

European Coffee Report 2018/2019



European Coffee Federation

CONTENTS

1. INTRODUCTION	3
2. CONVENTIONS, NOTATIONS AND DEFINITIONS.....	4
3. GREEN COFFEE PRICES AND STOCKS	6
4. EU28 GREEN COFFEE IMPORTS: VOLUME, ORIGINS AND TYPE OF COFFEE.....	8
5. EU28 IMPORTS OF GREEN DECAFEINATED COFFEE, ROASTED COFFEE, ROASTED DECAFFEINATED COFFEE AND SOLUBLE COFFEE	14
6. EU28 COFFEE EXPORTS IN VOLUME.....	16
6.1 ROASTED COFFEE EXPORTS	16
6.2 SOLUBLE COFFEE EXPORTS	18
7. IMPORTS AND EXPORTS OF COFFEE IN VALUE.....	19
8. COFFEE CONSUMPTION BY COUNTRY IN THE EU28	20
9. EU28 COUNTRIES KEY NATIONAL IMPORT DATA	24
10. EU MARKET IN PERSPECTIVE.....	30
11. EU VAT AND EXCISE DUTIES	31

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:

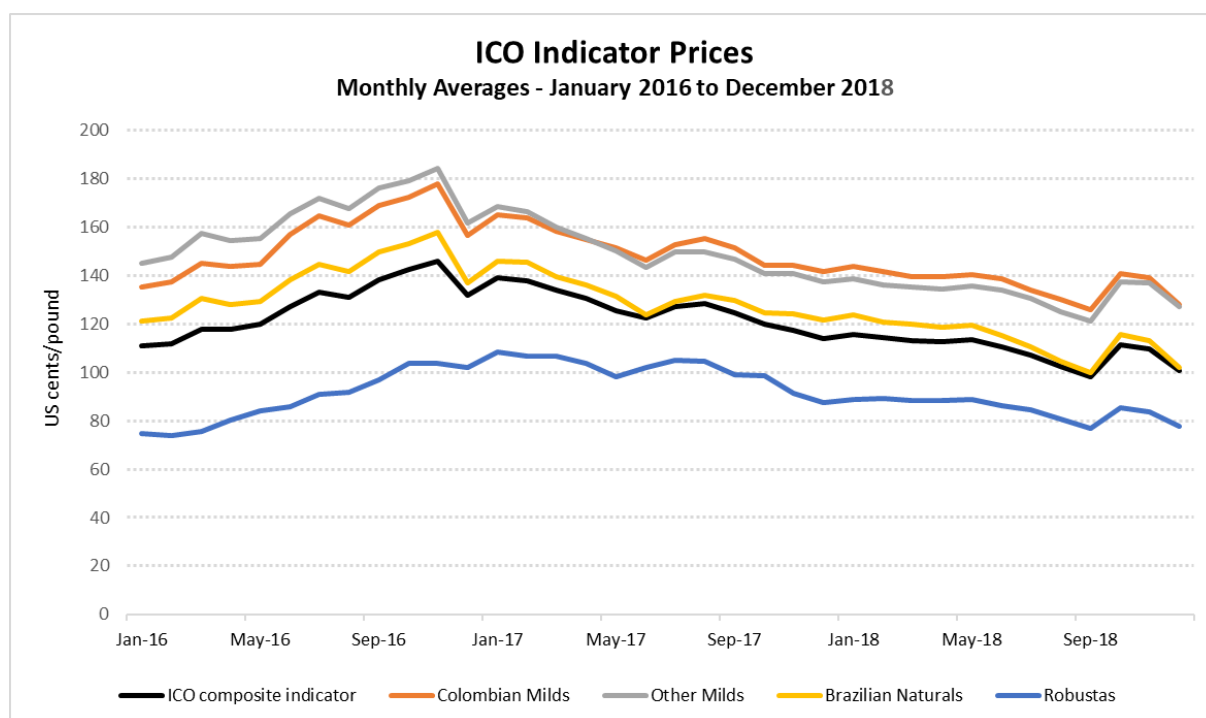
Eurostat trade figures may differ from those available from national sources.

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:

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

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):

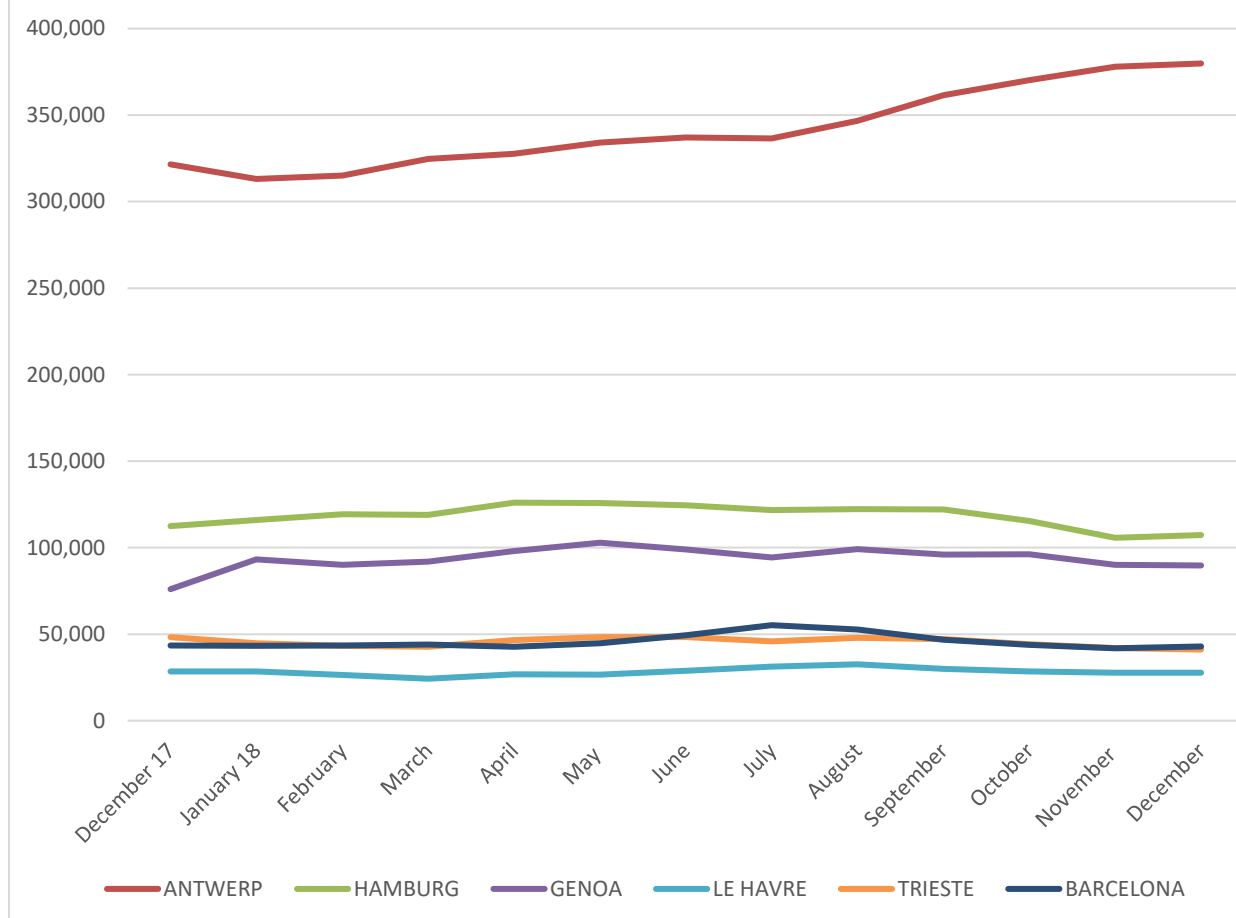
From October 2015:

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	Koninklijk Verbond der Beheerders van Goederenstromen
Hamburg	Unternehmensverband Hafen Hamburg e.V.
Genoa	Comitato Italiano del Caffé
Le Havre	Union Nationale du Café (UNACAF)
Trieste	Comitato Italiano del Caffé
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):

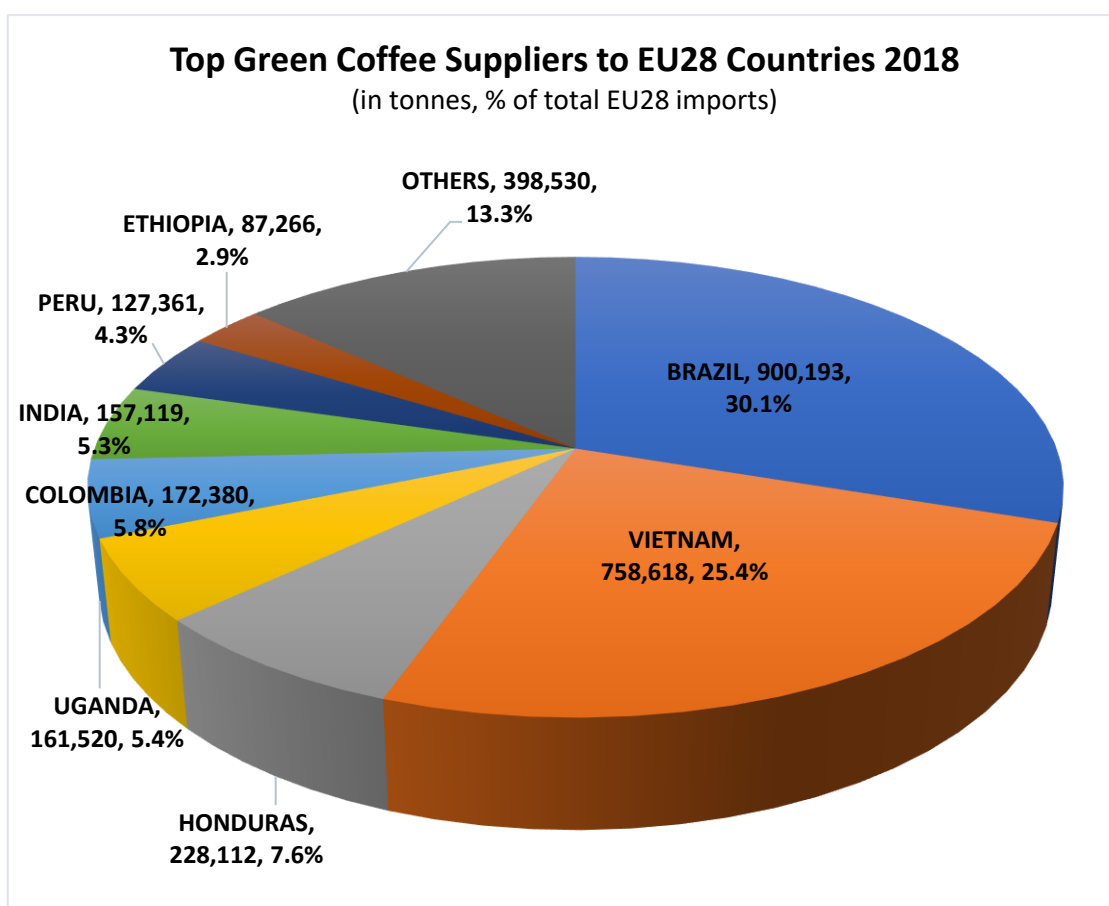
COUNTRY	2016		2017		2018	
	IN TONNES	% OF TOTAL	IN TONNES	% OF TOTAL	IN TONNES	% OF TOTAL
BRAZIL	922,069	31.0%	840,649	29.5%	900,193	30.1%
VIETNAM	729,069	24.5%	660,922	23.2%	758,618	25.4%
HONDURAS	192,546	6.5%	211,048	7.4%	228,112	7.6%
COLOMBIA	193,665	6.5%	186,975	6.6%	172,380	5.8%
UGANDA	123,466	4.1%	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

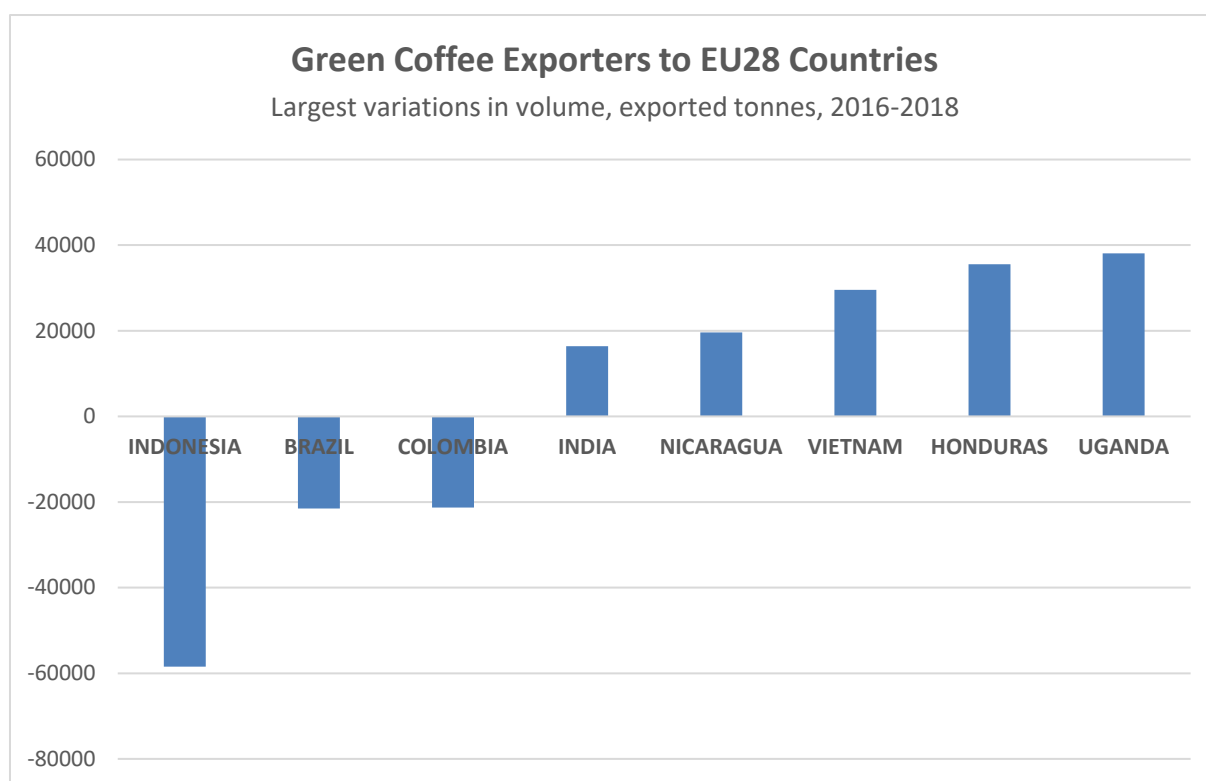
Brazil was again the largest source of green coffee imports for EU28 countries, supplying 900,193 tonnes or 30.1% of total EU28 green coffee imports. Vietnam supplied another 758,618 tonnes or 25.4% of total imports. These two origins have consistently ranked as the top-two suppliers to EU28 countries 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

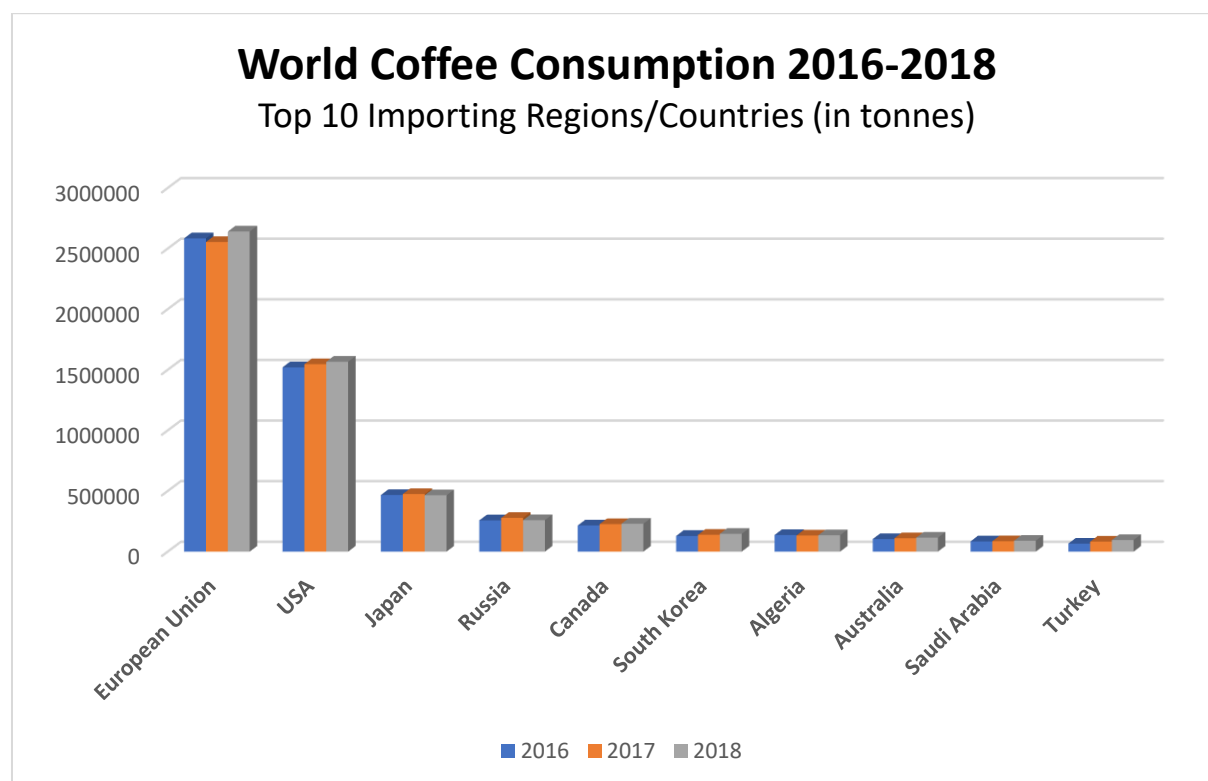
Slovenia					
Green Coffee (Including decaf)		Roasted Coffee (Including decaf)		Extracts, essences	
Brazil	9,876	Italy	2,973	Germany	206
India	6,516	Croatia	1,000	Croatia	118
Vietnam	2,243	Bosnia and Herzegovina	414	Austria	70
Colombia	1,183	Austria	361	Italy	33
Italy	780	Germany	184	Hungary	31
Others	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).

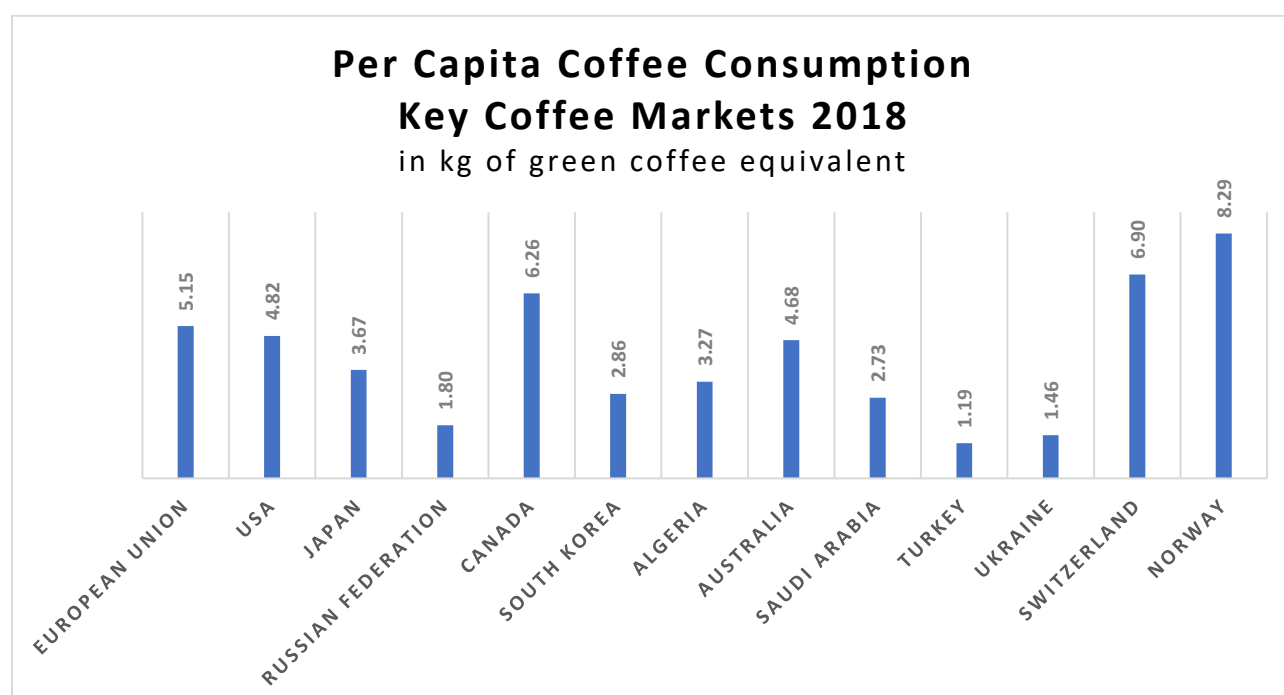
10. EU MARKET IN PERSPECTIVE

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.