

European Coffee Report 2018/2019



European Coffee Federation

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1. INTRODUCTION

This is the thirty-ninth issue of the 'European Coffee Report'. The European Coffee Federation (ECF) continues this series with the report over 2018/2019. 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:

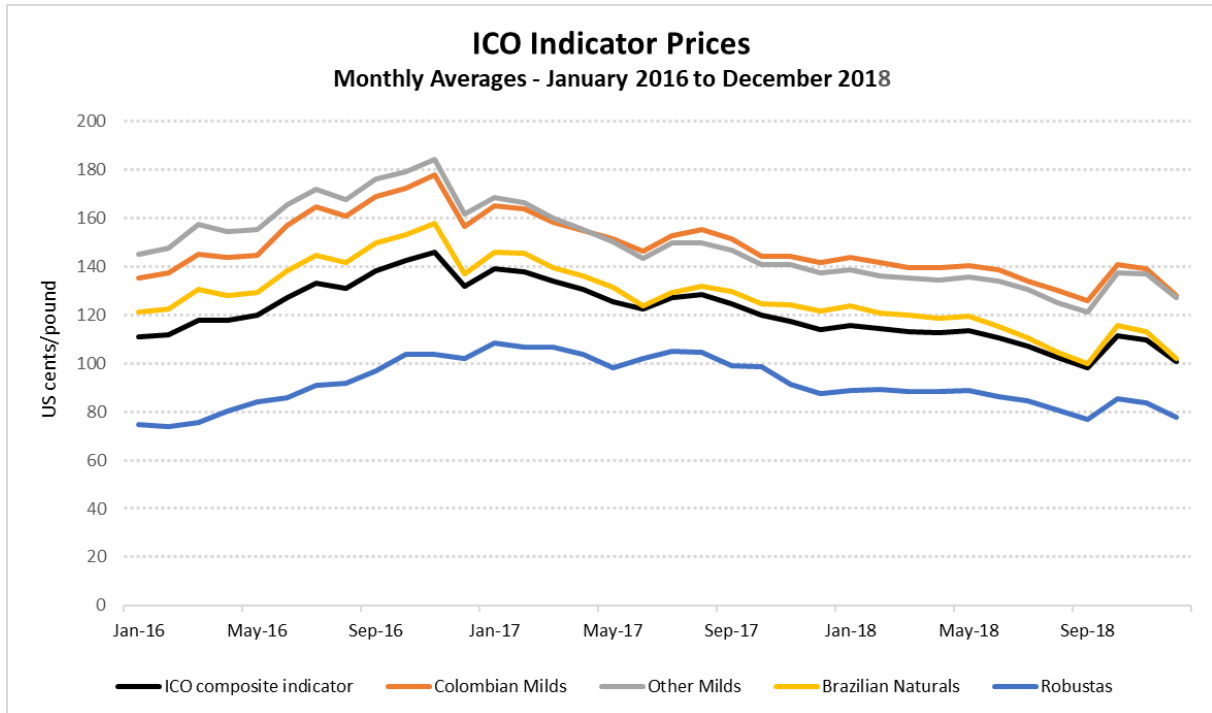
Eurostat trade figures may differ from those available from national sources.

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:

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

3. 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 2015:

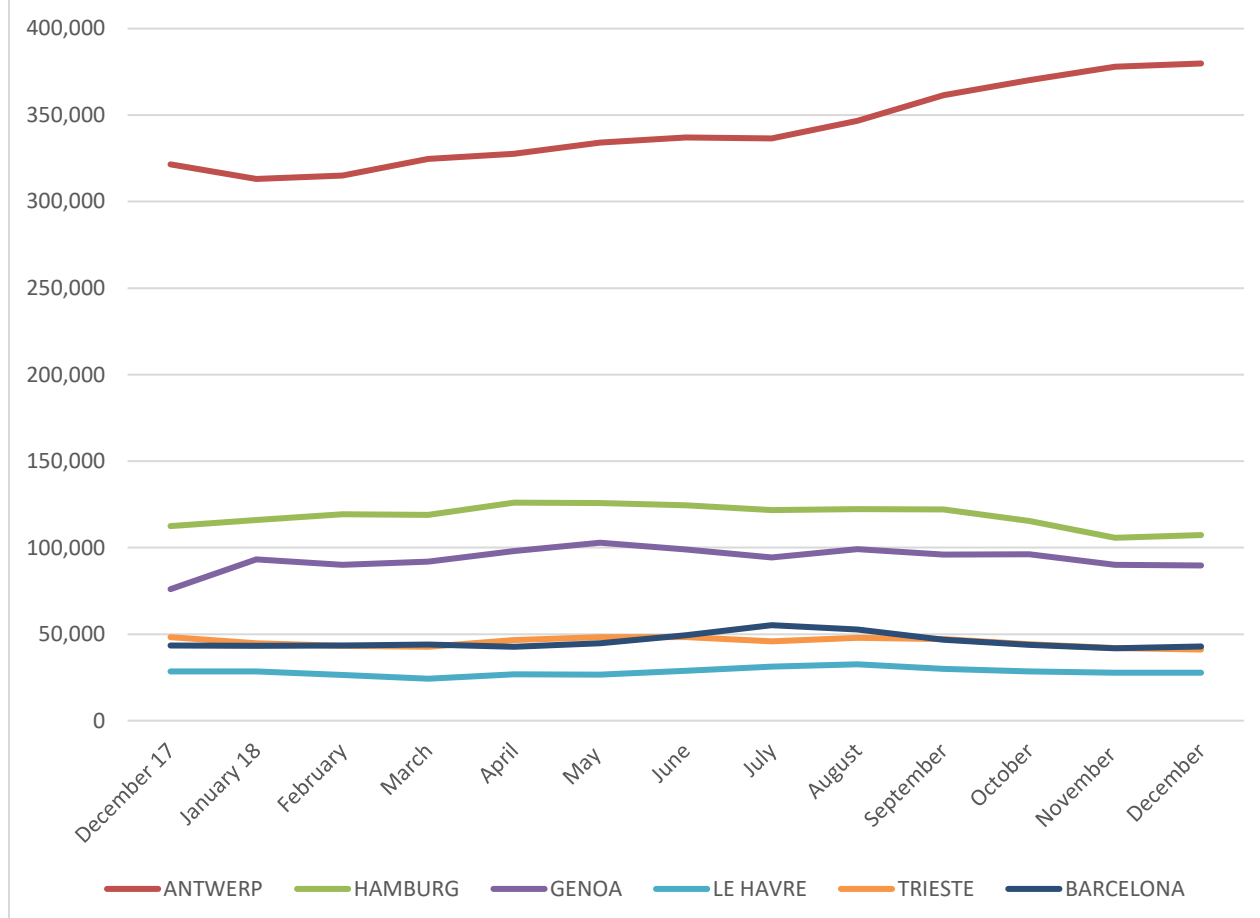
| | |
|---------------------|-----|
| Colombian Milds: | 10% |
| Other Milds: | 23% |
| Brazilian Naturals: | 30% |
| Robustas: | 37% |

From October 2017:

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

Total Coffee Stocks per Port (Antwerp, Hamburg, Genoa, Le Havre, Trieste and Barcelona)

December 2017 - December 2018



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 is supplied by warehousing and port organisations in the listed port areas and have been compiled by ECF.

| | |
|------------------|--|
| Antwerp | <i>Koninklijk Verbond der Beheerders van Goederenstromen</i> |
| Hamburg | Unternehmensverband Hafen Hamburg e.V. |
| Genoa | <i>Comitato Italiano del Caffé</i> |
| Le Havre | <i>Union Nationale du Café (UNACAF)</i> |
| Trieste | <i>Comitato Italiano del Caffé</i> |
| Barcelona | Asociación Española del Café |

4. 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, North Macedonia, Moldova, Montenegro, the Russian Federation, Serbia and Ukraine.

| Imports of green coffee into Europe by country 2016 - 2018 | | | | | | |
|---|------------------|-------------------|------------------|-------------------|------------------|-------------------|
| - in tonnes and in 60 kg bags - | | | | | | |
| COUNTRY | 2016 | | 2017 | | 2018 | |
| | in tonnes | in bags | in tonnes | in bags | in tonnes | in bags |
| AUSTRIA | 15,834 | 263,900 | 16,620 | 277,000 | 16.521 | 275,350 |
| BELGIUM | 305,197 | 5,086,617 | 275,524 | 4,592,067 | 280.745 | 4,679,083 |
| BULGARIA | 32,344 | 539,067 | 29,008 | 483,467 | 29.888 | 498,133 |
| CROATIA | 17,920 | 298,667 | 15,778 | 262,967 | 15.564 | 259,400 |
| CYPRUS | 1,590 | 26,500 | 1,520 | 25,333 | 3.036 | 50,600 |
| CZECH REPUBLIC | 17,763 | 296,050 | 12,100 | 201,667 | 17.675 | 294,583 |
| DENMARK | 19,214 | 320,233 | 15,054 | 250,900 | 17.029 | 283,817 |
| ESTONIA | 69 | 1,150 | 116 | 1,933 | 86 | 1,433 |
| FINLAND | 71,324 | 1,188,733 | 67,391 | 1,123,183 | 61.229 | 1,020,483 |
| FRANCE | 208,027 | 3,467,117 | 201,837 | 3,363,950 | 224.273 | 3,737,883 |
| GERMANY | 1,140,617 | 19,010,283 | 1,097,807 | 18,296,783 | 1.122.860 | 18,714,333 |
| GREECE | 49,207 | 820,117 | 17,939 | 298,983 | 32.186 | 536,433 |
| HUNGARY | 2,084 | 34,733 | 2,698 | 44,967 | 2.919 | 48,650 |
| IRELAND | 10,352 | 172,533 | 12,338 | 205,633 | 11.817 | 196,950 |
| ITALY | 571,824 | 9,530,400 | 563,185 | 9,386,417 | 604.836 | 10,080,600 |
| LATVIA | 3,360 | 56,000 | 3,828 | 63,800 | 3.068 | 51,133 |
| LITHUANIA | 1,228 | 20,467 | 1,444 | 24,067 | 1.643 | 27,383 |
| LUXEMBOURG | 689 | 11,483 | 892 | 14,867 | 814 | 13,567 |
| MALTA | 1 | 17 | 2 | 33 | 34 | 567 |
| NETHERLANDS | 174,129 | 2,902,150 | 177,130 | 2,952,167 | 190.174 | 3,169,567 |
| POLAND | 103,408 | 1,723,467 | 116,644 | 1,944,067 | 122.605 | 2,043,417 |
| PORTUGAL | 51,539 | 858,983 | 49,922 | 832,033 | 53.089 | 884,817 |
| ROMANIA | 20,292 | 338,200 | 19,229 | 320,483 | 16.983 | 283,050 |
| SLOVAKIA | 3,270 | 54,500 | 4,571 | 76,183 | 5.342 | 89,033 |
| SLOVENIA | 13,310 | 221,833 | 17,616 | 293,600 | 24.368 | 406,133 |
| SPAIN | 262,817 | 4,380,283 | 250,061 | 4,167,683 | 261.500 | 4,358,333 |
| SWEDEN | 110,650 | 1,844,167 | 108,350 | 1,805,833 | 106.588 | 1,776,467 |
| UNITED KINGDOM | 176,672 | 2,944,533 | 160,175 | 2,669,583 | 192.657 | 3,210,950 |
| EU28TOTAL | 3,430,345 | 57,172,425 | 3,240,796 | 54,013,267 | 3,421,547 | 57,025,783 |

(cont.)

| Imports of green coffee into Europe by country 2016 – 2018 | | | | | | |
|--|------------------|-------------------|------------------|-------------------|------------------|-------------------|
| - in tonnes and in 60 kg bags - | | | | | | |
| COUNTRY | 2016 | | 2017 | | 2018 | |
| | in tonnes | in bags | in tonnes | in bags | in tonnes | in bags |
| SWITZERLAND | 139,250 | 2,320,833 | 146,480 | 2,441,333 | 158,587 | 2,643,117 |
| NORWAY | 34,938 | 582,300 | 34,916 | 581,933 | 31,246 | 520,767 |
| ICELAND | 1,148 | 19,133 | 1,073 | 17,881 | 931 | 15,517 |
| WESTERN EUROPE TOTAL | 3,605,681 | 60,094,691 | 3,387,240 | 57,054,414 | 3,612,311 | 60,205,184 |
| Albania | 9,240 | 154,000 | 9,300 | 155,000 | N.A. | N.A. |
| Belarus | 16,500 | 275,000 | 17,400 | 290,000 | N.A. | N.A. |
| Bosnia and Herzegovina | 24,300 | 405,000 | 23,460 | 391,000 | N.A. | N.A. |
| Georgia | 11,220 | 187,000 | 11,400 | 190,000 | N.A. | N.A. |
| North Macedonia | 9,180 | 153,000 | 9,060 | 151,000 | N.A. | N.A. |
| Moldova | 3,060 | 51,000 | 3,120 | 52,000 | N.A. | N.A. |
| Montenegro | 3,540 | 59,000 | 3,540 | 59,000 | N.A. | N.A. |
| Russian Federation | 313,980 | 5,233,000 | 328,080 | 5,468,000 | N.A. | N.A. |
| Serbia | 32,820 | 547,000 | 34,560 | 576,000 | N.A. | N.A. |
| Ukraine | 71,040 | 1,184,000 | 68,820 | 1,147,000 | N.A. | N.A. |
| CENTRAL AND EASTERN EUROPE | 494,880 | 8,248,000 | 508,740 | 8,479,000 | N.A. | N.A. |
| EUROPE TOTAL | 4,100,561 | 68,342,691 | 3,895,980 | 65,533,414 | 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.

In 2018 those countries included in the 'Western Europe' region imported 3.61 million tonnes of green coffee, representing a 6.5% increase compared to 2017 when 3.39 million tonnes of green coffee were imported. EU28 countries absorb 94.7% of total green coffee imports into Western Europe with 3.42 million tonnes in 2018. Total EU28 green coffee imports edged up by 5.6% in 2018.

| EU 28 COUNTRIES – CHANGE IN COFFEE IMPORTS (2016-2018, IN %) | | | |
|---|---------|----------|--------|
| TOP 5 | | BOTTOM 5 | |
| | % | | % |
| Malta | +3,300% | Greece | -34.6% |
| Cyprus | 90.9% | Romania | -16.3% |
| Slovenia | 83.1% | Finland | -14.2% |
| Slovakia | 63.4% | Croatia | -13.1% |
| Hungary | 63.4% | Denmark | -11.4% |

Source: Eurostat

Among EU28 countries and taking the 2016-2018 period into account, markets showed mixed results with 13 of them showing a negative importing trend and another 15 increasing their imports. As usual, small markets showed greater volatility. The fastest growth was registered in Malta (+3,300%), followed by Cyprus (+90.9%) and Slovenia (+83.1%). More relevant, given the size of their markets, is the positive trend experienced in Poland (+18.6%), The Netherlands (+9.2%), United Kingdom (+9.0%), France (+7.2%) and Italy (+5.8%). EU28 countries posting sharp decreases in green coffee imports during the same period were Greece (-34.6%), Romania (-16.3%), Finland (-14.2%), Croatia (-13.1%) and Denmark (-11.4%). Among the largest importers it is worth mentioning Belgium with an 8% reduction in its imports during the same period.

| EU 28 COUNTRIES – CHANGE IN COFFEE IMPORTS (2016-2018, TOTAL VOLUME) | | | |
|---|------------------|-----------------|------------------|
| TOP 5 | In tonnes | BOTTOM 5 | In tonnes |
| Italy | +33,012 | Belgium | -24,452 |
| Poland | +19,197 | Germany | -17,757 |
| France | +16,246 | Greece | -17,021 |
| Netherlands | +16,045 | Finland | -10,095 |
| United Kingdom | +15,985 | Sweden | -4,062 |

Source: Eurostat

In terms of total volume of imported green coffee during the 2016-2018 period, Italy posted the largest increase after adding 33,012 tonnes (+5.8%), followed by Poland (19,197 tonnes, +18.6%) and France (16,246 tonnes, +7.8%). Belgium suffered the largest decrease in total volume of green coffee imports during the 2016-2018 period, importing 24,452 tonnes less (-8.0%), followed by Germany (-17,757 tonnes, -1.6%) and Greece (-17,021 tonnes, -34.6%).

ICO has not yet published 2018 data for those countries in the 'Central and Eastern Europe' region which are not members of the EU.

The 'top 20' sources of EU28 green coffee imports (excluding intra-EU trade) in the 2016-2018 period (listed according to 2018 volumes):

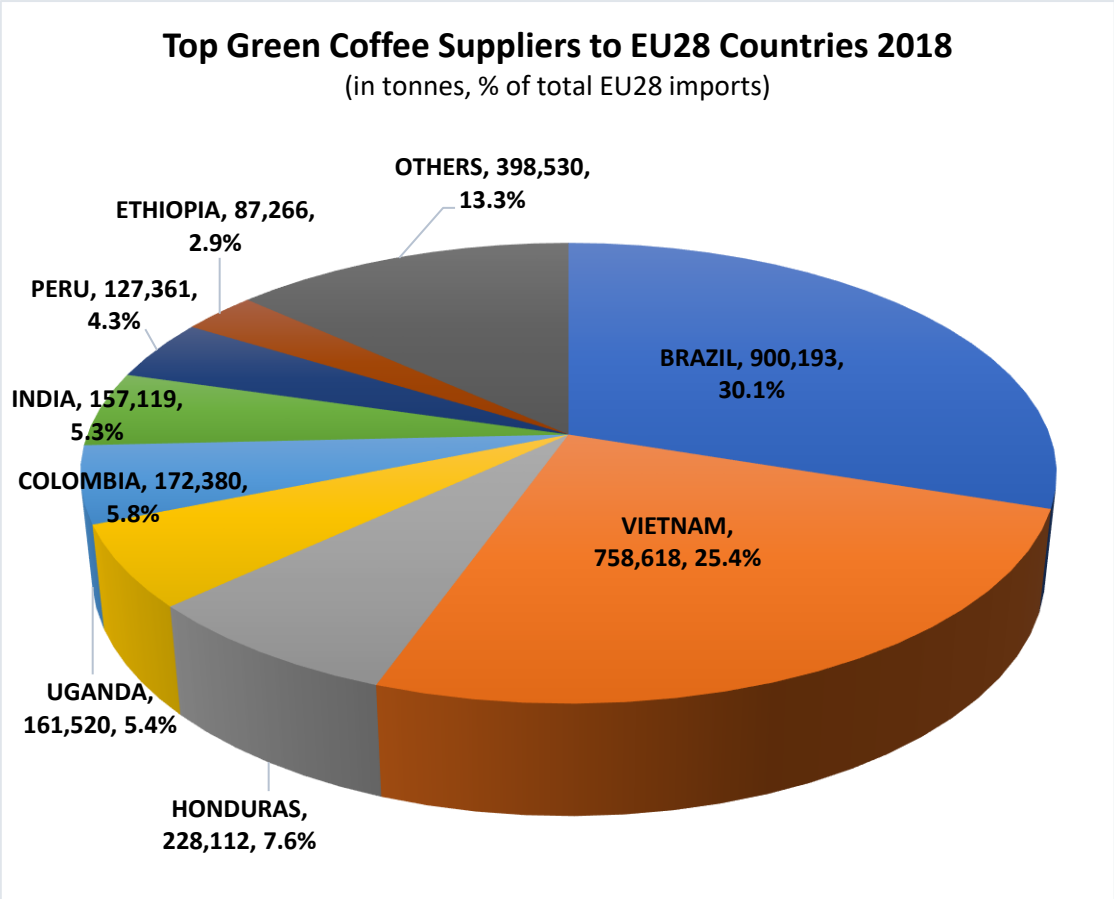
| COUNTRY | 2016 | | 2017 | | 2018 | |
|------------------------------|------------------|---------------|------------------|---------------|------------------|---------------|
| | IN TONNES | % OF TOTAL | IN TONNES | % OF TOTAL | IN TONNES | % OF TOTAL |
| BRAZIL | 922,069 | 31.0% | 840,649 | 29.5% | 900,193 | 30.1% |
| VIETNAM | 729,069 | 24.5% | 660,922 | 23.2% | 758,618 | 25.4% |
| HONDURAS | 192,546 | 6.5% | 211,048 | 7.4% | 228,112 | 7.6% |
| COLOMBIA | 193,665 | 6.5% | 186,975 | 6.6% | 172,380 | 5.8% |
| UGANDA | 123,466 | 4.1% | 149,337 | 5.3% | 161,520 | 5.4% |
| INDIA | 140,737 | 4.7% | 148,093 | 5.2% | 157,119 | 5.3% |
| PERU | 122,989 | 4.2% | 118,780 | 4.2% | 127,361 | 4.2% |
| ETHIOPIA | 80,288 | 2.7% | 77,256 | 2.7% | 87,266 | 2.9% |
| INDONESIA | 122,951 | 4.1% | 140,784 | 4.9% | 64,512 | 2.2% |
| GUATEMALA | 32,155 | 1.1% | 35,217 | 1.2% | 43,803 | 1.5% |
| NICARAGUA | 23,394 | 0.8% | 31,127 | 1.1% | 43,023 | 1.4% |
| CHINA | 42,937 | 1.4% | 39,046 | 1.4% | 42,349 | 1.4% |
| MEXICO | 23,824 | 0.8% | 22,314 | 0.8% | 27,381 | 0.9% |
| KENYA | 25,331 | 0.9% | 23,139 | 0.8% | 21,856 | 0.7% |
| PAPUA NEW GUINEA | 23,023 | 0.8% | 25,580 | 0.9% | 20,899 | 0.7% |
| TANZANIA | 31,731 | 1.1% | 22,165 | 0.8% | 20,020 | 0.7% |
| COTE D'IVOIRE | 35,692 | 1.2% | 17,176 | 0.6% | 19,024 | 0.6% |
| COSTA RICA | 15,085 | 0.5% | 16,023 | 0.6% | 15,974 | 0.5% |
| CAMEROON | 23,261 | 0.8% | 17,166 | 0.6% | 14,704 | 0.5% |
| EL SALVADOR | 7,737 | 0.3% | 7,859 | 0.3% | 11,430 | 0.4% |
| BURUNDI | 9,136 | 0.3% | 7,666 | 0.3% | 9,162 | 0.3% |
| OTHERS | 51,151 | 1.7% | 45,868 | 1.6% | 44,436 | 1.5% |
| EU28 (excl. Intra-EU) | 2,972,973 | 100.0% | 2,844,190 | 100.0% | 2,991,099 | 100.0% |

Source: Eurostat

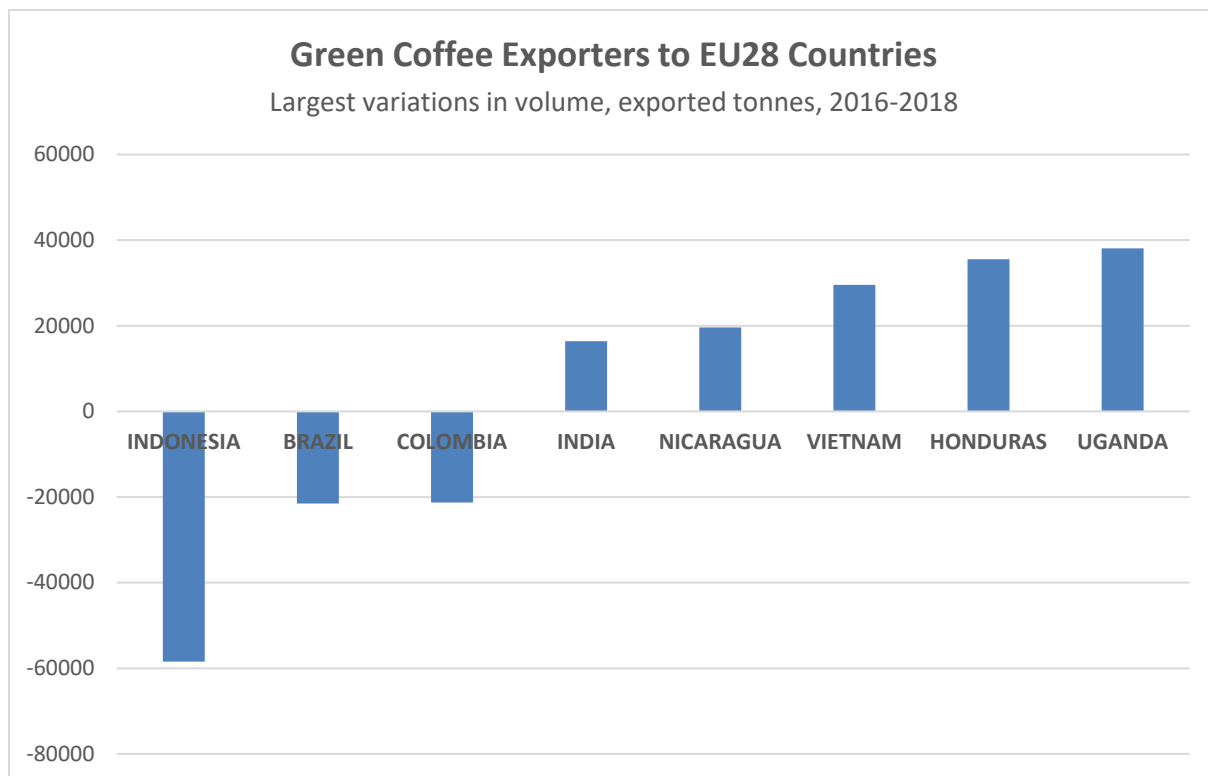
Brazil was again the largest source of green coffee imports for EU28 countries, supplying 900,193 tonnes or 30.1% of total EU28 green coffee imports. Vietnam supplied another 758,618 tonnes or 25.4% of total imports. These two origins have consistently ranked as the top-two suppliers to EU28 countries and they typically supply approximately 55% of total green coffee imported. After a slight decrease in their combined market share in 2017, they bounced back in 2018 reaching a 55.5% combined share of total EU28 imports. Brazil has seen its share of total EU28 imports of green coffee bounce back from 29.5% in 2017 to 30.1% in 2018, adding 59,544 tonnes in exports to EU28 countries. Vietnam substantially increased its market share in 2018 after exporting 97,696 additional tonnes to EU28 countries, reaching 25.4% of total EU28 imports (23.2% in 2017). The third top exporter, Honduras, joined the positive trend with its share increasing to 7.6% in 2018 from 7.4% in 2017 after adding 17,064 tonnes exported to EU28 countries.

Colombia was the only top-5 exporter posting a decrease in its exports to EU28 markets. Its market share decreased to 5.8% in 2018 (6.6% in 2017) after exporting 172,380 tonnes (-14,595 tonnes). Uganda is consistently increasing its exports to EU28 countries, reaching 161,520 tonnes in 2018 (+12,183 tonnes). Uganda's market share climbed to 5.4% (4.1% in 2016).

In 2018 Indonesia has represented a special case among coffee exporters to EU28 countries. Indonesia exported 64,512 tonnes in 2018 to EU28 markets, a whopping 54.2% drop compared to 2017. According to Reuters, this substantial decrease has two explanations. On one side Sumatra experienced a poor harvest in 2018 but, more importantly, coffee consumption in Indonesia, particularly for Sumatra's Arabica beans, has doubled since 2010, making the country among the fastest growing coffee markets in the world according to the USDA (United States Department of Agriculture). Increased coffee consumption in a 200 million consumers market has made Indonesia disappear from the Top 8 of coffee exporting countries to the EU28 and this trend could be replicated by other exporting countries as their domestic coffee markets develop.



Source: Eurostat



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 the case of 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 Belgium ranking as the 4th top origin of green coffee imports to the EU with 179,986 tonnes in 2018 and Germany supplying 175,867 tonnes to EU28 countries ranking as the fifth biggest 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 | | |
| | 2017 | 2018 |
| Arabicas | 62.9% | 60.5% |
| <i>Brazilian Naturals</i> | 32.3% | 33.2% |
| <i>Colombian Milds</i> | 8.2% | 7.2% |
| <i>Other Milds</i> | 20.5% | 20.1% |
| Robustas | 34.8% | 35.4% |
| Others | 2.3% | 4.1% |
| 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 (60.5% Arabicas in 2018 compared to 35.4% Robustas). Within the Arabicas, the share of Brazilian naturals recovered mimicking Brazil and Ethiopia's exports growth. Other Milds slightly decreased while Colombian Milds lost one percentage point in market share with substantial drops in exports from Colombia, Kenya and Tanzania.

5. 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 | | | | | | |
|---|-----------|---------|-----------|---------|-----------|---------|
| | 2016 | | 2017 | | 2018 | |
| | Imports | Exports | Imports | Exports | Imports | Exports |
| Green coffee (09011100) | 2,972,973 | 42,386 | 2,844,190 | 38,506 | 2,991,099 | 44,820 |
| Green coffee, decaffeinated (09011200) | 11,409 | 99,278 | 13,190 | 97,609 | 14,609 | 92,406 |
| Roasted coffee (09012100) | 53,508 | 118,903 | 56,274 | 132,351 | 62,674 | 140,729 |
| Roasted coffee, decaffeinated (09012200) | 4,527 | 2,701 | 4,774 | 2,914 | 5,478 | 2,829 |
| Coffee extracts (21011100) | 53,617 | 46,257 | 49,135 | 46,350 | 47,584 | 48,447 |

Source: Eurostat

Although green coffee imports represent more than 95% of the total volume of coffee and coffee-related products imported into the EU28 area, the analysis of other coffee products is also relevant in order to better understand the European coffee market. **Green decaffeinated coffee** imports are increasing substantially in the last few years (approximately 40% increase in volume since 2015). They reached 14,609 tonnes in 2018 after growing by 10.8% compared to 2017.

Imports of **roasted regular coffee** are also following a sustained upward trend. In 2018 they jumped to 62,674 tonnes in 2018 (+11.4%) while imports of **roasted decaffeinated coffee** also experienced a sharp increase reaching 5,478 tonnes in the same year (+14.7%). Imports of roasted coffee in the EU28 area are basically the result of trade with one commercial partner: Switzerland. EU28 countries imported 61,319 tonnes of roasted coffee (regular and decaffeinated) from Switzerland in 2017 (+17.0% compared to 2017), a figure that represents 90.0% of total imports of roasted coffee from outside EU28. Other non-EU28 origins have seen their exported volumes of roasted coffee to EU28 countries sharply decline. Imports from the United States amounted to 1,082 tonnes in 2018 (-58.2%) and Brazil supplied 698 tonnes (-36.8%). However, these two origins currently represent 1.6% and 1.0% of total imports respectively. As a curiosity, Syria has consolidated its position as the fifth largest supplier of roasted coffee to EU28 countries with 637 tonnes in 2018 (+11.0%).

| EU28 IMPORTS OF ROASTED COFFEE (INCL. DECAF) FROM NON-EU DESTINATIONS 2016-2018, in tonnes | | | |
|---|--------|--------|--------|
| COUNTRY | 2016 | 2017 | 2018 |
| SWITZERLAND | 49,590 | 52,423 | 61,319 |
| UNITED STATES | 3,418 | 2,586 | 1,082 |
| BRAZIL | 562 | 1,105 | 698 |
| BOSNIA AND HERZEGOVINA | 523 | 617 | 675 |
| SYRIA | 416 | 574 | 637 |
| SERBIA | 445 | 486 | 565 |

Source: Eurostat

Soluble coffee (instant coffee) imports stayed on a downward trend after decreasing by 3.2% in 2018 to 47,584 tonnes. 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. Ecuador was the main supplier of soluble coffee to the EU in 2015 but its market share is rapidly declining with only 6,396 tonnes exported to EU28 countries in 2018 (-27.7%). Ecuador is now the third supplier to the EU with a 13.4% market share. Brazil remains at the top with its sales to the EU slightly recovering in 2018 to 10,020 tonnes (+1.2%). Due to shrinking imports volume Brazil's market share increased by one percentage point to 21.1%. India keeps climbing positions in the ranking and is now the second largest supplier of soluble coffee to EU28 countries. Soluble coffee imports from India soared by 24.7% to 8,010 tonnes (16.8% market share). Vietnam relegated Switzerland to the fifth position and its exports continue its steady climb after exporting 6,168 tonnes in 2018 (+12.6%). However, Swiss exports of soluble coffee to EU28 countries also improved in 2018 to 5,168 tonnes (+6.5%).

| EU28 IMPORTS OF SOLUBLE COFFEE FROM NON-EU ORIGINS (HS 21011100) | | | | | | |
|---|---------------|---------------|---------------|---------------|---------------|---------------|
| - 2015-2017, in tonnes and % of total imports - | | | | | | |
| | 2016 | | 2017 | | 2018 | |
| | Tonnes | % | Tonnes | % | Tonnes | % |
| BRAZIL | 12,615 | 23.5% | 9,900 | 20.1% | 10,020 | 21.1% |
| INDIA | 5,568 | 10.4% | 6,425 | 13.1% | 8,010 | 16.8% |
| ECUADOR | 9,967 | 18.6% | 8,850 | 18.0% | 6,396 | 13.4% |
| VIETNAM | 4,034 | 7.5% | 5,478 | 11.1% | 6,168 | 13.0% |
| SWITZERLAND | 5,409 | 10.1% | 4,851 | 9.9% | 5,168 | 10.9% |
| COLOMBIA | 4,528 | 8.4% | 4,390 | 8.9% | 4,487 | 9.4% |
| OTHERS | 11,496 | 21.5% | 9,241 | 18.8% | 7,335 | 15.4% |
| TOTAL | 53,617 | 100.0% | 49,135 | 100.0% | 47,584 | 100.0% |

Source: Eurostat

6. 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 these 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, 2016-2018 | | | |
| | 2016 | 2017 | 2018 |
| Green coffee (09011100) | 42,386 | 38,506 | 44,820 |
| Green coffee, decaffeinated (09011200) | 99,278 | 97,609 | 92,406 |
| Roasted coffee (09012100) | 118,903 | 132,351 | 140,729 |
| Roasted coffee, decaffeinated (09012200) | 2,701 | 2,914 | 2,829 |
| Coffee extracts (21011100) | 46,257 | 46,350 | 48,447 |

Source: Eurostat

Re-exports of **green coffee** from EU28 countries increased by 16.4% to 44,820 tonnes in 2018, surpassing the record levels registered in 2016. Exports of **green decaffeinated coffee** continued to slide for the third consecutive year dropping to 92,406 tonnes (-5.3%) in 2018.

Exports of **roasted coffee** in 2018 kept its upward trend in the case of regular coffee (+6.3%) reaching 140,729 tonnes while exports of roasted decaffeinated coffee inched down (-2.9%) to 2,829 tonnes. For the case of regular roasted coffee, exports have been consistently increasing and have added on aggregate more than 28,000 tonnes during the 2015-2018 period. **Soluble coffee** exports increased to 48,447 tonnes (+4.5%) after staying flat during the previous three years.

6.1 ROASTED COFFEE EXPORTS

Analysing EU exports of roasted coffee during the years 2016-2018, the twenty major destinations of roasted coffee (non-decaffeinated plus decaffeinated) classified according to their ranking in 2018 are listed in the table below.

The Russian Federation remained the largest non-EU destination, absorbing 23,115 tonnes of roasted coffee or 16.4% of total EU28 exports. Not only is the Russian Federation the main customer for EU28 countries, but it has continuously increased its demand (+11.8% in 2018) during the last decade. During the 2015-2018 period alone, the Russian Federation has imported more than 6,300 additional tonnes from EU28. The Ukraine has surpassed the United States and it is currently the second largest customer for EU28 countries with 16,945 tonnes exported in 2018 or 12.0% of total EU28 exports. Sales to the Ukraine increased by 11.5% in 2018. The United States is now the third destination for EU28 roasted coffee exports with 16,187 tonnes in 2018 or 11.5% of total EU28 exports. Switzerland remains as the fourth major destination for EU28 roasted coffee exports after increasing by 6.6% in 2018 to 11,340 tonnes (8.1% of the total). These four clients (Russian Federation, Ukraine, United States and Switzerland) normally represent close to 50% of total EU28 exports of roasted coffee (48.0% in 2018) and they set the pace for the evolution of EU28 sales of roasted coffee in external markets. However, there are other non-traditional markets that are showing a very positive trend in the 2016-2018 period: Canada (+2,058 tonnes), Libya (+1,250 tonnes), Turkey (+1,192 tonnes) and Saudi Arabia (+1,114 tonnes). Libya is currently the fastest growing market for EU28's roasted coffee after increasing by 291.4% in the 2016-2018 period.

| EU28 EXPORTS OF ROASTED COFFEE (INCL. DECAF) TO NON-EU DESTINATIONS | | | | | | |
|---|----------------|---------------|----------------|---------------|----------------|---------------|
| 2016-2018, in tonnes and % of total exports | | | | | | |
| COUNTRY | 2016 | | 2017 | | 2018 | |
| Russian Federation | 17,875 | 15.1% | 20,683 | 15.6% | 23,115 | 16.4% |
| Ukraine | 13,399 | 11.3% | 15,198 | 11.5% | 16,945 | 12.0% |
| United States | 13,402 | 11.3% | 15,968 | 12.1% | 16,187 | 11.5% |
| Switzerland | 11,309 | 9.5% | 10,632 | 8.0% | 11,340 | 8.1% |
| Norway | 5,893 | 5.0% | 6,359 | 4.8% | 6,435 | 4.6% |
| Canada | 4,233 | 3.6% | 5,720 | 4.3% | 6,291 | 4.5% |
| Australia | 6,744 | 5.7% | 7,183 | 5.4% | 6,169 | 4.4% |
| Turkey | 3,268 | 2.8% | 3,604 | 2.7% | 4,462 | 3.2% |
| Israel | 2,710 | 2.3% | 2,634 | 2.0% | 3,135 | 2.2% |
| China | 2,527 | 2.1% | 3,093 | 2.3% | 2,878 | 2.0% |
| United Arab Emirates | 3,362 | 2.8% | 2,830 | 2.2% | 2,645 | 1.9% |
| South Korea | 2,147 | 1.8% | 2,529 | 1.9% | 2,621 | 1.9% |
| Albania | 2,305 | 1.9% | 2,305 | 1.7% | 2,583 | 1.8% |
| Japan | 2,179 | 1.8% | 2,305 | 1.7% | 2,528 | 1.8% |
| Saudi Arabia | 1,411 | 1.2% | 1,757 | 1.3% | 2,525 | 1.8% |
| Belarus | 2,393 | 2.0% | 2,051 | 1.6% | 2,228 | 1.6% |
| Lybia | 653 | 0.5% | 943 | 0.7% | 1,903 | 1.3% |
| Serbia | 1,412 | 1.2% | 1,623 | 1.2% | 1,808 | 1.3% |
| Bosnia and Herzegovina | 1,613 | 1.4% | 1,600 | 1.2% | 1,719 | 1.2% |
| Brazil | 1,495 | 1.3% | 1,573 | 1.2% | 1,226 | 0.9% |
| Others | 18,515 | 15.5% | 21,757 | 16.5% | 21,986 | 15.6% |
| TOTAL | 118,745 | 100.0% | 132,347 | 100.0% | 140,729 | 100.0% |

Source: Eurostat

On the negative side, exports to the United Arab Emirates (-717 tonnes), Australia (-575 tonnes) and Brazil (-269 tonnes) substantially decreased during the 2016-2018, with Belarus also posting negative figures (-165 tonnes). No other country in this ranking decreased its imports of EU28 roasted coffee during the 2016-2018 period although Chinese imports decreased in 2018 to 2,878 tonnes (-7.0%).

| EU28 EXPORTS – CHANGE IN ROASTED COFFEE EXPORTS (2016-2018, TOTAL VOLUME) | | | |
|--|--------|----------------------|--------|
| TOP 4 | Tonnes | BOTTOM 4 | Tonnes |
| Russian Federation | 5,240 | United Arab Emirates | -717 |
| Ukraine | 3,546 | Australia | -575 |
| United States | 2,785 | Brazil | -269 |
| Canada | 2,058 | Belarus | -165 |

Source: Eurostat

| EU28 EXPORTS - CHANGE IN ROASTED COFFEE EXPORTS (2016-2018, PERCENTAGE) | | | |
|--|---------|----------------------|--------|
| TOP 5 | % | BOTTOM 5 | % |
| Lybia | +291.4% | United Arab Emirates | -21.3% |
| Saudi Arabia | +80.0% | Brazil | -18.0% |
| Canada | +48.6% | Australia | -8.5% |
| Turkey | +36.5% | Belarus | -6.9% |
| Russia | +29.3% | Switzerland | +0.3% |

Source: Eurostat

6.2 SOLUBLE COFFEE EXPORTS

Regarding EU28 exports of soluble coffee (officially: extracts, essences and concentrates of coffee) to non-EU destinations, total volume decreased by 4.5% in 2018 to 48,447 tonnes. The largest client remained the Russian Federation, although exports to this country continue to shrink reaching just 9,931 tonnes in 2018 (-6.0%). This negative trend started in 2010 when the Russian Federation's share of EU28 exports reached 33%. However, the Russian Federation still absorbs 20.5% 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 | | | | | | |
|--|---------------|---------------|---------------|---------------|---------------|---------------|
| | 2016 | | 2017 | | 2018 | |
| | Tonnes | % | Tonnes | % | Tonnes | % |
| RUSSIAN FEDERATION | 12,075 | 26.1% | 10,568 | 22.8% | 9,931 | 20.5% |
| UKRAINE | 6,446 | 13.9% | 5,610 | 12.1% | 7,124 | 14.7% |
| AUSTRALIA | 5,267 | 11.4% | 5,576 | 12.0% | 6,077 | 12.5% |
| SOUTH AFRICA | 3,512 | 7.6% | 4,347 | 9.4% | 4,485 | 9.3% |
| UNITED STATES | 1,933 | 4.2% | 2,355 | 5.1% | 2,867 | 5.9% |
| NORWAY | 1,766 | 3.8% | 1,714 | 3.7% | 1,843 | 3.8% |
| TURKEY | 1,630 | 3.5% | 1,761 | 3.9% | 1,507 | 3.1% |
| EGYPT | 1,610 | 3.5% | 1,218 | 2.6% | 1,400 | 2.9% |
| CANADA | 1,228 | 2.7% | 1,434 | 3.1% | 1,199 | 2.5% |
| SWITZERLAND | 1,158 | 2.5% | 1,787 | 3.9% | 1,181 | 2.4% |
| OTHERS | 9,632 | 20.8% | 9,980 | 21.4% | 10,833 | 22.4% |
| TOTAL | 46,257 | 100.0% | 46,350 | 100.0% | 48,447 | 100.0% |

Source: Eurostat

The Ukraine is now the second largest customer for EU28 countries, importing 7,124 tonnes of soluble coffee in 2018 (+27.0%), while Australia stayed in third position after importing 6,077 tonnes in 2018 (+9.0%). South Africa consolidated its position as EU28 fourth largest market after importing 4,485 tonnes in 2018 (+3.2%). The United States also posted positive results with a 21.7% increase in 2018 to 2,867 tonnes. On the negative side, exports to Switzerland decreased by 33.9% in 2018 to 1,181 tonnes, back to 2015-2016 levels which indicates a one-off spike in 2017. EU28 exports to Canada (-16.4%) and Turkey (-14.4%) also showed a negative trend in 2018.

7. 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 2016-2018 (EUR millions) | | | | | | | | | | | | | | | |
|--|--------------|-------|-------|-------------|------|------|---------|-------|-------|---------------|------|------|---------|-------|-------|
| Green Coffee, Green Decaffeinated Coffee, Roasted Coffee, Roasted Decaffeinated Coffee, Soluble Coffee | | | | | | | | | | | | | | | |
| | GREEN COFFEE | | | GREEN DECAF | | | ROASTED | | | ROASTED DECAF | | | SOLUBLE | | |
| Imports | 2016 | 2017 | 2018 | 2016 | 2017 | 2018 | 2016 | 2017 | 2018 | 2016 | 2017 | 2018 | 2016 | 2017 | 2018 |
| EU extra trade | 6,968 | 7,252 | 6,400 | 32 | 40 | 38 | 1,326 | 1,338 | 1,261 | 137 | 136 | 125 | 421 | 411 | 360 |
| EU intra trade | 1,016 | 1,080 | 1,050 | 104 | 126 | 105 | 4,144 | 4,594 | 4,693 | 239 | 319 | 260 | 1,284 | 1,374 | 1,328 |
| Exports | 2016 | 2017 | 2018 | 2016 | 2017 | 2018 | 2016 | 2017 | 2018 | 2016 | 2017 | 2018 | 2016 | 2017 | 2018 |
| EU extra trade | 133 | 135 | 135 | 325 | 327 | 283 | 884 | 993 | 1,010 | 26 | 28 | 28 | 486 | 530 | 500 |
| EU intra trade | 1,084 | 1,234 | 1,084 | 184 | 216 | 206 | 4,705 | 4,881 | 4,782 | 201 | 232 | 231 | 1,417 | 1,543 | 1,485 |

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) inched down to EUR 6.50 billion in 2018 (-2.2%). 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 1.54 billion in 2018 (-1.3%).

8. COFFEE CONSUMPTION BY COUNTRY IN THE EU28

The following tables and graphs are derived from data provided by Euromonitor International. 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 RETAIL VOLUME AND VALUE* IN EU MARKETS 2015-2017 | | | | | | |
|---|--------|-------|--------|-------|--------|-------|
| - volume in '000 tonnes and sales in EUR million - | | | | | | |
| | 2016 | | 2017 | | 2018 | |
| | Volume | Value | Volume | Value | Volume | Value |
| Austria | 33.9 | 664 | 33.7 | 681 | 33.6 | 696 |
| Belgium | 42.0 | 641 | 41.3 | 667 | 40.9 | 692 |
| Bulgaria | 14.2 | 215 | 14.5 | 225 | 14.7 | 236 |
| Croatia | 12.7 | 153 | 12.8 | 157 | 13.0 | 166 |
| Cyprus* | 2.6 | 40 | 2.6 | 43 | 2.6 | 45 |
| Czech Republic | 21.8 | 345 | 21.7 | 371 | 21.7 | 397 |
| Denmark | 20.5 | 377 | 20.1 | 372 | 20.8 | 381 |
| Estonia | 4.0 | 69 | 5.0 | 71 | n.a. | n.a. |
| Finland | 47.9 | 397 | 47.0 | 404 | 47.3 | 412 |
| France | 161.9 | 3,219 | 162.8 | 3,389 | 165.6 | 3,606 |
| Germany | 365.6 | 4,805 | 366.3 | 4,904 | 367.0 | 4,999 |
| Greece | 16.7 | 290 | 16.3 | 316 | 16.3 | 332 |
| Hungary | 26.4 | 315 | 26.0 | 331 | 26.1 | 334 |
| Ireland | 3.9 | 111 | 4.5 | 133 | 5.2 | 157 |
| Italy | 156.9 | 2,008 | 153.7 | 2,051 | 150.7 | 2,102 |
| Latvia | 5.0 | 92 | 5.0 | 93 | n.a. | n.a. |
| Lithuania | 9.9 | 142 | 10.0 | 150 | 10.3 | 159 |
| Luxembourg* | 2.5 | 47 | 2.4 | 49 | 2.4 | 53 |
| Malta* | 1.1 | 18 | 1.1 | 19 | 1.1 | 20 |
| Netherlands | 82.9 | 976 | 80.1 | 988 | 78.5 | 1,003 |
| Poland | 93.7 | 961 | 93.2 | 992 | 93.4 | 1,023 |
| Portugal | 14.2 | 386 | 14.6 | 412 | 15.0 | 433 |
| Romania | 32.8 | 351 | 34.2 | 377 | 35.5 | 403 |
| Slovakia | 13.5 | 255 | 13.7 | 255 | 13.8 | 260 |
| Slovenia | 11.2 | 126 | 11.4 | 139 | 11.6 | 148 |
| Spain | 80.0 | 1,248 | 80.6 | 1,319 | 81.3 | 1,395 |
| Sweden | 62.1 | 514 | 61.5 | 527 | 61.2 | 516 |
| United Kingdom | 76.7 | 1,893 | 75.4 | 1,817 | 74.6 | 1,901 |

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

The EU28 coffee market is on aggregate rather stable as it would be expected from a market which includes many mature European markets. During the 2016-2018 period changes in the total coffee sold by retail value where noticeable in the following countries: Ireland (+41.4%), Slovenia (+17.5%), the Czech Republic (+15.1%) and Romania (+14.8%). However, the positive trend detected in Southern Europe is probably more relevant since it combines healthy growth with larger volumes: Greece (+14.5%), Portugal (+12.2%), Spain (+11.8%), France (+11.4%) and Italy (+4.7%). NO EU28 market experience negative growth in retail value terms during the 2016-2018 period.

| RETAIL vs. FOODSERVICE MARKET SHARE IN COFFEE VOLUME | | | | | |
|--|--------|-------------|----------------|--------|-------------|
| EU28 MARKETS 2018 | | | | | |
| - in % - | | | | | |
| | Retail | Foodservice | | Retail | Foodservice |
| Austria | 84 | 16 | Italy | 82 | 18 |
| Belgium | 79 | 21 | Latvia* | 90 | 10 |
| Bulgaria | 76 | 24 | Lithuania | 88 | 12 |
| Croatia | 68 | 32 | Luxembourg* | 81 | 19 |
| Cyprus* | 79 | 21 | Malta* | 79 | 21 |
| Czech Republic | 63 | 37 | Netherlands | 71 | 29 |
| Denmark | 75 | 25 | Poland | 74 | 26 |
| Estonia* | 93 | 7 | Portugal | 76 | 24 |
| Finland | 87 | 13 | Romania | 78 | 22 |
| France | 76 | 24 | Slovakia | 90 | 10 |
| Germany | 88 | 12 | Slovenia | 84 | 16 |
| Greece | 78 | 22 | Spain | 68 | 32 |
| Hungary | 75 | 25 | Sweden | 71 | 29 |
| Ireland | 75 | 25 | United Kingdom | 68 | 32 |

Source: © Euromonitor International, *Figures for Estonia, Latvia, Cyprus, Luxembourg and Malta correspond to 2017

In terms of coffee volume, the share of retail and foodservice (essentially representing out-of-home consumption) differs substantially between markets, ranging from a 37% share of the foodservice channel in the Czech Republic to just 7% in Estonia. The foodservice channel is also prominent in countries such as Croatia, Spain and the United Kingdom (32%), The Netherlands and Sweden (29%). In exchange, the retail channel absorbs a large proportion of sales not only in Estonia (93%) but also in Latvia and Slovakia (90%), Lithuania (88%) and Finland (87%).

| FRESH* AND INSTANT COFFEE MARKET SIZE BY RETAIL CHANNEL 2018 | | | | |
|--|--------|---------|-------------|---------|
| - Total volume in '000 tonnes- | | | | |
| | RETAIL | | FOODSERVICE | |
| | Fresh | Instant | Fresh | Instant |
| Austria | 30.5 | 3.1 | 6.3 | 0.0 |
| Belgium | 37.9 | 2.9 | 10.6 | 0.3 |
| Bulgaria | 8.5 | 6.2 | 2.6 | 0.7 |
| Croatia | 10.4 | 2.5 | 7.4 | 1.3 |
| Cyprus** | 2.0 | 0.6 | 0.5 | 0.2 |
| Czech Republic | 13.1 | 8.6 | 1.9 | 0.2 |
| Denmark | 18.5 | 2.3 | 7.2 | 0.0 |
| Estonia** | 5.4 | 0.2 | 0.4 | 0.0 |
| Finland | 46.3 | 1.0 | 7.2 | 0.0 |
| France | 153.1 | 12.5 | 31.5 | 2.4 |
| Germany | 314.1 | 52.8 | 47.2 | 3.4 |
| Greece | 16.8 | 3.9 | 14.6 | 2.6 |
| Hungary | 16.8 | 9.3 | 4.6 | 0.3 |
| Ireland | 3.8 | 1.4 | 1.0 | 0.7 |
| Italy | 146.5 | 4.2 | 48.9 | 2.7 |
| Latvia** | 3.3 | 1.3 | 0.4 | 0.0 |
| Lithuania | 8.3 | 2.0 | 1.1 | 0.3 |
| Luxembourg** | 2.2 | 0.2 | 0.5 | 0.0 |
| Malta** | 1.0 | 0.1 | 0.3 | 0.1 |
| Netherlands | 72.8 | 5.6 | 24.9 | 1.3 |
| Poland | 70.3 | 23.1 | 11.2 | 1.5 |
| Portugal | 13.1 | 1.9 | 13.2 | 0,3 |
| Romania | 27.0 | 8.6 | 7.2 | 2.5 |
| Slovakia | 9.1 | 4.7 | 0.6 | 0.1 |
| Slovenia | 9.9 | 1.7 | 1.7 | 0.4 |
| Spain | 69.1 | 12.2 | 54.9 | 1.2 |
| Sweden | 58.8 | 2.4 | 24.4 | 0.2 |
| United Kingdom | 36.2 | 38.4 | 35.2 | 10.2 |

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 and correspond to 2017. Figures for Estonia and Latvia correspond to 2017.

In 2018 the share of coffee commercialised in pods¹ as part of the total volume of coffee was lowest (0-2%) in Estonia, Finland, Hungary, Latvia, Lithuania, Poland, Romania, Slovenia and Sweden, while it reached its highest levels in France (32%), The Netherlands (31%), and Belgium (27%). Portugal (+6 percentage points) France (+4 percentage points), and Belgium, Italy, Spain and the United Kingdom (all with +3 percentage points) are the countries where the market share of coffee pods grew faster during the 2016-2018 period.

| TRADITIONAL COFFEE vs. COFFEE IN PODS | | | | | | |
|---|-------------|------|-------------|------|-------------|------|
| MARKET SHARE AS PERCENTAGE OF TOTAL COFFEE VOLUME IN THE EU28 MARKETS 2016-2018 | | | | | | |
| - in % - | | | | | | |
| | 2016 | | 2017 | | 2018 | |
| | Traditional | Pods | Traditional | Pods | Traditional | Pods |
| Austria | 83 | 17 | 83 | 17 | 83 | 17 |
| Belgium | 76 | 24 | 74 | 26 | 73 | 27 |
| Bulgaria | 97 | 03 | 97 | 03 | 96 | 04 |
| Croatia | 99 | 01 | 99 | 01 | 96 | 04 |
| Cyprus* | 94 | 06 | 94 | 06 | n.a. | n.a. |
| Czech Republic | 96 | 04 | 96 | 04 | 96 | 04 |
| Denmark | 97 | 03 | 97 | 03 | 96 | 04 |
| Estonia* | 98 | 02 | 98 | 02 | n.a. | n.a. |
| Finland | 99 | 01 | 99 | 01 | 99 | 01 |
| France | 72 | 28 | 70 | 30 | 68 | 32 |
| Germany | 87 | 13 | 86 | 14 | 86 | 14 |
| Greece | 97 | 03 | 97 | 03 | 98 | 02 |
| Hungary | 99 | 01 | 99 | 01 | 99 | 01 |
| Ireland | 68 | 32 | 62 | 38 | 84 | 16 |
| Italy | 93 | 07 | 91 | 09 | 90 | 10 |
| Latvia* | 100 | 00 | 100 | 00 | n.a. | n.a. |
| Lithuania* | 100 | 00 | 99 | 01 | n.a. | n.a. |
| Luxembourg* | 85 | 15 | 84 | 16 | n.a. | n.a. |
| Malta* | 87 | 13 | 86 | 14 | n.a. | n.a. |
| Netherlands | 65 | 35 | 65 | 35 | 69 | 31 |
| Poland | 99 | 01 | 99 | 01 | 99 | 01 |
| Portugal | 83 | 17 | 82 | 18 | 77 | 23 |
| Romania | 99 | 01 | 99 | 01 | 99 | 01 |
| Slovakia | 97 | 03 | 97 | 03 | 97 | 03 |
| Slovenia* | 99 | 01 | 99 | 01 | n.a. | n.a. |
| Spain | 90 | 10 | 89 | 11 | 87 | 13 |
| Sweden | 99 | 01 | 99 | 01 | 99 | 01 |
| United Kingdom | 90 | 10 | 89 | 11 | 87 | 13 |

Source: © Euromonitor International

*2018 figures for Cyprus, Estonia, Latvia, Lithuania, Luxembourg, Malta and Slovenia not available.

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.

9. EU28 COUNTRIES KEY NATIONAL IMPORT DATA

SUMMARY IMPORT STATISTICS EU28 MEMBERS 2018 (IN TONNES)

| Austria | | | | | |
|---|----------------|---|---------------|-------------------------------|--------------|
| Green Coffee (Including decaf) | | Roasted Coffee (Including decaf) | | Extracts, essences | |
| Germany | 6,685 | Germany | 16,941 | Germany | 3,724 |
| Italy | 3,067 | Italy | 12,382 | France | 268 |
| Brazil | 1,805 | Slovakia | 10,617 | Hungary | 267 |
| Vietnam | 1,415 | Switzerland | 3,742 | Spain | 265 |
| United Kingdom | 1,090 | Netherlands | 1,117 | Switzerland | 180 |
| Others | 2,929 | Others | 1,398 | Others | 551 |
| Total | 16,991 | Total | 46,197 | Total | 5,255 |
| Belgium | | | | | |
| Green Coffee (Including decaf) | | Roasted Coffee (Including decaf) | | Extracts, essences | |
| Brazil | 69,340 | Netherlands | 15,182 | Netherlands | 1,050 |
| Vietnam | 63,801 | Germany | 13,959 | France | 1,022 |
| Honduras | 24,478 | France | 6,900 | Germany | 773 |
| Peru | 21,530 | Poland | 1,491 | Brazil | 571 |
| Uganda | 17,396 | Italy | 927 | Colombia | 440 |
| Others | 84,815 | Others | 2,693 | Others | 1,184 |
| Total | 272,958 | Total | 41,152 | Total | 5,040 |
| Bulgaria | | | | | |
| Green Coffee (Including decaf) | | Roasted Coffee (Including decaf) | | Extracts, essences | |
| Vietnam | 9,642 | Italy | 4,640 | Brazil | 495 |
| Brazil | 3,903 | Germany | 934 | Poland | 210 |
| Germany | 3,835 | Poland | 867 | France | 134 |
| Indonesia | 3,329 | Spain | 334 | Germany | 117 |
| Peru | 1,469 | Romania | 225 | India | 101 |
| Others | 7,786 | Others | 878 | Others | 266 |
| Total | 29,964 | Total | 7,878 | Total | 1,323 |
| Croatia | | | | | |
| Green Coffee (Including decaf) | | Roasted Coffee (Including decaf) | | Extracts, essences | |
| Slovenia | 6,876 | Italy | 2,481 | Poland | 383 |
| Brazil | 2,838 | Slovenia | 1,901 | Spain | 358 |
| India | 2,096 | Germany | 293 | Germany | 340 |
| Vietnam | 1,369 | Austria | 219 | Brazil | 213 |
| Italy | 754 | Bosnia and Herzegovina | 74 | Switzerland | 126 |
| Others | 1,689 | Others | 208 | Others | 280 |
| Total | 15,622 | Total | 5,176 | Total | 1,700 |

| Cyprus | | | | | |
|-----------------------------------|---------------|-------------------------------------|---------------|-----------------------|---------------|
| Green Coffee (Including decaf) | | Roasted Coffee (Including decaf) | | Extracts, essences | |
| Brazil | 2,274 | Greece | 421 | Greece | 627 |
| Colombia | 385 | Italy | 192 | Austria | 295 |
| Greece | 142 | Germany | 137 | Netherlands | 96 |
| Ethiopia | 135 | United Kingdom | 87 | Germany | 91 |
| Uganda | 39 | Netherlands | 64 | Italy | 78 |
| Others | 102 | Others | 183 | Others | 149 |
| Total | 3,077 | Total | 1,084 | Total | 1,336 |
| Czech Republic | | | | | |
| Green Coffee (Including decaf) | | Roasted Coffee (Including decaf) | | Extracts, essences | |
| Germany | 12,073 | Germany | 15,041 | United Kingdom | 3,897 |
| Vietnam | 1,993 | Poland | 9,209 | Belgium | 3,879 |
| Cameroon | 787 | Slovakia | 4,418 | Germany | 3,164 |
| Belgium | 626 | Italy | 3,046 | Poland | 1,265 |
| Brazil | 317 | Netherlands | 2,281 | Netherlands | 1,234 |
| Others | 1,918 | Others | 3,438 | Others | 2,971 |
| Total | 17,714 | Total | 37,428 | Total | 16,410 |
| Denmark | | | | | |
| Green Coffee (Including decaf) | | Roasted Coffee (Including decaf) | | Extracts, essences | |
| Brazil | 4,190 | Sweden | 10,089 | Netherlands | 1,295 |
| Vietnam | 2,717 | Germany | 7,861 | Germany | 548 |
| Colombia | 1,408 | Poland | 1,462 | France | 402 |
| Germany | 1,388 | Netherlands | 834 | United Kingdom | 295 |
| Peru | 1,316 | Kenya | 293 | Hungary | 227 |
| Others | 6,554 | Others | 1,065 | Others | 605 |
| Total | 17,573 | Total | 21,604 | Total | 3,372 |
| Estonia | | | | | |
| Green Coffee (Including decaf) | | Roasted Coffee (Including decaf) | | Extracts, essences | |
| Belgium | 38 | Finland | 3,129 | Lithuania | 128 |
| Latvia | 19 | Latvia | 1,243 | India | 39 |
| United Kingdom | 13 | Lithuania | 1,082 | Latvia | 22 |
| Netherlands | 9 | Italy | 711 | Poland | 8 |
| Ethiopia | 4 | Netherlands | 312 | United Kingdom | 7 |
| Others | 3 | Others | 270 | Others | 9 |
| Total | 86 | Total | 6,747 | Total | 213 |
| Finland | | | | | |
| Green Coffee (Including decaf) | | Roasted Coffee (Including decaf) | | Extracts, essences | |
| Brazil | 29,825 | Netherlands | 4,816 | Switzerland | 311 |
| Colombia | 14,115 | Sweden | 4,400 | Germany | 282 |
| Honduras | 6,054 | Germany | 1,367 | Sweden | 123 |
| Nicaragua | 1,821 | Denmark | 261 | France | 77 |
| Uganda | 1,818 | Italy | 188 | United Kingdom | 16 |
| Others | 7,597 | Others | 291 | Others | 53 |
| Total | 61,230 | Total | 11,323 | Total | 862 |

| France | | | | | |
|-----------------------------------|------------------|-------------------------------------|----------------|-----------------------|---------------|
| Green Coffee (Including decaf) | | Roasted Coffee (Including decaf) | | Extracts, essences | |
| Brazil | 50,172 | Switzerland | 47,579 | Germany | 4,279 |
| Vietnam | 42,325 | Netherlands | 36,795 | Spain | 2,858 |
| Belgium | 37,197 | Germany | 25,142 | United Kingdom | 2,077 |
| Honduras | 22,382 | Italy | 20,460 | Netherlands | 626 |
| Germany | 14,824 | Belgium | 16,178 | Poland | 616 |
| Others | 60,552 | Others | 15,801 | Others | 2,591 |
| Total | 227,452 | Total | 161,955 | Total | 13,047 |
| Germany | | | | | |
| Green Coffee (Including decaf) | | Roasted Coffee (Including decaf) | | Extracts, essences | |
| Brazil | 340,672 | Italy | 36,982 | Belgium | 6,930 |
| Vietnam | 275,977 | Poland | 11,535 | United Kingdom | 6,334 |
| Honduras | 101,774 | Netherlands | 9,324 | Ecuador | 5,394 |
| Colombia | 61,900 | France | 7,351 | Netherlands | 4,874 |
| Peru | 57,598 | Switzerland | 6,825 | Poland | 4,061 |
| Others | 287,004 | Others | 9,143 | Others | 11,316 |
| Total | 1,124,925 | Total | 81,160 | Total | 38,909 |
| Greece | | | | | |
| Green Coffee (Including decaf) | | Roasted Coffee (Including decaf) | | Extracts, essences | |
| Brazil | 18,243 | Italy | 8,544 | Spain | 4,798 |
| Vietnam | 4,784 | Germany | 1,617 | Germany | 599 |
| India | 3,162 | Portugal | 1,304 | Italy | 574 |
| Cyprus | 1,485 | Bulgaria | 1,217 | Netherlands | 487 |
| Colombia | 1,032 | France | 668 | France | 367 |
| Others | 3,837 | Others | 1,473 | Others | 264 |
| Total | 32,543 | Total | 14,823 | Total | 7,089 |
| Hungary | | | | | |
| Green Coffee (Including decaf) | | Roasted Coffee (Including decaf) | | Extracts, essences | |
| Germany | 1,816 | Slovakia | 9,570 | Vietnam | 1,736 |
| Netherlands | 417 | Germany | 3,669 | Spain | 1,490 |
| United Kingdom | 138 | Poland | 1,815 | France | 747 |
| India | 131 | Bulgaria | 1,772 | Poland | 404 |
| Laos | 95 | Italy | 1,704 | United Kingdom | 399 |
| Others | 323 | Others | 3,538 | Others | 1,304 |
| Total | 2,920 | Total | 22,068 | Total | 6,080 |
| Ireland | | | | | |
| Green Coffee (Including decaf) | | Roasted Coffee (Including decaf) | | Extracts, essences | |
| United Kingdom | 5,069 | United Kingdom | 3,079 | United Kingdom | 2,583 |
| Brazil | 2,177 | Germany | 1,485 | Germany | 158 |
| Netherlands | 1,192 | Italy | 285 | Netherlands | 108 |
| Colombia | 961 | Netherlands | 162 | Poland | 18 |
| Peru | 569 | Poland | 131 | Italy | 10 |
| Others | 1,972 | Others | 89 | Others | 8 |
| Total | 11,940 | Total | 5,231 | Total | 2,885 |

| Italy | | | | | |
|---|----------------|---|---------------|-------------------------------|--------------|
| Green Coffee (Including decaf) | | Roasted Coffee (Including decaf) | | Extracts, essences | |
| Brazil | 175,619 | France | 5,943 | Spain | 1,123 |
| Vietnam | 130,274 | Germany | 3,773 | Germany | 823 |
| India | 80,786 | Spain | 1,882 | Vietnam | 673 |
| Uganda | 56,474 | Switzerland | 1,375 | China | 229 |
| Indonesia | 29,029 | Sweden | 1,088 | France | 228 |
| Others | 134,170 | Others | 2,580 | Others | 1,076 |
| Total | 606,349 | Total | 16,641 | Total | 4,152 |
| Latvia | | | | | |
| Green Coffee (Including decaf) | | Roasted Coffee (Including decaf) | | Extracts, essences | |
| Brazil | 830 | Lithuania | 2,060 | Lithuania | 441 |
| Germany | 570 | Germany | 1,528 | India | 217 |
| Poland | 488 | Sweden | 901 | Netherlands | 200 |
| Vietnam | 302 | Italy | 713 | Germany | 145 |
| Uganda | 217 | Estonia | 599 | Poland | 62 |
| Others | 1,124 | Others | 980 | Others | 35 |
| Total | 3,043 | Total | 6,781 | Total | 1,100 |
| Lithuania | | | | | |
| Green Coffee (Including decaf) | | Roasted Coffee (Including decaf) | | Extracts, essences | |
| Germany | 505 | Netherlands | 4,560 | Netherlands | 402 |
| United Kingdom | 484 | Estonia | 2,653 | Poland | 234 |
| Vietnam | 211 | Latvia | 2,584 | Brazil | 184 |
| Poland | 149 | Italy | 2,565 | Czech Republic | 113 |
| Italy | 78 | Denmark | 1,296 | Denmark | 96 |
| Others | 219 | Others | 3,639 | Others | 336 |
| Total | 1,646 | Total | 17,297 | Total | 1,365 |
| Luxembourg | | | | | |
| Green Coffee (Including decaf) | | Roasted Coffee (Including decaf) | | Extracts, essences | |
| Belgium | 521 | Germany | 14,194 | Germany | 112 |
| France | 115 | Belgium | 1,656 | Belgium | 85 |
| Colombia | 55 | Italy | 1,067 | Netherlands | 32 |
| Germany | 47 | Netherlands | 1,032 | Austria | 3 |
| United Kingdom | 36 | Poland | 534 | France | 2 |
| Others | 55 | Others | 406 | Others | 0 |
| Total | 829 | Total | 18,889 | Total | 234 |
| Malta | | | | | |
| Green Coffee (Including decaf) | | Roasted Coffee (Including decaf) | | Extracts, essences | |
| Brazil | 20 | Italy | 336 | United Kingdom | 124 |
| Italy | 10 | Spain | 22 | Italy | 33 |
| United Kingdom | 8 | Portugal | 19 | Netherlands | 24 |
| | | United Kingdom | 11 | France | 12 |
| | | Netherlands | 5 | Spain | 3 |
| Others | 0 | Others | 3 | Others | 0 |
| Total | 38 | Total | 396 | Total | 196 |

| Netherlands | | | | | |
|---|----------------|---|---------------|-------------------------------|---------------|
| Green Coffee (Including decaf) | | Roasted Coffee (Including decaf) | | Extracts, essences | |
| Belgium | 108,689 | Germany | 31,384 | Germany | 7,533 |
| Germany | 25,959 | Poland | 9,422 | United Kingdom | 1,992 |
| Brazil | 24,375 | Belgium | 7,551 | Belgium | 1,299 |
| Vietnam | 7,414 | France | 7,252 | Mexico | 561 |
| Colombia | 7,189 | Luxembourg | 4,735 | United States | 546 |
| Others | 27,919 | Others | 14,600 | Others | 2,766 |
| Total | 201,545 | Total | 74,944 | Total | 14,697 |
| Poland | | | | | |
| Green Coffee (Including decaf) | | Roasted Coffee (Including decaf) | | Extracts, essences | |
| Germany | 89,499 | Germany | 33,735 | Germany | 10,110 |
| Vietnam | 12,188 | Italy | 3,845 | India | 4,660 |
| Brazil | 5,411 | Slovakia | 2,987 | Spain | 3,156 |
| Belgium | 4,147 | Netherlands | 1,950 | Vietnam | 1,950 |
| Uganda | 3,183 | United Kingdom | 1,565 | Brazil | 1,751 |
| Others | 8,555 | Others | 6,216 | Others | 7,605 |
| Total | 122,983 | Total | 50,298 | Total | 29,232 |
| Portugal | | | | | |
| Green Coffee (Including decaf) | | Roasted Coffee (Including decaf) | | Extracts, essences | |
| Vietnam | 16,550 | Spain | 2,741 | Germany | 469 |
| Brazil | 7,740 | Italy | 1,998 | Spain | 352 |
| Uganda | 6,409 | France | 1,739 | France | 77 |
| India | 4,380 | Germany | 979 | United Kingdom | 58 |
| Spain | 4,092 | Netherlands | 290 | Austria | 45 |
| Others | 16,286 | Others | 226 | Others | 103 |
| Total | 55,457 | Total | 7,973 | Total | 1,104 |
| Romania | | | | | |
| Green Coffee (Including decaf) | | Roasted Coffee (Including decaf) | | Extracts, essences | |
| Vietnam | 3,611 | Germany | 9,747 | Vietnam | 994 |
| Uganda | 2,275 | Bulgaria | 9,068 | Poland | 688 |
| Brazil | 2,105 | Italy | 8,297 | Germany | 529 |
| Colombia | 2,059 | Poland | 2,767 | Spain | 528 |
| Germany | 2,023 | Netherlands | 1,064 | Italy | 444 |
| Others | 5,162 | Others | 3,238 | Others | 1,180 |
| Total | 17,235 | Total | 34,181 | Total | 4,363 |
| Slovakia | | | | | |
| Green Coffee (Including decaf) | | Roasted Coffee (Including decaf) | | Extracts, essences | |
| Belgium | 2,537 | Germany | 14,704 | Czech Republic | 1,093 |
| Germany | 1,691 | Poland | 7,546 | Poland | 676 |
| Czech Republic | 491 | Czech Republic | 3,333 | Spain | 383 |
| Vietnam | 331 | Hungary | 2,354 | France | 241 |
| Poland | 151 | Italy | 1,483 | Switzerland | 240 |
| Others | 350 | Others | 2,297 | Others | 682 |
| Total | 5,551 | Total | 31,717 | Total | 3,315 |

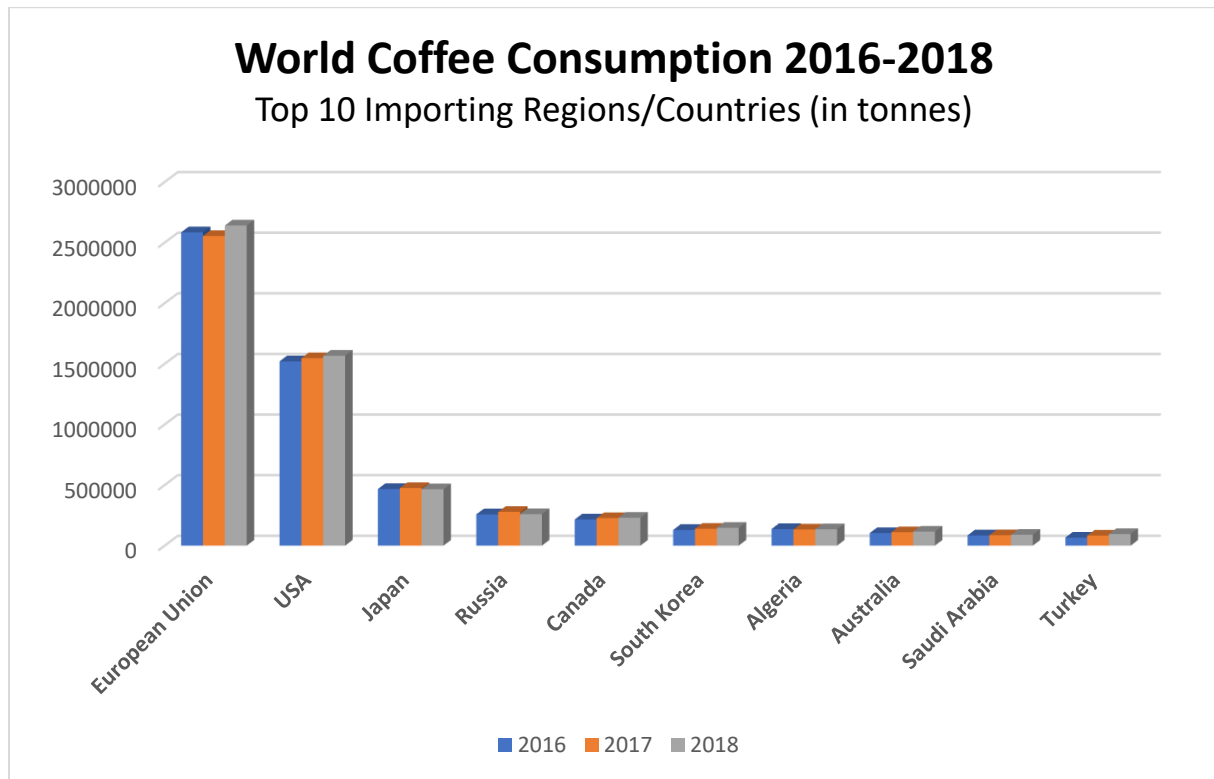
| Slovenia | | | | | |
|---|----------------|---|---------------|-------------------------------|---------------|
| Green Coffee (Including decaf) | | Roasted Coffee (Including decaf) | | Extracts, essences | |
| Brazil | 9,876 | Italy | 2,973 | Germany | 206 |
| India | 6,516 | Croatia | 1,000 | Croatia | 118 |
| Vietnam | 2,243 | Bosnia and Herzegovina | 414 | Austria | 70 |
| Colombia | 1,183 | Austria | 361 | Italy | 33 |
| Italy | 780 | Germany | 184 | Hungary | 31 |
| Others | 3,807 | Others | 938 | Others | 109 |
| Total | 24,405 | Total | 5,870 | Total | 567 |
| Spain | | | | | |
| Green Coffee (Including decaf) | | Roasted Coffee (Including decaf) | | Extracts, essences | |
| Vietnam | 135,554 | France | 7,829 | Netherlands | 1,206 |
| Brazil | 43,978 | Italy | 6,309 | Mexico | 1,177 |
| Germany | 24,882 | Germany | 5,181 | Germany | 709 |
| Colombia | 17,419 | Portugal | 4,061 | United Kingdom | 599 |
| Côte d'Ivoire | 14,346 | Netherlands | 2,320 | France | 596 |
| Others | 55,497 | Others | 2,638 | Others | 1,013 |
| Total | 289,676 | Total | 28,338 | Total | 5,300 |
| Sweden | | | | | |
| Green Coffee (Including decaf) | | Roasted Coffee (Including decaf) | | Extracts, essences | |
| Brazil | 38,031 | Netherlands | 4,926 | Switzerland | 1,193 |
| Peru | 13,579 | Germany | 2,361 | Czech Republic | 951 |
| Honduras | 9,744 | Denmark | 1,288 | Germany | 611 |
| Colombia | 5,258 | Italy | 1,285 | Hungary | 497 |
| Belgium | 4,989 | Switzerland | 1,101 | United Kingdom | 462 |
| Others | 32,162 | Others | 3,443 | Others | 1,333 |
| Total | 106,763 | Total | 13,119 | Total | 5,047 |
| United Kingdom | | | | | |
| Green Coffee (Including decaf) | | Roasted Coffee (Including decaf) | | Extracts, essences | |
| Brazil | 66,410 | Germany | 13,671 | Germany | 9,464 |
| Vietnam | 54,573 | Italy | 12,855 | Spain | 6,436 |
| Colombia | 16,281 | Spain | 7,562 | Brazil | 3,858 |
| Honduras | 13,584 | France | 7,525 | Netherlands | 2,647 |
| Peru | 8,990 | Netherlands | 6,153 | France | 1,635 |
| Others | 37,453 | Others | 9,381 | Others | 5,042 |
| Total | 197,291 | Total | 57,147 | Total | 29,082 |

Source: Eurostat

Note: data are in tonnes and refer to imports from all origins (totals include EU intra-trade).

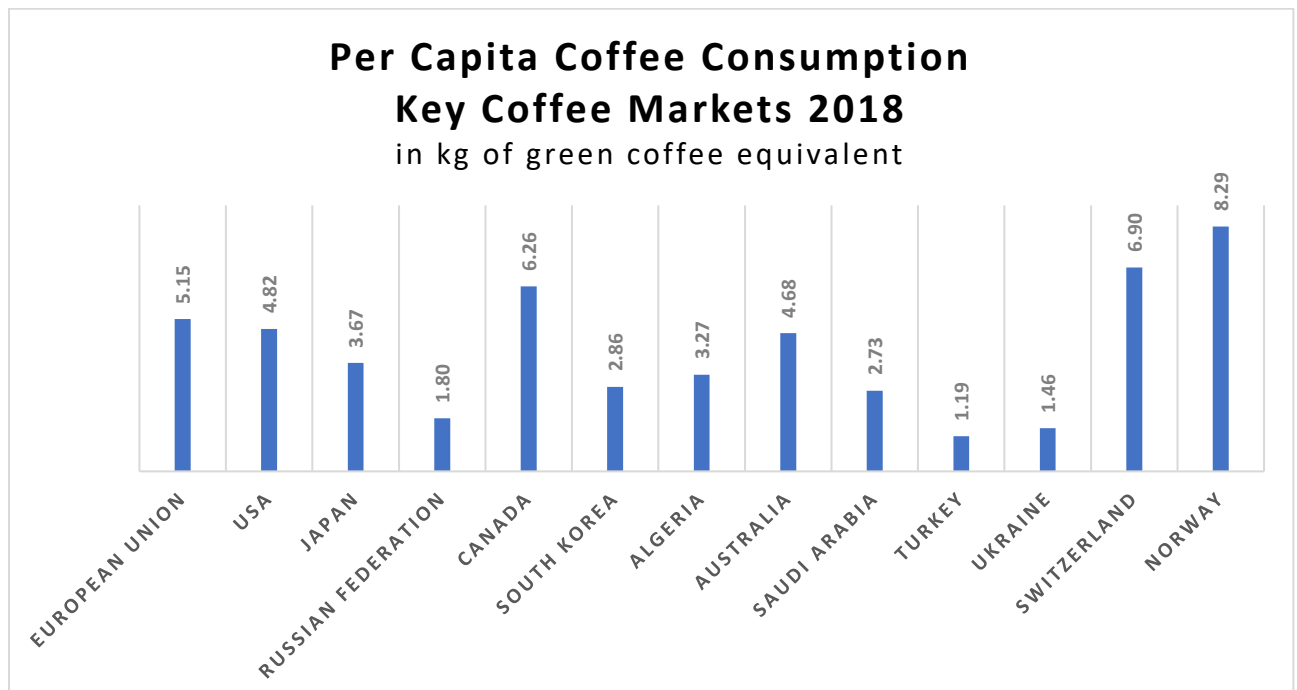
10. EU MARKET IN PERSPECTIVE

Based on data from the International Coffee Organization, this graph shows the evolution of coffee consumption in the top 10 importing markets during the 2016-2018 period:



Source: ICO

Combining ICO consumption data and World Bank population information (2017), the per capita consumption in selected importing countries/regions in the three most recent years was as follows:



Source: ICO, World Bank

11. 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 | 9 | |
| Poland | 23 | |
| Portugal | 23 | |
| Romania | 9 | |
| Slovakia | 20 | |
| Slovenia | 9.5 | |
| Spain | 10 | |
| Sweden | 12 | |
| United Kingdom | 0 | |

Source: Trade Helpdesk website as at 10 May 2019

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 Member States in their 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.