.261	5,0
Norway	2.809	3,8	3.274	4,1	4.209	4,9
Canada	2.201	3,0	2.968	3,7	3.685	4,3
Croatia	1.878	2,6	2.009	2,5	2.342	2,7
Turkey	1.012	1,4	1.433	1,8	1.805	2,1
Israel	1.198	1,6	1.452	1,8	1.547	1,8
South Korea	817	1,1	1.106	1,4	1.527	1,8
Belarus	960	1,3	1.223	1,5	1.504	1,8
Albania	1.410	1,9	1.459	1,8	1.499	1,7
United Arab Emirates	1.093	1,5	1.228	1,5	1.487	1,7
Japan	1.040	1,4	1.127	1,4	1.203	1,4
Bosnia and Herzegovina	1.140	1,6	1.134	1,4	1.139	1,3
Ceuta	871	1,2	864	1,1	1.136	1,3
South Africa	901	1,2	956	1,2	1.106	1,3
China	424	0,6	744	0,9	1.068	1,2
Moldova	514	0,7	728	0,9	844	1,0
Others	11.660	15,9	13.881	17,3	13.114	15,3
Total external trade	**73.467**	**100,0**	**80.310**	**100,0**	**85.930**	**100,0**

Source: Eurostat

In 2011 total exports of roasted coffee (including decaffeinated coffee) to non-EU destinations increased by 7% in volume compared to the previous year. The US remained the largest non-EU destination, but numbers two to four (respectively Russian Federation, Ukraine and Switzerland) were in the same order of magnitude.

Regarding the EU exports of soluble coffee (officially: extracts, essences and concentrates of coffee) to non-EU destinations, the total volume increased somewhat (+5%). In 2011 the three largest clients were Ukraine, the Russian Federation and Australia. In 2011 the Russian Federation was no longer the major destination. That position was taken over by Ukraine. This was not because a strong increase in exports to Ukraine, but a serious drop in exports to the Russian Federation (-34%). Remarkable was the increase in exports to Australia from 704 tons in 2010 to over 3.800 tons in 2011, an increase of almost 450%. This made Australia the third destination in 2011. Exports to South Korea Increased significantly as well: +636%. In volume terms, listed according to their 2011 ranking, the 10 largest destinations in the three most recent years were:

EU27 exports of soluble coffee to non-EU destinations (HS 21011100)
- in tons and % -

	2009		2010		2011	
	tons	**%**	**tons**	**%**	**tons**	**%**
Ukraine	8.945	22,8	9.558	2,4	9.182	2,2
Russian Federation	7.712	19,7	12.923	3,3	8.481	2,1
Australia	744	1,9	704	0,2	3.869	0,9
United States	2.103	5,4	1.990	0,5	2.184	0,5
Turkey	2.131	5,4	2.328	0,6	2.062	0,5
Switzerland	1.335	3,4	2.018	0,5	1.725	0,4
South Korea	111	0,3	220	0,1	1.621	0,4
Israel	1.185	3,0	862	0,2	1.337	0,3
Norway	629	1,6	585	0,1	1.301	0,3
Canada	1.250	3,2	1.112	0,3	1.263	0,3
Others	13.081	33,4	358.453	91,7	377.236	92,0
Total external trade	**39.224**	**100,0**	**39.075**	**100,0**	**41.026**	**100,0**

Source: Eurostat

Several coffee-producing countries have a sizeable production and export of soluble coffee. The following table, giving EU imports of soluble coffee from the five main non-EU origins, illustrates this: all but one of the five largest suppliers are coffee producing countries. Overall volume decreased by 5,5%. In 2011 Ecuador retained its first position ahead of Brazil and Switzerland took third place. Colombia and India completed the top 5.

EU27 imports of soluble coffee from non-EU origins (HS 21011100)
- in tons and % -

	2009		2010		2011	
	tons	%	tons	%	tons	%
Ecuador	10.177	24,8	11.548	26,5	12.506	30,4
Brazil	11.124	27,1	9.987	22,9	8.645	21,0
Switzerland	3.199	7,8	5.759	13,2	5.983	14,5
Colombia	3.521	8,6	3.679	8,4	3.827	9,3
India	3.303	8,0	2.636	6,0	3.016	7,3
Others	9.735	23,7	10.012	23,0	7.229	17,5
Total external trade	**41.061**	**100,0**	**43.620**	**100,0**	**41.206**	**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 EU27 imports and exports of green, roasted and soluble coffee
- in mln EUR -

	Green		Green decaf		Roasted		Roasted decaf		Soluble	
Imports	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**
From non-EU origins	5.792	8.414	6	11	708	889	93	108	281	328
From EU origins	6.623	9.470	165	177	2.866	3.578	184	230	1.348	1.680
Exports	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**
To non-EU destinations	59	84	267	422	445	577	22	27	343	484
To EU destinations	1.043	1.395	452	686	2.788	3.647	146	180	1.313	1.771

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 2011 was EUR 4,2 billion. In comparison, the value of exports to non-EU destinations of finished coffee products was much smaller, but still represents a relevant contribution to the EU export performance: EUR 1,1 billion. 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 2010 and 2011, 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.	
	2010	**2011**	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**
Austria	0	0	10.943	10.818	90	78	0	10.942
Belgium	0	0	74.408	72.287	6.694	6.686	0	0
Bulgaria	0	0	15.954	13.374	0	0	385	0
Croatia	0	0	12.250	12.497	0	0	0	0
Czech Republic	0	0	0	19.073	0	0	0	0
Denmark	0	0	30.550	25.403	0	0	0	0
Estonia	0	0	6.979	361	0	0	0	0
Finland	0	0	55.578	53.928	0	0	2	0
France	0	0	120.119	107.128	7.603	7.462	48.779	52.834
Germany	209.333	217.118	509.504	517.343	23.047	22.547	99.794	97.051
Greece	0	0	8.965	7.692	0	0	0	0
Hungary	0	0	0	0	0	0	0	19.342
Ireland	0	0	0	0	0	0	0	0
Italy	16.497	12.763	399.336	344.892	27.173	25.981	0	2.450
Lithuania	0	0	85	148	1	1	0	0
Netherlands	0	0	112.513	0	5.503	0	0	0
Norway	0	0	31.134	30.888	259	236	0	0
Poland	0	0	48.230	49.831	0	0	12.745	27.310
Portugal	0	0	37.463	37.347	2.013	1.826	0	0
Romania	0	0	20.775	19.285	0	0	0	0
Spain	14.982	16.539	135.126	105.411	15.494	14.178	40.108	36.210
Sweden	0	0	105.483	102.274	0	0	0	0
United Kingdom	0	0	25.419	25.954	1.716	1.539	0	0
EU27TOTALS	**241.680**	**246.436**	**1.757.879**	**1.677.514**	**90.217**	**88.253**	**319.194**	**351.425**

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.	
	2010	**2011**	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**
Austria	0	0	61	70	1	1	0	20
Belgium	0	0	414	509	49	56	0	0
Bulgaria	0	0	55	56	0	0	1	1
Croatia	0	0	76	83	0	0	0	0
Denmark	0	0	175	137	0	0	0	0
Estonia	0	0	1	1	0	0	0	0
Finland	0	0	252	343	0	0	0	0
France	0	0	847	738	65	68	1.096	965
Germany	137	209	1.317	1.741	89	113	548	573
Greece	0	0	56	49	0	0	0	0
Hungary	0	0	0	0	0	0	0	98
Italy	19	15	2.753	2.790	181	181	0	20
Latvia	0	0	0	9	0	0	0	0
Lithuania	0	0	1	2	0	0	0	0
Netherlands	0	0	667	811	0	0	0	0
Norway	0	0	210	248	2	2	0	0
Poland	0	0	177	220	0	0	81	135
Portugal	0	0	279	265	16	14	0	0
Romania	0	0	92	83	0	0	0	0
Spain	50	69	585	630	94	101	257	296
Sweden	0	0	358	417	0	0	0	0
United Kingdom	0	0	184	210	14	13	0	0
EU27TOTALS	**208**	**293**	**8.499**	**9.317**	**551**	**599**	**3.109**	**3.218**

Source: Eurostat
Note: The product codes are those of NACE rev 2. These categories are not the same as those of the Harmonised System used for external trade data.

Only those countries for which at least some data are available have been included in the tables. We repeat our *caveat*: the Prodcom statistics need to be used with care. For a number of countries data are not published for reasons of confidentiality or too high level of estimates. Sometimes only volumes are reported but no values or vice-versa. Absence of a country or 'zero' reporting therefore can mean 'unavailable' as well as 'no production'. 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. Occasionally very different values are reported for similar volumes of production. For all of these reasons we present the data 'as is' and refrain from drawing conclusions.

AUSTRIA

1. IMPORTS OF GREEN COFFEE

Because of a change in the data source, the 2011 data may not be fully comparable to the earlier data. With that proviso, imports of not–decaffeinated green coffee in 2011 reached a volume of 566.965 bags (34.018 tons). This is an increase of 13% in comparison to 2010, when 501.900 bags (30.114 tons) were imported.

Austria: Imports of not-decaffeinated green coffee - in bags and % -						
	2009		2010		2011	
Countries of Origin	bags	%	bags	%	bags	%
Honduras	5.353	1,3	3.247	0,6	56.061	9,9
Vietnam	21.083	5,1	27.958	5,6	41.476	7,3
Brazil	46.027	11,2	47.673	9,5	40.562	7,2
India	28.185	6,8	29.380	5,9	32.324	5,7
Guatemala	6.183	1,5	8.530	1,7	8.857	1,6
Costa Rica	4.978	1,2	4.653	0,9	5.598	1,0
Peru	8.955	2,2	8.455	1,7	5.580	1,0
Cameroon	11.325	2,8	6.173	1,2	5.432	1,0
El Salvador	4.090	1,0	1.135	0,2	4.942	0,9
Ethiopia	1.248	0,3	1.662	0,3	1.773	0,3
Nicaragua	2.645	0,6	1.405	0,3	1.426	0,3
Mexico	2	0,0	432	0,1	1.232	0,2
Laos	0	0,0	3.515	0,7	0	0,0
China	2.132	0,5	2.208	0,4	0	0,0
Côte d'Ivoire	2.745	0,7	823	0,2	0	0,0
Others	266.610	64,8	354.650	70,7	361.702	63,8
Total all origins	**411.562**	**100,0**	**501.900**	**100,0**	**566.965**	**100,0**

Source: Eurostat (2009, 2010) and Austrian Coffee Association (2011)

Austria is a landlocked country and therefore the green coffee arrives 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 partial picture. It is not known what countries of production are represented in the coffee arriving via other EU members and in what volume. Even so, the rapid increase of Honduras as a main supplier is noteworthy.

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 from	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**
non-EU	8.949	9.890	4	247	2.167	2.893	187	214	603	752
EU	21.165	24.128	1.855	1.007	29.659	28.963	1.075	1.011	2.376	3.801
Total	30.114	34.018	1.859	1.254	31.826	31.856	1.262	1.225	2.979	4.553
Exports to	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**
non-EU	52	47	11	3	2.002	2.386	210	113	249	226
EU	471	113	29	0	18.095	14.314	321	120	378	459
Total	523	160	40	3	20.497	16.700	531	233	627	685

Source: Austrian Coffee Association

3. COFFEE CONSUMPTION

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

Austria: total coffee consumption - in bags -	
2002	926.027
2003	719.572
2004	995.824
2005	772.066
2006	612.471
2007	846.816
2008	907.887
2009	885.716
2010	902.854
2011	1.117.000

Austria: per capita coffee consumption - in kilos -	
2005	5,63
2006	4,44
2007	6,12
2008	6,53
2009	6,35
2010	6,46
2011	7,99

Source: ICO

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

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

Austria: retail prices for roasted coffee - EUR/kilo -	
2004	5,92
2005	6,68
2006	7,26
2007	6,86
2008	7,12
2009	11,00
2010	11,10
2011	13,18

Source: ICO. Differ from previous editions because of change in type of coffee product. .

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

The date for this chapter have been provided by the Royal Association of Coffee Roasters unless noted otherwise.

Belgium: Imports of green not-decaffeinated coffee - in bags -						
	2009		2010		2011	
Countries of origin	**bags**	**%**	**bags**	**%**	**bags**	**%**
Brazil	1.455.240	28,4	1.441.767	28,4	1.293.570	26,3
Vietnam	761.572	14,8	839.988	16,5	842.298	17,1
Honduras	375.222	7,3	523.043	10,3	470.372	9,6
Peru	395.710	7,7	367.075	7,2	458.277	9,3
Uganda	376.107	7,3	223.650	4,4	225.690	4,6
Colombia	284.295	5,5	182.668	3,6	174.337	3,5
Indonesia	114.968	2,2	143.700	2,8	142.272	2,9
Ethiopia	128.952	2,5	135.363	2,7	122.703	2,5
India	68.092	1,3	61.105	1,2	117.937	2,4
Togo	57.242	1,1	90.125	1,8	108.858	2,2
Guatemala	111.085	2,2	120.933	2,4	84.525	1,7
Kenya	108.505	2,1	80.997	1,6	68.828	1,4
Nicaragua	62.265	1,2	106.365	2,1	67.028	1,4
Rwanda	103.293	2,0	67.928	1,3	65.607	1,3
Tanzania	69.972	1,4	50.133	1,0	64.963	1,3
Mexico	157.063	3,1	130.667	2,6	57.117	1,2
El Salvador	83.677	1,6	52.120	1,0	56.687	1,2
Côte d'Ivoire	33.302	0,6	38.340	0,8	48.788	1,0
Burundi	52.837	1,0	17.215	0,3	38.013	0,8
Cameroon	24.448	0,5	27.772	0,5	37.257	0,8
Others	305.257	6,0	380.502	7,5	379.778	7,7
Total all origins	**5.129.102**	**100,0**	**5.081.457**	**100,0**	**4.924.905**	**100,0**

In 2011 the total non-decaffeinated green coffee imports from all origins dropped somewhat (-3%) compared to 2010. The main origin remained Brazil with a lower share of 26,3%, followed by Vietnam (17,1%) and Honduras (9,6%).

2. FOREIGN TRADE IN ALL FORMS

Belgium remains an important point of entry for green coffee destined for other EU countries. This is confirmed by the significant re-exports of green coffee to EU destinations. Exports of roasted coffee, roasted decaffeinated and soluble coffee to EU countries remained at a high level.

Belgium: international trade in green, roasted and soluble coffee - in tons -										
	Green		Green decaf		Roasted		Roasted decaf		Soluble	
Imports from	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**
non-EU	297.607	285.282	24	1	913	1.018	143	151	2.595	1.799
EU	7.419	10.233	7.353	6.832	18.932	19.427	2.347	2.260	3.507	3.490
Total	*305.026*	*295.515*	*7.377*	*6.833*	*19.836*	*20.445*	*2.490*	*2.411*	*6.102*	*5.289*

Exports to	2010	2011	2010	2011	2010	2011	2010	2011	2010	2011
non-EU	1.701	2.315	10	30	1.027	848	46	43	319	232
EU	215.981	212.391	943	848	51.523	51.523	3.809	3.214	8.852	8.454
Total	*217.682*	*214.706*	*952*	*878*	*52.549*	*52.055*	*3.855*	*3.257*	*9.171*	*8.686*

3. COFFEE CONSUMPTION

Belgian total and per capita consumption in recent years were as follows:

Belgium: total coffee consumption - in tons -	
2000	54.121
2001	55.334
2002	51.669
2003	53.333
2004	55.926
2005	54.703
2006	51.534
2007	50.258
2008	51.686
2009	52.505
2010	52.767
2011	57.841

Source: Excises

Belgium: per capita coffee consumption - in kilos -	
2000	5,29
2001	5,40
2002	5,05
2003	5,21
2004	5,38
2005	5,24
2006	4,90
2007	4,75
2008	4,85
2009	4,88
2010	4,87
2011	5,28

The above data were derived as follows: the total coffee consumption based upon the excises revenue, divided by the number of inhabitants obtained from the Ministry of Economy. The number of inhabitants is still increasing, but the consumption based upon the revenue from excises has increased even more.

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

The development of retail prices for roasted coffee in recent years was as follows:

Belgium: retail prices for roasted coffee - EUR/kilo -	
2004	7,01
2005	6,86
2006	7,27
2007	7,58

2008	7,90
2009	8,19
2010	8,60
2011	10,27

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%.

The level of VAT and the excise duties did not change. Nevertheless, the duties on soluble coffee have been extended to all products as described under HS Code 2101. This heading includes not only soluble coffee but also extracts, essences and concentrates of coffee and preparations with a basis of these products or with a basis of coffee, roasted chicory and other roasted coffee substitutes, and extracts, essences and concentrates thereof. In these preparations, the amount of coffee does not matter and products can be liquid or powder. For all these product an excise duty of 0,6941 Euro per kg total net weight is applied.

DENMARK

1. IMPORTS OF GREEN COFFEE

Imports of green not-decaffeinated coffee into Denmark from all sources were 367.897 bags (22.074 tons) in 2011, compared to 601.148 bags (36.069 tons) in 2010. This is a significant decrease of 39% which appears to be mainly due to the drop in imports from other EU countries: from 326.057 bags in 2010 to 99.882 bags in 2011. We could indeed observe a change of import patters, but another explanation is that some of the intra-EU trade may not have been recorded in the process of statistical data collection. If the latter is the case, we may see a correction in next years' data.

Brazil was once more Denmark's most important supplier in 2011. Vietnam lost its second place to Uganda.

Denmark: Imports of green not-decaffeinated coffee - in bags and % -						
	2009		2010		2011	
Countries of origin	**bags**	**%**	**bags**	**%**	**bags**	**%**
Brazil	103.600	18,1	95.630	15,9	92.830	25,2
Uganda	22.840	4,0	31.408	5,2	48.693	13,2
Vietnam	33.812	5,9	40.247	6,7	45.432	12,3
Colombia	22.837	4,0	18.592	3,1	15.940	4,3
Peru	20.050	3,5	29.382	4,9	15.738	4,3
Honduras	10.718	1,9	11.163	1,9	10.633	2,9
Tanzania	11.888	2,1	5.137	0,9	8.543	2,3
Indonesia	12.003	2,1	12.233	2,0	5.500	1,5
Burundi	4.150	0,7	4.450	0,7	4.112	1,1
Ethiopia	857	0,1	4.370	0,7	3.803	1,0
Papua New Guinea	3.875	0,7	1.997	0,3	3.480	0,9
Kenya	2.325	0,4	1.407	0,2	3.062	0,8
Mexico	3.742	0,7	7.278	1,2	2.047	0,6
Nicaragua	447	0,1	1.432	0,2	1.897	0,5
Guatemala	1.980	0,3	1.147	0,2	1.545	0,4
Others	318.730	55,5	335.277	55,8	104.642	28,4
Total all origins	**573.853**	**100,0**	**601.148**	**100,0**	**367.897**	**100,0**

Source: Eurostat

When looking at the import volumes and shares, we have to express a word of caution. The variability of the category 'others' means that import shares differ significantly between 2010 and 2011 while the volumes remain relatively stable. Again: in the next year or so we will know whether we are seeing a statistical hiccup or a change in pattern.

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	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**
From non-EU origins	16.506	16.081	0	0	393	462	19	23	430	385
From EU origins	19.563	5.993	3.082	1.041	14.446	21.582	157	203	1.821	1.993
Total	36.069	22.074	3.082	1.041	14.839	22.044	176	226	2.251	2.378
Exports	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**
To non-EU destinations	15	139	0	0	1.637	1.437	7	11	240	278

To EU destinations	674	108	0	0	7.630	5.084	3	8	85	98
Total	688	247	0	0	9.266	6.521	9	20	325	376

Source: Eurostat;

Regarding imports of processed coffee in 2011, Sweden and Germany covered the totality of Denmark's decaffeinated green coffee imports with a share of 90% and 10% respectively. Sweden remained the major supplier of roasted non-decaffeinated coffee imports with a share of 53%. The Netherlands was the second source (28%), followed Poland (8%) and Germany (2%). In 2011 Italy was the major supplier of roasted decaffeinated coffee, with a share of 35%, followed by the Netherlands (28%) and Germany (27%). Germany was the major supplier of soluble coffee (26%), followed by France (19%), the United Kingdom (14%), Switzerland (10%), Czech Republic (10%) and Colombia (6%).

3. COFFEE CONSUMPTION

According to data of the International Coffee Organization, the Danish 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	794.284
2008	688.344
2009	678.553
2010	847.000
2011	790.000

Source: ICO

Denmark: per capita coffee consumption - in kilos -	
2005	8,80
2006	9,09
2007	8,74
2008	7,56
2009	7,44
2010	9,27
2011	8,65

Source: ICO for total consumption and UN for population

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		
	DKK/kg	EUR/kg
2001	58,48	7,85
2002	53,57	7,21
2003	52,11	7,01

2004	52,21	7,02
2005	56,56	7,59
2006	57,99	7,77
2007	57,73	7,75
2008	60,44	8,11
2009	62,32	8,37
2010	67,30	9,04
2011	81,81	10,98

Source: ICO. For ease of comparison the original DKK values have been converted to EUR using the European Central Bank (ECB) reference exchange rate annual averages.

5. COMMENTS ON PARTICULAR ASPECTS

The Danish coffee association promotion activities include providing scientific information to health care professionals.

6. EXCISE DUTIES AND VAT LEVEL

VAT is unchanged at 25%. The excise duties have been increased and are currently DKK 5,70 per kilo for green coffee, DKK 6,84 for roasted coffee and DKK 14,82 for coffee extracts.

FINLAND

1. IMPORTS OF GREEN COFFEE

The data in this chapter were supplied by the Finnish Coffee Roasters Association.

In 2011 Finland imported 1.065.096 bags of green coffee, a decrease of 3,9% compared to 2010.

Finland: Imports of green coffee in 2001-2011 - in bags -	
Year	**Imports**
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
2010	1.107.717
2011	1.065.096

The most important origins by volume were:

Finland: Imports of green coffee by country of origin - in 1000 bags -			
Countries of origin	**2009**	**2010**	**2011**
Brazil	467,1	494,5	516,9
Colombia	112,5	116,1	143,6
Mexico	21,8	21,7	66,6
Guatemala	80,0	72,3	54,1
Honduras	98,4	50,5	38,3
Tanzania	38,8	25,2	37,9
Kenya	91,1	70,4	36,9
Peru	23,6	51,5	36,6
Nicaragua	87,4	81,5	35,4
Ethiopia	18,6	39,0	31,8
Vietnam	19,9	25,7	22,4
Ruanda	1,4	2,6	9,8
El Salvador	14,0	7,9	9,1
India	7,3	9,5	9,1
Uganda	15,4	16,2	5,6
Congo	0,0	0,0	3,6
Burundi	11,1	4,5	2,6
Indonesia	1,3	2,9	0,0
Others	13,8	15,7	8,4
Total	**1.182,8**	**1.123,5**	**1.065,1**

The 'top 5' suppliers in 2011 were Brazil, Colombia, Mexico, Guatemala and Honduras.

Finland: Percentage distribution of green coffee imports by main sources 2009-2011 - in % -			
Countries of origin	**2009**	**2010**	**2011**
Brazil	41,6	44,6	48,5
Colombia	10,0	10,5	13,5
Mexico	1,9	2,0	6,3
Guatemala	7,1	6,5	5,1
Honduras	8,8	4,6	3,6
Tanzania	3,5	2,3	3,6
Others	27,1	29,5	19,4
Total	**100,0**	**100,0**	**100,0**

2. FOREIGN TRADE OF COFFEE IN ALL FORMS

Green coffee
Imports of green coffee reached 63.906 tons in 2011. The imports decreased by 3,9% from the previous year. The average C.I.F price was EUR 4,29/kg.
There were 1.101 tons *exports* of green coffee in 2011 (148 tons in 2010).

Roasted coffee
Imports of roasted coffee were 7.721 tons in 2011, an increase of 5,2% from 2010.
Exports of roasted coffee decreased from 2010 by 8,6% to 8.710 tons. The main export destination for roasted coffee were the Baltic Countries and Russia (95,5%).

Finland: Foreign trade in coffee 2009-2011 - in tons -						
	Imports			**Exports**		
Forms of coffee	**2009**	**2010**	**2011**	**2009**	**2010**	**2011**
Green coffee	67.409	66.463	63.906	122	148	1.101
Roasted coffee	5.200	7.343	7.721	9.150	9.529	8.710
Instant coffee	1.113	1.268	1.665	48	47	53

3. IMPORT RATES AND NATIONAL TAXES

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

4. COFFEE CONSUMPTION

The consumption of roasted coffee was 9,7 kg/person in 2011.

5. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

2010: 6,12 EUR/kg
2011: 8,50 EUR/kg

6. EXCISE DUTIES AND VAT LEVEL

The value-added tax for coffee is the same as for other food stuffs, i.e. 13%. There are no excise duties for coffee.

FRANCE

1. IMPORTS

Total non-decaffeinated green coffee imports into France from all origins in 2011 were 4.007.302 bags (240.438 tons). This was 4,8% less than the 4.208.660 bags (252.520 tons) imported in 2010. The main green coffee suppliers in terms of volumes and percentages were:

France: Imports of green, non-decaffeinated coffee by main origins
- in bags and % -

	2009		2010		2011	
	bags	**%**	**bags**	**%**	**bags**	**%**
Brazil	914.398	21,2	835.068	19,8	835.398	20,8
Vietnam	633.608	14,7	474.562	11,3	380.525	9,5
Ethiopia	157.058	3,6	211.810	5,0	227.582	5,7
Honduras	168.790	3,9	174.812	4,2	210.992	5,3
Togo	23.803	0,6	117.570	2,8	114.318	2,9
Colombia	217.880	5,1	144.697	3,4	112.818	2,8
Indonesia	167.843	3,9	117.797	2,8	97.688	2,4
Peru	77.128	1,8	109.737	2,6	93.473	2,3
India	41.870	1,0	46.692	1,1	82.020	2,0
Cameroon	41.233	1,0	69.115	1,6	72.338	1,8
Guinea	49.542	1,1	48.542	1,2	66.198	1,7
Madagascar	19.972	0,5	24.282	0,6	50.377	1,3
Uganda	67.345	1,6	57.978	1,4	50.367	1,3
Guatemala	33.355	0,8	49.315	1,2	41.687	1,0
Cote d'Ivoire	26.147	0,6	63.165	1,5	41.382	1,0
Mexico	32.737	0,8	56.907	1,4	37.422	0,9
Nicaragua	44.945	1,0	42.402	1,0	30.997	0,8
China	24.575	0,6	32.265	0,8	27.147	0,7
Kenya	16.275	0,4	15.000	0,4	25.635	0,6
Burundi	19.740	0,5	10.907	0,3	21.727	0,5
Others	222.470	5,2	148.398	3,5	129.808	3,2
Intra EU	1.309.762	30,4	1.357.642	32,3	1.257.403	31,4
All origins	**4.310.477**	**100,0**	**4.208.660**	**100,0**	**4.007.302**	**100,0**

Source: Eurostat

Brazil retained its position of first supplier in 2011. Its volume remained virtually unchanged; its market share increased somewhat compared to 2010. Second supplier remained Vietnam, albeit with a lower volume and market share. Ethiopia, sixth supplier in 2009, retained the third place it achieved in 2010. Honduras remained the fourth source and Togo replaced Colombia as fifth supplier. As with other markets a word of caution is in order: roughly one-third of coffee reaches France via other EU members with large coffee ports, notably Belgium and Germany. Statistically this coffee loses its identity and the original source can no longer be determined.

2. FOREIGN TRADE FOR ALL FORMS OF COFFEE

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

	Green		Green decaf		Roasted		Roasted decaf		Soluble	
Imports from	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**
non-EU	171.061	164.994	197	306	12.324	13.334	1.686	1.822	1.827	1.681
EU	81.459	75.444	11.820	10.682	84.152	84.200	2.073	2.123	11.611	14.873
Total	*252.520*	*240.438*	*12.016*	*10.987*	*96.476*	*97.533*	*3.759*	*3.944*	*13.438*	*16.553*
Exports to	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**

non-EU	612	501	49	75	1.703	1.872	59	87	4.113	3.426
EU	1.704	5.327	2.757	25	14.511	13.125	931	835	10.306	10.488
Total	*2.315*	*5.828*	*2.806*	*100*	*16.214*	*14.997*	*990*	*922*	*14.419*	*13.915*

Source: Eurostat

Imports of green decaffeinated coffee dropped by 9% in 2011 compared to 2010. Imports of roasted, roasted decaf and soluble coffee all increased, in the case of soluble coffee significantly (+23%).
Exports of processed coffee all decreased, mostly modestly (roasted -8%, roasted decaf -7%, soluble -4%), but very significantly in the case of green decaf (-96%). Since the main drop was in intra-EU trade where coverage of movements between countries is not total, this may be a statistical phenomenon rather than a trade patterns.

3. COFFEE CONSUMPTION

According to data of the International Coffee Organization, the French coffee consumption in recent years was as follows:

France: total coffee consumption - in bags -	
2001	5.252.819
2002	5.525.715
2003	5.393.680
2004	4.929.117
2005	4.787.358
2006	5.277.586
2007	5.627.754
2008	5.151.567
2009	5.676.750
2010	5.713.000
2011	5.963.000

Source: ICO

France: per capita coffee consumption - in kilos -	
2006	5,16
2007	5,47
2008	4,98
2009	5,46
2010	5,47
2011	5.71

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:

France: retail prices for roasted coffee - EUR/kilo -	
2004	4,84
2005	4,88
2006	5,20
2007	5,48
2008	5,80

2009	6,00
2010	6,00
2011	6,56

Source: ICO. .

5. EXCISE DUTIES AND VAT LEVEL

The value-added tax for coffee is 5,5%. There are no excise duties for coffee.

GERMANY

1. IMPORTS OF GREEN COFFEE

According to German data, imports of green coffee (not decaffeinated) into the Federal Republic of Germany in 2011 reached a volume of about 18,4 million bags (1.101.437 tons). This represents an increase of 1,1% compared to 2010.

Germany: Imports of not-decaffeinated green coffee - in bags and % -				
	2010		2011	
	bags	%	bags	%
Brazil	6.313.612	34,78%	6.250.302	34,05%
Vietnam	3.384.823	18,65%	3.305.217	18,00%
Peru	1.335.967	7,36%	1.371.897	7,47%
Honduras	1.130.833	6,23%	1.161.252	6,33%
Ethiopia	928.393	5,11%	909.503	4,95%
Indonesia	1.093.585	6.02%	791.977	4,31%
India	371.783	2.05%	734.292	4,00%
Uganda	594.328	3.27%	545.887	2,97%
El Salvador	436.722	2,41%	530.943	2,89%
Papua New Guinea	379.673	2,09%	500.707	2,73%
Colombia	314.820	1,73%	379.500	2,07%
Guatemala	254.343	1,40%	263.035	1,43%
China	278.797	1,54%	160.938	0,88%
Kenya	162.203	0,89%	151.657	0,83%
Togo	93.905	0,52%	148.908	0,81%
Tanzania	70.385	0,39%	123.333	0,67%
Nicaragua	104.487	0,58%	106.200	0,58%
Others	904.284	4.98%	921.738	5,02%
Total all origins	**18.152.907**	**100,00**	**18.357.286**	**100,00%**

Source: Statistisches Bundesamt, Deutscher Kaffeeverband

The main supplier of green coffee (not decaffeinated) remained Brazil: 34% of the imports into Germany came from this origin, and 18% from number two supplier Vietnam. Imports from Peru reached a percentage of 7,5. Compared to 2010 there was an increase of imports from Peru, Honduras, India, El Salvador, New Guinea, Columbia, Guatemala, Togo, Tanzania and Nicaragua.

2. FOREIGN TRADE IN COFFEE

Germany: Imports and exports of coffee in all forms - in tons -					
	Customs Code	Imports 2010	Imports 2011	Exports 2010	Exports 2011
Green coffee (not decaffeinated)	0901 11 00	1.089.174	1.101.437	197.994	176.331
Green coffee (decaffeinated)	0901 12 00	833	904	130.468	165.204
Roasted coffee (not decaffeinated)	0901 21 00	59.288	63.515	165.405	158.339
Roasted coffee (decaffeinated)	0901 22 00	1.185	1.420	8.218	6.942
Coffee extracts in dry and liquid form	2101 11 00	26.666	29.462	59.218	62.286
Preparations*	2101 12 92	15.988	14.660	13.190	10.990

Source: Statistisches Bundesamt *on the basis of extracts, essences and concentrates of coffee

The import and export data show that Germany is a place for processing and export of processed coffee. The main export destinations of decaffeinated green coffee in 2011 were the United States (52,2%), Spain (12,1%), the Netherlands (7,7%), Belgium (7,4%) and France (6,8%). Exports of roasted coffee (not decaffeinated) were mainly destined to Poland (17,7%), France (13,8%), the Netherlands (10,7%), Slovakia (9,3%) and Luxemburg (7%). In 2011 the five largest export destinations for coffee extracts from Germany were the United Kingdom (15,2%), France (11,9%), the Ukraine (11,6%), Poland (10,2%) and the Netherlands (9,6%). Green coffee (not decaffeinated) is mainly re-exported to Poland (43,6%), followed by the destinations Austria (10,3%) and Hungary (7%).

Exports of green decaffeinated coffee (0901 12 00) - in tons -	
	2011
USA	86.161
Spain	19.924
The Netherlands	12.770
Belgium	12.214
France	11.394

Exports of solid and liquid extracts (2101 11 00) - in tons -	
	2011
United Kingdom	9.490
France	7.439
Ukraine	7.230
Poland	6.331
The Netherlands	5.978

Exports of non-decaf roasted coffee (0901 21 00) - in tons -	
	2011
Poland	27.970
France	21.862
The Netherlands	16.999
Slovakia	14.778
Luxemburg	11.110

Exports of non-decaf green coffee (0901 11 00) - in tons -	
	2011
Poland	76.811
Austria	18.144
Hungary	12.404
France	11.725
The Netherlands	11.659

Source: Statistisches Bundesamt

Imports of roasted coffee (not decaffeinated) into Germany came mainly from Italy (27,6%), Poland (21,4%) and the Netherlands (12,1%). Germany imported coffee extracts from Ecuador (20,8%), Belgium (20,5%), the Netherlands (14,8%), the United Kingdom (12,1%) and Brazil (9,7%).

Imports of non-decaf roasted coffee (0901 21 00) - in tons -	
	2011
Italy	17.527
Poland	13.577
The Netherlands	7.709
Switzerland	5.532
Austria	5.111

Imports of solid and liquid extracts (2101 11 00) - in tons -	
	2011
Ecuador	6.141
Belgium	6.027
The Netherlands	4.371
United Kingdom	3.562
Brazil	2.860

Source: Statistisches Bundesamt

3. COFFEE CONSUMPTION

In 2011, the statistical per capita consumption was unchanged and remained at 6,4 kilo (green coffee equivalent).

The growing segments of the German coffee market in 2011 were single portions, espresso/caffè crema and pure soluble coffee. These segments continued the development of the former years and kept increasing.

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
2010	526.860	6,4
2011	521.150	6,4

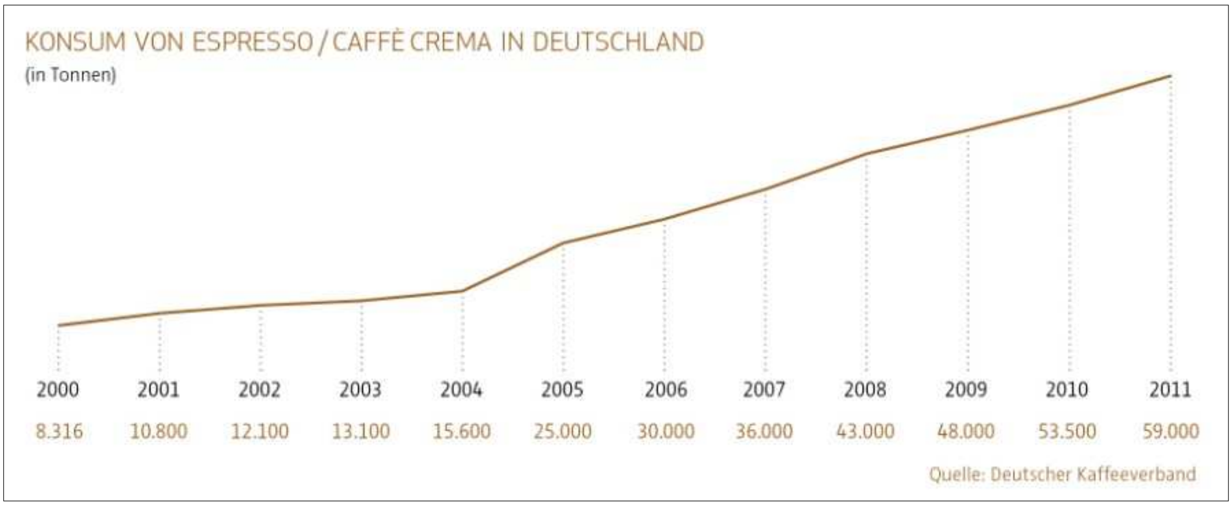
Source: Deutscher Kaffeeverband

* Green coffee processed for consumption on the German market

** from 1990: including inhabitants of the new Bundesländer

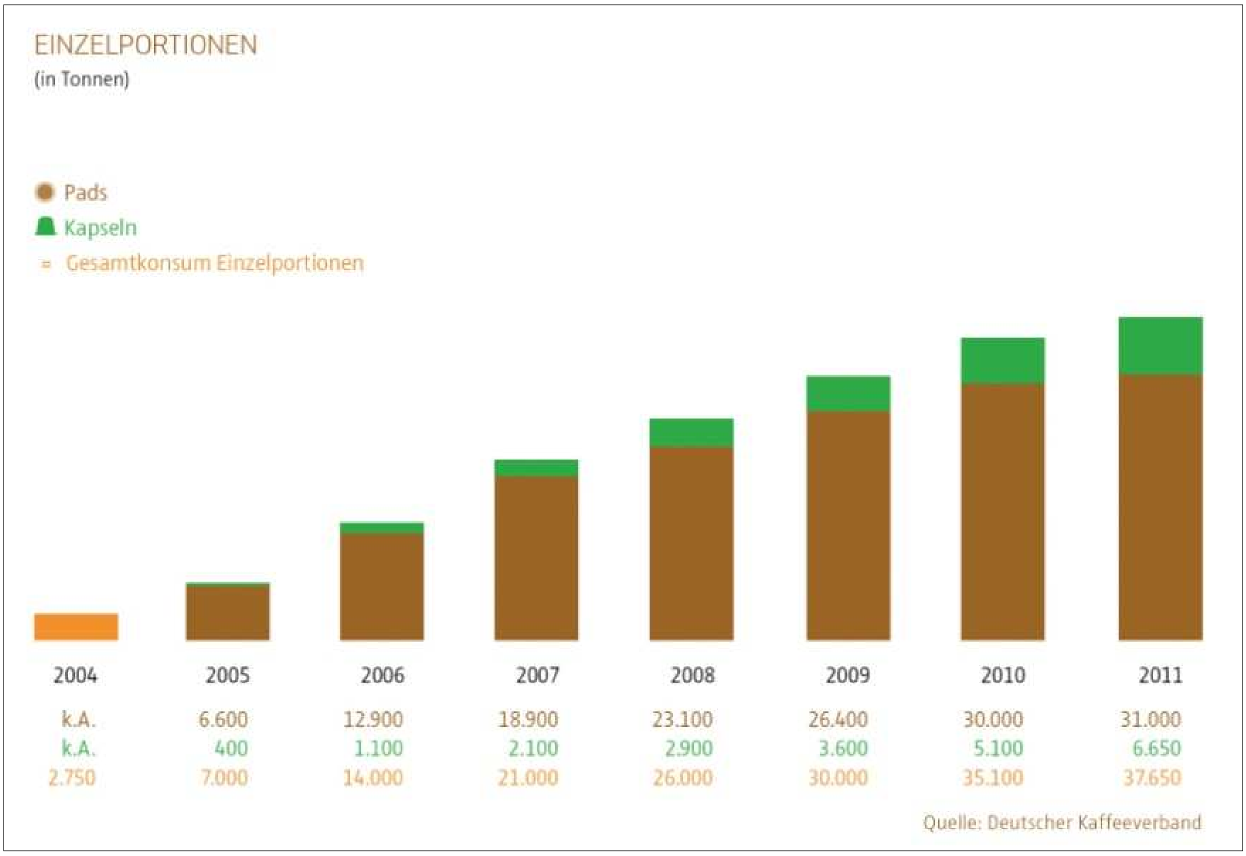
Germany: roasted coffee market segments - in tons -		
	2010	**2011**
Roasted coffee, traditional	317.900	305.350
Espresso/Caffè Crema	53.500	59.000
Single portion	35.100	37.650
Roasted coffee, total	**406.500**	**402.000**

Source: Deutscher Kaffeeverband

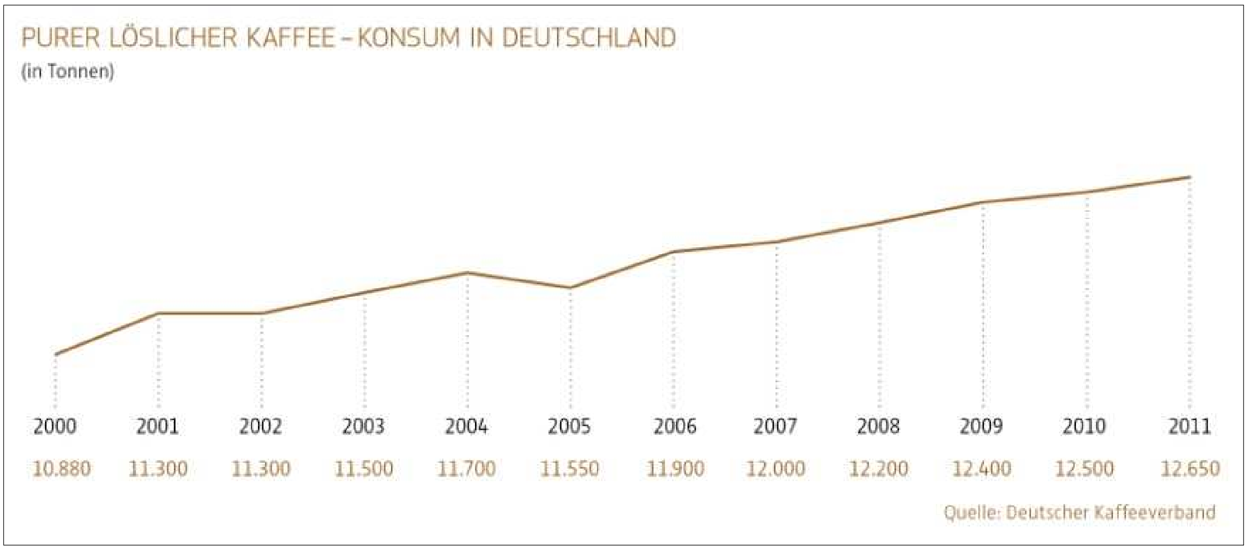


Consumption of espresso/caffè crema in Germany in tons

Source: Deutscher Kaffeeverband



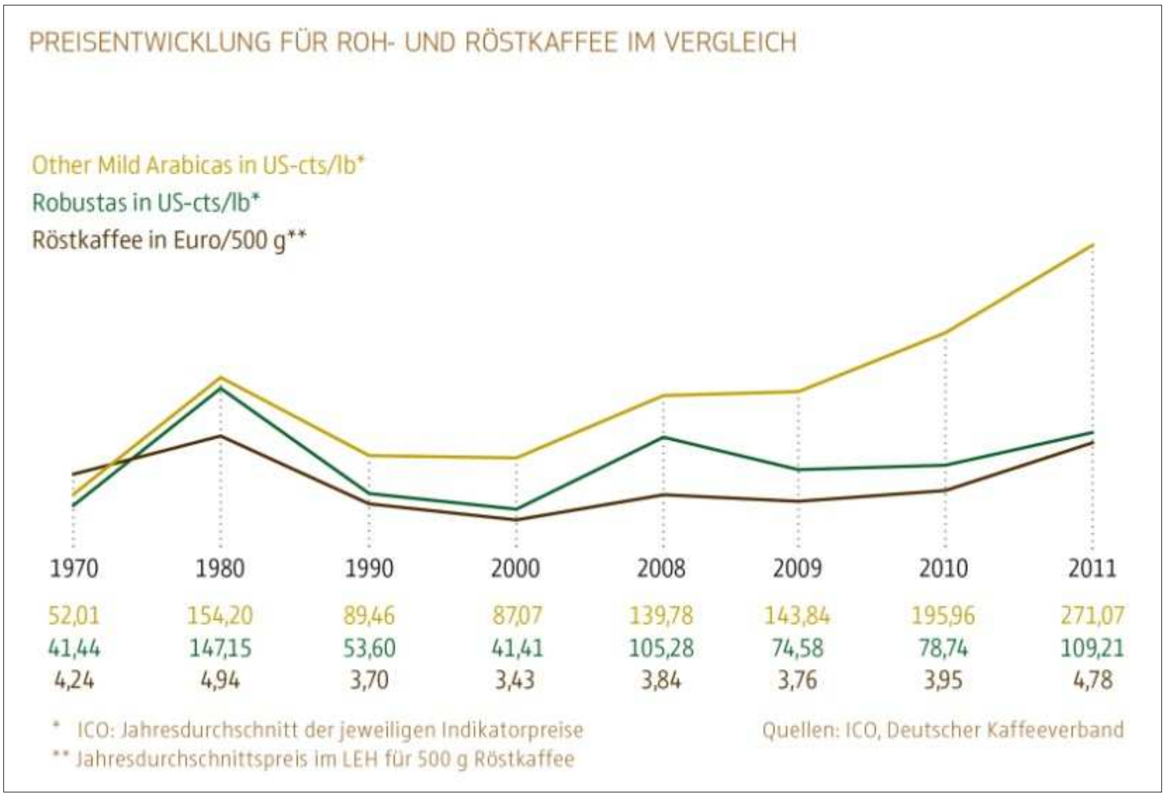
Consumption of single portion coffee in Germany in tons; brown = pads, green = capsules
Source: Deutscher Kaffeeverband



Consumption of pure soluble coffee in Germany in tons
Source: Deutscher Kaffeeverband

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

In Germany, the average retail price for 500 gram roasted coffee was EUR 4,78 in 2011. This price includes EUR 1,095 excise duty on coffee as well as 7% VAT.



Comparison price development green and roasted coffee; roasted coffee is annual average in food retail for 500 grams
Source: ICO, Deutscher Kaffeeverband

5. ASSOCIATION MEMBERSHIP

As at March 2012, the German Coffee Association had members from the following sectors:

Coffee Agents and Brokers:	6
Green coffee importers:	10
Warehousing companies:	3
Decaffeinators:	2
Producers of soluble coffee and soluble coffee beverages:	9
Coffee roasters:	53
Coffee associated members:	22
Supporting members:	22

6. COMMENTS ON PARTICULAR ASPECTS

The German Coffee Day provides a good opportunity to gain recognition for coffee in the media and to organise events around coffee. Around 300 articles on coffee mentioning the German Coffee Day have been published in 2011. Over 100 companies and organisations conducted different activities on September 30th 2011 in order to promote coffee and demonstrate its diversity.

The German Coffee Association continued its national Healthcare Professions Coffee Education Programme in 2011. Information material was distributed at five congresses and at the medical faculty of a university. The aim of the programme is to counteract the prejudices against the health effects of coffee among the target group of opinion leaders in health questions. Information on coffee and health is also taken up by the general media. Over 900 articles on coffee and health have been published in Germany in 2011.

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 2011 imports of green, not decaffeinated coffee from all sources into Greece were 30.505 tons (508.420 bags). In calendar year 2010 a volume of 25.231 tons (420.523 bags) was imported. This represents an increase of almost 21%, easily compensating for the drop of 9,5% the year before. The most important origins in the most recent three years were (listed in the 2011 order):

Greece: Imports of green, not-decaffeinated coffee by origin - in bags -						
	2009		2010		2011	
Countries of origin	**bags**	**%**	**bags**	**%**	**bags**	**%**
Brazil	311.788	67,1	287.147	68,3	281.510	55,4
Vietnam	42.833	9,2	39.550	9,4	71.597	14,1
India	41.755	9,0	36.345	8,6	51.432	10,1
Indonesia	17.288	3,7	9.257	2,2	35.732	7,0
Uganda	2.082	0,4	1.325	0,3	5.955	1,2
Ethiopia	6.638	1,4	6.272	1,5	5.358	1,1
Colombia	7.340	1,6	4.182	1,0	3.427	0,7
Guatemala	652	0,1	518	0,1	2.053	0,4
Tanzania	1.170	0,3	2.393	0,6	1.898	0,4
Cameroon	918	0,2	653	0,2	1.790	0,4
Madagascar	350	0,1	300	0,1	1.535	0,3
Costa Rica	1.105	0,2	655	0,2	1.272	0,3
Peru	22	0,0	537	0,1	1.057	0,2
Côte d'Ivoire	115	0,0	208	0,0	332	0,1
Mexico	210	0,0	225	0,1	312	0,1
Others	30.650	6,6	30.957	7,4	43.162	8,5
Total all origins	**464.917**	**100,0**	**420.523**	**100,0**	**508.420**	**100,0**

Source: Eurostat

In 2011 Brazil remained by far the most important supplier, with a reduced share (-12,9 percentage points) and a marginally lower volume (-5.637 bags) The next three suppliers retained their position with an increased volume: Vietnam (+32.047 bags), India (+15.087 bags) and Indonesia (+26.475 bags). Uganda completed the top-5 with a quadrupled import volume.

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 from	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**
non-EU	23.483	27.953	1	0	25	28	0	0	2.832	2.724
EU	1.748	2.552	527	177	7.644	7.489	205	251	8.077	8.775
Total	*25.231*	*30.505*	*528*	*177*	*7.669*	*7.517*	*205*	*251*	*10.909*	*11.499*
Exports to	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**
non-EU	96	156	0	0	259	165	0	0	94	92
EU	1.913	5.233	1	1	266	394	33	38	446	561
Total	*2.009*	*5.390*	*1*	*1*	*525*	*560*	*33*	*38*	*540*	*653*

Source: Eurostat

This table illustrates the high volume of finished coffee imports into Greece. Expressed in green coffee equivalent, the volume of the 2011 finished coffee imports (roasted + soluble) was 28% larger than the green coffee imports. In 2010 this figure was 50%. Total coffee imports of all forms into Greece increased with almost 10% from 63.519 tons green coffee equivalent in 2010 to 69.833 tons in 2011. Greece's 2011 roasted coffee imports (regular + decaffeinated) came from Italy (49,0%), Portugal (16,3%) and Germany (12,4%). In 2011 Spain (32,7%), Germany (20,1%) and Côte d'Ivoire (18,5%) were the main sources for soluble coffee.

3. COFFEE CONSUMPTION

Based on ICO data, the consumption of coffee in Greece is as follows:

Greece: Total coffee consumption - in bags -	
Years	**Total consumption**
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
2010	993.692
2011	1.023.000

Source: ICO

Greece: Per capita consumption - in kg green coffee equivalent -	
Year	**Consumption**
2005	4,7
2006	4,6
2007	5,4
2008	5,2
2009	5,2
2010	5,3
2011	n.a.

4. VAT, EXCISE DUTIES

In Greece, the VAT on roasted and soluble coffee is 13%. There are no excise duties.

IRELAND

1. IMPORTS OF GREEN COFFEE

In 2011 imports of green, not decaffeinated coffee from all sources into Ireland were 4.813 tons (80.210 bags), a surprising increase of 92% compared to the 2.495 tons (41.587 bags) imported in 2010. No immediate explanation is available for this difference.

Close to 80% of the green coffee imported into Ireland arrives through other EU members, mostly the United Kingdom (65%), the Netherlands and Germany (both 4%). 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 2011 order):

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

	2009		2010		2011	
Countries of origin	**bags**	**%**	**bags**	**%**	**bags**	**%**
Peru	0	0,0	0	0,0	5.378	6,7
Nicaragua	1.498	3,6	2.397	5,8	4.890	6,1
Colombia	960	2,3	642	1,5	2.563	3,2
Tanzania	0	0,0	0	0,0	2.103	2,6
Mexico	0	0,0	0	0,0	1.882	2,3
Others	38.752	94,0	38.548	92,7	63.393	79,0
Total all origins	**41.210**	**100,0**	**41.587**	**100,0**	**80.210**	**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 from	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**
non-EU	260	1.309	0	1	84	86	0	0	0	0
EU	2.235	3.504	69	102	1.229	1.671	41	58	2.158	2.114
Total	2.495	4.813	69	103	1.313	1.757	41	59	2.158	2.114
Exports to	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**
non-EU	0	0	0	0	0	1	0	0	0	0
EU	101	122	0	0	248	1.234	0	0	42	70
Total	101	122	0	0	248	1.235	0	0	42	70

Source: Eurostat

Total coffee imports of all forms into Ireland increased from 9.790 tons green coffee equivalent in 2010 to 12.577 tons in 2011 (+28,5%). The vast majority of Irelands soluble coffee imports (88% in 2011) came from the United Kingdom. The Netherlands (6%) and Poland (4%) supplied most of the remainder. In 2011 the UK represented 64% of Irelands roasted coffee imports. The second largest supplier – at a considerable distance - was Germany (29% in 2011).

3. COFFEE CONSUMPTION

Based on International Coffee Organization data, coffee consumption in Ireland is as follows:

Ireland: Total coffee consumption - in bags -	
Years	
2002	136.116
2003	150.926
2004	224.743
2005	222.892
2006	202.660
2007	244.346
2008	115.107
2009	134.496
2010	156.596
2011	181.000

Source: ICO

Ireland: Per capita consumption - in kg green coffee equivalent -	
Years	
2005	3,2
2006	2,7
2007	3,2
2008	1,5
2009	1,8
2010	2,1
2011	n.a.

After the large and still unexplained apparent drop in total and per capita consumption in 2008, the 2009-2011 data showed a significant increase. Given the higher total consumption in 2011, a further increase of the per capita consumption in 2011 can be expected, but exact data are as yet unavailable.

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 2011 was 7.756.170 bags with an increase of 0,91% compared to 2010.

This increase should be ascribed to the consistent growth of roasted coffee exports by 9,43%.

In order to provide a more accurate and realistic analysis of the activity in this sector it is worthwhile taking into consideration data related to the import and export of coffee in all forms in the last seven years.

This comparison shows that the annual growth in the coffee processing sector for the period in consideration is about 1,93%. 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 1,83%, exports by 6,16%.

Italy: Imports of green coffee
- in bags -

Country of Origin	2005	2006	2007	2008	2009	2010	2011
Brazil	2.408.309	2.555.270	2.622.211	2.632.506	2.629.697	2.648.602	2.602.643
Vietnam	982.050	1.118.287	1.363.381	1.322.467	1.367.306	1.517.688	1.554.992
India	748.934	893.873	943.971	769.871	729.856	986.359	1.065.867
Uganda	245.459	146.067	284.722	486.046	548.246	380.106	400.765
Indonesia	484.097	466.671	325.940	399.499	519.597	457.716	461.602
Colombia	352.293	399.286	414.546	402.951	214.159	85.046	125.871
Guatemala	153.635	174.292	183.956	208.262	193.137	228.063	164.472
Tanzania	95.299	73.174	79.280	79.993	186.111	151.231	197.647
Honduras	89.880	128.815	128.775	116.246	183.080	232.702	201.860
Cameroon	299.654	251.930	251.971	202.079	164.355	186.807	153.974
Ethiopia	141.412	105.468	125.381	135.231	134.898	132.030	157.491
Peru	38.556	29.448	50.813	84.119	99.291	120.741	111.193
Costa Rica	101.525	73.606	75.112	76.140	65.356	63.720	47.313
Congo Dem. Rep.	85.292	68.367	47.890	59.062	55.226	42.235	32.552
Ivory Coast	143.407	128.354	114.729	90.842	53.881	83.414	78.686
Nicaragua	35.735	42.301	56.772	50.163	45.253	61.887	57.344
El Salvador	39.230	25.215	41.820	33.185	45.045	35.079	46.048
Togo	36.137	40.758	44.502	50.351	30.157	50.305	40.410
Congo	24.522	30.109	71.003	61.062	25.147	25.505	25.466
Kenya	9.938	10.628	10.699	10.212	18.882	11.870	7.573
Mexico	11.888	13.028	17.234	8.024	17.051	16.307	16.921
Dominican Rep.	16.682	16.805	19.010	13.516	13.928	12.998	14.999
Burundi	43.081	40.856	6.490	8.430	13.440	1.668	2.450
Haiti	3.845	3.760	4.651	3.833	3.856	2.406	1.214
Others	74.191	99.112	117.764	170.791	127.188	34.676	35.804
Total	**6.665.051**	**6.935.480**	**7.402.623**	**7.474.879**	**7.484.143**	**7.569.161**	**7.605.157**

The data for the year 2011 contained in the above table compared with the previous year show that:
- Brazil maintains, with a large margin, its position as the number one supplier of coffee for the Italian market;
- imports from Vietnam continue to increase, but at a slower rate;
- imports from India, Uganda, Indonesia and Colombia have shown growth;

- imports from Guatemala, Honduras and Cameroon dropped;
- in percentage terms, the top-10 origins that in 2011 have shown the greatest improvement within the Italian market are: Colombia (+48%), Tanzania (+31%) and India (+8%).

Italy: Imports of green coffee - in % -							
Country	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**
Brazil	36,13	36,84	1,49	35,32	35,14	34,99	34,22
Vietnam	14,74	16,04	0,78	17,69	18,27	20,05	20.45
India	11,24	12,89	12,75	10,33	9,75	13,03	14,01
Uganda	3,68	2,10	0,18	6,40	7,32	5,02	5,27
Indonesia	7,26	6,73	0,19	5,35	6,94	6,05	6,07
Colombia	5,29	5,76	5,60	5,42	2,86	1,12	1,65
Guatemala	2,31	2,51	2,49	2,82	2,58	3,01	2,16
Cameroon	4,50	3,64	3,40	2,72	2,20	2,47	2,02
Ethiopia	2,12	1,52	1,69	1,83	1,80	1,74	2,07
Costa Rica	1,52	1,07	1,01	1,02	0,87	0,84	0,62
Ivory Coast	2,15	1,85	1,55	1,21	0,72	1,10	1,03
Others	9,06	9,04	9,42	9,89	11,55	10,58	10,43
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 for 'Colombian Milds' which increased by 33,33%. 'Other Mild' coffees, 'Brazilian Natural' coffees and 'Robusta' coffees are slightly decreasing by 2,47%, 1,25% and 0,14%.

Italy: Imports of green coffee - distribution by coffee type –							
Type	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**
Colombian Milds	6,90	6,99	6,87	6,72	5,66	3,27	4,36
Other Milds	19,66	21,07	21,20	18,95	19,25	23,49	22,91
Brazilian Naturals	38,47	38,51	37.43	37,62	37,33	36,75	36,29
Robustas	34,97	33,43	34,50	36,71	37,76	36,49	36,44
Total	**100,00**	**100,00**	**100,00**	**100,00**	**100,00**	**100,00**	**100,00**

2. FOREIGN TRADE IN ALL FORMS

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-				
Import	**2008**	**2009**	**2010**	**2011**
Green coffee	448.630	449.049	461.175	465.364
Green decaffeinated coffee	7.970	8.078	8.617	8.061
Roasted coffee	16.712	12.401	10.672	12.186
Roasted decaffeinated coffee	700	630	810	983
Coffee extracts	4.841	4.401	3.951	4.376
Preparations with coffee	1.864	2.657	3.059	3.146
Export	**2008**	**2009**	**2010**	**2011**
Green coffee	5.748	5.819	6.797	7.288
Green decaffeinated coffee	827	720	751	665
Roasted coffee	101.618	102.145	111.462	122.307
Roasted decaffeinated coffee	3.279	3.002	3.353	4.265
Coffee extracts	320	606	494	330
Preparations with coffee	6.681	5.958	4.112	2.623

The export of roasted coffee, which in recent years has represented the major positive factor of the activity in our sector since the increase in internal consumption is rather contained, has further increased reaching nearly 2,5 million bags green equivalent.

3. COFFEE CONSUMPTION

In 2011 the volume sales of the total home coffee market in Italy have decreased by 3,3% 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 74% of total household consumption in volume) and the Espresso segment (coffee blends for espresso machines – 9,5% of total household consumption in volume) are decreasing (-4% Moka, -9% Espresso) while the Beans segment (about 6,5% of total household consumption in volume) and the Decaffeinated segment (7% of total household consumption in volume) holds virtually steady.

Finally, the Pods segment, that reached the weight of 3,5% on the total market, rose by more than 17,5%.

Total packaged coffee (total market without the instant segment): sales location in percentage by type of client and point of sale (year 2011):

Type of Client	%	**Type of Sales Outlet**	%
Large Distributors	50	Supermarkets & Hypermarkets	66
Volunteer Union and Purchasing Groups	50	Self Services &Groceries	22
		Discount	12

In 2011 the 'out of Home' market has been basically steady compared to the previous year, even if the two major segments, full service (restaurants) and quick service (bars), show a slight increase in number of visits and average spending. As in 2010, the switch between foodservice and other low-cost solutions (i.e. vending and/or unconventional points of sale) continued in 2011.

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

2011 has been characterised by ever-increasing prices: the average price of the total regular coffee was 9,43 EUR/kg, +14% compared to 2010.
In relation to coffee segments, the average price of Moka was 8,25 EUR/kg and it increased by 13,6%.
Even the price of the decaffeinated segment increased compared to the previous year, reaching 9,71 EUR/kg (+7,3%); the average price of the Espresso segment grew by 12,0% to 10,30 EUR/kg.

5. COMMENTS ON PARTICULAR SUBJECTS

During 2011 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 2012.

6. VAT LEVELS

Coffee is subject to 21% Value Added Tax. Soluble coffee is subject to 10% Value Added Tax.

THE NETHERLANDS

1. IMPORTS OF GREEN COFFEE

The source of these import data is different from that in the previous edition and data are therefore not comparable. In 2011 imports of green coffee into the Netherlands reached a volume of 1.293.682 bags (77.621 tons), a 5,4% increase compared to the previous year when 1.227.787 bags (73.667 tons) were imported. The table below shows the most important countries of origin.

The Netherlands: Imports of green not decaffeinated coffee - in bags and % -						
	2009		2010		2011	
Countries of origin	bags	%	bags	%	bags	%
Brazil	342.837	28,4	410.503	33,4	352.870	27,3
Vietnam	178.770	14,8	179.750	14,6	242.347	18,7
Honduras	61.402	5,1	75.800	6,2	71.955	5,6
Peru	56.822	4,7	34.205	2,8	53.722	4,2
India	12.402	1,0	2.715	0,2	44.982	3,5
Uganda	27.730	2,3	30.030	2,4	44.007	3,4
Costa Rica	32.743	2,7	38.688	3,2	40.262	3,1
Guatemala	56.675	4,7	74.877	6,1	37.407	2,9
Indonesia	32.780	2,7	20.420	1,7	19.090	1,5
Ethiopia	6.867	0,6	11.182	0,9	13.552	1,0
Colombia	30.288	2,5	8.857	0,7	12.823	1,0
Tanzania	30.262	2,5	3.295	0,3	12.392	1,0
Kenya	9.277	0,8	7.383	0,6	11.943	0,9
Nicaragua	7.727	0,6	7.072	0,6	9.342	0,7
Burundi	720	0,1	0	0,0	6.755	0,5
Others	319.978	26,5	323.010	26,3	320.235	24,8
Total all origins	**1.207.278**	**100,0**	**1.227.787**	**100,0**	**1.293.682**	**100,0**

Source: Eurostat

The figures in the tables above show that:

1. Brazil remains the main supplier of the Netherlands. Imports from Brazil are down compared to 2010 with a total share of imports reaching 27,3% or 352.870 bags.
2. In 2011 imports from Vietnam increased with 35%, totalling 242.347 bags.
3. The imports from number three supplier Honduras decreased with 3.845 bags. Those from number four (Peru) and number five (India) increased with 19.517 and 42.267 bags respectively. The latter represented a very remarkable sixteen-fold increase.

2. FOREIGN TRADE IN COFFEE IN ALL FORMS

The Netherlands: international trade in green, roasted and soluble coffee - in tons -										
	Green		Green decaf		Roasted		Roasted decaf		Soluble	
Imports from	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**
non-EU	56.552	60.065	0	0	2.257	2.529	201	203	4.036	1.999
EU	17.115	17.556	16	20	51.205	38.890	2.391	3.482	4.298	4.464
Total	*73.667*	*77.621*	*16*	*20*	*53.462*	*41.419*	*2.592*	*3.685*	*8.333*	*6.463*
Exports to	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**
non-EU	775	1.447	18	28	2.099	2.163	113	115	311	6.392
EU	15.216	14.198	0	21	42.590	50.952	1.464	1.558	2.833	20.408
Total	*15.991*	*15.645*	*18*	*49*	*44.689*	*53.115*	*1.577*	*1.673*	*3.144*	*26.800*

Source: Eurostat

Remarkable is the nine-fold increase of export of soluble coffee in 2011. It remains to be seen whether this is a statistical anomaly or a change in the trade pattern.

3. COFFEE CONSUMPTION

Dutch total and per capita consumption in recent years were as follows:

The Netherlands: total coffee consumption - in 1000 bags -	
2010	1.347
2011	1.024

Source: ICO

The Netherlands: per capita coffee consumption - in kilos -	
2010	4,85
2011	3,69

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:

The Netherlands: retail prices for roasted coffee - EUR/kilo -	
2005	6,64
2006	6,96
2007	7,16
2008	7,56
2009	7,44
2010	7,60
2011	n.a.

Source: ICO

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

1. IMPORTS OF GREEN COFFEE

In 2011 Norway imported 610.250 bags (36.615 tons) of not-decaffeinated green coffee, an increase of 2,7% compared to the 594.393 bags (35.664 tons) imported in 2010.

The top-three suppliers remained unchanged, even though volumes from number three, Guatemala, dropped with almost a quarter. Nicaragua became the forth supplier with a more than five-fold increase in volume. Kenya completed the top-five albeit with a 28% drop in volume.

Norway: Imports of not-decaffeinated green coffee - in bags -						
	2009		2010		2011	
	bags	%	bags	%	bags	%
Brazil	267.853	46,7	274.774	46,2	324.729	53,2
Colombia	108.705	19,0	102.687	17,3	108.518	17,8
Guatemala	58.439	10,2	73.471	12,4	55.769	9,1
Nicaragua	4.167	0,7	4.393	0,7	24.756	4,1
Kenya	33.147	5,8	22.234	3,7	15.954	2,6
India	11.154	1,9	15.822	2,7	14.688	2,4
Vietnam	5.991	1,0	5.675	1,0	12.387	2,0
Mexico	35.946	6,3	39.361	6,6	10.698	1,8
Ethiopia	2.065	0,4	19.670	3,3	10.210	1,7
Tanzania	4.990	0,9	3.563	0,6	7.420	1,2
Peru	17.179	3,0	16.301	2,7	7.136	1,2
Honduras	11.986	2,1	5.883	1,0	6.412	1,1
El Salvador	3.233	0,6	820	0,1	4.605	0,8
Indonesia	3.156	0,6	4.570	0,8	2.524	0,4
Costa Rica	503	0,1	146	0,0	621	0,1
Others	4.482	0,8	5.024	0,8	3.823	0,6
Total	**572.997**	**100,0**	**594.393**	**100,0**	**610.250**	**100,0**

Source: Statistics Norway

2. FOREIGN TRADE IN ALL FORMS

In 2011 imports of not-decaffeinated green coffee were 36.651 tons, an increase of 2,7% compared to 2010. Imports of decaffeinated green coffee increased from 186 to 351 tons (+89%).
The imports of roasted, not decaffeinated coffee increased, as did those of roasted decaffeinated coffee, albeit on a much lower level. Total imports of all roasted coffee increased by close to 20%.

The most important suppliers of not-decaffeinated roasted coffee were Sweden (45%), followed by the Netherlands, Brazil, the United Kingdom and Switzerland (all at 9%).

Imports of instant coffee were modestly lower in 2011 (-1,6%). Switzerland remained by far the most important supplier with a 33% share, followed by the Netherlands (25%), and Spain (8%).

Norway: Foreign trade in coffee - in tons-						
Forms of coffee	Imports			Exports		
	2009	2010	2011	2009	2010	2011
green coffee	34.380	35.664	36.615	254	424	238
green coffee, decaf	286	186	351	1	0	4
green coffee, total	*34.666*	*35.850*	*36.966*	*255*	*424*	*242*
roasted coffee	3.635	4.329	5.180	168	218	220
roasted coffee, decaf	25	25	33	0	0	0

roasted coffee, total	*3.661*	*4.354*	*5.213*	*168*	*218*	*220*
coffee extracts, essences	1.712	1.763	1.735	25	52	35

Source: Statistics Norway

3. COFFEE CONSUMPTION

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

Norway: Total coffee consumption - in bags -	
Years	
2002	692.248
2003	683.002
2004	708.938
2005	743.416
2006	721.267
2007	771.422
2008	714.556
2009	715.239
2010	745.699
2011	785.000

Norway: Per capita consumption - in kg green coffee equivalent -	
Years	
2005	9,6
2006	9,3
2007	9,8
2008	9,0
2009	8,9
2010	9,2
2011	9,7

Source: ICO

4. ASSOCIATION MEMBERSHIP

The motto of the Norwegian Coffee Association (www.kaffe.no) is: 50 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: 16
- Coffee agents: 1
- Importers of approved brewing equipment: 13
- Associate members (companies related to the coffee business like shipping, transport and packaging): 29

5. VAT AND DUTIES

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

PORTUGAL

1. IMPORTS OF GREEN COFFEE

Portuguese imports of green not-decaffeinated coffee from all sources in 2011 were 47.204 tons (786.735 bags), compared to 43.312 tons (721.868 bags) in 2010. This is an increase of almost 9%. The fifteen major suppliers were (ranked in order of 2011 imports):

Portugal: Imports of green not-decaffeinated coffee - in bags -						
	2009		2010		2011	
Countries of origin	**bags**	**%**	**bags**	**%**	**bags**	**%**
Vietnam	119.760	15,6	142.372	19,7	146.355	18,6
Uganda	92.117	12,0	76.543	10,6	106.762	13,6
Brazil	104.238	13,5	115.487	16,0	103.837	13,2
Cameroon	77.465	10,1	71.007	9,8	89.478	11,4
India	50.718	6,6	63.518	8,8	75.350	9,6
Honduras	47.975	6,2	18.050	2,5	50.577	6,4
Guatemala	20.093	2,6	9.205	1,3	27.052	3,4
Costa Rica	22.363	2,9	20.358	2,8	22.763	2,9
Laos	15.175	2,0	8.267	1,1	19.355	2,5
Indonesia	31.820	4,1	16.595	2,3	17.533	2,2
Côte d'Ivoire	26.593	3,5	36.258	5,0	9.103	1,2
Peru	5.378	0,7	10.890	1,5	7.703	1,0
Timor-Leste	7.180	0,9	7.020	1,0	6.660	0,8
Colombia	22.830	3,0	5.870	0,8	6.060	0,8
Angola	5.020	0,7	2.620	0,4	4.380	0,6
Others	121.178	15,7	117.808	16,3	93.767	11,9
Total all origins	**769.905**	**100,0**	**721.868**	**100,0**	**786.735**	**100,0**

Source: Eurostat

In 2011 Vietnam, Uganda, Brazil and Cameroon retained their position as the four biggest suppliers. Uganda swapped places with Brazil and became the second origin. Vietnam and Brazil both lost some market share in Portuguese imports. India completed the top-five with a higher share and volume.

2. FOREIGN TRADE

Portugal: International trade in green, roasted and soluble coffee - in tons -										
	Green		Green decaf		Roasted		Roasted decaf		Extracts	
Imports from	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**
non-EU	38.438	42.573	56	0	1.202	1.299	165	165	0	0
EU	4.874	4.632	2.228	2.130	3.468	4.152	237	317	1.828	1.912
Total	43.312	47.204	2.284	2.130	4.670	5.451	401	482	1.828	1.912
Exports to	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**
non-EU	94	74	0	0	1.122	1.298	38	41	16	10
EU	60	66	3	186	7.119	7.456	1.019	845	65	19
Total	154	139	3	186	8.241	8.754	1.057	886	81	29

Source: Eurostat

The pattern of imports and exports of the various forms of coffee has been relatively stable in the last two years, but ups and downs can always be observed. In 2011 imports of roasted non-decaf coffee grew with 17%

and exports with 6%. Imports of roasted decaffeinated coffee increased with 20% and exports dropped with 16%. Imports of soluble coffee increased with 5% while exports were 65% lower, albeit on a modest volume. On the import side, for roasted coffee (regular plus decaffeinated) the main sources were Italy (36%), Switzerland (25%), Spain (21%) and Germany (16%). The main sources for imported coffee extracts in 2011 were Spain (77%), and the United Kingdom (13%).
On the export side, Spain was by far the most important export destination for roasted coffee (incl. decaffeinated) with 53% of the total volume, followed by Germany (12%) and Greece (10%).

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**
2002	719.582
2003	657.369
2004	685.402
2005	655.544
2006	671.447
2007	716.861
2008	691.735
2009	721.363
2010	796.000
2011	802.000

Portugal: Per capita consumption - in kg green coffee equivalent -	
Year	**Consumption**
2005	3,7
2006	3,8
2007	3,9
2008	3,7
2009	4,0
2010	4,2
2011	4,7

Source: ICO for consumption, UN for population

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 -	
2002	8,98
2003	8,88
2004	8,59
2005	8,53
2006	8,32
2007	8,23
2008	8,58
2009	8,45
2010	8,31
2011	8,60

Source: ICO.

7. EXCISE DUTIES AND VAT LEVEL

The value-added tax for coffee (roasted and soluble) is 23%. There are no excise duties for coffee.

SPAIN

1. IMPORTS OF GREEN COFFEE

In 2011 Spain imported 4.010.955 bags of not-decaffeinated green coffee (240.657 tons) which represents a 5% drop compared to the previous year. In year 2010 a total volume of 4.224.223 bags (253.453 tons) was imported.

Spain: Imports of green not-decaffeinated coffee - in bags -						
	2009		2010		2011	
Countries of origin	**bags**	**%**	**bags**	**%**	**bags**	**%**
Vietnam	1.542.608	38,2	1.558.047	36,9	1.403.323	35,0
Brazil	887.667	22,0	928.612	22,0	860.513	21,5
Uganda	295.133	7,3	244.837	5,8	296.183	7,4
India	113.990	2,8	142.503	3,4	244.568	6,1
Colombia	218.037	5,4	198.473	4,7	224.225	5,6
Côte d'Ivoire	147.993	3,7	198.885	4,7	147.123	3,7
Togo	0	0,0	58.668	1,4	110.458	2,8
Honduras	61.817	1,5	73.488	1,7	84.003	2,1
Nicaragua	98.045	2,4	110.900	2,6	49.002	1,2
Peru	31.293	0,8	37.747	0,9	35.930	0,9
Indonesia	197.847	4,9	168.517	4,0	35.708	0,9
Ethiopia	19.960	0,5	23.447	0,6	27.672	0,7
China	1.360	0,0	5.950	0,1	25.905	0,6
Guatemala	20.682	0,5	20.328	0,5	25.183	0,6
Guinea	16.692	0,4	11.955	0,3	11.848	0,3
Others	387.447	9,6	441.867	10,5	429.308	10,7
Total all origins	**4.040.570**	**100,0**	**4.224.223**	**100,0**	**4.010.955**	**100,0**

Source: Eurostat

Since a number of years Vietnam is Spain's main supplier even though in recent years its share in total imports has gone down. Brazil is the second source with a stable market a share of around 22% in recent years. Uganda retained its third position. India became fourth supplier in 2011 with a considerably higher volume (+72%). Colombia completed the top-five.

2. FOREIGN TRADE IN COFFEE IN ALL FORMS

Spain: International trade in green, roasted and soluble coffee - in tons -										
	Green		Green decaf		Roasted		Roasted decaf		Extracts	
Imports from	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**
non-EU	235.169	218.219	1.052	1.658	130	123	12	4	396	541
EU	18.285	22.439	13.878	12.942	12.255	12.151	2.233	2.298	5.847	5.828
Total	253.453	240.657	14.931	14.600	12.385	12.274	2.246	2.302	6.243	6.369
Exports to	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**	**2010**	**2011**
non-EU	502	1.285	10.245	10.424	1.888	2.303	122	181	8.325	4.372
EU	12.189	6.321	3.735	2.742	4.593	6.838	487	593	20.214	22.073
Total	12.691	7.606	13.980	13.166	6.481	9.140	609	775	28.539	26.444

Source: Eurostat

During the year 2011 the pattern of imports and exports of processed coffee was relatively stable, with the exception of the exports of regular roasted coffee, which increased with 41% and the exports of decaffeinated roasted coffee (+27%).

3. COFFEE CONSUMPTION

N.B.: this paragraph has been carried forward from the previous edition and is awaiting an update.

Spain: Coffee consumption 2008/2010 - in tons -			
	2008	**2009**	**2010**
Home consumption			
- Roasted	64.300	63.722	65.308
- Soluble	10.300	10.286	11.366
Food service			
- Roasted	65.284	62.770	58.313
- Soluble	2.337	2.020	1.790
Green coffee equivalent			
- Roasted	151.613	147.996	144.636
- Soluble	31.593	30.765	32.890
Total Green coffee equivalent	**183.206**	**178.761**	**177.526**

Even though green coffee imports have risen during the past years (although they experienced a slight drop in 2008 and 2009), coffee consumption has remained stable at around 4 kg per person per year. Higher green coffee imports basically respond, as stated above, to the important increase of soluble coffee exports (+35%) and therefore of Spanish local soluble coffee production. For the same reason Spain's net green coffee imports (imports-exports) have decreased over the past years even though total imports have increased.

Within the Spanish coffee market (always in green coffee equivalent), there is yet another slight drop (1%) during 2010, affected by the general economic situation but fortunately not as much as other food and drink manufactured products.

Even though there is an overall increase in home consumption (4%), thanks to the rapid and strong growth of the capsules/pods segment, there is an 8% drop in out of home consumption. At home, roasted coffee consumption experiences a 2,5% increase, whilst out home it drops 7,10%. As for soluble coffee, at home consumption increased 10,50% and fell 11,39% in the out of home market.

It is important to stress that it is only since June 2007 that the relevant Ministry is providing official and consistent out of home consumption data, as up until then the line item included other products besides coffee and tea. In any case, the current market distribution assigns 59,05% of the market share to home consumption and the remaining 40,95% to the food service industry.

Concerning roasted and soluble coffee market distribution, roasted coffee accounts (in green coffee equivalent) for 81,47% of the market, whilst soluble coffee accounts for the remaining 18,53%, following an identical trend to previous years.

As for different forms of consuming coffee, when at home, blended coffee (natural & *torrefacto*) accounts for 38,11% of total consumption, whilst natural coffee (no added sugars) account for 39,39% of the market share. When enjoying a cup of coffee out of home Spaniards also prefer their coffee blended with *torrefacto* (46,44%) or otherwise natural (39,89%). 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 12% of food service industry consumption.

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

According to ICO data, retail prices for roasted coffee in 2011 were on average 7,00 EUR/kg, compared to an average of 6,52 EUR/kg in 2010.

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. DUTIES AND VAT LEVELS

Regarding fiscal matters, there are no excise duties imposed on coffee in Spain. The current VAT rate is 8% for roasted and soluble coffee.

SWEDEN

1. IMPORTS OF GREEN COFFEE

According to Statistics Sweden, the import of non-decaffeinated coffee reached 102.743 tons (1.712.383 bags) in 2011. This is about 12% less than in 2010, when the imports were 116.669 tons (1.944.483 bags). That year however, was extreme with a temporary peak in imports and stock building.

Sweden: Imports of not-decaffeinated green coffee from origin countries - in tons actual weight -					
Countries of origin	2009	Change	2010	Change	2011
Brazil	43.174	-1%	42.825	-11%	38.225
Peru	8.374	17%	9.816	10%	10.787
Ethiopia	2.215	226%	7.228	10%	7.952
Colombia	12.403	-35%	8.099	-9%	7.381
Kenya	7.601	-6%	7.177	-26%	5.306
Honduras	6.340	-10%	5.688	-10%	5.132
Mexico	1.581	60%	2.528	35%	3.411
Nicaragua	2.825	20%	3.400	0%	3.385
El Salvador	505	255%	1.793	78%	3.192
Burundi	3.315	-82%	584	270%	2.163
Vietnam	2.006	-20%	1.597	25%	1.995
Guatemala	1.065	-51%	522	82%	951
Uganda	785	113%	1.675	-54%	775
Indonesia	869	39%	1.211	-37%	762
Tanzania	707	-55%	317	82%	578
Papua New Guinea	299	-63%	110	355%	500
Costa Rica	245	49%	366	-22%	284
India	221	-20%	177	46%	259
Rwanda	236	9%	258	-3%	249
Congo	0	na	19	1.163%	240
Malawi	22	882%	216	-50%	108
Dominican Republic	307	-80%	62	69%	105
Other origins	944	178%	2.622	-86%	367
Other Europe*)	**10.717**	**72%**	**18.381**	**-53%**	**8.635**

Source: Statistics Sweden
* Volumes imported from other European countries, of which the country of production cannot be verified in the statistics

The 2010 import statistics were difficult to analyse. Imports of green coffee increased next to 10%, which the consumption did not. Neither did the exports of roasted coffee. Thus substantially increased stocks were built up. Furthermore, the number two "origin" was Other Europe, reflecting heavily increasing volumes exported to Sweden from other European countries. Actually 75% of the increased volumes were imported from Other Europe. Statistics catch trading partners but not for sure the origin.

As usual Brazil was the main supplier with a volume 1% less than the year before. Number two among known origins was Peru, then increasing 17% and passing Colombia. Colombia had for many years been the second most important supplier, but high prices and quality problems had affected the volumes negatively. How much was however difficult to know, because you could not know how much Colombian coffee was shipped to Sweden from other Europe.

Among the other of the top six origins, Ethiopia, Kenya and Honduras, the most remarkable was the comeback of Ethiopia, tripling its volumes and share of market and passing Kenya as number four in the ranking.

In 2011 we are back to a more normal situation. The total volume is 102.742 tons green coffee and the imports from other Europe are back on earlier level. What we can see now is that Peru is strengthening its position as the number two supplier on the cost of Brazil, whose pool position still is far from threatened. Colombia has decreased even more and is now the number four supplier, passed by Ethiopia, which continues to increase its share and volume. Kenya and Honduras are losing volume but still keep their rankings as number five and six. Mexico is doing well with more than doubled volume since 2009 and now ranked number seven. El Salvador and Burundi are back as important suppliers after temporary dips.

The Robusta origins Vietnam and Indonesia decreased their volumes in 2007 after a few years of good increases. In 2009 – 2011 they have more or less unchanged shares of total volume (about 2% together). These Robusta volumes do not reflect any 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	2009	2010	2011
Brazil	40,4%	36,7%	37,2%
Peru	7,8%	8,4%	10,5%
Ethiopia	2,1%	6,2%	7,7%
Colombia	11,6%	6,9%	7,2%
Kenya	7,1%	6,2%	5,2%
Honduras	5,9%	4,9%	5,0%
Mexico	1,5%	2,2%	3,3%
Nicaragua	2,6%	2,9%	3,3%
El Salvador	0,5%	1,5%	3,1%
Burundi	3,1%	0,5%	2,1%
Vietnam	1,9%	1,4%	1,9%
Guatemala	1,0%	0,4%	0,9%
Uganda	0,7%	1,4%	0,8%
Indonesia	0,8%	1,0%	0,7%
Tanzania	0,7%	0,3%	0,6%
Papua New Guinea	0,3%	0,1%	0,5%
Costa Rica	0,2%	0,3%	0,3%
India	0,2%	0,2%	0,3%
Rwanda	0,2%	0,2%	0,2%
Congo	0,0%	0,0%	0,2%
Malawi	0,0%	0,2%	0,1%
Dominican Republic	0,3%	0,1%	0,1%
Other origins	0,9%	2,2%	0,4%
Other Europe*)	**10,0%**	**15,8%**	**8,4%**

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

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

Type of coffee	2009		2010		2011	
Arabica	85,5%		80,0%		87,9%	
Colombian Milds		19,4%		13,6%		12,9%
Other Milds		23,4%		22,2%		30,1%
Brazilian Naturals		42,6%		44,3%		44,9%
Robusta	3,2%		3,4%		3,3%	
Not specified	11,4%		16,6%		8,8%	
Total	**100,0%**		**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 continued with Brazilian Naturals losing volume. Other Milds increased to the cost of Colombian Milds. In 2010 the most remarkable change was the Colombian decrease and the increase of volumes imported from other Europe without origin in the statistics. Some of them might have been Colombian, but it is unknown how much. In 2011 however, when the volumes from other Europe decreased to a more normal level, the share of Colombian Milds is even lower, while Other Milds increased their share substantially.

The share of Robusta reflects exports, mainly to Denmark and the Baltic countries (and to a smaller 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		
	2009	2010	2011	2009	2010	2011
Green coffee	106.755	116.669	102.743	1.715	1.076	1.446
Green coffee (decaf)	741	984	706	0	0	13
Roasted coffee	8.808	10.043	13.427	22.830	23.200	22.660
Roasted coffee (decaf)	11	25	41	744	761	1.107
Instant coffee	~2.900	3.066	3.496	453	552	590

Source: Statistics Sweden and the Swedish National Coffee Association

Sweden is a big exporter of roasted coffee since 2005, due to structural changes in the Scandinavian coffee industry. Two big roasting plants were closed in Denmark and these volumes were moved to Swedish plants. Thus Denmark since 2005 is the biggest export market with not far from 50% of the volume in 2011.

The export volumes are very stable, 23.500 – 24.000 tons/year. The largest destination after Denmark was the USA (17% of total exports), and the other Nordic countries (15%), followed by the Baltic countries (6%), Great Britain and Greece (3% respectively).

Imports of roasted coffee increased with 34% to 13.400 tons and came in 2011 mainly from the Netherlands, Germany and Denmark (52%, 15% and 13% respectively). Imports from Italy were 7% of the total import volume, reflecting the espresso trend.

Net imports of instant coffee (only pure instant is registered), are increasing and are now next to 3.000 tons. The import figure from 2009 is best estimate based on internal statistics, since official figures from this year are not available.

3. COFFEE CONSUMPTION

Consumption usually is estimated to be equivalent to net import, since stock changes are not registered or visible. Net imports are usually 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.

The total size of the Swedish net imports of all coffee in 2011 was 97.976 tons roasted coffee equivalent, giving a total per capita volume of all forms of coffee of 9,3 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 calculated this way, about 13% was instant coffee.

As mentioned the net imports in 2010 peaked dramatically (about 15%, all types of coffee included), which the exports or the consumption did not. Obviously substantially bigger stocks were built that year. Since changes in stocks cannot be captured, the consumption figures these years are based on moving averages for the net imports during the last three years, which show that the per capita consumption is slightly increasing or quite stable. The figures for coffee beverage are calculated as 7,5 grams coffee/cup of 0,125 litre.

Sweden: Per capita consumption of coffee				
		2009	2010	2011
Roasted ground coffee	kg/capita	8,24	8,45	8,38
Instant	gr/capita	257	267	306
All coffee as roasted	kg/capita	9,26	9,49	9,48
	cups/capita/day	3,4	3,5	3,5
	liters/capita/year	154	158	158
Roasted ground coffee	kg/capita	10,90	11,16	11,16

Source: Statistics Sweden and the Swedish National Coffee Association

The consumption of ecological coffee is about 14% and still increasing. 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 16%. Double certifying is common and the main part 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 37%.

Espresso is doing well too on this typical filter coffee market, stabilizing its share about 2 – 3%, thanks to the coffee shop trend. The most expanding segment latest years however is *whole beans* (espresso excl.), which now counts for more than 4% of this typical R&G market. Instant coffee is gradually strengthen its share of market.

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.

4. DEVELOPMENT OF RETAIL PRICES FOR ROASTED COFFEE

According to Statistics Sweden data, the average retail price for roasted coffee was SEK 79,90 per kilo in 2011, increasing 26%. However the official statistics underestimate discounts and campaign prices which are frequent in Sweden and a weighted average price per kilo usually is about 10% lower. The table does well reflect the trend of prices, 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
2002	54,60	2007	52,20
2003	52,30	2008	54,10
2004	49,90	2009	59,54
2005	49,18	2010	63,18
2006	51,12	2011	79,90

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. Members of The Swedish National Coffee Association are roasters and importers with their own brand. The members cover about 93% of the total 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 2.185.000 bags in 2011. This is an increase of 8,4% compared to the 2.015.100 bags imported in 2010.

The main supplying producing countries (2011 ranking) were:

Switzerland: Imports of green coffee - in bags -		
	2010	**2011**
Brazil	606.000	679.500
Colombia	298.100	306.800
Vietnam	179.300	186.700
India	146.300	180.200
Guatemala	103.100	115.300
Costa Rica	89.900	109.800
Ethiopia	80.200	107.400
Honduras	109.900	91.400
Indonesia	57.100	43.000
Mexico	44.500	40.300
Others	300.700	324.600
Total	**2.015.100**	**2.185.000**

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

Volumes from the main supplier, Brazil, increased considerably (+12%) and those from the number two, Colombia, modestly (+3%). Imports from number three, Vietnam, increased with 4%. Remarkable is the strong performances of India (+23%) and Ethiopia (+34%).

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

Switzerland: Imports of green coffee - in % -		
	2010	**2011**
Brazil	30,1	31,1
Colombia	14,8	14,0
Vietnam	8,9	8,5
India	7,3	8,2
Guatemala	5,1	5,3
Costa Rica	4,5	5,0
Ethiopia	4,0	4,9
Honduras	5,5	4,2
Indonesia	2,8	2,0
Mexico	2,2	1,8
Others	14,9	14,9
Total	**100,0**	**100,0**

2. FOREIGN TRADE IN COFFEE IN ALL FORMS

Switzerland: Coffee trade - in 1000 bags green bean equivalent -						
	Imports			Exports		
	2010	2011	% change	2010	2011	% change
Green coffee	2.015,1	2.185,0	8,4	18,5	23,4	26,5
Roasted coffee	205,5	214,8	4,5	687,0	823,6	19,9
Soluble coffee	127,4	113,7	-10,8	622,0	585,6	-5,9

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

On the whole, imports and exports of roasted coffee increased while those of soluble coffee dropped.

3. COFFEE CONSUMPTION

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

Switzerland: Total coffee consumption - in bags -	
Years	
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
2010	1.012.000
2011	1.035.000

Source: ICO

Switzerland: Per capita consumption - in kg green coffee equivalent -	
Years	
2005	8,9
2006	7,4
2007	7,8
2008	9,1
2009	7,7
2010	8,2
2011	n.a.

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

Switzerland: retail prices roasted coffee - In CHF per kg -	
2010	13,96
2011	n.a.

Source: ICO. The original dollar values have been converted to Swiss Francs using Swiss National Bank exchange rate annual averages.

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 2011 of non-decaffeinated green coffee showed an increase of 3,3%.

United Kingdom: Imports of green coffee non-decaffeinated - in bags of 60 kilos -				
Countries of origin	**2008**	**2009**	**2010**	**2011**
Vietnam	465.314	457.423	471.070	552.638
Colombia	446.211	306.781	271.208	443.505
Brazil	313.922	431.071	394.061	429.388
Indonesia	240.667	260.700	414.082	298.206
Peru	63.301	61.566	86.124	78.345
Kenya	53.357	44.370	46.173	43.093
Ethiopia	48.504	35.345	55.744	75.519
Honduras	38.125	128.679	158.044	67.756
Costa Rica	26.508	19.678	28.470	14.438
Guatemala	21.223	22.896	46.700	12.257
Nicaragua	21.199	15.989	26.323	25.955
El Salvador	18.547	18.953	33.101	43.034
India	17.930	10.391	21.130	44.342
Tanzania	11.363	7.913	11.543	9.915
Uganda	10.769	17.059	15.297	17.904
Mexico	7.589	5.833	21.193	6.658
Papua New Guinea	4.875	3.362	2.115	3.045
Cameroon				6.135
China				5.700
Zambia				5.100
Rwanda				3.657
Zimbabwe	2.873	1.521	0	0
Ivory Coast		16.683	833	0
Others/Unknown	34.774	75.217	49.803	38.834
Total	**1.847.051**	**1.971.434**	**2.153.014**	**2.224.819**

Source: British Coffee Association

Main suppliers remain the same countries but Colombians return to 2nd place after Vietnam. Central Americans declined other than Nicaragua holding volumes with El Salvador increasing substantially. Papua New Guinea rallied considerably, but new volumes noted for Cameroon, China, Zambia and Rwanda.

United Kingdom Percentage distribution of green coffee non-decaffeinated imports by main origin - in % -				
Countries of Origin	**2008**	**2009**	**2010**	**2011**
Vietnam	25,19	24,72	21,89	24,84
Colombia	24,16	15,56	12,59	19,93
Brazil	17,00	21,86	18,30	19,22
Indonesia	13,03	13,22	19,23	13,40
Peru	3,43	3,12	4,00	3,52
Kenya	2,89	2,25	2,14	1,94
Ethiopia	2,63	1,79	2,59	3,40
Honduras	2,06	6,53	7,34	3,04
Costa Rica	1,44	1,00	1,32	0,65
Guatemala	1,15	1,16	2,17	0,55
Nicaragua	1,15	0,81	1,22	1,16
El Salvador	1,00	0,96	1,54	1,93

India	0,97	0,53	0,98	1,99
Tanzania	0,62	0,40	0,53	0,40
Uganda	0,58	0,86	0,71	0,80
Mexico	0,41	0,30	0,98	0,29
Papua New Guinea	0,26	0,17	0,10	0,14
Cameroon				0,27
China				0,26
Zambia				0,23
Rwanda				0,16
Zimbabwe	0,16	0,08	0	0
Ivory Coast		0,85	0,04	0
Others/Unknown	1,88	3,83	2,33	2,02
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	2007	2008	2009	2010	2011
Arabicas	56	60	56	56	56
Colombian Milds	28	28	16	16	23
Other Milds	13	13	16	19	14
Brazilian Naturals	15	19	24	21	19
Robustas	42	39	40	42	41
Others/Unknown	2	1	4	2	3

Source: British Coffee Association

Arabicas retain the majority share of 56% of imports with Robusta holding at 41%, no real changes noted.

2. FOREIGN TRADE IN ALL FORMS

United Kingdom: Foreign Trade in Coffee
- in tons -

	Imports				Exports			
	2008	2009	2010	2011	2008	2009	2010	2011
Green	110.803	118.256	129.181	133.487	3.199	3.327	5.799	4.887
Green Decaf	303	281	528	386	157	115	150	279
Roasted	1.066	1.064	1.919	1.564	5.482	8.978	10.010	11.027
Roasted Decaf	194	205	296	218	234	295	281	278
Soluble/Extracts	8.123	10.051	7.664	4.999	15.572	11.270	17.833	21.475

Source: British Coffee Association

Imports of Green increased by 3%, with exports declining in comparison with 2010. Green decaffeinated imports were down but exports almost doubled. Exports of roasted coffee continue to increase as with soluble and extracts.

3. COFFEE CONSUMPTION

UK consumption continues to increase reflecting the impact of the communication programme.
Instant still remains the main as consumed beverage but with slowly declining share.
Roast and Ground continue to increase as before driven mainly by ‘ORECA’ and ‘Capsule’ market.

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

High prices of Green caused increased retail price but these seem to have had only minimal impact on volumes.
Coffee Houses and Retail Outlets continue to show increased growth.

5. INFORMATION ON ASSOCIATION MEMBERSHIP

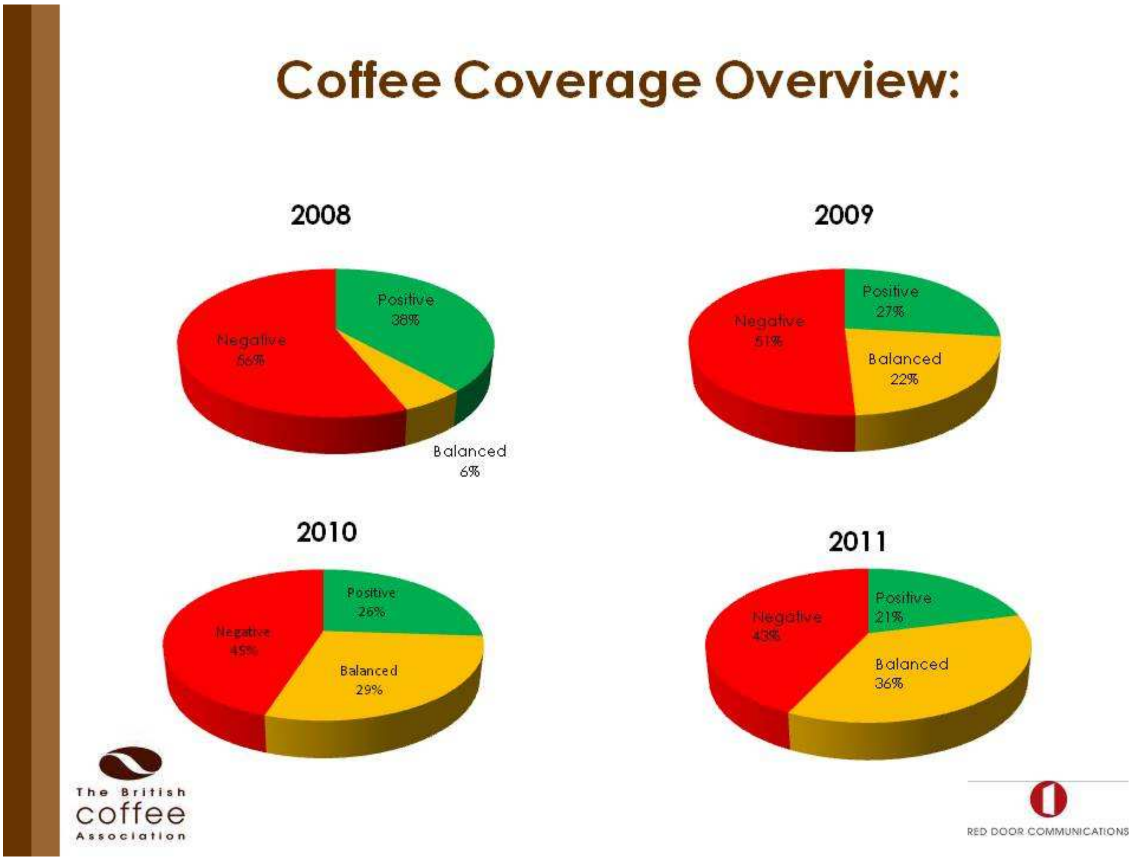
The BCA continues steady expansion of members. The London Coffee Arbitration Service New Rules became effective from 1st February 2012, aimed at fast process with low costs under UK Arbitration Act 1996 and avoiding legal representation during the process. The Education Seminar is held annually aimed at expanding total 'Tree to Cup' knowledge and is open to all.

6. HEALTH

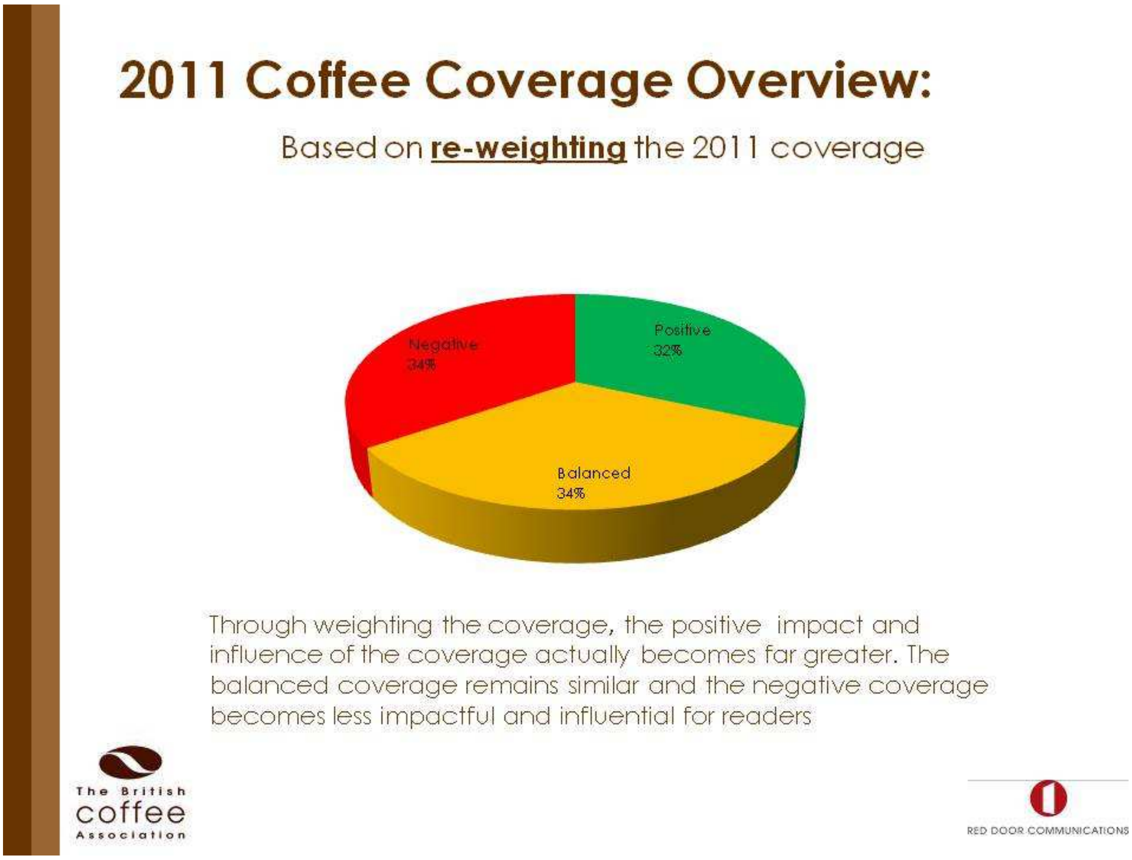
The BCA is seen as the point of contact for the media for a balanced source of information on coffee and health. The programme focus in 2011 was a continued split between the Consumer and the Health Care Profession (HCP).

During 2011 the BCA saw the best year to date for the Red Door Press Office and 126 pieces of coverage were secured from a wider target audience, not only nationals but consumer and medical publications.

With the strong PR campaign in place, we continue to see a marked decrease in the negative coverage. In the detailed graphs below you can see the percentage shift change in media coverage from 2008 to 2011.



In 2011 the BCA Executive Board asked that the Secretariat and Red Door looked at re-weighting the coverage seen to reflect the publication, size of article and influence this may have, this was done and showed a much fairer proportional split as can be seen below.



During 2011 the BCA undertook a large piece of market research that has shaped the 2012 programme. Highlighted in this research was the fact that there has been a decrease in advice from HCP's to either reduce or give up their coffee from 2006 research compared to 2011, this shows the programme is definitely working within this area.

- Percentage of HCPs who believe that 4 – 5 cups is safe or may confer health benefits:
  2006 = 29,5% 2011 = 67%
- Percentage of HCPs advising their patient to reduce coffee consumption:
  2006 = 52,25% 2011 = 30%
- Percentage of HCPs who believe that a cup of coffee is a source of fluid in the diet:
  2006 = 27,5% 2011 = 32%

The UK media are still prolific writers on coffee and health across all types of publications and media. On average they generate well over 120 articles per month.

7. EXCISE DUTIES AND VAT LEVEL

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

SELECTED OTHER EU MEMBERS

1. KEY IMPORT DATA 2011

Bulgaria					
Green Coffee (Incl Decaf)		**Roasted Coffee (Incl Decaf)**		**Extracts, essences**	
Vietnam	4.408	Italy	1.505	Brazil	380
Indonesia	2.935	Germany	670	Germany	241
Peru	1.467	Greece	456	France	127
Brazil	1.179	Romenia	324	Hungary	70
Honduras	849	Hungary	182	UK	67
Others	10.243	Others	388	Others	181
Total	21.081	Total	3.525	Total	1.066
Czech Republic					
Green Coffee (Incl Decaf)		**Roasted Coffee (Incl Decaf)**		**Extracts, essences**	
Brazil	5.897	Poland	9.754	Spain	1.333
Vietnam	2.602	Germany	4.850	Poland	1.281
Ghana	1.820	Austria	456	Germany	823
Indonesia	1.476	France	351	France	742
Honduras	1.120	Italy	324	UK	422
Others	4.781	Others	4.252	Others	993
Total	17.696	Total	19.986	Total	5.593
Hungary					
Green Coffee (Incl Decaf)		**Roasted Coffee (Incl Decaf)**		**Extracts, essences**	
Cameroon	63	Slovakia	7.385	Brazil	1.402
Brazil	31	Austria	2.354	Spain	926
Vietnam	23	Germany	830	Germany	801
India	2	Italy	675	UK	748
Indonesia	2	Romania	383	Poland	609
Others	6.540	Others	884	Others	1.286
Total	6.660	Total	12.510	Total	5.771
Poland					
Green Coffee (Incl Decaf)		**Roasted Coffee (Incl Decaf)**		**Extracts, essences**	
Vietnam	10.761	Germany	27.119	Germany	7.315
Laos	2.709	Czech Rep	1.021	Ecuador	4.790
Brazil	2.555	Italy	680	UK	2.588
Uganda	2.442	Netherlands	536	France	1.350
Peru	775	UK	535	Israel	1.070
Others	87.997	Others	2.426	Others	4.890
Total	107.239	Total	32.317	Total	22.003
Romania					
Green Coffee (Incl Decaf)		**Roasted Coffee (Incl Decaf)**		**Extracts, essences**	
Vietnam	6.897	Germany	5.503	Germany	925
Uganda	2.301	Bulgaria	3.612	Brazil	701
Brazil	2.190	Italy	2.785	Spain	658
Indonesia	1.976	Poland	1.801	Poland	439
Colombia	995	Austria	704	Israel	429
Others	5.902	Others	2.020	Others	18.851
Total	20.261	Total	16.425	Total	22.003

Slovenia					
Green Coffee (Incl Decaf)		**Roasted Coffee (Incl Decaf)**		**Extracts, essences**	
Brazil	4.192	Italy	1.197	Austria	418
India	1.951	Croatia	329	Germany	182
Colombia	366	Bosnia Herz	320	Italy	15
Papua NG	122	Austria	252	Netherlands	3
China	119	Germany	178	France	3
Others	2.448	Others	156	Others	7
Total	9.197	Total	2.431	Total	628
Slovakia					
Green Coffee (Incl Decaf)		**Roasted Coffee (Incl Decaf)**		**Extracts, essences**	
Vietnam	504	Germany	15.324	Czech Rep	1.473
Ethiopia	181	Hungary	4.976	Poland	422
Brazil	105	Czech Rep	4.915	Spain	299
India	94	Austria	1.200	Switzerland	175
Indonesia	49	Poland	496	Hungary	163
Others	4.863	Others	799	Others	247
Total	5.796	Total	27.710	Total	2.778

Source: Eurostat

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

2. CONSUMPTION

Total coffee consumption - in bags of 60 kg -			
	2009	**2010**	**2011**
Bulgaria	409.276	395.358	360.000
Czech Republic	525.168	471.719	571.000
Hungary	445.286	382.082	180.000
Poland	721.363	749.062	2.042.000
Romania	774.945	795.875	802.000
Slovakia	212.745	337.067	388.000
Slovenia	198.275	205.066	208.000

Source: ICO

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*
Côte 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**
Togo	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 21 September 2012
* 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. The above is provided for information only. No responsibility can be accepted by the ECF for any inadvertent errors or omissions.

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	5,0	
Czech Republic	14,0	
Denmark	25,0	Green: DKK 5,45/kg; 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	13,0	
Hungary	27,0	
Ireland	0,0	
Italy	21,0	
Latvia	21,0	LVL 100/100 kg pure coffee
Lithuania	21,0	
Luxembourg	3,0	
Malta	0,0	
Netherlands	6,0	
Poland	23,0	
Portugal	23,0	
Romania	24,0	Green: EUR 153/ton; roasted: EUR 225/ton; soluble: EUR 900/ton
Slovakia	20,0	
Slovenia	8,5	
Spain	8,0	
Sweden	12,0	
United Kingdom	0,0	

Source: DG External Trade Export Helpdesk website as at 21 September 2012

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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