

# European Coffee Report 2016/17



**European Coffee Federation**

# CONTENTS

|   |    |
|---|----|
| CONTENTS .....  | 2  |
| INTRODUCTION.....                                       | 3  |
| NOTE ON THE TABLES.....                                 | 4  |
| ICO INDICATOR PRICES .....                              | 5  |
| GREEN COFFEE STOCKS IN MAJOR EUROPEAN COFFEE PORTS..... | 6  |
| THE EUROPEAN COFFEE MARKET IN 2016.....                 | 7  |
| EUROMONITOR INTERNATIONAL .....                         | 16 |
| KEY NATIONAL IMPORT DATA.....                           | 20 |
| EU VAT AND EXCISE DUTIES .....                          | 28 |

## INTRODUCTION

This is the thirty-seventh issue of the 'European Coffee Report'. The European Coffee Federation (ECF) continues this series with the report over 2016/17. Unfortunately, we are unable to present country chapters as we did until a few years ago. It has become increasingly difficult for many national associations to obtain data from their national statistical offices. This has been partly compensated by including data from Euromonitor International, which we trust will be an important and welcome addition.

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

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This report was finalised in August 2017

EUROPEAN COFFEE FEDERATION



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## NOTE ON THE TABLES

Bags are bags of 60 kilos

Tons are metric tons

In these reports we are 'going metric'; the data in bags are phased out.

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
- from roasted decaffeinated to green: multiply by 1,25
- from soluble decaffeinated to green: multiply by 2,73.

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 'short scale' is used:  $10^6$  = one million,  $10^9$  = one billion,  $10^{12}$  = one trillion.

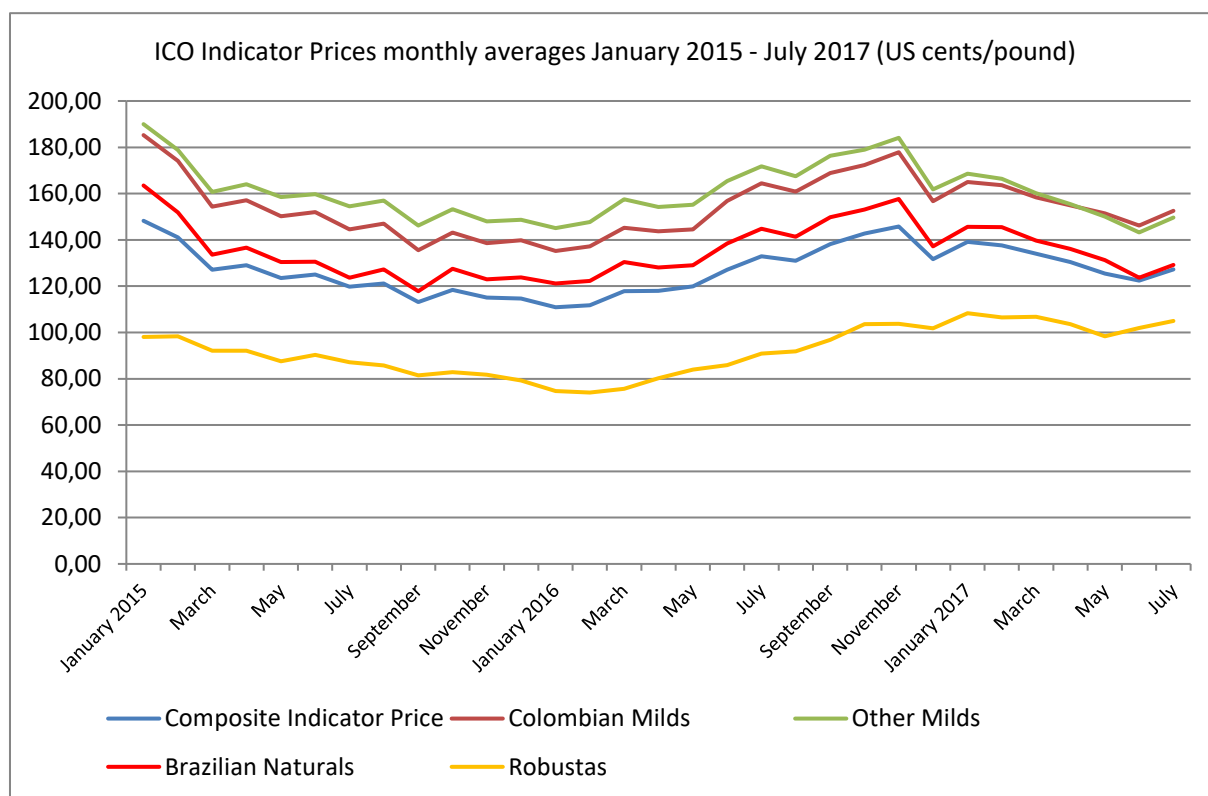
Abbreviations of currencies are those used for international banking purposes, based on ISO standards.

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:

| Colombian Milds | Arabicas           |                    | Robustas              |
|-----------------|--------------------|--------------------|-----------------------|
|                 | 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



The calculation of the ICO composite indicator price is weighted as follows (latest: ICO document ICC 105-17 Add 2):

From October 2013:

|                     |     |
|---------------------|-----|
| Colombian Milds:    | 9%  |
| Other Milds:        | 24% |
| Brazilian Naturals: | 31% |
| Robustas:           | 36% |

From October 2015:

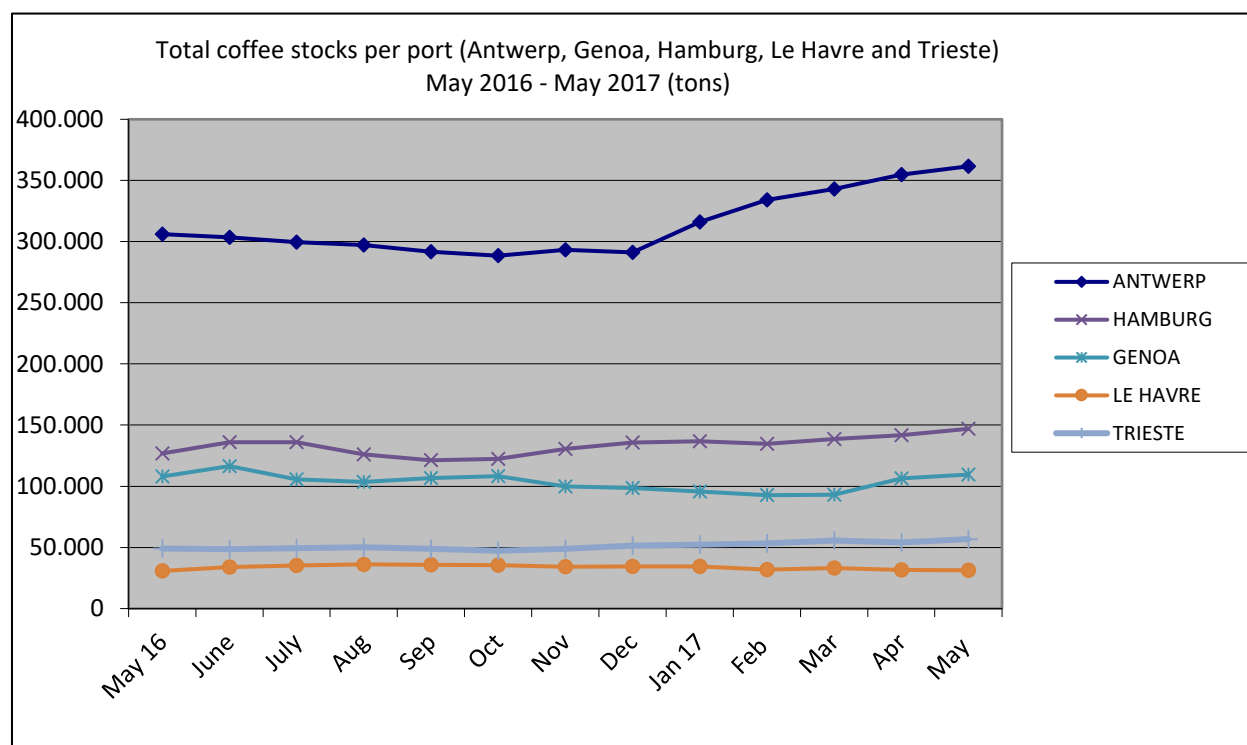
|                     |     |
|---------------------|-----|
| Colombian Milds:    | 10% |
| Other Milds:        | 23% |
| Brazilian Naturals: | 30% |
| Robustas:           | 37% |

## GREEN COFFEE STOCKS IN MAJOR EUROPEAN COFFEE PORTS

Volumes are in tons.

The ports covered are: Antwerp, Hamburg, Genoa, Le Havre and Trieste.

Stocks include 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 2016

## 1. IMPORTS AND EXPORTS

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'. EU data refer to the 28-member European Union.

| Imports of green coffee into European countries from 2014 to 2016<br>- in tons and in bags of 60 kilos - |                  |                   |                  |                   |                  |                   |
|--|------------------|-------------------|------------------|-------------------|------------------|-------------------|
|  | 2014             |                   | 2015             |                   | 2016             |                   |
|  | tons             | bags              | tons             | bags              | tons             | bags              |
| Austria  | 17.222           | 287.032           | 16.226           | 270.437           | 15.834           | 263.905           |
| Belgium  | 263.735          | 4.395.577         | 281.010          | 4.683.502         | 283.740          | 4.729.005         |
| Bulgaria   | 25.853           | 430.888           | 29.544           | 492.403           | 32.344           | 539.072           |
| Croatia  | 15.364           | 256.068           | 16.520           | 275.333           | 17.919           | 298.655           |
| Cyprus   | 1.927            | 32.115            | 1.012            | 16.862            | 1.590            | 26.505            |
| Czech Republic   | 15.496           | 258.270           | 21.130           | 352.162           | 17.546           | 292.430           |
| Denmark  | 16.535           | 275.590           | 16.787           | 279.777           | 19.299           | 321.647           |
| Estonia  | 125              | 2.077             | 93               | 1.542             | 69               | 1.152             |
| Finland  | 61.218           | 1.020.293         | 67.711           | 1.128.517         | 71.324           | 1.188.737         |
| France   | 227.180          | 3.786.338         | 212.725          | 3.545.408         | 207.708          | 3.461.793         |
| Germany  | 1.129.724        | 18.828.740        | 1.077.432        | 17.957.192        | 1.140.529        | 19.008.818        |
| Greece   | 29.938           | 498.968           | 31.846           | 530.758           | 48.925           | 815.412           |
| Hungary  | 15.621           | 260.350           | 4.335            | 72.257            | 2.059            | 34.322            |
| Ireland  | 5.922            | 98.700            | 8.130            | 135.493           | 10.339           | 172.320           |
| Italy  | 526.949          | 8.782.487         | 527.893          | 8.798.215         | 571.966          | 9.532.760         |
| Latvia   | 3.660            | 61.005            | 3.058            | 50.972            | 3.360            | 55.993            |
| Lithuania  | 626              | 10.428            | 854              | 14.228            | 1.213            | 20.208            |
| Luxembourg   | 591              | 9.848             | 767              | 12.775            | 679              | 11.320            |
| Malta  | 28               | 468               | 23               | 377               | 1                | 18                |
| Netherlands  | 148.846          | 2.480.762         | 153.333          | 2.555.553         | 157.742          | 2.629.037         |
| Poland   | 78.762           | 1.312.695         | 103.953          | 1.732.552         | 103.301          | 1.721.675         |
| Portugal   | 47.470           | 791.170           | 46.180           | 769.665           | 51.397           | 856.617           |
| Rumania  | 18.425           | 307.082           | 17.989           | 299.823           | 20.273           | 337.878           |
| Slovakia   | 3.843            | 64.052            | 4.114            | 68.560            | 3.261            | 54.357            |
| Slovenia   | 10.969           | 182.822           | 11.389           | 189.815           | 13.310           | 221.840           |
| Spain  | 260.535          | 4.342.255         | 258.835          | 4.313.910         | 262.838          | 4.380.630         |
| Sweden   | 101.561          | 1.692.685         | 98.898           | 1.648.293         | 110.650          | 1.844.170         |
| United Kingdom   | 148.757          | 2.479.290         | 168.781          | 2.813.013         | 176.673          | 2.944.550         |
| <i>EU28 total (incl. intra-EU)</i>   | <i>3.176.883</i> | <i>52.948.055</i> | <i>3.180.564</i> | <i>53.009.393</i> | <i>3.345.890</i> | <i>55.764.825</i> |
|  |                  |                   |                  |                   |                  |                   |
| Norway   | 32.387           | 539.786           | 35.258           | 587.626           | 34.938           | 582.306           |
| Switzerland  | 133.856          | 2.230.933         | 139.537          | 2.325.620         | 139.250          | 2.320.830         |
| <i>Western Europe total</i>  | <i>3.343.126</i> | <i>55.718.774</i> | <i>3.355.358</i> | <i>55.922.639</i> | <i>3.520.078</i> | <i>58.667.961</i> |
|  |                  |                   |                  |                   |                  |                   |
| Belarus  | 15.427           | 257.118           | 15.517           | 258.617           |                  |                   |
| Bosnia and Herzegovina   | 23.543           | 392.382           | 24.490           | 408.174           | 24.300           | 405.000           |
| Georgia  | 10.093           | 168.222           | 11.003           | 183.375           |                  |                   |

|   |                  |                   |                  |                   |         |           |
|---|------------------|-------------------|------------------|-------------------|---------|-----------|
| Montenegro                              | 3.917            | 65.277            | 3.916            | 65.273            | 3.540   | 59.000    |
| Russian Federation                      | 284.786          | 4.746.438         | 282.602          | 4.710.038         | 313.980 | 5.233.000 |
| Serbia                                  | 35.668           | 594.468           | 30.690           | 511.497           | 32.820  | 547.000   |
| Ukraine                                 | 77.465           | 1.291.076         | 69.305           | 1.155.078         | 71.040  | 1.184.000 |
| <i>Central and Eastern Europe total</i> | <i>450.899</i>   | <i>7.514.980</i>  | <i>437.523</i>   | <i>7.292.053</i>  |         |           |
|   |                  |                   |                  |                   |         |           |
| <b>Europe total</b>                     | <b>3.794.025</b> | <b>63.233.754</b> | <b>3.792.881</b> | <b>63.214.692</b> |         |           |

Sources: Eurostat for EU; Statistics Norway/Statbank for Norway; Swiss Federal Customs Administration/Swiss-Impex for Switzerland; ICO for other countries.

Notes: Figures show imports of green coffee, not decaffeinated for the EU, Norway and Switzerland and imports of coffee in all forms for other countries.

In calendar year 2016 green coffee imports in Western Europe were 3,52 million tons, 4,9% higher than the 3,35 million tons imported in 2015. The Western European market is heavily dominated by the EU. Green coffee imports into the EU28 – including intra-EU trade – increased with 5,2% to 3,35 million tons.

According to ICO data, imports of coffee from selected Central and Eastern European countries in all forms in 2015 amounted to 0,44 million tons, compared to 0,45 million tons the year before, a drop of 3%. Not all 2016 data are available, but major markets like the Russian Federation and Ukraine showed increases of 11,1% and 2,5% respectively

The 'top 20' sources of EU28 green coffee imports (excluding intra-EU trade) in 2014, 2015 and 2016 were as follows (listed in the order of 2016 imports):

| Imports of green, not decaffeinated coffee into the EU28<br>(excluding intra-EU trade) by main origins |                  |              |                  |              |                  |              |
|--|------------------|--------------|------------------|--------------|------------------|--------------|
|  | 2014             |              | 2015             |              | 2016             |              |
|  | tons             | %            | tons             | %            | tons             | %            |
| Brazil   | 917.322          | 32,4         | 943.330          | 33,5         | 914.605          | 31,0         |
| Vietnam  | 702.719          | 24,8         | 630.543          | 22,4         | 728.279          | 24,7         |
| Colombia   | 168.213          | 5,9          | 180.644          | 6,4          | 193.210          | 6,5          |
| Honduras   | 165.063          | 5,8          | 174.645          | 6,2          | 191.783          | 6,5          |
| India  | 133.426          | 4,7          | 121.245          | 4,3          | 140.739          | 4,8          |
| Indonesia  | 118.151          | 4,2          | 147.864          | 5,3          | 122.417          | 4,1          |
| Uganda   | 131.294          | 4,6          | 125.604          | 4,5          | 122.402          | 4,1          |
| Peru   | 116.212          | 4,1          | 109.510          | 3,9          | 117.796          | 4,0          |
| Ethiopia   | 72.811           | 2,6          | 73.575           | 2,6          | 80.054           | 2,7          |
| China  | 33.841           | 1,2          | 32.805           | 1,2          | 42.998           | 1,5          |
| Cote d'Ivoire  | 17.756           | 0,6          | 11.883           | 0,4          | 35.691           | 1,2          |
| Tanzania   | 24.151           | 0,9          | 25.582           | 0,9          | 31.695           | 1,1          |
| Guatemala  | 30.918           | 1,1          | 28.607           | 1,0          | 27.899           | 0,9          |
| Kenya  | 27.810           | 1,0          | 27.294           | 1,0          | 26.538           | 0,9          |
| Cameroon   | 17.374           | 0,6          | 21.826           | 0,8          | 23.265           | 0,8          |
| Mexico   | 25.345           | 0,9          | 23.682           | 0,8          | 23.213           | 0,8          |
| Nicaragua  | 23.105           | 0,8          | 26.800           | 1,0          | 23.119           | 0,8          |
| Papua New Guinea   | 20.234           | 0,7          | 15.471           | 0,6          | 23.023           | 0,8          |
| Costa Rica   | 16.358           | 0,6          | 15.263           | 0,5          | 14.972           | 0,5          |
| Laos   | 11.326           | 0,4          | 13.282           | 0,5          | 10.596           | 0,4          |
| Others   | 59.770           | 2,1          | 63.086           | 2,2          | 57.257           | 1,9          |
| <b>EU28 excl. intra-EU</b>   | <b>2.833.197</b> | <b>100,0</b> | <b>2.812.539</b> | <b>100,0</b> | <b>2.951.549</b> | <b>100,0</b> |

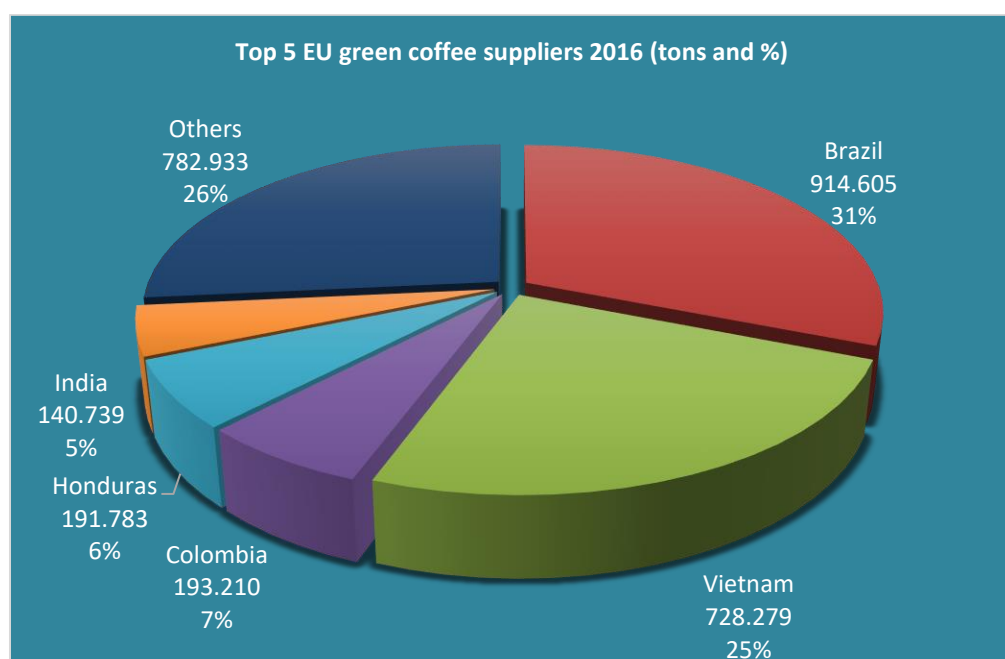
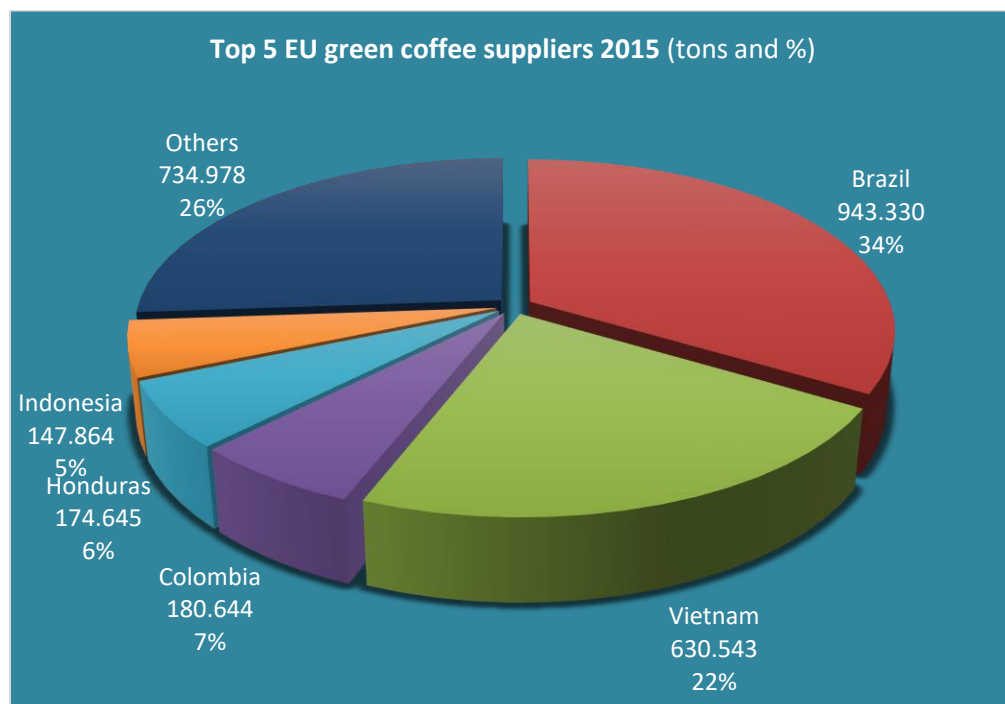
Source: Eurostat

For quite a few years, Brazil and Vietnam have consistently been the top-two suppliers. The third position has changed over time. Historically, this fell to Colombia, but changed to Indonesia in 2009 and 2010, to India in 2011, to Honduras in 2012 and 2013, and back to Colombia in 2014, 2015 and 2016. In 2016 Brazil continued to be the major green coffee supplier to the EU, albeit with a lower volume of 914.605 tons (-28.725 tons



compared to 2015) and market share (-2,5 percentage points). Vietnam retained its position as second supplier, with a higher volume of 728.279 tons (+97.736 tons) and import share (+2,3 percentage points). Colombia took third spot again in 2016, with a higher volume: +12.566 tons. The top-five was completed by Honduras and India. The last-mentioned country has had a bit of an up-and-down performance in recent years; in 2016 it has recovered ground lost in 2015 and surpassed the 2014 volume. Volume changes that appear small from the EU perspective are sometimes significant for the countries concerned. For example, the import volume from Côte d'Ivoire tripled, that from Laos dropped by 20%.

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



Imports by type of coffee for each individual country are becoming practically impossible to determine with any accuracy. 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 is provided for the EU28:

| EU28 imports per type of coffee<br>- in % - |      |      |
|---|------|------|
|   | 2015 | 2016 |
| Arabicas                                    | 65,3 | 63,9 |
| Brazilian Naturals                          | 36,2 | 33,8 |
| Colombian Milds                             | 8,3  | 8,5  |
| Other Milds                                 | 20,7 | 21,6 |
| Robustas                                    |      |      |
| Other/Unknown                               | 34,6 | 36,0 |
| <b>Total</b>                                | 0,2  | 0,2  |

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

The overall ratio Arabicas/Robustas has shifted somewhat towards Robustas. Within the Arabica group the share of Brazilian naturals dropped while that of Colombian Milds and Other Milds increased. xxxxxxxxxxxxxxxx

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 regular roasted coffee are modest compared to the exports of the same products while the imports and the exports of decaffeinated roasted coffee and coffee extracts (soluble coffee) are within the same order of magnitude.

| EU28 imports and exports of green coffee and (semi)finished products<br>from non-EU origins/to non-EU destinations<br>- in tons - |           |         |           |         |           |         |
|---|-----------|---------|-----------|---------|-----------|---------|
|   | 2014      |         | 2015      |         | 2016      |         |
|   | Import    | Export  | Import    | Export  | Import    | Export  |
| Green coffee (09011100)   | 2.833.197 | 34.470  | 2.812.005 | 27.812  | 2.951.608 | 42.640  |
| Green coffee, decaffeinated (09011200)  | 4.881     | 96.249  | 10.430    | 95.760  | 11.409    | 99.305  |
| Roasted coffee (09012100)   | 43.872    | 104.971 | 47.651    | 111.789 | 53.495    | 118.768 |
| Roasted coffee, decaffeinated (09012200)  | 4.324     | 2.506   | 4.636     | 2.976   | 4.524     | 2.697   |
| Coffee extracts (21011100)  | 50.877    | 47.974  | 53.261    | 46.001  | 53.617    | 47.139  |

Source: Eurostat

Compared to 2015 the re-exports in 2016 of green coffee increased by some 53%. The **exports** of green decaffeinated coffee increased modestly (+3,7%). Exports of roasted coffee were higher both for regular (+6,2%) but lower for decaffeinated (-9,4%). Soluble coffee exports increased somewhat (+2,5%). Green decaffeinated **imports** increased with 9,4% in 2016 compared to 2015. Imports of roasted coffee increased for regular coffee (+12,3%) but dropped slightly for decaffeinated coffee (-2,4%). Imports of soluble coffee were stable (+0,7%).

Looking in some more detail at the EU exports of finished products, in the years 2014-2016 the twenty main destinations of roasted coffee (non-decaffeinated plus decaffeinated), listed according to their ranking in 2016, were:

| EU28 exports of roasted coffee (including. decaf) to non-EU destinations<br>- in tons and % - |                |              |                |              |                |              |
|---|----------------|--------------|----------------|--------------|----------------|--------------|
|   | 2014           |              | 2015           |              | 2016           |              |
|   | tons           | %            | tons           | %            | tons           | %            |
| Russian Federation  | 15.983         | 14,9         | 16.801         | 14,6         | 17.914         | 14,7         |
| United States   | 11.133         | 10,4         | 11.483         | 10,0         | 13.435         | 11,1         |
| Ukraine   | 11.329         | 10,5         | 11.942         | 10,4         | 13.328         | 11,0         |
| Switzerland   | 10.194         | 9,5          | 10.442         | 9,1          | 11.342         | 9,3          |
| Australia   | 7.533          | 7,0          | 7.447          | 6,5          | 6.760          | 5,6          |
| Norway  | 5.138          | 4,8          | 5.781          | 5,0          | 5.893          | 4,9          |
| Canada  | 3.515          | 3,3          | 3.615          | 3,1          | 4.226          | 3,5          |
| United Arab Emirates  | 2.402          | 2,2          | 3.122          | 2,7          | 3.361          | 2,8          |
| Turkey  | 2.375          | 2,2          | 2.965          | 2,6          | 3.267          | 2,7          |
| Israel  | 2.242          | 2,1          | 2.296          | 2,0          | 2.715          | 2,2          |
| China   | 1.581          | 1,5          | 2.467          | 2,1          | 2.524          | 2,1          |
| Belarus   | 2.273          | 2,1          | 2.541          | 2,2          | 2.393          | 2,0          |
| Albania   | 1.860          | 1,7          | 1.973          | 1,7          | 2.270          | 1,9          |
| Japan   | 2.080          | 1,9          | 1.912          | 1,7          | 2.180          | 1,8          |
| South Korea   | 1.903          | 1,8          | 2.071          | 1,8          | 2.153          | 1,8          |
| Bosnia and Herzegovina  | 1.500          | 1,4          | 1.517          | 1,3          | 1.613          | 1,3          |
| Ceuta   | 1.446          | 1,3          | 1.633          | 1,4          | 1.499          | 1,2          |
| Brazil  | 1.650          | 1,5          | 2.463          | 2,1          | 1.495          | 1,2          |
| Serbia  | 1.158          | 1,1          | 1.264          | 1,1          | 1.411          | 1,2          |
| Iceland   | 1.252          | 1,2          | 966            | 0,8          | 1.370          | 1,1          |
| Others  | 18.931         | 17,6         | 20.067         | 17,5         | 20.319         | 16,7         |
| <b>Total external trade</b>   | <b>107.477</b> | <b>100,0</b> | <b>114.766</b> | <b>100,0</b> | <b>121.465</b> | <b>100,0</b> |

Source: Eurostat

In 2016 total exports of roasted coffee (including decaffeinated coffee) to non-EU destinations increased by almost 6% in volume compared to the previous year. The Russian Federation remained the largest non-EU destination. The three next largest destinations are roughly in the same order of magnitude: United States, Ukraine and Switzerland. From the fourth destination (Australia) the volumes are much lower.

Regarding the EU exports of soluble coffee (officially: extracts, essences and concentrates of coffee) to non-EU destinations, the total volume decreased by 2,5%. In 2016 the three largest clients remained the Russian Federation, Ukraine and Australia. The share of the Russian Federation in EU soluble coffee exports (25,6% in 2016) has been fairly stable in recent years, but still falls short of the high level of 2010 (33%). Exports to Ukraine increased significantly with 47%. South Africa remained the fourth destination in 2016 and the United States completed the top-five, albeit with a lower volume and share. Listed according to their 2016 ranking, the ten largest destinations by volume in the three most recent years were:

| EU28 exports of soluble coffee to non-EU destinations (HS 21011100) |               |              |               |              |               |              |
|---|---------------|--------------|---------------|--------------|---------------|--------------|
| - in tons and % -   |               |              |               |              |               |              |
|   | 2014          |              | 2015          |              | 2016          |              |
|   | tons          | %            | tons          | %            | tons          | %            |
| Russian Federation  | 13.702        | 28,6         | 12.317        | 26,8         | 12.075        | 25,6         |
| Ukraine   | 8.352         | 17,4         | 4.383         | 9,5          | 6.446         | 13,7         |
| Australia   | 4.565         | 9,5          | 5.143         | 11,2         | 5.267         | 11,2         |
| South Africa  | 3.362         | 7,0          | 3.381         | 7,3          | 3.512         | 7,4          |
| United States   | 1.832         | 3,8          | 2.108         | 4,6          | 1.933         | 4,1          |
| Norway  | 1.024         | 2,1          | 1.628         | 3,5          | 1.766         | 3,7          |
| Turkey  | 1.397         | 2,9          | 1.482         | 3,2          | 1.630         | 3,5          |
| Egypt   | 1.641         | 3,4          | 2.348         | 5,1          | 1.610         | 3,4          |
| Canada  | 1.340         | 2,8          | 1.398         | 3,0          | 1.234         | 2,6          |
| Switzerland   | 1.218         | 2,5          | 992           | 2,2          | 1.160         | 2,5          |
| Others  | 9.543         | 19,9         | 10.820        | 23,5         | 10.507        | 22,3         |
| <b>EU28_EXTRA</b>   | <b>47.974</b> | <b>100,0</b> | <b>46.001</b> | <b>100,0</b> | <b>47.139</b> | <b>100,0</b> |

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 increased marginally by 0,7%. In 2016 the Brazil replaced Ecuador as the main supplier and India became number three, relegating Switzerland to the fourth position. The increase of soluble coffee imports from Vietnam came to a halt in 2016; the volume dropped by 11,4%.

| EU28 imports of soluble coffee from non-EU origins (HS 21011100) |               |              |               |              |               |              |
|--|---------------|--------------|---------------|--------------|---------------|--------------|
| - in tons and % -  |               |              |               |              |               |              |
|  | 2014          |              | 2015          |              | 2016          |              |
|  | tons          | %            | tons          | %            | tons          | %            |
| Brazil   | 10.625        | 20,9         | 11.943        | 22,4         | 12.610        | 23,5         |
| Ecuador  | 16.326        | 32,1         | 13.695        | 25,7         | 9.967         | 18,6         |
| India  | 3.498         | 6,9          | 4.522         | 8,5          | 5.560         | 10,4         |
| Switzerland  | 6.587         | 12,9         | 5.635         | 10,6         | 5.420         | 10,1         |
| Vietnam  | 3.376         | 6,6          | 4.555         | 8,6          | 4.034         | 7,5          |
| Others   | 10.465        | 20,6         | 12.911        | 24,2         | 16.027        | 29,9         |
| <b>Total external trade</b>                                      | <b>50.877</b> | <b>100,0</b> | <b>53.261</b> | <b>100,0</b> | <b>53.617</b> | <b>100,0</b> |

Source: Eurostat

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

| Value of EU28 imports and exports of green, roasted and soluble coffee<br>- in mln EUR - |       |       |             |      |         |       |               |      |         |       |
|--|-------|-------|-------------|------|---------|-------|---------------|------|---------|-------|
|  | Green |       | Green decaf |      | Roasted |       | Roasted decaf |      | Soluble |       |
| Imports  | 2015  | 2016  | 2015        | 2016 | 2015    | 2016  | 2015          | 2016 | 2015    | 2016  |
| From non-EU origins  | 7.403 | 6.913 | 34          | 32   | 1.272   | 1.326 | 150           | 137  | 442     | 421   |
| From EU origins  | 8.394 | 7.901 | 141         | 134  | 5.375   | 5.455 | 378           | 375  | 1.673   | 1.686 |
| Exports  | 2015  | 2016  | 2015        | 2016 | 2015    | 2016  | 2015          | 2016 | 2015    | 2016  |
| To non-EU destinations   | 107   | 134   | 337         | 325  | 870     | 886   | 29            | 26   | 523     | 500   |
| To EU destinations   | 1.226 | 1.209 | 529         | 509  | 5.548   | 5.564 | 240           | 226  | 1.889   | 1.915 |

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 2016 was EUR 5,6 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 1,4 billion.

## 2. PRODUCTION

The following table is a summary of the Eurostat Prodcom statistics over calendar years 2015 and 2016, 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<br>- 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. |         |
|  | 2015  | 2016    | 2015  | 2016      | 2015   | 2016    | 2015  | 2016    |
| EU28TOTALS   | 224.000   | 248.000 | 1.675.672   | 1.796.416 | 92.821   | 101.233 | 319.142   | 323.269 |
| Austria  | 0   | 0       | 9.918   | 6.343     | 46   | 60      | *   | *       |
| Belgium  | 0   | 0       | 50.066  | 50.776    | 3.790  | 4.070   | *   | *       |
| Bulgaria   | 0   | 0       | 4.812   | 4.812     | *  | *       | 121   | 553     |
| Croatia  | 0   | 0       | 11.706  | 12.120    | 30   | 51      | 90  | 80      |
| Czech Republic   | 0   | 0       | *   | 4.738     | 0  | 0       | *   | *       |
| Denmark  | 0   | 0       | 19.035  | 18.829    | 0  | 0       | 0   | 0       |
| Estonia  | 0   | 0       | 405   | 0         | 0  | 0       | 0   | 0       |
| Finland  | 0   | 0       | 47.294  | 47.305    | *  | *       | 0   | 0       |
| France   | *   | 0       | 130.879   | 140.520   | 3.757  | 3.769   | *   | *       |
| Germany  | 197.739   | 209.907 | 491.205   | 519.139   | 21.352   | 22.969  | 96.374  | 95.030  |
| Greece   | 0   | 0       | 11.943  | 12.867    | *  | *       | 5.624   | 6.268   |
| Hungary  | 0   | 0       | 1.976   | 143       | *  | 0       | 20.116  | 1.526   |
| Italy  | 348   | 585     | 464.603   | 519.949   | 28.768   | 26.461  | *   | 17.626  |
| Lithuania  | 0   | 0       | 528   | 683       | 1  | 1       | 0   | 0       |
| Netherlands  | *   | *       | 124.494   | 120.662   | 15.870   | 24.048  | 29.263  | 33.065  |
| Norway   | 0   | 0       | 29.170  | 31.198    | *  | *       | 0   | 0       |

|                |        |        |         |         |        |        |        |        |
|----------------|--------|--------|---------|---------|--------|--------|--------|--------|
| Poland         | 0      | 0      | 29.813  | 34.654  | *      | *      | 30.747 | 30.386 |
| Portugal       | 0      | 0      | 38.798  | 39.468  | 1.628  | 1.728  | 1.936  | *      |
| Romania        | 0      | 0      | 15.432  | 16.169  | *      | *      | *      | *      |
| Spain          | 21.051 | 23.520 | 114.937 | 122.117 | 16.063 | 15.882 | 34.309 | 35.437 |
| Sweden         | 0      | 0      | 70.318  | 87.061  | *      | *      | *      | *      |
| United Kingdom | 0      | 0      | 23.665  | 25.370  | 1.258  | 1.610  | *      | *      |

Source: Eurostat

\*: Data for this item are confidential and have been suppressed in the Prodcom statistics

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.

| Production of green decaffeinated, roasted and soluble coffee in selected EU and EFTA countries<br>- 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. |       |
|   | 2012  | 2013 | 2012  | 2013   | 2012   | 2013 | 2012  | 2013  |
| EU28TOTALS  | 280   | 300  | 9.799   | 10.386 | 571  | 617  | 2.991   | 2.773 |
| Austria   | 0   | 0    | 66  | 50     | 0  | 1    | *   | *     |
| Belgium   | 0   | 0    | 406   | 396    | 39   | 38   | *   | *     |
| Bulgaria  | 0   | 0    | 19  | 14     | *  | *    | 1   | 2     |
| Croatia   | 0   | 0    | 74  | 81     | 0  | 1    | 0   | 0     |
| Denmark   | 0   | 0    | 99  | 99     | 0  | 0    | 0   | 0     |
| Estonia   | 0   | 0    | 2   | 0      | 0  | 0    | 0   | 0     |
| Finland   | 0   | 0    | 333   | 312    | 0  | 2    | 0   | 0     |
| France  | *   | *    | 1.187   | 1.263  | 40   | 39   | *   | *     |
| Germany   | 180   | 195  | 1.628   | 1.628  | 90   | 83   | 621   | 591   |
| Greece  | 0   | 0    | 98  | 106    | *  | *    | 114   | 127   |
| Hungary   | 0   | 0    | 9   | 1      | *  | 0    | 81  | 6     |
| Italy   | 1   | *    | 3.316   | 3.859  | 202  | 212  | *   | 118   |
| Latvia  | *   | *    | 10  | 10     | 0  | 0    | *   | *     |
| Lithuania   | 0   | 0    | 215   | 225    | *  | *    | 0   | 0     |
| Netherlands   | *   | *    | 585   | 507    | 38   | 76   | *   | *     |
| Norway  | 0   | 0    | 215   | 225    | *  | *    | 0   | 0     |
| Poland  | 0   | 0    | 136   | 154    | *  | *    | 168   | 159   |
| Portugal  | 0   | 0    | 301   | 293    | 14   | 16   | 5   | *     |
| Romania   | 0   | 0    | 85  | 85     | *  | *    | *   | *     |
| Spain   | 85  | 61   | 805   | 860    | 131  | 132  | 286   | 272   |
| Sweden  | 0   | 0    | 331   | 365    | *  | *    | *   | *     |
| United Kingdom  | 0   | 0    | 229   | 210    | 14   | 15   | *   | *     |

Source: Eurostat

\*: Data for this item are confidential and have been suppressed in the Prodcom statistics

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. The Prodcum database indicates where this is the case. Sometimes only volumes are reported but no values or vice-versa. Absence of a country or 'zero' reporting therefore can mean 'unavailable' or 'confidential' or 'no production'. 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.

## EUROMONITOR INTERNATIONAL

The following tables and graphs are derived from data provided by Euromonitor International. The data may differ from those from other sources. This may be because of different definitions or methodologies.

The first two tables present data on total coffee<sup>1</sup> market volume and value and per capita volume:

| Total coffee volume and value in selected EU markets 2014-2016<br>- in tons and EUR million Retail Sales Price - |         |       |         |       |         |       |
|--|---------|-------|---------|-------|---------|-------|
|  | 2014    |       | 2015    |       | 2016    |       |
|  | Volume  | Value | Volume  | Value | Volume  | Value |
| Austria  | 40.485  | 728   | 40.394  | 741   | 40.397  | 755   |
| Belgium  | 53.745  | 612   | 53.700  | 628   | 53.819  | 640   |
| Bulgaria   | 16.982  | 168   | 17.385  | 179   | 17.707  | 187   |
| Croatia  | 20.327  | 145   | 20.711  | 147   | 21.057  | 149   |
| Czech Republic   | 23.598  | 312   | 23.401  | 317   | 23.279  | 318   |
| Denmark  | 27.417  | 316   | 26.762  | 356   | 26.594  | 347   |
| Estonia  | 5.554   | 58    | 5.806   | 62    | 6.068   | 67    |
| Finland  | 55.425  | 418   | 56.228  | 437   | 56.419  | 434   |
| France   | 198.937 | 3.078 | 197.476 | 3.112 | 196.313 | 3.154 |
| Germany  | 421.563 | 4.806 | 413.444 | 4.766 | 407.996 | 4.753 |
| Greece   | 27.693  | 325   | 27.335  | 349   | 27.386  | 359   |
| Hungary  | 31.143  | 288   | 32.125  | 305   | 32.928  | 320   |
| Ireland  | 4.590   | 82    | 5.051   | 98    | 5.674   | 120   |
| Italy  | 211.822 | 1.704 | 208.707 | 1.753 | 205.804 | 1.794 |
| Latvia   | 5.042   | 86    | 5.023   | 86    | 5.056   | 89    |
| Lithuania  | 10.988  | 140   | 10.887  | 139   | 11.062  | 142   |
| Netherlands  | 109.314 | 1.002 | 108.377 | 999   | 108.640 | 1.013 |
| Poland   | 119.304 | 1.051 | 120.788 | 1.062 | 121.846 | 1.072 |
| Portugal   | 26.925  | 371   | 27.426  | 385   | 27.916  | 398   |
| Romania  | 39.409  | 335   | 40.647  | 330   | 41.761  | 321   |
| Slovakia   | 13.740  | 247   | 13.691  | 244   | 13.624  | 243   |
| Slovenia   | 13.037  | 116   | 13.159  | 118   | 13.377  | 120   |
| Spain  | 135.496 | 1.168 | 135.295 | 1.198 | 136.061 | 1.226 |
| Sweden   | 86.273  | 485   | 89.074  | 549   | 90.172  | 576   |
| United Kingdom   | 110.708 | 1.796 | 115.222 | 1.892 | 118.616 | 1.941 |

Source: © Euromonitor International

<sup>1</sup> Coffee: This is the aggregation of fresh coffee and instant coffee. Please note that foodservice sales of coffee are volumes sold to the on-trade (foodservice) sector and not those sold to the consumer.



| Total coffee volume in kg per capita in selected EU markets 2016<br>- in kg - |      |                |     |
|---|------|----------------|-----|
| Austria   | 4,6  | Italy          | 3,4 |
| Belgium   | 4,8  | Latvia         | 2,6 |
| Bulgaria  | 2,5  | Lithuania      | 3,8 |
| Croatia   | 5,0  | Netherlands    | 6,4 |
| Czech Republic  | 2,2  | Poland         | 3,2 |
| Denmark   | 4,7  | Portugal       | 2,7 |
| Estonia   | 4,6  | Romania        | 2,1 |
| Finland   | 10,3 | Slovakia       | 2,5 |
| France  | 3,0  | Slovenia       | 6,5 |
| Germany   | 5,0  | Spain          | 2,9 |
| Greece  | 2,5  | Sweden         | 9,2 |
| Hungary   | 3,3  | United Kingdom | 1,8 |
| Ireland   | 1,2  |                |     |

Source: © Euromonitor International

The share of retail and foodservice (essentially representing out-of-home consumption) differs substantially between markets, ranging from a 55% share of retail in Portugal to 95% in Slovakia.

| Share of retail and foodservice in coffee volume in selected EU markets 2016<br>- in % - |        |             |                |    |
|--|--------|-------------|----------------|----|
|  | Retail | Foodservice |                |    |
| Austria  | 85     | 15          | Italy          | 74 |
| Belgium  | 80     | 20          | Latvia         | 90 |
| Bulgaria   | 81     | 19          | Lithuania      | 89 |
| Croatia  | 57     | 43          | Netherlands    | 77 |
| Czech Republic   | 92     | 8           | Poland         | 90 |
| Denmark  | 74     | 26          | Portugal       | 55 |
| Estonia  | 93     | 7           | Romania        | 77 |
| Finland  | 87     | 13          | Slovakia       | 95 |
| France   | 82     | 18          | Slovenia       | 84 |
| Germany  | 88     | 12          | Spain          | 62 |
| Greece   | 76     | 24          | Sweden         | 72 |
| Hungary  | 86     | 14          | United Kingdom | 66 |
| Ireland  | 71     | 29          |                |    |

Source: © Euromonitor International

In 2016 the share of pods<sup>2</sup> was lowest (below 1%) in Poland and highest (46%) in Ireland.

| Share of standard coffee and coffee in pods in selected EU markets 2014-2016<br>- in % - |          |      |          |      |          |      |
|--|----------|------|----------|------|----------|------|
|  | 2014     |      | 2015     |      | 2016     |      |
|  | Standard | Pods | Standard | Pods | Standard | Pods |
| Austria  | 82       | 18   | 80       | 20   | 79       | 21   |
| Belgium  | 79       | 21   | 77       | 23   | 75       | 26   |
| Bulgaria   | 97       | 03   | 97       | 03   | 96       | 04   |
| Czech Republic   | 97       | 03   | 96       | 04   | 96       | 04   |
| Denmark  | 97       | 03   | 96       | 04   | 96       | 04   |
| Finland  | 99       | 01   | 99       | 01   | 99       | 01   |
| France   | 71       | 29   | 70       | 30   | 69       | 32   |
| Germany  | 87       | 13   | 86       | 14   | 85       | 15   |
| Greece   | 96       | 04   | 96       | 04   | 96       | 04   |
| Hungary  | 99       | 01   | 99       | 01   | 99       | 01   |
| Ireland  | 74       | 26   | 64       | 36   | 54       | 46   |
| Italy  | 94       | 06   | 93       | 07   | 92       | 08   |
| Netherlands  | 61       | 39   | 61       | 39   | 61       | 39   |
| Poland   | 100      | 00   | 100      | 01   | 100      | 01   |
| Portugal   | 54       | 46   | 51       | 49   | 49       | 51   |
| Romania  | 99       | 01   | 99       | 01   | 99       | 01   |
| Slovakia   | 98       | 02   | 97       | 03   | 97       | 03   |
| Spain  | 81       | 19   | 80       | 20   | 79       | 21   |
| Sweden   | 99       | 02   | 98       | 02   | 98       | 02   |
| United Kingdom   | 90       | 10   | 87       | 13   | 86       | 14   |

Source: © Euromonitor International

These are the average sales prices for coffee beans, roast&ground coffee, coffee pods and regular instant coffee in 2016. Please note that for some markets the sales price for pods are not in kilos but in units.

<sup>2</sup> Pods: Pods are portions of fresh ground coffee, tea, or other hot drinks encapsulated in a container, which can be metal, plastic, or paper. Both soft pods (pads) and hard pods (capsules) are included.

| Average sales price 2016<br>- in EUR per kg except * EUR per unit - |       |       |        |         |
|---|-------|-------|--------|---------|
|   | Beans | R&G   | Pods   | Instant |
| Austria   | 14,28 | 13,75 | 0,27 * | 32,30   |
| Belgium   | 13,27 | 12,75 | 0,31 * | 31,75   |
| Bulgaria  | 13,50 | 10,88 | 45,25  | 27,13   |
| Croatia   | 29,66 | 17,16 | 58,89  | 34,28   |
| Czech Republic  | 16,62 | 15,71 | 36,86  | 33,50   |
| Denmark   | 16,44 | 14,74 | 0,48 * | 38,76   |
| Estonia   | 17,50 | 15,56 | 29,07  | 33,07   |
| Finland   | n.a.  | n.a.  | n.a.   | 33,66   |
| France  | 13,28 | 11,27 | 40,37  | 31,79   |
| Germany   | 11,68 | 10,34 | 29,82  | 40,40   |
| Greece  | n.a.  | 19,92 | n.a.   | 42,29   |
| Hungary   | 12,33 | 20,08 | 44,18  | 32,84   |
| Ireland   | 15,99 | 20,53 | 35,57  | 41,05   |
| Italy   | 11,57 | 13,28 | 45,57  | 32,56   |
| Latvia  | 18,18 | 16,81 | 2,20 * | 41,42   |
| Lithuania   | 10,88 | 13,70 | 39,22  | 44,26   |
| Netherlands   | 11,77 | 11,14 | 0,19 * | 37,57   |
| Poland  | 15,28 | 10,03 | 41,85  | 26,94   |
| Portugal  | 9,73  | 11,93 | 0,29 * | 58,20   |
| Romania   | 10,29 | 7,38  | 40,31  | 28,97   |
| Slovakia  | 18,55 | 17,55 | 0,41 * | 33,02   |
| Slovenia  | 14,53 | 12,44 | 52,76  | 27,25   |
| Spain   | 7,40  | 12,48 | 0,23 * | 25,92   |
| Sweden  | 9,64  | n.a.  | n.a.   | 32,98   |
| United Kingdom  | 17,16 | 18,67 | 73,11  | 33,65   |

\*: average price per unit

Source: © Euromonitor International

## KEY NATIONAL IMPORT DATA

### 1. SUMMARY IMPORT STATISTICS EU MEMBERS 2016 (IN TONS)

| <b>Austria</b>                        |         |   |        |                           |       |
|---------------------------------------|---------|---|--------|---------------------------|-------|
| <b>Green Coffee (Including decaf)</b> |         | <b>Roasted Coffee (Including decaf)</b> |        | <b>Extracts, essences</b> |       |
| Germany                               | 8.365   | Germany                                 | 16.535 | Germany                   | 4.406 |
| Vietnam                               | 1.621   | Italy                                   | 14.387 | Spain                     | 482   |
| Italy                                 | 1.564   | Slovakia                                | 10.882 | France                    | 280   |
| Brazil                                | 1.452   | Switzerland                             | 3.267  | Switzerland               | 275   |
| Belgium                               | 772     | Netherlands                             | 1.096  | United Kingdom            | 181   |
| Others                                | 2.361   | Others                                  | 1.735  | Others                    | 535   |
| Total                                 | 16.135  | Total                                   | 47.900 | Total                     | 6.158 |
| <b>Belgium</b>                        |         |   |        |                           |       |
| <b>Green Coffee (Including decaf)</b> |         | <b>Roasted Coffee (Including decaf)</b> |        | <b>Extracts, essences</b> |       |
| Brazil                                | 81.251  | Germany                                 | 12.083 | Brazil                    | 1.294 |
| Vietnam                               | 47.026  | Netherlands                             | 9.706  | Netherlands               | 1.166 |
| Honduras                              | 19.802  | France                                  | 2.165  | Germany                   | 901   |
| Colombia                              | 19.438  | Switzerland                             | 1.717  | France                    | 897   |
| Peru                                  | 15.545  | United Kingdom                          | 1.224  | Colombia                  | 394   |
| Others                                | 105.677 | Others                                  | 3.544  | Others                    | 1.198 |
| Total                                 | 288.739 | Total                                   | 30.439 | Total                     | 5.850 |
| <b>Bulgaria</b>                       |         |   |        |                           |       |
| <b>Green Coffee (Including decaf)</b> |         | <b>Roasted Coffee (Including decaf)</b> |        | <b>Extracts, essences</b> |       |
| Vietnam                               | 7.200   | Italy                                   | 3.536  | Brazil                    | 778   |
| Greece                                | 5.664   | Germany                                 | 1.496  | Germany                   | 313   |
| Germany                               | 4.858   | Spain                                   | 407    | Croatia                   | 292   |
| Brazil                                | 3.604   | Greece                                  | 140    | United Kingdom            | 147   |
| Indonesia                             | 3.147   | Romania                                 | 138    | Poland                    | 111   |
| Others                                | 8.011   | Others                                  | 638    | Others                    | 289   |
| Total                                 | 32.484  | Total                                   | 6.356  | Total                     | 1.930 |
| <b>Croatia</b>                        |         |   |        |                           |       |
| <b>Green Coffee (Including decaf)</b> |         | <b>Roasted Coffee (Including decaf)</b> |        | <b>Extracts, essences</b> |       |
| Brazil                                | 4.616   | Italy                                   | 2.151  | Germany                   | 477   |
| India                                 | 3.752   | Slovenia                                | 1.723  | Spain                     | 289   |
| Slovenia                              | 2.827   | Hungary                                 | 652    | Brazil                    | 286   |
| Vietnam                               | 2.733   | Germany                                 | 259    | Poland                    | 262   |
| Italy                                 | 1.099   | Austria                                 | 149    | Czech Republic            | 66    |
| Others                                | 2.948   | Others                                  | 169    | Others                    | 187   |
| Total                                 | 17.974  | Total                                   | 5.103  | Total                     | 1.567 |

| Cyprus                         |        |                                  |        |                    |        |
|--------------------------------|--------|----------------------------------|--------|--------------------|--------|
| Green Coffee (Including decaf) |        | Roasted Coffee (Including decaf) |        | Extracts, essences |        |
| Brazil                         | 1.539  | Greece                           | 242    | Greece             | 739    |
| Greece                         | 25     | Italy                            | 167    | Austria            | 77     |
| Ethiopia                       | 18     | Germany                          | 110    | Italy              | 62     |
| Mexico                         | 8      | United Kingdom                   | 73     | Germany            | 60     |
| Lebanon                        | 4      | Switzerland                      | 44     | Spain              | 60     |
| Others                         | 5      | Others                           | 170    | Others             | 144    |
| Total                          | 1.599  | Total                            | 806    | Total              | 1.142  |
| Czech Republic                 |        |                                  |        |                    |        |
| Green Coffee (Including decaf) |        | Roasted Coffee (Including decaf) |        | Extracts, essences |        |
| Brazil                         | 3.765  | Poland                           | 24.724 | Germany            | 3.723  |
| Germany                        | 3.764  | Germany                          | 9.513  | United Kingdom     | 3.683  |
| Vietnam                        | 2.757  | Slovakia                         | 3.796  | Belgium            | 1.421  |
| Cameroon                       | 1.326  | Italy                            | 2.142  | Poland             | 1.383  |
| Slovakia                       | 1.005  | Netherlands                      | 1.146  | Spain              | 1.105  |
| Others                         | 5.006  | Others                           | 2.701  | Others             | 2.255  |
| Total                          | 17.623 | Total                            | 44.022 | Total              | 13.569 |
| Denmark                        |        |                                  |        |                    |        |
| Green Coffee (Including decaf) |        | Roasted Coffee (Including decaf) |        | Extracts, essences |        |
| Brazil                         | 7.017  | Sweden                           | 9.975  | Netherlands        | 1.132  |
| Colombia                       | 2.245  | Germany                          | 9.550  | Germany            | 728    |
| Vietnam                        | 1.783  | Poland                           | 1.395  | United Kingdom     | 402    |
| India                          | 1.622  | Netherlands                      | 475    | France             | 239    |
| Honduras                       | 1.281  | Italy                            | 229    | Hungary            | 167    |
| Others                         | 5.757  | Others                           | 497    | Others             | 459    |
| Total                          | 19.704 | Total                            | 22.121 | Total              | 3.126  |
| Estonia                        |        |                                  |        |                    |        |
| Green Coffee (Including decaf) |        | Roasted Coffee (Including decaf) |        | Extracts, essences |        |
| Latvia                         | 24     | Finland                          | 3.348  | Lithuania          | 124    |
| Colombia                       | 20     | Latvia                           | 824    | India              | 49     |
| Brazil                         | 12     | Lithuania                        | 775    | Latvia             | 15     |
| Netherlands                    | 11     | Italy                            | 292    | Sweden             | 10     |
| Czech Republic                 | 3      | Netherlands                      | 114    | Poland             | 10     |
| Others                         | 4      | Others                           | 507    | Others             | 14     |
| Total                          | 73     | Total                            | 5.860  | Total              | 222    |
| Finland                        |        |                                  |        |                    |        |
| Green Coffee (Including decaf) |        | Roasted Coffee (Including decaf) |        | Extracts, essences |        |
| Brazil                         | 34.993 | Netherlands                      | 3.617  | Switzerland        | 332    |
| Colombia                       | 17.572 | Sweden                           | 3.029  | Germany            | 237    |
| Honduras                       | 4.485  | Germany                          | 1.057  | Sweden             | 62     |
| Kenya                          | 2.556  | Italy                            | 131    | Hungary            | 51     |
| Tanzania                       | 1.851  | Denmark                          | 129    | France             | 29     |
| Others                         | 9.867  | Others                           | 386    | Others             | 40     |
| Total                          | 71.324 | Total                            | 8.350  | Total              | 751    |

|                                       |           |   |         |                           |        |
|---------------------------------------|-----------|---|---------|---------------------------|--------|
| <b>France</b>                         |           |   |         |                           |        |
| <b>Green Coffee (Including decaf)</b> |           | <b>Roasted Coffee (Including decaf)</b> |         | <b>Extracts, essences</b> |        |
| Brazil                                | 48.797    | Switzerland                             | 31.224  | Germany                   | 5.738  |
| Vietnam                               | 43.349    | Belgium                                 | 27.743  | United Kingdom            | 1.719  |
| Honduras                              | 18.042    | Italy                                   | 23.370  | Spain                     | 1.202  |
| Belgium                               | 17.999    | Germany                                 | 20.235  | Switzerland               | 783    |
| Ethiopia                              | 12.200    | Netherlands                             | 14.283  | Czech Republic            | 706    |
| Others                                | 69.497    | Others                                  | 15.080  | Others                    | 2.910  |
| Total                                 | 209.884   | Total                                   | 131.936 | Total                     | 13.057 |
| <b>Germany</b>                        |           |   |         |                           |        |
| <b>Green Coffee (Including decaf)</b> |           | <b>Roasted Coffee (Including decaf)</b> |         | <b>Extracts, essences</b> |        |
| Brazil                                | 360.294   | Italy                                   | 31.434  | Netherlands               | 7.147  |
| Vietnam                               | 292.899   | Netherlands                             | 13.058  | Ecuador                   | 6.973  |
| Honduras                              | 93.816    | Poland                                  | 11.404  | Belgium                   | 6.891  |
| Colombia                              | 64.602    | Switzerland                             | 9.871   | United Kingdom            | 3.488  |
| Peru                                  | 58.583    | Belgium                                 | 3.496   | Poland                    | 3.248  |
| Others                                | 270.795   | Others                                  | 8.478   | Others                    | 11.816 |
| Total                                 | 1.140.989 | Total                                   | 77.741  | Total                     | 39.564 |
| <b>Greece</b>                         |           |   |         |                           |        |
| <b>Green Coffee (Including decaf)</b> |           | <b>Roasted Coffee (Including decaf)</b> |         | <b>Extracts, essences</b> |        |
| Brazil                                | 26.017    | Italy                                   | 8.661   | Korea, South              | 3.656  |
| India                                 | 6.716     | Portugal                                | 1.840   | Spain                     | 1.482  |
| Vietnam                               | 5.346     | Bulgaria                                | 1.732   | Italy                     | 954    |
| Indonesia                             | 1.870     | Germany                                 | 1.432   | Germany                   | 912    |
| Italy                                 | 1.755     | Spain                                   | 632     | Netherlands               | 780    |
| Others                                | 7.542     | Others                                  | 1.436   | Others                    | 2.391  |
| Total                                 | 49.246    | Total                                   | 15.732  | Total                     | 10.174 |
| <b>Hungary</b>                        |           |   |         |                           |        |
| <b>Green Coffee (Including decaf)</b> |           | <b>Roasted Coffee (Including decaf)</b> |         | <b>Extracts, essences</b> |        |
| Germany                               | 1.454     | Slovakia                                | 9.587   | Brazil                    | 2.107  |
| India                                 | 168       | Germany                                 | 2.748   | Spain                     | 989    |
| Uganda                                | 137       | Spain                                   | 2.118   | Germany                   | 522    |
| Brazil                                | 59        | Poland                                  | 1.460   | Poland                    | 519    |
| Netherlands                           | 55        | Netherlands                             | 1.114   | France                    | 377    |
| Others                                | 192       | Others                                  | 4.553   | Others                    | 776    |
| Total                                 | 2.065     | Total                                   | 21.579  | Total                     | 5.291  |
| <b>Ireland</b>                        |           |   |         |                           |        |
| <b>Green Coffee (Including decaf)</b> |           | <b>Roasted Coffee (Including decaf)</b> |         | <b>Extracts, essences</b> |        |
| United Kingdom                        | 5.016     | United Kingdom                          | 2.117   | United Kingdom            | 3.043  |
| Brazil                                | 1.362     | Germany                                 | 937     | Germany                   | 220    |
| Netherlands                           | 902       | Netherlands                             | 122     | Netherlands               | 99     |
| Colombia                              | 634       | Italy                                   | 117     | Poland                    | 52     |
| Nicaragua                             | 564       | Portugal                                | 95      | United States             | 1      |
| Others                                | 2.095     | Others                                  | 277     | Others                    | 1      |
| Total                                 | 10.573    | Total                                   | 3.664   | Total                     | 3.414  |

| Italy                          |         |                                  |        |                    |       |
|--------------------------------|---------|----------------------------------|--------|--------------------|-------|
| Green Coffee (Including decaf) |         | Roasted Coffee (Including decaf) |        | Extracts, essences |       |
| Brazil                         | 176.738 | France                           | 5.326  | Spain              | 1.303 |
| Vietnam                        | 128.272 | Spain                            | 2.658  | Switzerland        | 687   |
| India                          | 73.335  | Germany                          | 2.120  | Vietnam            | 669   |
| Uganda                         | 41.557  | Switzerland                      | 2.024  | Germany            | 571   |
| Indonesia                      | 37.074  | Sweden                           | 1.091  | France             | 424   |
| Others                         | 123.299 | Others                           | 2.901  | Others             | 1.159 |
| Total                          | 580.274 | Total                            | 16.121 | Total              | 4.812 |
| Latvia                         |         |                                  |        |                    |       |
| Green Coffee (Including decaf) |         | Roasted Coffee (Including decaf) |        | Extracts, essences |       |
| Poland                         | 903     | Lithuania                        | 1.882  | Lithuania          | 619   |
| Brazil                         | 569     | Poland                           | 1.076  | India              | 214   |
| Germany                        | 504     | Estonia                          | 785    | Poland             | 130   |
| Vietnam                        | 437     | Sweden                           | 724    | Germany            | 23    |
| Italy                          | 211     | Germany                          | 691    | Finland            | 22    |
| Others                         | 736     | Others                           | 1.073  | Others             | 41    |
| Total                          | 3.359   | Total                            | 6.231  | Total              | 1.048 |
| Lithuania                      |         |                                  |        |                    |       |
| Green Coffee (Including decaf) |         | Roasted Coffee (Including decaf) |        | Extracts, essences |       |
| Germany                        | 408     | Netherlands                      | 3.700  | Netherlands        | 918   |
| United Kingdom                 | 305     | Poland                           | 3.549  | Poland             | 427   |
| Poland                         | 126     | Estonia                          | 2.522  | Brazil             | 426   |
| Vietnam                        | 115     | Latvia                           | 2.224  | Latvia             | 243   |
| Italy                          | 97      | Italy                            | 1.896  | Spain              | 119   |
| Others                         | 183     | Others                           | 4.191  | Others             | 340   |
| Total                          | 1.235   | Total                            | 18.081 | Total              | 2.474 |
| Luxembourg                     |         |                                  |        |                    |       |
| Green Coffee (Including decaf) |         | Roasted Coffee (Including decaf) |        | Extracts, essences |       |
| Belgium                        | 451     | Germany                          | 13.707 | Belgium            | 108   |
| Germany                        | 70      | Belgium                          | 1.756  | Germany            | 103   |
| France                         | 64      | Netherlands                      | 1.084  | Netherlands        | 25    |
| Colombia                       | 51      | Italy                            | 1.001  | Austria            | 2     |
| Italy                          | 42      | Poland                           | 600    | France             | 2     |
| Others                         | 14      | Others                           | 514    | Others             | 0     |
| Total                          | 691     | Total                            | 18.661 | Total              | 240   |
| Malta                          |         |                                  |        |                    |       |
| Green Coffee (Including decaf) |         | Roasted Coffee (Including decaf) |        | Extracts, essences |       |
| Italy                          | 2       | Italy                            | 305    | United Kingdom     | 86    |
| Germany                        | 0       | Spain                            | 52     | Italy              | 32    |
| Belgium                        | 0       | United Kingdom                   | 13     | Netherlands        | 29    |
| Andorra                        | 0       | Portugal                         | 7      | France             | 7     |
| United Arab Emirates           | 0       | Germany                          | 2      | Spain              | 0     |
| Others                         | 0       | Others                           | 3      | Others             | 0     |
| Total                          | 3       | Total                            | 380    | Total              | 154   |

| Netherlands                    |         |                                  |        |                    |        |
|--------------------------------|---------|----------------------------------|--------|--------------------|--------|
| Green Coffee (Including decaf) |         | Roasted Coffee (Including decaf) |        | Extracts, essences |        |
| Belgium                        | 93.654  | Germany                          | 24.627 | Germany            | 2.445  |
| Germany                        | 24.190  | Belgium                          | 16.897 | Belgium            | 2.121  |
| Brazil                         | 19.125  | France                           | 4.547  | France             | 901    |
| Vietnam                        | 7.176   | Poland                           | 3.141  | Czech Republic     | 361    |
| Honduras                       | 4.364   | Luxembourg                       | 2.963  | Ecuador            | 328    |
| Others                         | 19.483  | Others                           | 6.640  | Others             | 1.899  |
| Total                          | 167.991 | Total                            | 58.814 | Total              | 8.056  |
| Poland                         |         |                                  |        |                    |        |
| Green Coffee (Including decaf) |         | Roasted Coffee (Including decaf) |        | Extracts, essences |        |
| Germany                        | 74.936  | Germany                          | 32.589 | Germany            | 11.434 |
| Vietnam                        | 14.258  | Italy                            | 2.406  | Spain              | 4.140  |
| Brazil                         | 4.216   | United Kingdom                   | 1.942  | India              | 2.659  |
| Uganda                         | 3.480   | Czech Republic                   | 1.872  | Ecuador            | 2.115  |
| Belgium                        | 1.449   | Netherlands                      | 1.415  | Vietnam            | 1.299  |
| Others                         | 5.216   | Others                           | 3.496  | Others             | 6.328  |
| Total                          | 103.553 | Total                            | 43.720 | Total              | 27.976 |
| Portugal                       |         |                                  |        |                    |        |
| Green Coffee (Including decaf) |         | Roasted Coffee (Including decaf) |        | Extracts, essences |        |
| Vietnam                        | 13.523  | Spain                            | 2.668  | Spain              | 822    |
| Brazil                         | 7.944   | Italy                            | 2.136  | Germany            | 463    |
| Uganda                         | 6.633   | France                           | 1.537  | United Kingdom     | 410    |
| Cameroon                       | 4.344   | Germany                          | 801    | France             | 110    |
| Spain                          | 4.136   | Belgium                          | 153    | Poland             | 49     |
| Others                         | 17.050  | Others                           | 124    | Others             | 23     |
| Total                          | 53.628  | Total                            | 7.418  | Total              | 1.878  |
| Romania                        |         |                                  |        |                    |        |
| Green Coffee (Including decaf) |         | Roasted Coffee (Including decaf) |        | Extracts, essences |        |
| Vietnam                        | 4.788   | Bulgaria                         | 8.939  | Brazil             | 1.017  |
| Brazil                         | 3.417   | Germany                          | 8.193  | Germany            | 593    |
| Uganda                         | 3.300   | Italy                            | 4.879  | Poland             | 524    |
| Germany                        | 2.407   | Poland                           | 3.853  | Vietnam            | 507    |
| Colombia                       | 1.807   | Netherlands                      | 820    | Spain              | 465    |
| Others                         | 4.658   | Others                           | 2.954  | Others             | 1.227  |
| Total                          | 20.377  | Total                            | 29.638 | Total              | 4.333  |
| Slovakia                       |         |                                  |        |                    |        |
| Green Coffee (Including decaf) |         | Roasted Coffee (Including decaf) |        | Extracts, essences |        |
| Belgium                        | 1.434   | Germany                          | 14.510 | Czech Republic     | 1.074  |
| Germany                        | 844     | Czech Republic                   | 10.679 | Germany            | 786    |
| Vietnam                        | 410     | Poland                           | 3.437  | Poland             | 769    |
| Czech Republic                 | 145     | Hungary                          | 2.029  | Spain              | 336    |
| Spain                          | 129     | Italy                            | 1.180  | Hungary            | 291    |
| Others                         | 477     | Others                           | 1.748  | Others             | 410    |
| Total                          | 3.439   | Total                            | 33.582 | Total              | 3.665  |



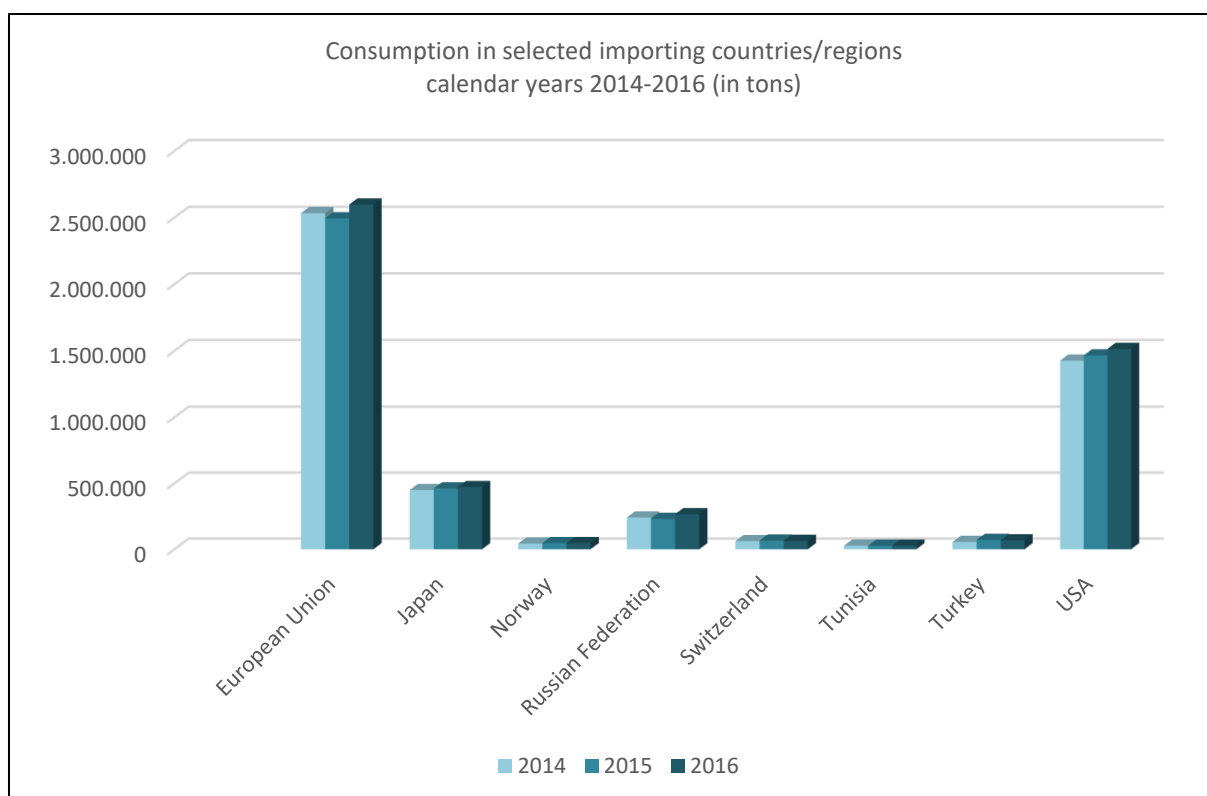
| <b>Slovenia</b>                       |         |   |        |                           |        |
|---------------------------------------|---------|---|--------|---------------------------|--------|
| <b>Green Coffee (Including decaf)</b> |         | <b>Roasted Coffee (Including decaf)</b> |        | <b>Extracts, essences</b> |        |
| Brazil                                | 6.692   | Italy                                   | 1.738  | Germany                   | 213    |
| India                                 | 3.166   | Croatia                                 | 965    | Croatia                   | 126    |
| Colombia                              | 1.018   | Bosnia and Herzegovina                  | 302    | Austria                   | 63     |
| Italy                                 | 1.016   | Austria                                 | 220    | Italy                     | 48     |
| Vietnam                               | 719     | Germany                                 | 173    | Hungary                   | 24     |
| Others                                | 730     | Others                                  | 283    | Others                    | 50     |
| Total                                 | 13.340  | Total                                   | 3.680  | Total                     | 524    |
| <b>Spain</b>                          |         |   |        |                           |        |
| <b>Green Coffee (Including decaf)</b> |         | <b>Roasted Coffee (Including decaf)</b> |        | <b>Extracts, essences</b> |        |
| Vietnam                               | 126.542 | Italy                                   | 6.951  | Netherlands               | 2.138  |
| Brazil                                | 45.017  | France                                  | 6.726  | Mexico                    | 1.137  |
| Germany                               | 38.386  | Germany                                 | 5.761  | France                    | 838    |
| Colombia                              | 17.850  | Portugal                                | 4.260  | Germany                   | 688    |
| Uganda                                | 9.731   | Netherlands                             | 1.508  | Vietnam                   | 556    |
| Others                                | 49.979  | Others                                  | 2.715  | Others                    | 1.038  |
| Total                                 | 287.504 | Total                                   | 27.921 | Total                     | 6.394  |
| <b>Sweden</b>                         |         |   |        |                           |        |
| <b>Green Coffee (Including decaf)</b> |         | <b>Roasted Coffee (Including decaf)</b> |        | <b>Extracts, essences</b> |        |
| Brazil                                | 41.661  | Netherlands                             | 4.947  | Switzerland               | 1.265  |
| Peru                                  | 13.072  | Germany                                 | 2.034  | Germany                   | 923    |
| Colombia                              | 11.389  | Denmark                                 | 1.508  | Czech Republic            | 801    |
| Honduras                              | 9.375   | Italy                                   | 1.411  | United Kingdom            | 465    |
| Germany                               | 6.805   | Switzerland                             | 1.117  | Netherlands               | 433    |
| Others                                | 28.350  | Others                                  | 3.039  | Others                    | 1.207  |
| Total                                 | 110.651 | Total                                   | 14.056 | Total                     | 5.093  |
| <b>United Kingdom</b>                 |         |   |        |                           |        |
| <b>Green Coffee (Including decaf)</b> |         | <b>Roasted Coffee (Including decaf)</b> |        | <b>Extracts, essences</b> |        |
| Brazil                                | 34.213  | Germany                                 | 10.382 | Germany                   | 9.017  |
| Vietnam                               | 32.024  | Italy                                   | 10.136 | Brazil                    | 3.323  |
| Indonesia                             | 28.897  | Netherlands                             | 3.408  | Netherlands               | 3.216  |
| Côte d'Ivoire                         | 21.992  | France                                  | 3.354  | France                    | 3.028  |
| Colombia                              | 19.015  | United States                           | 2.851  | Spain                     | 2.178  |
| Others                                | 42.207  | Others                                  | 10.980 | Others                    | 7.474  |
| Total                                 | 178.348 | Total                                   | 41.110 | Total                     | 28.234 |

Source: Eurostat

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

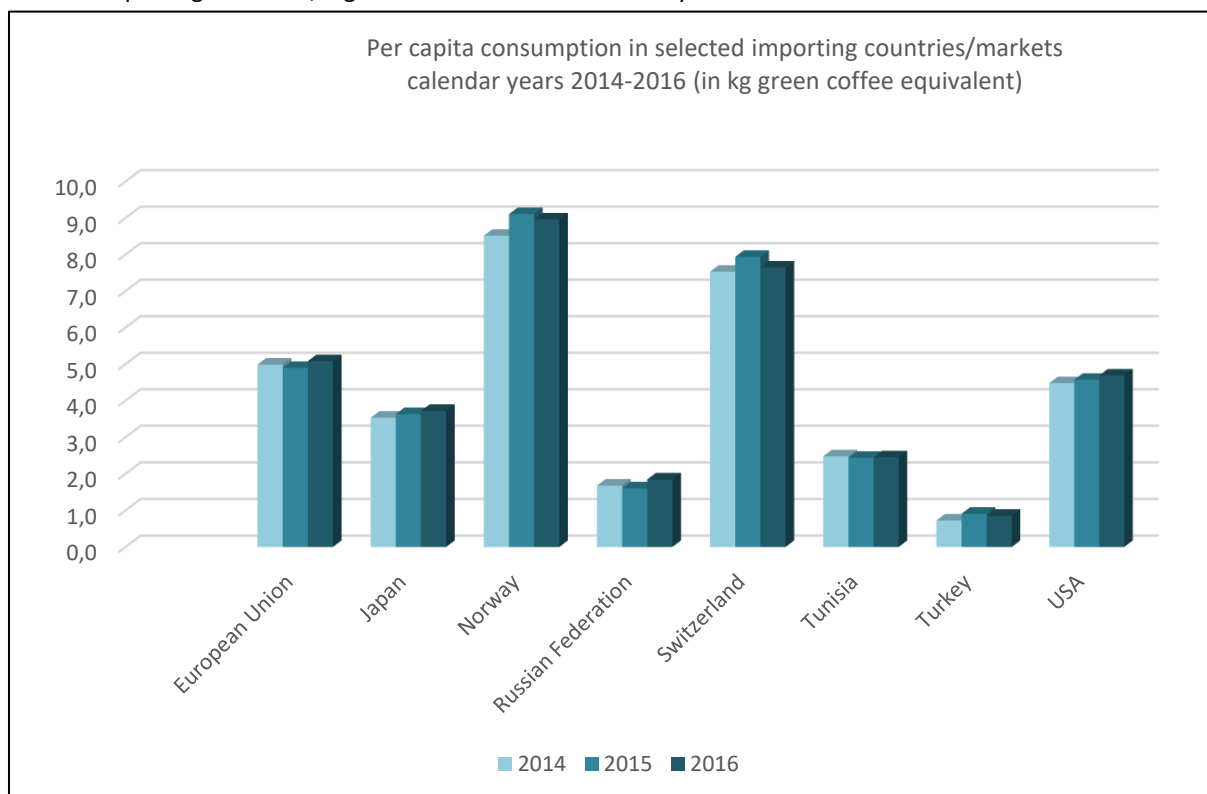
## 2. EU MARKET IN PERSPECTIVE

Based on data from the International Coffee Organization, this graph shows the consumption in some of the major coffee importing markets:



Source: ICO

Combining ICO consumption data and World Bank population information, the per capita consumption in selected importing countries/regions in the three most recent years was as follows:



Source: ICO, World Bank



## EU VAT AND EXCISE DUTIES

| ROASTED, NON-DECAFFEINATED COFFEE, UNLESS INDICATED OTHERWISE |      |  |
|---|------|--|
| COUNTRY   | VAT% | EXCISE DUTIES  |
| Austria   | 20   |  |
| Belgium   | 6    | Green: EUR 0,2001/kg; roasted 0,2502/kg; soluble 0,7004/kg   |
| Bulgaria  | 20   |  |
| Croatia   | 25   | Roasted: HRK 6 /kg net weight; extracts, essences and concentrates: HRK 20/kg net weight (for coffee extracts: HRK 20/kg dry matter); preparations of coffee, coffee contained in the final product: HRK 20/kg dry matter  |
| Cyprus  | 5    |  |
| Czech Republic  | 15   |  |
| Denmark   | 25   | Green: DKK 6,39/kg; roasted: DKK 7,67/kg; extracts DKK 16,61/kg  |
| Estonia   | 20   |  |
| Finland   | 14   |  |
| France  | 5,5  |  |
| Germany   | 7    | Roasted: EUR 2,19/kg; instant EUR 4,78/kg; products containing roasted or instant: ranging from EUR 0,12 to EUR 3,83 per kg depending on roasted or instant coffee content   |
| Greece  | 24   | Roasted: EUR 3/kg; Non-roasted: EUR 2/kg; Instant EUR 4/kg; Preparations based on extracts, essences and concentrates of coffee and preparations of coffee: EUR 4/kg   |
| Hungary   | 27   |  |
| Ireland   | 0    |  |
| Italy   | 22   |  |
| Latvia  | 21   | coffee, whether or not ground, roasted or decaffeinated coffee extracts, essences and concentrates and products based on such extracts, essences or concentrates or on coffee: EUR 142,29 per 100 kilograms of pure coffee |
| Lithuania   | 21   |  |
| Luxembourg  | 3    |  |
| Malta   | 0    |  |
| Netherlands   | 6    |  |
| Poland  | 23   |  |
| Portugal  | 23   |  |
| Romania   | 9    |  |
| Slovakia  | 20   |  |
| Slovenia  | 9,5  |  |
| Spain   | 10   |  |
| Sweden  | 12   |  |
| United Kingdom  | 0    |  |

Source: DG External Trade Export Helpdesk website as at 21 August 2017

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 by consulting official sources. No responsibility can be accepted by the ECF for any inadvertent errors or omissions.