

European Coffee Report 2017/2018



European Coffee Federation

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1. INTRODUCTION

This is the thirty-eight issue of the 'European Coffee Report'. The European Coffee Federation (ECF) continues this series with the report over 2016/2017. 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 continues to be an important and welcome addition.

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

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2. CONVENTIONS, NOTATIONS AND DEFINITIONS

Coffee units:

In these reports we will mostly use metric data (tonnes and kilograms) since the use of bags as reference has been phased out. Some tables include data in bags in addition to metric data:

- Bags are bags of 60 kilograms
- Tonnes are metric tonnes (1,000 kilograms)

Conversion factors:

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 2.60
- 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 aggregated volume of green, green decaffeinated, roasted and soluble coffee recalculated to green coffee with the above conversion factors.

Notations:

In the notation of figures, the convention of written English:

- the thousands separator is the comma (,)
- the decimal separator is the dot (.)

For large numbers the so-called 'short scale' is used: 10^6 = one million, 10^9 = one billion, 10^{12} = one trillion.

Currencies:

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

Data:

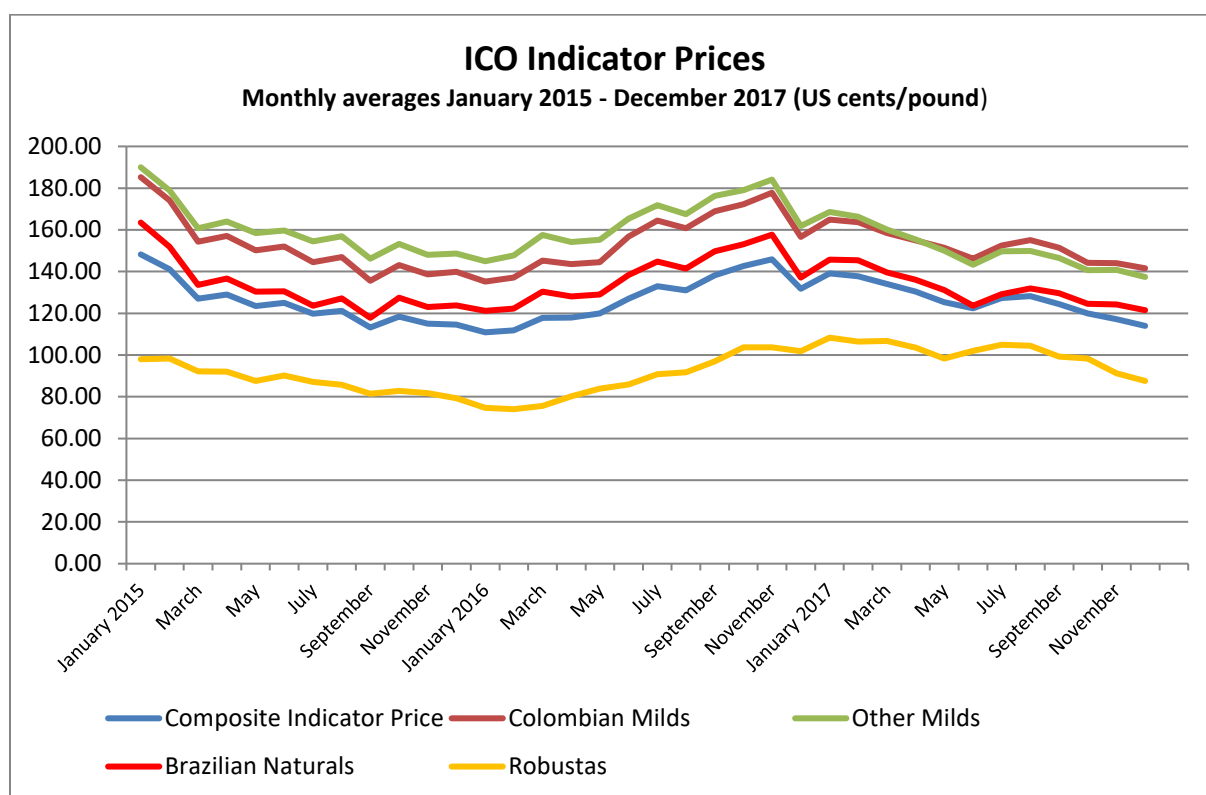
Eurostat trade figures may differ from those available from national sources.

Distribution of green coffee imports by types of coffee:

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

1. GREEN COFFEE PRICES AND STOCKS



Source: ICO

The calculation of the ICO composite indicator price is weighted as follows (latest: ICO document ICC 105-17 Add 3):

From October 2013:

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

From October 2015:

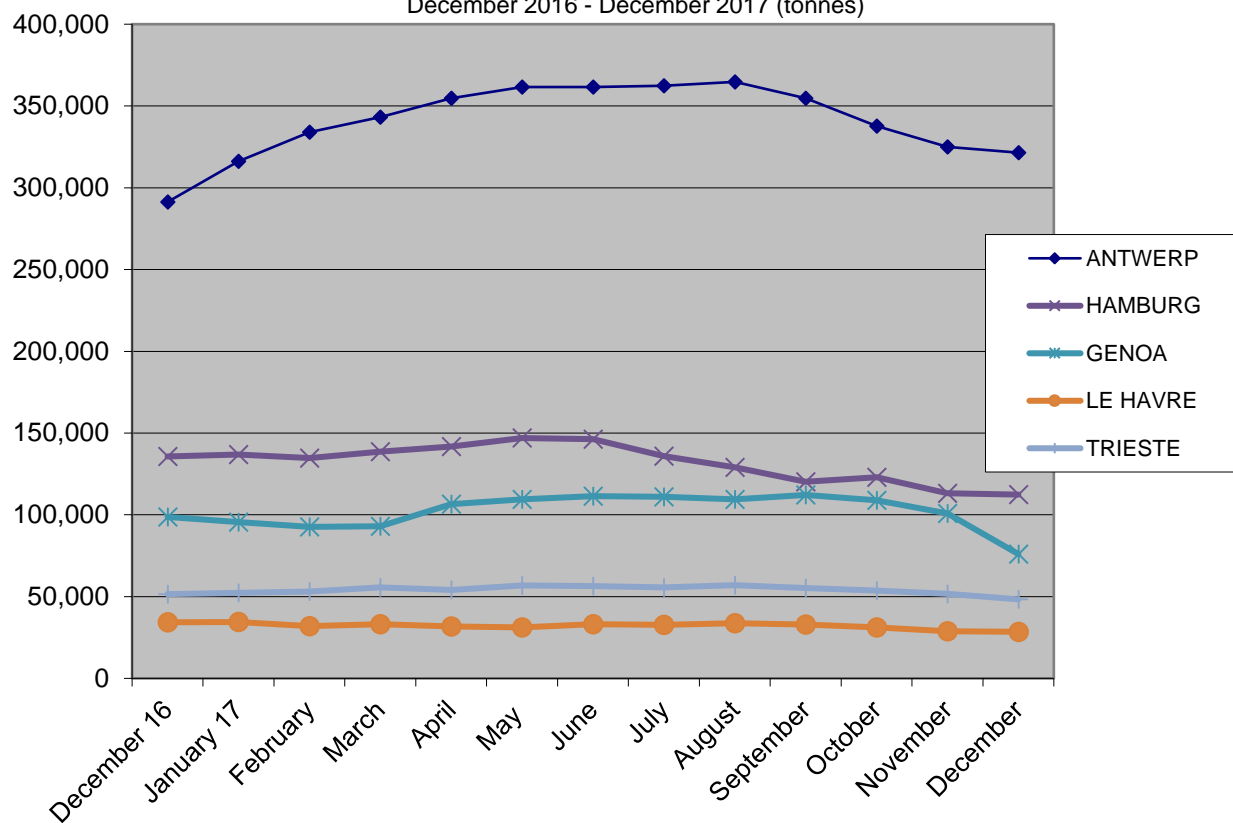
Colombian Milds:	10%
Other Milds:	23%
Brazilian Naturals:	30%
Robustas:	37%

From October 2017:

Colombian Milds:	11%
Other Milds:	20%
Brazilian Naturals:	31%
Robustas:	38%

GREEN COFFEE STOCKS IN MAJOR EUROPEAN COFFEE PORTS

Total coffee stocks per port (Antwerp, Genoa, Hamburg, Le Havre and Trieste)
December 2016 - December 2017 (tonnes)



Source: ECF

Note: 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.

3. EU28 GREEN COFFEE IMPORTS: VOLUME, ORIGINS AND TYPE OF COFFEE

The terms 'Western Europe' and 'Central and Eastern Europe' are not strictly defined since many Central and Eastern European countries are now members of the EU. In this report, the 'Western Europe' region includes all EU28 countries plus Switzerland, Norway and Iceland. The 'Central and Eastern Europe' region currently includes: Albania, Belarus, Bosnia and Herzegovina, Georgia, Macedonia FYR, Moldova, Montenegro, the Russian Federation, Serbia and Ukraine.

Imports of green coffee into Europe by country 2015 - 2017						
- in tonnes and in 60 kg bags -						
COUNTRY	2015		2016		2017	
	in tonnes	in bags	in tonnes	in bags	in tonnes	in bags
AUSTRIA	16,226	270,437	15,834	263,905	16,372	272,873
BELGIUM	280,843	4,680,722	303,774	5,062,902	272,000	4,533,327
BULGARIA	29,544	492,403	32,344	539,072	29,008	483,458
CROATIA	16,520	275,333	17,919	298,655	15,778	262,965
CYPRUS	1,012	16,862	1,590	26,502	1,519	25,322
CZECH REP.	21,130	352,162	17,762	296,033	12,084	201,405
DENMARK	16,787	279,777	19,213	320,215	15,017	250,280
ESTONIA	93	1,542	69	1,152	117	1,945
FINLAND	67,711	1,128,517	71,324	1,188,737	67,266	1,121,092
FRANCE	212,864	3,547,740	207,935	3,465,582	201,796	3,363,268
GERMANY	1,077,432	17,957,192	1,140,534	19,008,902	1,097,479	18,291,322
GREECE	31,846	530,758	48,947	815,783	17,878	297,960
HUNGARY	4,335	72,257	2,084	34,738	2,697	44,955
IRELAND	8,130	135,492	10,352	172,540	12,277	204,620
ITALY	527,893	8,798,215	571,824	9,530,405	563,257	9,387,612
LATVIA	3,058	50,972	3,360	56,000	3,754	62,563
LITHUANIA	854	14,228	1,228	20,465	1,398	23,307
LUXEMBOURG	774	12,898	687	11,457	832	13,858
MALTA	23	377	1	18	2	28
NETHERLANDS	153,917	2,565,287	159,497	2,658,287	186,340	3,105,663
POLAND	103,953	1,732,552	103,301	1,721,675	116,671	1,944,523
PORTUGAL	46,293	771,542	51,663	861,045	50,034	833,900
ROMANIA	17,989	299,823	20,283	338,048	19,195	319,910
SLOVAKIA	4,114	68,560	3,270	54,507	4,377	72,942
SLOVENIA	11,389	189,815	13,310	221,840	17,451	290,847
SPAIN	258,835	4,313,910	262,818	4,380,297	250,244	4,170,728
SWEDEN	98,898	1,648,293	110,650	1,844,170	108,349	1,805,823
UNITED KINGDOM	168,781	2,813,013	176,673	2,944,550	160,174	2,669,568
EU28 TOTAL	3,181,241	53,020,677	3,368,249	56,137,480	3,243,364	54,056,065
SWITZERLAND	139,540	2,325,667	139,250	2,320,833	146,480	2,441,333
NORWAY	35,258	587,633	34,938	582,300	34,914	581,900
ICELAND	1,161	19,351	1,148	19,133	1,073	17,881
WESTERN EUROPE TOTAL	3,357,200	55,953,328	3,543,585	59,059,746	3,425,831	57,097,179

(cont.)

Imports of green coffee into Europe by country 2015 - 2017						
- in tonnes and in 60 kg bags -						
COUNTRY	2015		2016		2017	
	in tonnes	in bags	in tonnes	in bags	in tonnes	in bags
Albania	8,580	143,000	9,240	154,000	N.A.	N.A.
Belarus	15,540	259,000	16,500	275,000	N.A.	N.A.
Bosnia and Herzegovina	24,480	408,000	24,300	405,000	N.A.	N.A.
Georgia	11,040	184,000	11,220	187,000	N.A.	N.A.
Macedonia FYR	8,820	147,000	9,180	153,000	N.A.	N.A.
Moldova	2,400	40,000	3,060	51,000	N.A.	N.A.
Montenegro	3,900	65,000	3,540	59,000	N.A.	N.A.
Russian Federation*	282,600	4,710,000	313,980	5,233,000	338,470	5,641,000
Serbia	30,660	511,000	32,820	547,000	N.A.	N.A.
Ukraine*	69,300	1,155,000	71,040	1,184,000	71,395	1,190,000
CENTRAL AND EASTERN EUROPE	457,320	7,622,000	494,880	8,248,000	N.A.	N.A.
EUROPE TOTAL	3,814,520	63,575,328	4,038,465	67,307,746	N.A.	N.A.

Source: European Union countries (Eurostat), Iceland (Statistics Iceland/Hagstofa), Norway (Statistics Norway/Statbank), and Switzerland (Swiss Federal Customs Administration/Swiss-Impex); other European countries (ICO).

Notes: Figures show imports of green coffee, not decaffeinated for the EU, Norway and Switzerland (HS 09011100). For other countries, imports of coffee in all forms are reported.

*2017 data for the Russian Federation and the Ukraine have been estimated based on coffee consumption figures provided by ICO

In 2017 countries in the 'Western Europe' region imported 3.42 million tonnes of green coffee, a 3.3% decrease compared to 2016 when 3.54 million tonnes of green coffee were imported. EU28 countries represent 94.7% of total green coffee imports into Western Europe with 3.24 million tonnes in 2017. EU28 green coffee imports fell by 3.7% in 2017.

EU 28 COUNTRIES - CHANGE IN COFFEE IMPORTS (2015-2017, IN %)			
TOP 5		BOTTOM 5	
	%		%
Lithuania	63.8%	Malta	-92.5%
Ireland	51.0%	Greece	-43.9%
Cyprus	50.2%	Czech Republic	-42.8%
Estonia	26.2%	Hungary	-37.8%

Source: Eurostat

Among EU28 countries and taking the 2015-2017 period, Lithuania (+63.8%) posted the fastest growth in accumulated green coffee imports, followed by Ireland (+51.0%), Cyprus (+50.2%) and Estonia (+26.2%). Other EU28 countries experienced sharp decreases in green coffee imports during the same period, led by Malta (-92.5%), Greece (-43.5%), the Czech Republic (-42.8%) and Hungary (-37.8%).

In terms of the total volume of imported green coffee during the 2015-2017 period, Italy posted the largest increase after adding 35,364 tonnes (+6.7%), followed by The Netherlands (32,423 tonnes, +21.1%), Germany (20,048 tonnes, +1.9%), Poland (12,718 tonnes, +12.2%) and Sweden (9,452 tonnes, +9.6%). Greece suffered the largest decrease in total volume of green coffee imports during the 2015-2017 period after reducing them in 13,968 tonnes (-43.5%). France (-11,069 tonnes, -5.2%), the Czech Republic (-9,045 tonnes, -42.8%), Belgium (-8,844 tonnes, -3.1%) and the United Kingdom (-8,607 tonnes, -5.1%) also posted important reductions in their volumes of green coffee imports.

EU 28 COUNTRIES - CHANGE IN COFFEE IMPORTS (2015-2017, TOTAL VOLUME)			
TOP 5	In tonnes	BOTTOM 5	In tonnes
Italy	35,364	Greece	-13,968
Netherlands	32,423	France	-11,068
Germany	20,048	Czech Republic	-9,045
Poland	12,718	Belgium	-8,844
Sweden	9,452	United Kingdom	-8,607

Source: Eurostat

ICO has not yet published 2017 data for those countries in the 'Central and Eastern Europe' region which are not members of the EU. The figures for the Russian Federation and the Ukraine have been estimated based on coffee consumption figures provided by ICO.

The 'top 20' sources of EU28 green coffee imports (excluding intra-EU trade) in the 2015-2017 period (listed according to 2017 volumes):

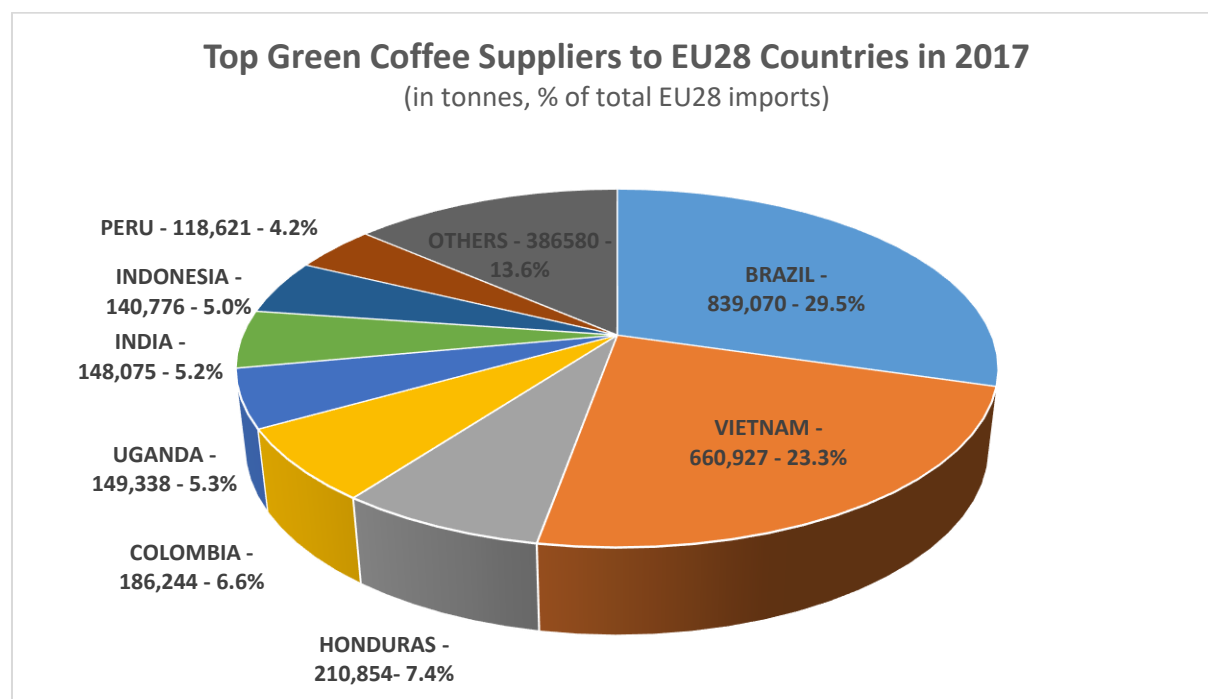
COUNTRY	2015		2016		2017	
	IN TONNES	% OF TOTAL	IN TONNES	% OF TOTAL	IN TONNES	% OF TOTAL
BRAZIL	943,254	33.5%	921,691	31.0%	839,070	29.5%
VIETNAM	630,524	22.4%	729,162	24.5%	660,927	23.3%
HONDURAS	174,645	6.2%	191,881	6.5%	210,854	7.4%
COLOMBIA	180,644	6.4%	193,635	6.5%	186,244	6.6%
UGANDA	125,603	4.5%	122,318	4.1%	149,338	5.3%
INDIA	121,244	4.3%	140,738	4.7%	148,075	5.2%
INDONESIA	147,846	5.3%	122,504	4.1%	140,776	5.0%
PERU	109,509	3.9%	123,092	4.1%	118,621	4.2%
ETHIOPIA	73,586	2.6%	80,287	2.7%	77,256	2.7%
CHINA	32,805	1.2%	42,998	1.4%	39,046	1.4%
GUATEMALA	28,605	1.0%	32,090	1.1%	34,227	1.2%
NICARAGUA	26,800	1.0%	23,157	0.8%	31,070	1.1%
PAPUA NEW GUINEA	15,471	0.6%	23,023	0.8%	25,581	0.9%
KENYA	27,294	1.0%	26,538	0.9%	23,139	0.8%
MEXICO	23,681	0.8%	23,824	0.8%	22,284	0.8%
TANZANIA	25,582	0.9%	31,694	1.1%	22,165	0.8%
COTE D'IVOIRE	11,883	0.4%	35,686	1.2%	17,176	0.6%
CAMEROON	21,806	0.8%	23,261	0.8%	17,166	0.6%
COSTA RICA	15,262	0.5%	15,044	0.5%	16,012	0.6%
RWANDA	8,864	0.3%	9,136	0.3%	8,617	0.3%
EL SALVADOR	10,357	0.4%	7,737	0.3%	7,878	0.3%
OTHERS	56,600	2.0%	52,009	1.8%	44,963	1.6%
EU28 (excl. Intra-EU)	2,811,865	100.0%	2,971,505	100.0%	2,840,485	100.0%

Source: Eurostat

Brazil was again the largest source of green coffee imports for EU28 countries, supplying 839,070 tonnes or 29.5% of total EU28 green coffee imports. Vietnam supplied another 660,927 tonnes or 23.3% of total imports. These two origins have consistently ranked as the top-two suppliers to EU28 countries and they typically supply approximately 55% of total green coffee imported. In 2017, they remain as the top-two suppliers but their aggregated share has decreased to 52.8% of total EU28 imports. Brazil has seen its share of total EU28 imports of green coffee fall from 33.5% in 2015 to 29.5% in 2017, exporting more than 104,000 tonnes less to EU28 countries. Other origins that experienced a retreat in their market share during the 2015-2017 period were: Indonesia (-7,070 tonnes, 5.3% to 5.0%), Cameroon (-4,640 tonnes, 0.8% to 0.6%), Kenya (4,155 tonnes, 1.0% to 0.8%) and Tanzania (3,417 tonnes, 0.9% to 0.8%).

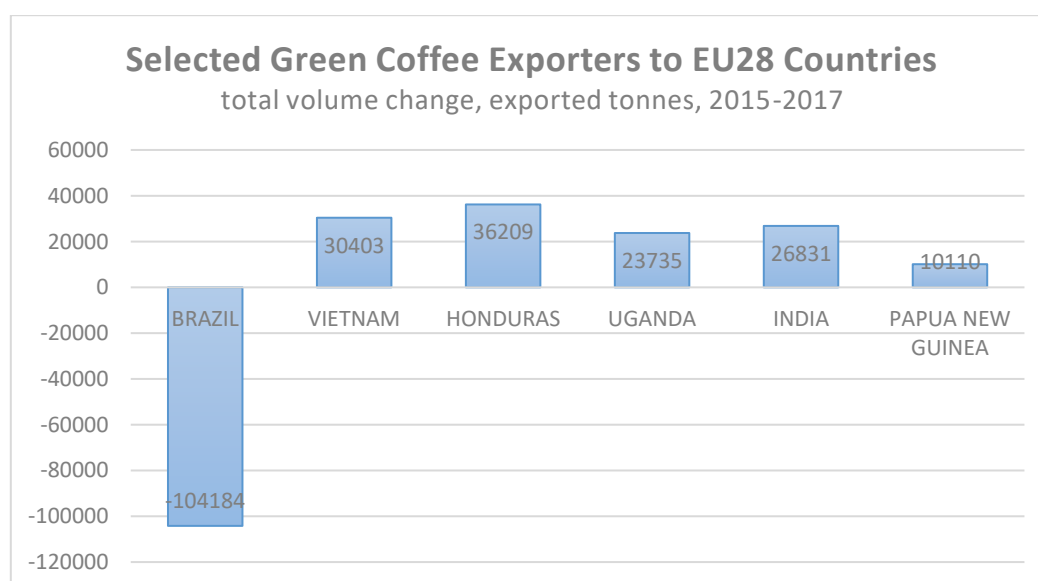
The substantial fall in sourcing of green coffee from Brazil was more than offset by strong growth in imports from 5 destinations: Honduras, Vietnam, India, Uganda and Papua New Guinea. Honduras increased its green coffee exports to EU28 countries by 36,209 tonnes with its share climbing from 6.2% in 2015 to 7.4% in 2017 and passing Colombia to claim the third position in the ranking of top green coffee exporters to EU28 countries. Vietnam consolidates its second position with a 30,403 tonnes increase in its exports, bringing its share of total EU28 imports to 23.3% in 2017 (22.4% in 2017). Uganda added another 23,735 tonnes with a 5.3% share of EU28

imports in 2017 (4.5% in 2015), ranking 5th among the top exporters. India also added 26,831 tonnes in export to EU28 countries with its share climbing from 4.2% in 2015 to 5.1% in 2017, and ranking 6th among top green coffee exporters to EU28 countries. Papua New Guinea is the fastest growing exporter of green coffee to the EU28 during the 2015-2017 period after adding 10,110 tonnes and reaching a 0.9% share of total EU28 imports.



Source: Eurostat

According to market consensus, the coffee crop in Brazil in 2017/2018 should stay closed to the record levels reached in 2016/2017, therefore boosting the country's coffee exports during the next period. These should reverse the downward trend observed during the 2015-2017 period due to bad weather and the impact of broca infestations.



Source: Eurostat

Although data from Eurostat are perfectly reliable, real imports by origin or type of coffee are practically impossible to determine with any accuracy. Intra-EU trade represents a relevant share of traded green coffee and for intra-EU trade Eurostat's country statistics do not reveal the country of production of green coffee. When arriving to major coffee ports in the EU, the origin of green coffee may be recorded as Germany when it reaches the Port of Hamburg or Belgium when unloaded at the Port of Antwerp. The share of the intra-EU trade is quite high with Germany ranking as the 5th top origin of green coffee imports to the EU with 167,346 tonnes in 2017, while Belgium supplied 131,827 tonnes to EU28 countries ranking as the top seven supplier.

Therefore, analysis of green coffee imports to EU28 based on Eurostat data indicate trends rather than fully accurate figures. The same rule applies to the breakdown of green coffee imports by type of coffee. The following table is thus provided as reference for EU28 green coffee imports by type of coffee:

EU28 Imports per Type of Coffee		
% of total green coffee imports		
	2016	2017
Arabicas	62.7%	62.9%
<i>Brazilian Naturals</i>	33.7%	32.3%
<i>Colombian Milds</i>	8.5%	8.2%
<i>Other Milds</i>	20.5%	22.4%
Robustas	34.3%	34.8%
Others	3.0%	2.3%
TOTAL	100.0%	100.0%

Source: Eurostat. Intra-EU trade excluded. Totals may differ from the sum of the items due to rounding.

The overall ratio Arabicas/Robustas seems to remain stable at approximately two-thirds to one-third (62.9% Arabicas in 2017 compared to 34.8% Robustas). Within the Arabicas, the share of Brazilian naturals is falling being compensated by the increase in Other Milds imported from origins such as Honduras, India or Papua New Guinea.

4. EU28 IMPORTS OF GREEN DECAFFEINATED COFFEE, ROASTED COFFEE, ROASTED DECAFFEINATED COFFEE AND SOLUBLE COFFEE

EU28 Imports and Exports of green coffee and (semi)finished coffee products from non-EU origins/to non-EU destinations						
in tonnes, 2015-2017						
	2015		2016		2017	
	Imports	Exports	Imports	Exports	Imports	Exports
Green coffee (09011100)	2,811,865	28,056	2,971,505	42,136	2,840,485	38,213
Green coffee, decaffeinated (09011200)	10,430	95,743	11,409	99,259	13,190	97,603
Roasted coffee (09012100)	47,647	109,531	53,498	116,261	56,263	129,546
Roasted coffee, decaffeinated (09012200)	4,636	2,762	4,524	2,484	4,772	2,801
Coffee extracts (21011100)	53,267	45,874	53,620	46,805	49,133	46,161

Source: Eurostat

Although green coffee imports represented more than 95% of the total volume of coffee and coffee-related products imported into the EU28 area, the analysis of is relevant in order to better understand the European coffee market. **Green decaffeinated coffee** imports are increasing substantially in the last few years and it reached 13,190 tonnes in 2017 after growing by 15.6% compared to 2016

Imports of **roasted regular coffee** are also following a sustained upward trend and reached 56,263 tonnes in 2017 (+5.2%) while imports of **roasted decaffeinated coffee** increased as well by 5.5% in that year to 4,772 tonnes. Imports of roasted coffee in the EU28 area are basically the result of trade with one commercial partner: Switzerland. EU28 countries imported 52,417 tonnes of roasted coffee (regular and decaffeinated) from Switzerland in 2017 (+5.7% compared to 2016), a figure that represents 85.9% of total imports of roasted coffee. Among other origins, imports from the United States amounted to 2,586 tonnes in 2017 (-24.3%) and Brazil supplied 1,105 tonnes (+96.6%), but they only represent 4.2% and 1.8% of total imports respectively. As a curiosity, Syria has now become the fifth largest supplier of roasted coffee to EU28 countries with 566 tonnes in 2017.

EU28 IMPORTS OF ROASTED COFFEE (INCL. DECAF) FROM NON-EU DESTINATIONS 2015-2017, in tonnes			
COUNTRY	2015	2016	2017
SWITZERLAND	46,041	49,590	52,417
UNITED STATES	2,020	3,418	2,586
BRAZIL	518	562	1,105
BOSNIA AND HERZEGOVINA	496	523	617
SYRIA	54	416	566
LEBANON	398	644	505

Source: Eurostat

Soluble coffee imports fell to 49,133 tonnes after decreasing by 8.3% in 2017. Several coffee-producing countries have a sizeable production of soluble coffee and are major exporters of this product. All but one of the six largest suppliers of soluble coffee to EU28 countries are coffee producing countries. Overall volume sharply decreased by 8.4% to 49,133 tonnes, below 2014 levels. After replacing Ecuador in 2016 as the main supplier of soluble coffee to the EU, Brazil remained at the top even after seeing its sales to the EU plummet by 21.5% in 2017 to 9,900 tonnes. Imports from Ecuador also decreased in 2017 (-11.2%) to 8,850 tonnes. On the positive side, India has moved up to the top three, after relegating Vietnam and Switzerland. Imports from India reached 6,426 tonnes in 2017 (+15.4% yoy). Vietnam relegated Switzerland to the fifth position after exporting 5,478 tonnes in 2017 (+35.8% yoy).

EU28 IMPORTS OF SOLUBLE COFFEE FROM NON-EU ORIGINS (HS 21011100) - 2015-2017, in tonnes and % of total imports -						
	2015		2016		2017	
	Tonnes	%	Tonnes	%	Tonnes	%
BRAZIL	11,943	22.4%	12,610	23.5%	9,900	20.1%
ECUADOR	13,695	25.7%	9,967	18.6%	8,850	18.0%
INDIA	4,522	8.5%	5,569	10.4%	6,426	13.1%
VIETNAM	4,555	8.5%	4,034	7.5%	5,478	11.1%
SWITZERLAND	5,635	10.6%	5,409	10.1%	4,848	9.9%
COLOMBIA	4,102	7.7%	4,528	8.4%	4,390	8.9%
OTHERS	8,896	16.7%	11,528	21.5%	9,242	18.8%
TOTAL	53,348	100.0%	53,644	100.0%	49,133	100.0%

Source: Eurostat

5. EU28 COFFEE EXPORTS IN VOLUME

The EU is not only a major importer of green coffee, but also a significant exporter of green coffee and coffee-based 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 Exports of green coffee and (semi)finished coffee products to non-EU destinations in tonnes, 2015-2017			
	2015	2016	2017
Green coffee (09011100)	28,056	42,136	38,213
Green coffee, decaffeinated (09011200)	95,743	99,259	97,603
Roasted coffee (09012100)	109,531	116,261	129,546
Roasted coffee, decaffeinated (09012200)	2,762	2,484	2,801
Coffee extracts (21011100)	45,874	46,805	46,161

Source: Eurostat

Re-exports of **green coffee** from EU28 decreased by 9.3% to 38,213 tonnes in 2017, a modest step back after the record growth (+50%) registered in 2016. Exports of **green decaffeinated coffee** decreased modestly in 2017 to 97,603 tonnes (-1.7%) but stayed above 2015 levels.

Exports of **roasted coffee** in 2017 were substantially higher both for regular coffee (+11.4%) and decaffeinated coffee (+12.8%). For the case of regular roasted coffee, exports have been consistently increasing and have added on aggregate 20,015 tonnes during the 2015-2017 period, an accumulated increase of 18.3%. As for roasted decaffeinated coffee, the trend is equally positive during the last few years except for the dip in 2016. **Soluble coffee** exports decreased marginally to 46,161 tonnes (-1.4%) staying above 2015 levels.

5.1 ROASTED COFFEE EXPORTS

Looking in some more detail at the EU exports of roasted coffee in the years 2015-2017, the twenty major destinations of roasted coffee (non-decaffeinated plus decaffeinated) classified according to their ranking in 2017 are listed in the table below.

The Russian Federation remained the largest non-EU destination, absorbing 20,694 tonnes of roasted coffee or 15.6% of total EU28 exports. Not only is the Russian Federation EU28's main customer, but it continues to increase its demand (+15.8% in 2017) and added 3,893 tonnes during the 2015-2017 period. The United States is now the second destination for EU28 roasted coffee exports with 15,981 tonnes in 2017 or 12.1% of total EU28 exports. Sales to the United States increased by 4,497 tonnes during the 2015-2017, the largest growth in volume among EU28's customers. Exports growth to the United States in 2017 reached 19.2%. The Ukraine is now the third top destination for EU28 exports with 15,216 tonnes or 11.5% of the total in 2017, after increasing by 13.6% on the previous year. Although exports to Switzerland decreased by 6.0% in 2017, remains the fourth destination for EU28 roasted coffee exports with 10,633 tonnes (8.0% of the total). These four clients (Russian Federation, United States, Ukraine and Switzerland) represent close to 50% (47.2%) of total EU28 exports of roasted coffee and they definitely set the pace for the evolution of EU28 sales of roasted coffee in external markets.

EU28 EXPORTS OF ROASTED COFFEE (INCL. DECAF) TO NON-EU DESTINATIONS						
2015-2017, in tonnes and % of total exports						
COUNTRY	2015		2016		2017	
Russian Federation	16,801	15.0%	17,877	15.1%	20,694	15.6%
United States	11,483	10.2%	13,402	11.3%	15,981	12.1%
Ukraine	11,943	10.6%	13,399	11.3%	15,216	11.5%
Switzerland	10,442	9.3%	11,309	9.5%	10,633	8.0%
Australia	7,447	6.6%	6,744	5.7%	7,182	5.4%
Norway	5,781	5.1%	5,893	5.0%	6,359	4.8%
Canada	3,615	3.2%	4,233	3.6%	5,720	4.3%
Turkey	2,965	2.6%	3,268	2.8%	3,628	2.7%
China	2,467	2.2%	2,527	2.1%	3,108	2.3%
United Arab Emirates	3,122	2.8%	3,362	2.8%	2,853	2.2%
Israel	2,297	2.0%	2,710	2.3%	2,633	2.0%
South Korea	2,071	1.8%	2,180	1.8%	2,388	1.8%
Japan	1,912	1.7%	2,099	1.8%	2,305	1.7%
Albania	1,973	1.8%	2,262	1.9%	2,305	1.7%
Belarus	2,541	2.3%	2,393	2.0%	2,060	1.6%
Saudi Arabia	1,041	0.9%	1,411	1.2%	1,757	1.3%
Serbia	1,264	1.1%	1,407	1.2%	1,623	1.2%
Bosnia and Herzegovina	1,517	1.4%	1,613	1.4%	1,600	1.2%
Brazil	2,463	2.2%	1,495	1.3%	1,585	1.2%
Iceland	966	0.9%	1,370	1.2%	1,204	0.9%
Others	18,185	16.2%	17,792	15.0%	21,224	16.3%
TOTAL	112,293	100.0%	118,745	100.0%	132,347	100.0%

Source: Eurostat

It is clear that two areas are contributing to EU28 exports growth of roasted coffee: USA/Canada and Russia/Ukraine, Exports to the United States have increased by 4,497 tonnes during the 2015-2017 period, while Canada added 2,106 tonnes, The Russian Federation received 3,893 additional tonnes of roasted coffee from EU28 countries during the same period, while the Ukraine added 3,273, In all, these four countries generated 13,769 tonnes in additional exports during the 2015-2017 period, On the negative side, exports to Brazil plummeted during the 2015-2017 period by more than 35% during this period (878 tonnes), with Belarus also posting a substantial decrease (-481 tonnes, -18,9%).

EU28 EXPORTS - CHANGE IN ROASTED COFFEE EXPORTS (2015-2017, TOTAL VOLUME)			
TOP 5	Tonnes	BOTTOM 5	Tonnes
United States	4,497	Brazil	-878
Russian Federation	3,893	Belarus	-481
Ukraine	3,273	United Arab Emirates	-268
Canada	2,106	Australia	-264

Source: Eurostat

EU28 EXPORTS - CHANGE IN ROASTED COFFEE EXPORTS (2015-2017, PERCENTAGE)			
TOP 5	%	BOTTOM 5	%
Saudi Arabia	68,7	Brazil	-35,7
Canada	58,3	Belarus	-18,9
United States	39,2	United Arab Emirates	-8,6
Serbia	28,4	Australia	-3,6

Source: Eurostat

5.2 SOLUBLE COFFEE EXPORTS

Regarding EU28 exports of soluble coffee (officially: extracts, essences and concentrates of coffee) to non-EU destinations, total volume decreased by 5.7% in 2017 to 46,161 tonnes. The largest client remained the Russian Federation, although exports to this country substantially decreased in 2017 to 10,576 tonnes (-12.4%). This negative trend started in 2010 when the Russian Federation's share of EU28 exports reached 33%. However, the Russian Federation still absorbs 22.9% of total EU exports of soluble coffee.

EU28 EXPORTS OF SOLUBLE COFFEE TO NON-EU DESTINATIONS (HS 21011100) 2015-2017, in tonnes and % of total exports						
	2015		2016		2017	
	Tonnes	%	Tonnes	%	Tonnes	%
RUSSIAN FEDERATION	12,317	26.9%	12,075	25.8%	10,576	22.9%
AUSTRALIA	5,143	11.2%	5,267	11.3%	5,672	12.3%
UKRAINE	4,383	9.6%	6,446	13.8%	5,613	12.2%
SOUTH AFRICA	3,381	7.4%	3,512	7.5%	4,352	9.4%
UNITED STATES	2,108	4.6%	1,933	4.1%	2,352	5.1%
SWITZERLAND	992	2.2%	1,158	2.5%	1,789	3.9%
TURKEY	1,482	3.2%	1,630	3.5%	1,761	3.8%
NORWAY	1,628	3.5%	1,766	3.8%	1,714	3.7%
CANADA	1,398	3.0%	1,228	2.6%	1,434	3.1%
EGYPT	2,348	5.1%	1,610	3.4%	1,218	2.6%
OTHERS	11,027	24.0%	10,534	22.5%	9,932	21.5%
TOTAL	45,874	100.0%	46,805	100.0%	46,161	100.0%

Source: Eurostat

Australia is now the second largest customer for EU28 countries, importing 5,672 tonnes of soluble coffee in 2017 (+7.7%), while the Ukraine imported 5,613 tonnes in 2017 (-12.9%). Exports to South Africa continue a steady climb and reached 4,352 tonnes in 2017, a 23.9% increase on 2016. The United States also posted positive results with a 21.7% increase in 2017 to 2,352 tonnes. On the negative side, Egypt was in 2015 the fifth best customer for EU28 soluble coffee importing 2,348 tonnes. In 2017, exports to Egypt decreased by 24.3% on the previous year to 1,218 tonnes. This figure represents almost half the volume exported to Egypt in 2015.

6. IMPORTS AND EXPORTS OF COFFEE IN VALUE

This section some relevant data on the value of imports and exports in the EU28 area of green coffee green decaffeinated coffee, roasted regular coffee, roasted decaffeinated coffee and soluble coffee:

EU28 COFFEE TRADE IN VALUE 2015-2017 (EUR millions)															
Green Coffee, Green Decaffeinated Coffee, Roasted Coffee, Roasted Decaffeinated Coffee, Soluble Coffee															
	GREEN COFFEE			GREEN DECAF			ROASTED			ROASTED DECAF			SOLUBLE		
Imports	2015	2016	2017	2015	2016	2017	2015	2016	2017	2015	2016	2017	2015	2016	2017
EU extra trade	7,403	6,966	7,241	34	32	40	1,272	1,326	1,338	150	137	136	442	421	411
EU intra trade	991	990	1,082	107	102	126	4,103	4,141	4,598	228	236	320	1,231	1,268	1,378
Exports	2015	2016	2017	2015	2016	2017	2015	2016	2017	2015	2016	2017	2015	2016	2017
EU extra trade	107	133	135	337	325	327	870	884	995	29	26	28	523	500	532
EU intra trade	1,125	1,072	1,239	192	184	216	4,678	4,683	4,874	211	201	232	1,369	1,414	1,541

Source: Eurostat

These data underline the economic relevance of the coffee sector for the EU food and drinks industry. The value of intra-EU trade of finished coffee products (roasted regular coffee, roasted decaffeinated coffee and soluble coffee) reached EUR 6.65 billion in 2017 (+5.5%). The value of exports to non-EU destinations of finished coffee products is much smaller than intra-EU trade, but still represents a relevant contribution to EU exporting performance. EU28 countries exported finished coffee products worth EUR 1.56 billion in 2017, a 10.3% increase on 2016.

7. COFFEE CONSUMPTION BY COUNTRY IN THE EU28

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. "Coffee" is here the aggregation of fresh coffee and instant (soluble) coffee. Please note that foodservice sales of coffee are volumes sold to the on-trade (foodservice) sector and not those sold to the consumer.

COFFEE SALES VOLUME AND VALUE* IN EU MARKETS 2015-2017						
- volume in '000 tonnes and sales in EUR million -						
	2015		2016		2017	
	Volume	Value	Volume	Value	Volume	Value
Austria	64	680	62	678	62	673
Belgium	48	647	48	657	48	670
Bulgaria	13	208	13	219	13	224
Croatia	11	156	11	155	11	153
Czech Republic	21	329	21	331	20	339
Denmark	22	400	21	382	21	372
Estonia	03	64	04	69	05	71
Finland	31	449	33	442	35	442
France	163	3,160	162	3,263	161	3,348
Germany	364	4,870	366	4,894	365	4,884
Greece	34	361	34	374	34	399
Hungary	14	312	14	319	15	325
Ireland	05	96	06	112	06	128
Italy	158	1,958	157	2,034	154	2,048
Latvia	05	89	05	92	05	93
Lithuania	11	144	11	146	11	149
Netherlands	77	1,018	77	1,016	75	986
Poland	80	979	80	1,011	80	1,006
Portugal	21	337	20	354	20	370
Romania	28	330	26	349	26	382
Slovakia	13	247	14	255	14	259
Slovenia	10	121	10	128	10	139
Spain	85	1,233	83	1,274	80	1,284
Sweden	43	547	42	518	41	502
United Kingdom	92	1,889	94	1,907	94	1,922

Source: ©Euromonitor International. *Retail value estimated as per Retail Sales Price (RSP)

The EU28 coffee market is on aggregate very stable as it would be expected from a market which includes European countries with mature markets. During the 2015-2017 period only a handful of small countries showed noticeable changes in the total coffee volume sold in their markets: Estonia (+67% on aggregate), Ireland (+20%) and Finland (+13%). During the same period, no EU28 market experienced a decrease in total coffee volume sold higher than 5% except for Spain (-6% on aggregate) and Romania (-7%).

RETAIL vs. FOODSERVICE MARKET SHARE IN COFFEE VOLUME IN THE EU28 MARKETS 2017 - in % -					
	Retail	Foodservice		Retail	Foodservice
Austria	85	15	Italy	74	26
Belgium	79	21	Latvia	90	10
Bulgaria	81	19	Lithuania	89	11
Croatia	60	40	Luxembourg*	81	19
Cyprus*	79	21	Malta*	79	21
Czech Republic	91	9	Netherlands	76	24
Denmark	74	26	Poland	89	11
Estonia	93	7	Portugal	46	54
Finland	87	13	Romania	78	22
France	83	17	Slovakia	95	5
Germany	88	12	Slovenia	84	16
Greece	75	25	Spain	59	41
Hungary	85	15	Sweden	71	29
Ireland	73	27	United Kingdom	64	36

Source: © Euromonitor International, *Figures for Cyprus, Luxembourg and Malta have been modelled

In terms of coffee volume, the share of retail and foodservice (essentially representing out-of-home consumption) differs substantially between markets, ranging from a 54% share of the foodservice channel in Portugal to just 5% in Slovakia. The foodservice channel is also prominent in countries such as Spain (41%), Croatia (40%), the United Kingdom (36%) and Sweden (29%). In exchange, the retail channel prevails not only in Slovakia (95%) but also in Estonia (93%), the Czech Republic (91%), Latvia (90%) and Lithuania (89%).

FRESH* AND INSTANT COFFEE MARKET SIZE BY RETAIL CHANNEL 2017				
- Total volume in tonnes-				
	RETAIL		FOODSERVICE	
	Fresh	Instant	Fresh	Instant
Austria	30,513	3,111	6,102	0
Belgium	38,403	2,907	10,402	292
Bulgaria	8,502	6,072	2,603	727
Croatia	10,082	2,483	7,257	1,294
Cyprus**	1,959	608	519	172
Czech Republic	12,610	8,636	1,827	174
Denmark	17,820	2,295	7,081	0
Estonia	5,444	230	410	22
Finland	46,998	988	7,038	0
France	148,513	12,739	31,658	2,407
Germany	314,534	50,596	47,779	3,448
Greece	16,855	3,584	4,706	1,928
Hungary	16,960	9,037	4,403	304
Ireland	3,083	1,386	993	669
Italy	149,726	4,355	50,252	2,627
Latvia	3,277	1,319	440	64
Lithuania	8,032	1,972	1,012	271
Luxembourg**	2,191	233	537	34
Malta**	1,013	118	250	50
Netherlands	74,838	5,473	24,010	1,344
Poland	69,692	24,681	10,549	1,470
Portugal	9,005	2,178	12,760	352
Romania	26,514	8,313	7,063	2,544
Slovakia	9,122	4,709	567	95
Slovenia	9,720	1,691	1,726	440
Spain	68,731	11,653	53,667	1,170
United Kingdom	33,318	41,478	31,677	10,575

Source: © Euromonitor International

* Euromonitor defines "fresh coffee" as the aggregate of "fresh coffee beans" (green coffee) and "fresh ground coffee", which includes "standard fresh ground coffee" and "fresh ground coffee pods".

**Figures for Cyprus, Luxembourg and Malta have been modelled.

In 2017 the share of coffee commercialised in pods¹ as part of the total volume of coffee was lowest (0-1%) in Croatia, Hungary, Latvia, Lithuania, Poland, Romania and Sweden, while it reached its highest levels in Ireland (38%), The Netherlands (35%), France (30%) and Belgium (26%). Ireland (+13 percentage points), France (+4 percentage points) and Belgium (+3 percentage points) are the countries where the market share of coffee pods is growing faster during the 2015-2017 period.

TRADITIONAL COFFEE vs. COFFEE IN PODS						
MARKET SHARE AS PERCENTAGE OF TOTAL COFFEE VOLUME IN THE EU28 MARKETS 2015-2017						
- in % -						
	2015		2016		2017	
	Traditional	Pods	Traditional	Pods	Traditional	Pods
Austria	83	17	83	17	83	17
Belgium	77	23	76	24	74	26
Bulgaria	97	03	97	03	97	03
Croatia*	99	01	99	01	99	01
Cyprus*	94	06	94	06	94	06
Czech Republic	96	04	96	04	96	04
Denmark	97	03	97	03	97	03
Estonia*	99	01	98	02	98	02
Finland	99	01	99	01	99	01
France	74	26	72	28	70	30
Germany	87	13	87	13	86	14
Greece	97	03	97	03	97	03
Hungary	99	01	99	01	99	01
Ireland	75	25	68	32	62	38
Italy	93	07	93	07	91	09
Latvia*	100	00	100	00	100	00
Lithuania*	100	00	100	00	99	01
Luxembourg*	87	13	85	15	84	16
Malta*	88	12	87	13	86	14
Netherlands	65	35	65	35	65	35
Poland	99	01	99	01	99	01
Portugal	84	16	83	17	82	18
Romania	99	01	99	01	99	01
Slovakia	97	03	97	03	97	03
Slovenia*	99	01	99	01	99	01
Spain	90	10	90	10	89	11
Sweden	99	01	99	01	99	01
United Kingdom	91	09	90	10	89	11

Source: © Euromonitor International

*Figures for Croatia, Cyprus, Estonia, Latvia, Lithuania, Luxembourg, Malta and Slovenia have been modelled

Note: 'Traditional coffee' includes fresh ground coffee and instant coffee, including decaffeinated coffee. 'Coffee in pods' includes fresh ground coffee in pods.

¹ 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.

8. EU28 COUNTRIES KEY NATIONAL IMPORT DATA

SUMMARY IMPORT STATISTICS EU28 MEMBERS 2017 (IN TONS)

Austria					
Green Coffee (Including decaf)		Roasted Coffee (Including decaf)		Extracts, essences	
Germany	6,775	Germany	15,836	Germany	3,783
Vietnam	2,045	Italy	13,729	Spain	470
Italy	1,898	Slovakia	10,966	France	319
Brazil	1,637	Switzerland	3,436	Switzerland	303
Belgium	1,262	Netherlands	1,067	Hungary	179
Others	3,025	Others	1,506	Others	569
Total	16,641	Total	46,539	Total	5,624
Belgium					
Green Coffee (Including decaf)		Roasted Coffee (Including decaf)		Extracts, essences	
Brazil	71,469	Netherlands	15,963	Brazil	1,116
Vietnam	53,834	Germany	15,842	France	1,061
Honduras	25,497	France	3,655	Netherlands	896
Uganda	19,594	Poland	1,261	Germany	710
Peru	18,099	Spain	1,110	Colombia	471
Others	84,465	Others	3,918	Others	1,108
Total	272,958	Total	41,749	Total	5,361
Bulgaria					
Green Coffee (Including decaf)		Roasted Coffee (Including decaf)		Extracts, essences	
Vietnam	6,386	Italy	3,806	Brazil	472
Indonesia	6,001	Germany	1,593	Germany	288
Brazil	3,807	Spain	368	United Kingdom	173
Germany	3,341	Romania	221	Poland	113
Peru	1,987	Poland	220	France	108
Others	7,547	Others	613	Others	284
Total	29,068	Total	6,821	Total	1,437
Croatia					
Green Coffee (Including decaf)		Roasted Coffee (Including decaf)		Extracts, essences	
Slovenia	5,864	Italy	2,305	Germany	349
Brazil	3,465	Slovenia	1,715	Spain	314
India	2,496	Germany	269	Poland	300
Vietnam	1,946	Hungary	240	Brazil	231
Italy	758	Austria	167	France	129
Others	1,291	Others	208	Others	257
Total	15,820	Total	4,905	Total	1,580

Cyprus					
Green Coffee (Including decaf)		Roasted Coffee (Including decaf)		Extracts, essences	
Brazil	1,289	Greece	344	Greece	655
Ethiopia	96	Italy	171	Netherlands	104
Greece	59	Germany	160	Germany	95
Colombia	39	Netherlands	50	Austria	87
Uganda	18	Switzerland	50	Italy	64
Others	33	Others	174	Others	199
Total	1,533	Total	949	Total	1,203
Czech Republic					
Green Coffee (Including decaf)		Roasted Coffee (Including decaf)		Extracts, essences	
Germany	2,531	Germany	9,836	Germany	3,698
Brazil	1,837	Poland	7,980	United Kingdom	3,603
Indonesia	1,413	Slovakia	4,866	Belgium	2,962
Vietnam	1,248	Italy	2,238	Netherlands	1,177
Peru	745	Netherlands	1,624	Poland	1,171
Others	4,347	Others	4,369	Others	1,704
Total	12,122	Total	30,914	Total	14,315
Denmark					
Green Coffee (Including decaf)		Roasted Coffee (Including decaf)		Extracts, essences	
Brazil	3,725	Sweden	10,294	Netherlands	1,198
Colombia	1,712	Germany	8,760	Germany	522
Vietnam	1,362	Poland	1,479	France	450
India	1,317	Netherlands	823	Hungary	309
Peru	1,228	Kenya	262	United Kingdom	271
Others	6,080	Others	910	Others	623
Total	15,424	Total	22,527	Total	3,373
Estonia					
Green Coffee (Including decaf)		Roasted Coffee (Including decaf)		Extracts, essences	
Latvia	25	Finland	2,802	Lithuania	129
Netherlands	22	Latvia	1,147	India	48
United Kingdom	22	Lithuania	842	Latvia	24
Colombia	20	Italy	468	Belgium	10
Brazil	12	Germany	248	Poland	9
Others	17	Others	453	Others	12
Total	118	Total	5,961	Total	230
Finland					
Green Coffee (Including decaf)		Roasted Coffee (Including decaf)		Extracts, essences	
Brazil	31,394	Netherlands	4,685	Switzerland	339
Colombia	16,363	Sweden	3,910	Germany	256
Honduras	5,443	Germany	857	Sweden	82
Nicaragua	2,761	Denmark	196	United Kingdom	60
Kenya	2,096	Italy	150	Hungary	37
Others	9,210	Others	227	Others	50
Total	67,266	Total	10,024	Total	822

France					
Green Coffee (Including decaf)		Roasted Coffee (Including decaf)		Extracts, essences	
Brazil	52,521	Switzerland	38,399	Germany	5,040
Vietnam	41,021	Netherlands	31,897	United Kingdom	2,149
Belgium	21,583	Germany	24,970	Spain	2,094
Honduras	17,017	Italy	20,542	Czech Republic	839
Colombia	13,945	Belgium	15,916	Poland	579
Others	58,766	Others	15,000	Others	2,610
Total	204,852	Total	146,724	Total	13,309
Germany					
Green Coffee (Including decaf)		Roasted Coffee (Including decaf)		Extracts, essences	
Brazil	336,214	Italy	35,181	Ecuador	7,164
Vietnam	251,738	Poland	11,711	Belgium	6,789
Honduras	101,746	Netherlands	10,921	Netherlands	6,602
Colombia	59,241	Switzerland	7,089	United Kingdom	5,728
Peru	53,451	France	6,056	Poland	4,208
Others	296,329	Others	7,990	Others	10,504
Total	1,098,718	Total	78,947	Total	40,994
Greece					
Green Coffee (Including decaf)		Roasted Coffee (Including decaf)		Extracts, essences	
Brazil	10,155	Italy	6,831	Spain	2,926
Vietnam	2,149	Germany	1,494	Korea, South	1,435
India	1,180	Portugal	1,117	Germany	827
Spain	632	Bulgaria	1,087	Cote d'Ivoire	504
Colombia	612	France	546	Netherlands	382
Others	3,418	Others	1,542	Others	1,015
Total	18,147	Total	12,617	Total	7,089
Hungary					
Green Coffee (Including decaf)		Roasted Coffee (Including decaf)		Extracts, essences	
Germany	1,614	Slovakia	9,462	Spain	1,196
Netherlands	600	Germany	3,342	Vietnam	1,144
Uganda	159	Bulgaria	1,848	Brazil	937
India	84	Poland	1,527	France	669
Brazil	70	Italy	1,293	Germany	336
Others	172	Others	3,535	Others	1,184
Total	2,700	Total	21,006	Total	5,466
Ireland					
Green Coffee (Including decaf)		Roasted Coffee (Including decaf)		Extracts, essences	
United Kingdom	5,509	United Kingdom	2,404	United Kingdom	2,666
Brazil	1,785	Germany	1,045	Germany	228
Netherlands	1,106	Netherlands	153	Netherlands	117
Colombia	823	Italy	95	Poland	34
Peru	664	Poland	82	Turkey	2
Others	2,571	Others	200	Others	3
Total	12,457	Total	3,977	Total	3,049

Italy					
Green Coffee (Including decaf)		Roasted Coffee (Including decaf)		Extracts, essences	
Brazil	164,342	France	5,500	Spain	934
Vietnam	120,087	Spain	2,999	Vietnam	791
India	72,630	Germany	2,358	Germany	652
Uganda	51,027	Switzerland	1,431	Switzerland	483
Indonesia	34,969	Sweden	1,081	France	444
Others	126,932	Others	1,957	Others	1,070
Total	569,988	Total	15,326	Total	4,374
Latvia					
Green Coffee (Including decaf)		Roasted Coffee (Including decaf)		Extracts, essences	
Poland	949	Germany	1,746	Lithuania	468
Brazil	788	Lithuania	1,742	India	202
Germany	575	Sweden	688	Poland	81
Vietnam	264	Poland	583	Germany	33
Sweden	253	Italy	571	Russia	16
Others	994	Others	641	Others	18
Total	3,822	Total	6,236	Total	816
Lithuania					
Green Coffee (Including decaf)		Roasted Coffee (Including decaf)		Extracts, essences	
Germany	532	Netherlands	3,856	Netherlands	404
United Kingdom	324	Estonia	3,375	Brazil	219
Vietnam	134	Italy	2,518	Poland	179
Poland	107	Latvia	2,316	India	99
Italy	81	Poland	1,531	Spain	69
Others	224	Others	3,825	Others	209
Total	1,402	Total	17,420	Total	1,178
Luxembourg					
Green Coffee (Including decaf)		Roasted Coffee (Including decaf)		Extracts, essences	
Belgium	554	Germany	13,370	Belgium	81
Germany	108	Belgium	1,675	Germany	77
France	81	Italy	989	Netherlands	25
Colombia	52	Netherlands	726	Austria	3
United Kingdom	35	Poland	563	France	2
Others	62	Others	468	Others	0
Total	892	Total	17,789	Total	188
Malta					
Green Coffee (Including decaf)		Roasted Coffee (Including decaf)		Extracts, essences	
Italy	15	Italy	310	United Kingdom	69
Germany	4	Portugal	8	Italy	32
Belgium	1	United Kingdom	4	Netherlands	18
		Spain	4	France	6
		Germany	2	Spain	2
Others	0	Others	2	Others	0
Total	20	Total	330	Total	127

Netherlands					
Green Coffee (Including decaf)		Roasted Coffee (Including decaf)		Extracts, essences	
Belgium	112,054	Germany	31,384	Germany	3,911
Germany	30,182	Belgium	9,422	Belgium	2,302
Brazil	18,374	France	7,551	France	1,022
Vietnam	6,851	Poland	7,252	United Kingdom	982
Colombia	5,777	United Kingdom	4,423	Czech Republic	765
Others	24,980	Others	15,561	Others	3,127
Total	198,217	Total	71,170	Total	12,110
Poland					
Green Coffee (Including decaf)		Roasted Coffee (Including decaf)		Extracts, essences	
Germany	89,098	Germany	28,803	Germany	10,423
Vietnam	12,286	Italy	3,008	India	3,889
Brazil	3,476	Netherlands	2,631	Spain	3,328
Uganda	3,142	United Kingdom	2,093	Mexico	1,950
Belgium	2,033	Czech Republic	1,069	Vietnam	1,462
Others	7,089	Others	3,929	Others	6,453
Total	117,123	Total	41,532	Total	27,505
Portugal					
Green Coffee (Including decaf)		Roasted Coffee (Including decaf)		Extracts, essences	
Vietnam	13,093	Spain	2,648	Germany	516
Brazil	7,801	Italy	2,009	Spain	425
Uganda	6,752	France	1,800	United Kingdom	199
Spain	4,517	Germany	895	France	191
Cameroon	4,294	Netherlands	201	Switzerland	57
Others	16,093	Others	141	Others	46
Total	52,550	Total	7,694	Total	1,433
Romania					
Green Coffee (Including decaf)		Roasted Coffee (Including decaf)		Extracts, essences	
Vietnam	4,063	Bulgaria	8,848	Vietnam	818
Germany	3,339	Germany	8,736	Poland	634
Uganda	3,037	Italy	7,723	Brazil	607
Brazil	2,064	Poland	2,348	Spain	546
Colombia	1,491	Hungary	721	Germany	530
Others	5,327	Others	2,729	Others	1,288
Total	19,321	Total	31,105	Total	4,423
Slovakia					
Green Coffee (Including decaf)		Roasted Coffee (Including decaf)		Extracts, essences	
Germany	2,133	Germany	10,847	Czech Republic	1,063
Belgium	1,333	Poland	5,610	Poland	687
Czech Republic	189	Czech Republic	3,902	Germany	424
United Kingdom	180	Italy	1,277	Spain	349
Vietnam	145	Hungary	1,260	Switzerland	241
Others	615	Others	1,627	Others	473
Total	4,595	Total	24,523	Total	3,236

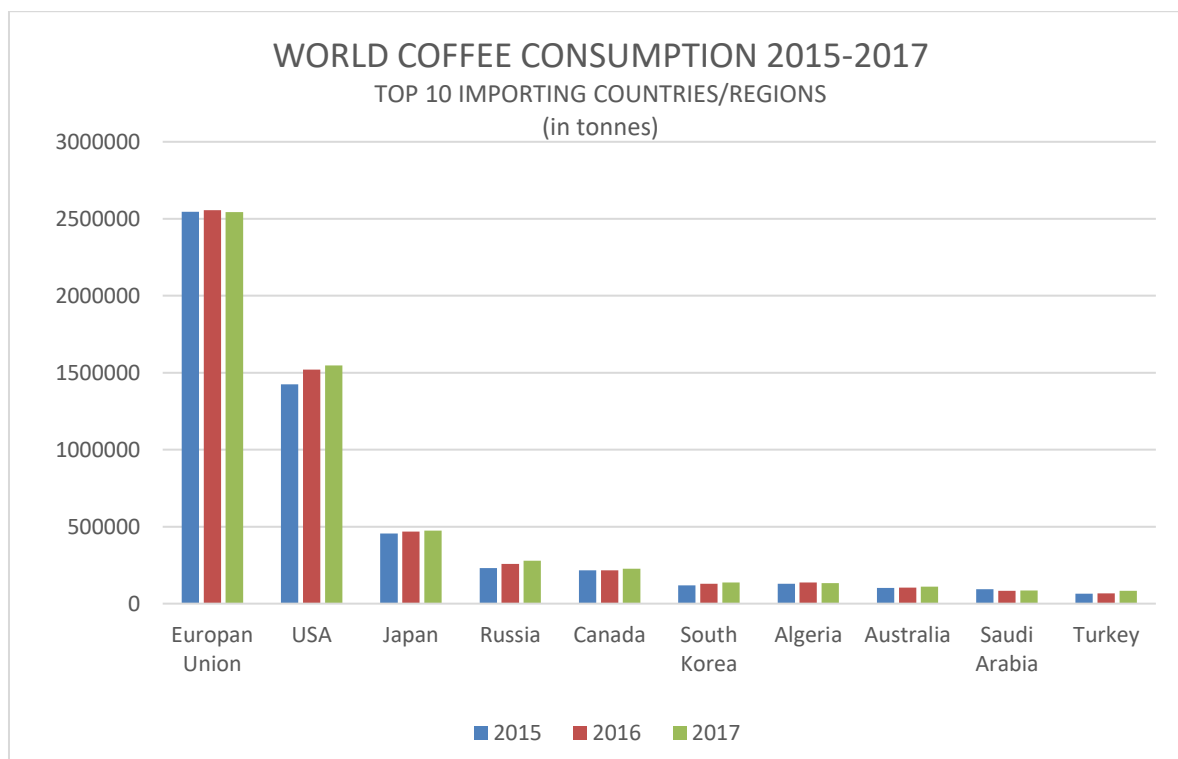
Slovenia					
Green Coffee (Including decaf)		Roasted Coffee (Including decaf)		Extracts, essences	
Brazil	7,309	Italy	1,789	Germany	203
India	4,938	Croatia	1,061	Croatia	111
Vietnam	1,239	Bosnia and Herzegovina	346	Austria	52
Colombia	890	Austria	242	Italy	32
Italy	793	Germany	198	Hungary	27
Others	2,321	Others	456	Others	50
Total	17,490	Total	4,092	Total	475
Spain					
Green Coffee (Including decaf)		Roasted Coffee (Including decaf)		Extracts, essences	
Vietnam	111,719	Italy	7,503	Netherlands	1,042
Brazil	44,663	France	7,073	Mexico	990
Germany	26,066	Germany	5,714	France	707
Colombia	19,064	Portugal	4,391	Germany	688
Uganda	13,957	United Kingdom	2,945	United Kingdom	469
Others	58,271	Others	3,926	Others	1,192
Total	273,740	Total	31,552	Total	5,087
Sweden					
Green Coffee (Including decaf)		Roasted Coffee (Including decaf)		Extracts, essences	
Brazil	35,710	Netherlands	5,549	Switzerland	1,277
Peru	13,805	Germany	1,887	Czech Republic	921
Honduras	11,419	Denmark	1,523	Germany	666
Colombia	8,544	Italy	1,319	United Kingdom	433
Germany	6,785	Switzerland	1,098	Netherlands	344
Others	32,142	Others	2,825	Others	1,225
Total	108,405	Total	14,201	Total	4,867
United Kingdom					
Green Coffee (Including decaf)		Roasted Coffee (Including decaf)		Extracts, essences	
Vietnam	36,610	Germany	15,656	Germany	8,974
Brazil	34,823	Italy	10,427	Netherlands	3,774
Indonesia	25,246	Netherlands	5,426	Spain	3,514
Colombia	19,747	France	4,562	Brazil	2,998
Honduras	8,110	Spain	3,885	France	1,618
Others	41,327	Others	10,707	Others	3,728
Total	165,863	Total	50,663	Total	24,605

Source: Eurostat

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

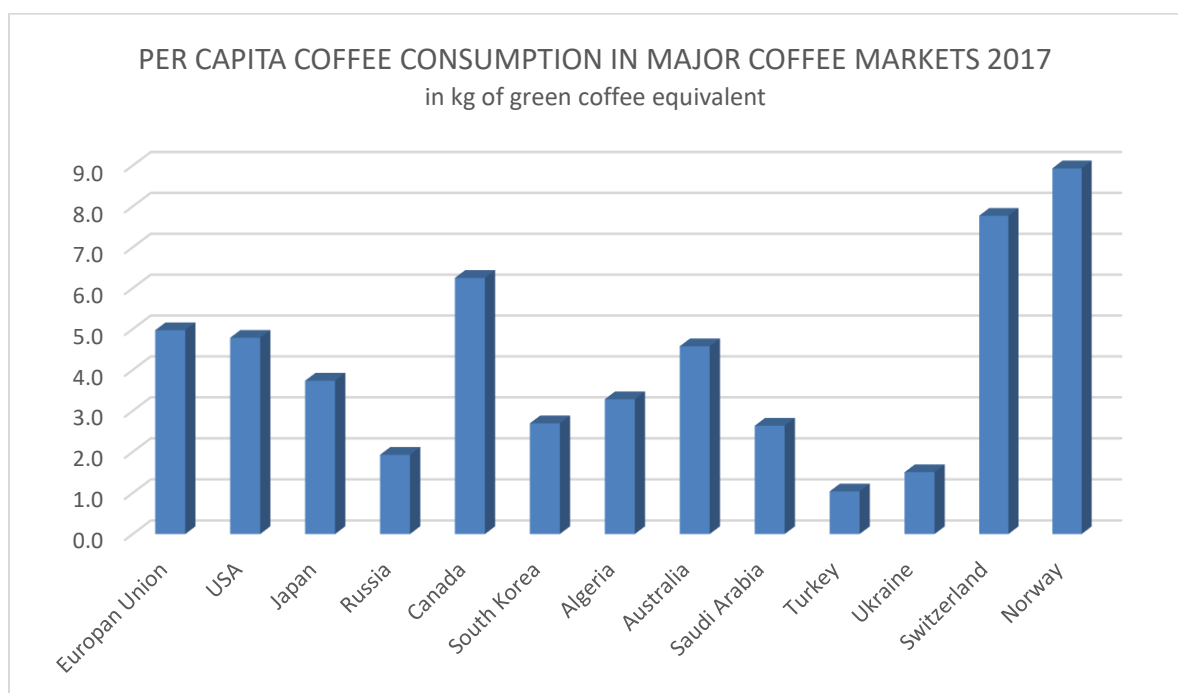
9. EU MARKET IN PERSPECTIVE

Based on data from the International Coffee Organization, this graph shows the evolution of coffee consumption in the top 10 importing markets during the 2015-2017 period:



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

10. EU VAT AND EXCISE DUTIES

ROASTED, NON-DECAFFEINATED COFFEE (0901210000), UNLESS INDICATED OTHERWISE		
COUNTRY	VAT %	EXCISE DUTIES
Austria	20	
Belgium	6	<ul style="list-style-type: none"> - Non-roasted coffee: EUR 0.2001 / kg net weight - Roasted coffee: EUR 0.2502 / kg net weight - An exemption from excise duty is granted when coffee serves for industrial uses other than the roasting of coffee or the production of coffee extracts.
Bulgaria	20	
Croatia	25	<ul style="list-style-type: none"> - Roasted coffee: HRK 6 / kg net weight - Coffee substitutes containing coffee: HRK 6 / kg net weight - Extracts, essences and concentrates of coffee, solid or liquid; preparations with a basis of these products: 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 net weight.
Cyprus	5	
Czech Republic	15	
Denmark	25	- Roasted coffee: DKK 7.67/kg
Estonia	20	
Finland	14	
France	5,5	
Germany	7	- Roasted coffee: EUR 2.19/kg
Greece	24	<ul style="list-style-type: none"> - Roasted coffee: EUR 3/kg - Non-roasted coffee: EUR 2/kg.
Hungary	27	
Ireland	0	
Italy	22	
Latvia	21	- EUR 142.29 / 100 kg 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: Trade Helpdesk website as at 25 May 2018

Up-to-date information on VAT and excise duties can be found on the European Commission's Trade Helpdesk website: <http://trade.ec.europa.eu/tradehelp/>.

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 ECF for any inadvertent errors or omissions.