

# European Coffee Report 2022/2023



EUROPEAN  
COFFEE  
FEDERATION



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## 1. INTRODUCTION

This is the fortieth issue of the 'European Coffee Report'. The European Coffee Federation (ECF) continues the series with the report over 2018/2019. The Covid pandemic deterred ECF from publishing this report given ECF's focus on more pressing matters and the difficulties associated to the collection, compilation, and analysis of the relevant data. This 2022/2023 edition presents a detailed analysis of the European coffee market relying on official data (Eurostat), data collected by ECF, and market intelligence provided by Euromonitor International, which we trust continues to be an important and welcome addition.

The European Coffee Report is available in electronic format only and can be downloaded from ECF's website: [www.ecf-coffee.org](http://www.ecf-coffee.org).

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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 applied by the International Coffee Organization (ICO) as described in its 'Rules' (Rules on Statistics / Certificates of Origin. Revised version approved by the International Coffee Council at its 134<sup>th</sup> Session on 7 October 2022). Available online at: <https://www.icocoffee.org/wp-content/uploads/2022/11/icc-102-9-r5e-rules-certificates-origin-final.pdf>

- from roasted coffee to green coffee: multiply the net weight of roasted coffee by 1.19.
- from soluble to green coffee: multiply by the net weight of soluble coffee 2.60.
- from green decaffeinated to green coffee: multiply the net weight of green decaffeinated coffee by 1.05.
- from roasted decaffeinated to green coffee: multiply the net weight of roasted decaffeinated coffee by 1.25.
- from soluble decaffeinated to green coffee: multiply the net weight of the soluble decaffeinated coffee by 2.73.

Green coffee equivalent is the aggregated volume of green, green decaffeinated, roasted, and soluble coffee recalculated to green coffee after applying 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.

'yoy' refers to 'year-on-year'. It is calculated using current values and previous year's values and it is expressed in percentage terms.

### Currencies:

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

Data:

When analysing data, the term 'analysis period' refers to the period 2020 to 2022.

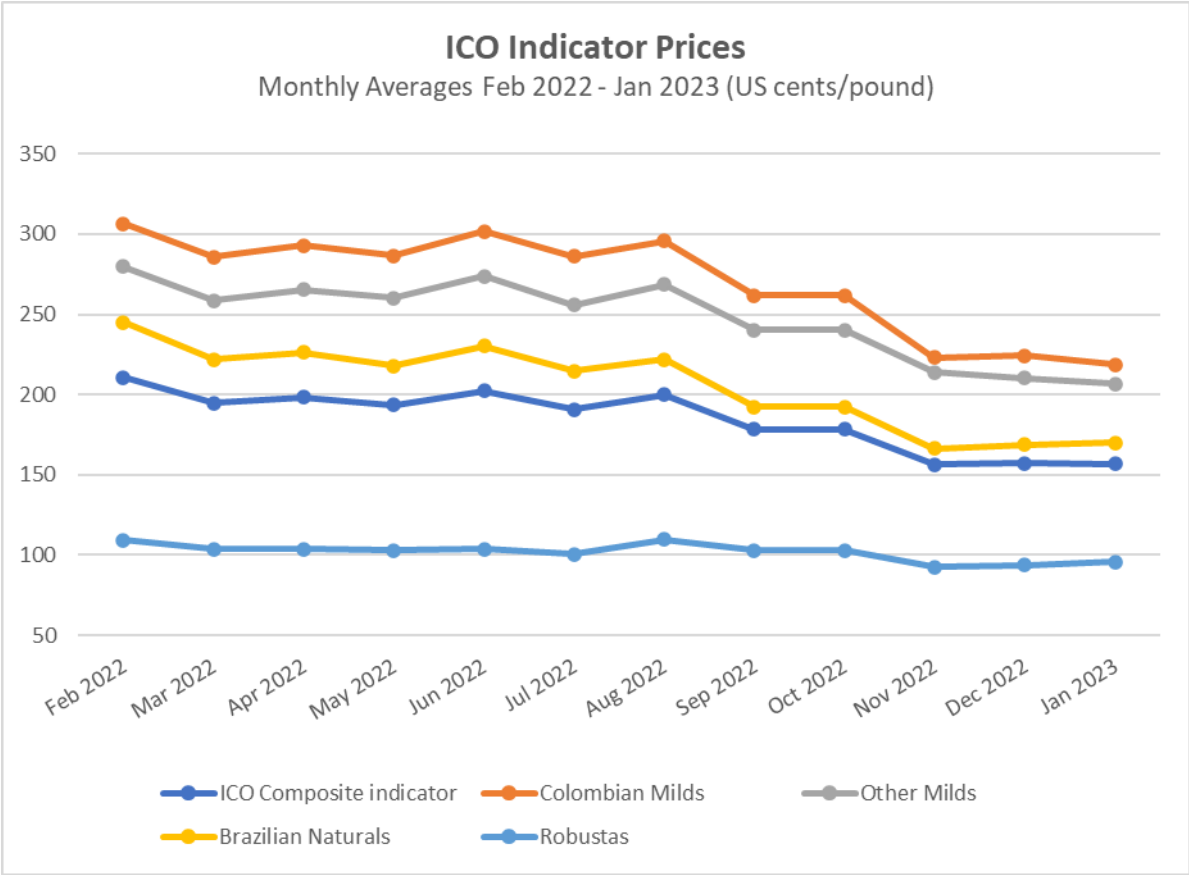
Eurostat, ICO or World Bank (WITS) trade figures may differ from those available from national sources.

Distribution of green coffee imports by type of coffee:

The distribution of green coffee imports by type of coffee is based on the following grouping of coffee producing countries according to the criteria applied by the International Coffee Organization (ICO):

<b>Arabicas</b>			<b>Robustas</b>
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



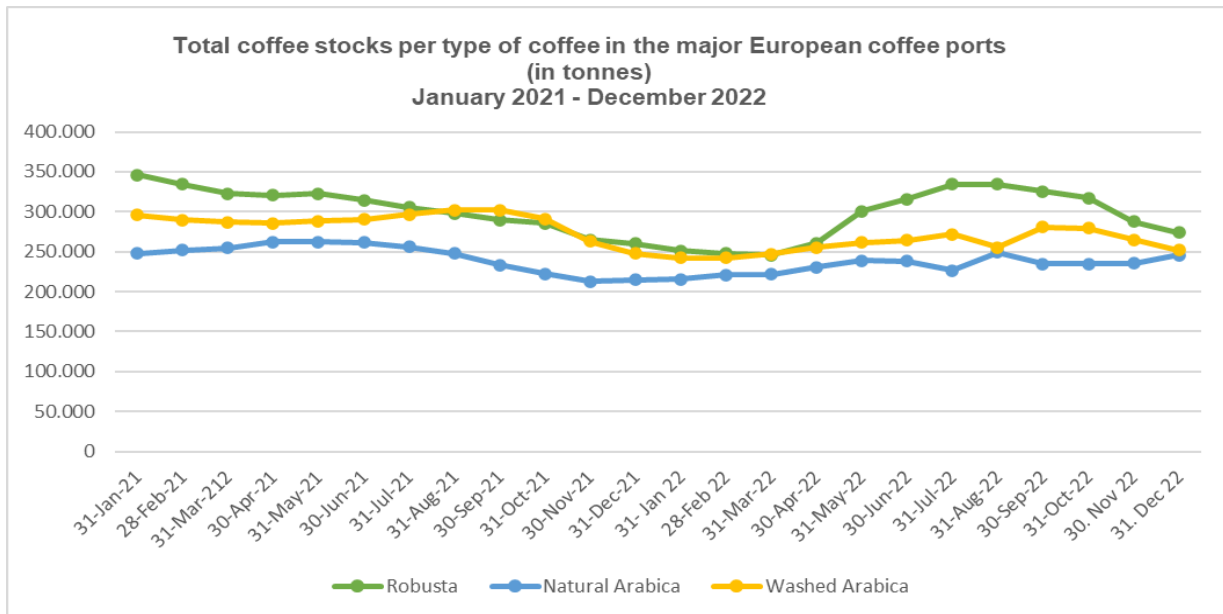
Source: ICO

According to ICO document ICC-105-17 Annex 1, the calculation of the ICO Composite indicator price is weighted as follows:

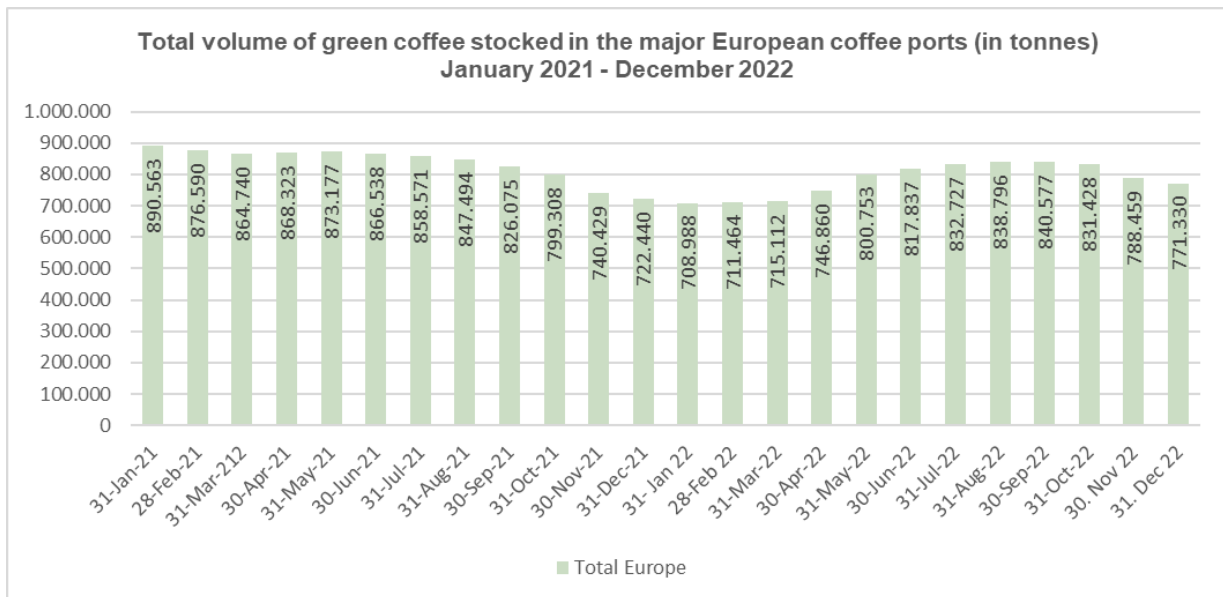
- Colombian Milds: 12%
- Other Milds: 23%
- Brazilian Naturals: 31%
- Robustas: 34%

From May 2021, the ICO has moved to a new system of collection of prices. For further details, please see <https://www.ico.org/documents/cy2020-21/sc-106e-rules-indicator-prices.pdf>





Source: ECF



Source: ECF

Note: The ports covered are: Antwerp, Hamburg, Le Havre, Barcelona, Trieste, Genoa, Napoli, Tallin, London, Felixstowe, and Bremen (partly). The stocks have been broken down in three categories: Robusta, Natural Arabica (includes Brazil semi-washed) and Washed Arabica. Stocks include ICE certified stocks as well as non-exchange stocks. The data are supplied by warehousing and port organisations in the listed port areas and have been compiled by ECF.

#### 4. EU27 GREEN COFFEE IMPORTS: VOLUME, ORIGINS AND TYPE OF COFFEE

The terms 'Western Europe' and 'Central and Eastern Europe' do not follow a strict definition. Many Central and Eastern European countries are now members of the EU while the UK is no longer a member. In this report, the 'Western Europe' region includes all EU27 countries plus the United Kingdom, 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						
Data by importing country 2020 – 2022 (in tonnes and in 60 kg bags)						
COUNTRY	2020		2021		2022	
	in tonnes	in bags	in tonnes	in bags	in tonnes	in bags
AUSTRIA	5,764.2	96,070	5,807.2	96,797	6,558.0	109,300
BELGIUM	306,688.8	5,111,480	336,620.4	5,610,340	378,162.4	6,302,707
BULGARIA	24,151.1	402,518	23,390.6	389,843	20,915.4	348,590
CROATIA	716.0	11,933	292.9	4,882	160.5	2,675
CYPRUS	2,037.8	33,963	1,099.4	18,323	1,073.2	17,887
CZECHIA	3,264.3	54,405	2,520.1	42,002	2,083.6	34,727
DENMARK	11,577.7	192,962	12,037.7	200,628	11,942.2	199,037
ESTONIA	59.5	992	60.9	1,015	100.1	1,668
FINLAND	58,054.1	967,568	51,391.6	856,527	50,753.6	845,893
FRANCE	157,845.6	2,630,760	158,397.2	2,639,953	146,004.6	2,433,410
GERMANY	1,084,930.8	18,082,180	1,074,070.3	17,901,172	1,083,613.2	18,060,220
GREECE	33,012.2	550,203	33,719.3	561,988	33,512.5	558,542
HUNGARY	1,234.4	20,573	264.6	4,410	183.9	3,065
IRELAND	7,670.1	127,835	5,405.3	90,088	7,424.5	123,742
ITALY	553,213.6	9,220,227	596,610.7	9,943,512	650,100.1	10,835,002
LATVIA	1,635.2	27,253	1,337.3	22,288	1,109.8	18,497
LITHUANIA	1,718.2	28,637	801.2	13,353	1,303.1	21,718
LUXEMBOURG	133.0	2,217	74.4	1,240	55.9	932
MALTA	138.6	2,310	39.2	653	1.4	23
NETHERLANDS	63,116.8	1,051,947	62,003.4	1,033,390	107,836.8	1,797,280
POLAND	34,358.2	572,637	31,981.2	533,020	24,854.1	414,235
PORTUGAL	38,675.5	644,592	36,068.5	601,142	39,499.1	658,318
ROMANIA	13,026.6	217,110	11,774.4	196,240	11,542.6	192,077
SLOVAKIA	131.0	2,183	163.1	2,718	203.2	3,387
SLOVENIA	26,246.6	437,443	26,661.5	444,358	26,336.6	438,943
SPAIN	257,522.6	4,292,043	225,574.5	3,759,575	256,503.2	4,275,053
SWEDEN	95,402.4	1,590,040	86,206.7	1,436,778	85,877.6	1,431,293
<b>EU27 TOTAL</b>	<b>2,782,324.9</b>	<b>46,372,082</b>	<b>2,784,374.2</b>	<b>46,406,237</b>	<b>2,947,693.2</b>	<b>49,128,220</b>
UNITED KINGDOM	155,811.0	2,596,850	148,138.0	2,468,965	176,618.1	2,943,635
SWITZERLAND	180,848.3	3,014,138	192,401.0	3,206,683	199,316.3	3,321,938
NORWAY	36,386.0	606,434	32,756.5	545,942	31,019.1	516,985
ICELAND	1,025.2	17,087	911.4	15,191	846.3	14,105
<b>WESTERN EUROPE TOTAL</b>	<b>3,156,012.4</b>	<b>52,600,208</b>	<b>3,158,581.1</b>	<b>52,643,018</b>	<b>3,156,176.7</b>	<b>55,924,883</b>

(cont.)

Imports of GREEN COFFEE into Europe						
Data by importing country 2020 – 2022 (in tonnes and in 60 kg bags)						
COUNTRY	2020		2021		2022	
	in tonnes	in bags	in tonnes	in bags	in tonnes	in bags
ALBANIA*	5,320.1	88,668	5,900.0	98,333	n.a.	n.a.
BELARUS	2,326.6	38,777	2,311.8	38,530	n.a.	n.a.
BOSNIA AND HERZEGOVINA	20,016.5	333,608	20,664.9	344,415	n.a.	n.a.
GEORGIA	5,210.3	86,838	5,134.9	85,582	n.a.	n.a.
NORTH MACEDONIA	5,741.0	95,683	5,157.0	85,950	n.a.	n.a.
MOLDOVA	52.0	867	74.0	1,233	n.a.	n.a.
MONTENEGRO	2,130.4	35,507	2,310.4	38,507	n.a.	n.a.
RUSSIAN FEDERATION	198,269.0	3,304,483	205,269.0	3,421,150	n.a.	n.a.
SERBIA	29,800.0	496,667	29,851.3	497,522	n.a.	n.a.
UKRAINE	24,478.2	407,970	27,192.2	453,203	n.a.	n.a.
CENTRAL AND EASTERN EUROPE	293,344.1	4,889,068	303,865.5	5,064,425	n.a.	n.a.
EUROPE TOTAL	3,449,356.5	57,489,276	3,462,446.6	57,707,443	n.a.	n.a.

Source: Eurostat (European Union's countries); Statistics Iceland/Hagstofa (Iceland); Statistics Norway/Statbank (Norway); Swiss Federal Customs Administration/Swiss-Impex (Switzerland); HMRC (United Kingdom); and World Bank WITS (other European countries)

\*Data for Albania (2021) have been modelled.

Note: Figures show imports of green coffee, not decaffeinated (HS 090111). Totals may differ from the sum of the items due to rounding.

In 2022 those countries included in the 'Western Europe' region imported on aggregate 3.13 million tonnes of green coffee, a -0.8% variation compared to 2021. **Western Europe's green coffee imports have remained very stable during the analysis period (2020-2022).**

**EU27 countries absorb 94.1% of total green coffee imports into Western Europe with 2.95 million tonnes in 2022 (+5.9% yoy).** However, the recovery of EU27's green coffee imports has not yet compensated the effects of the Covid pandemic. It has to be noted that EU27's green coffee imports (excluding UK imports in the calculation) in 2016 reached 3.21 million tonnes, while in 2017 the figure was 3.08 million tonnes decreasing to 2.81 million tonnes in 2018. **Current imports are therefore still roughly 8% below the 2016 peak level.**

The figures for Central and Eastern Europe are only available for 2020 and 2021. Countries in Central and Eastern Europe increased their imports of green coffee in 2021 to 0.3 million tonnes (+3.6%) with the Russian Federation being responsible for most of this growth (7,000 tonnes, roughly 70% of the total increase).

The figures for Europe as a whole are only available for 2020 and 2021. **European imports of green coffee reached 3.46 million tonnes in 2021 (+0.4%), again very stable but far from the pre-pandemic peak level reached in 2016 and 2017 with 4.1 and 3.9 million tonnes, respectively.**

EU 27 Largest Absolute Variations in GREEN COFFEE Imports (in tonnes, 2022 vs. 2020)			
TOP 5	TONNES	BOTTOM 5	TONNES
ITALY	96,887	FRANCE	-11,841
BELGIUM	71,474	SWEDEN	-9,525
THE NETHERLANDS	44,720	POLAND	-9,504
PORTUGAL	824	FINLAND	-7,301
AUSTRIA	794	BULGARIA	-3,236

Source: Eurostat

During the analysis period (2020-2022), green coffee imports seem to be concentrating even further in the traditional major importing countries. Germany remains the largest importer with 36.8% of EU's green coffee imports coming through its ports in 2022 (+0.9% yoy) with Italy posting the largest growth adding 96,887 tonnes (2020-2022) to reach 650,100 tonnes (22.1% of EU imports). Coffee traffic through Belgian ports also increased rapidly (+71,474 tonnes in the analysis period) and Belgium now imports 12.8% of total green coffee into the EU. Spain is the fourth largest importer with 256,503 tonnes in 2022 (8.7% of total green coffee EU imports). **These four countries (Germany, Italy, Belgium, and Spain) channel on aggregate more than 80 % of total EU imports of green coffee.** Therefore, green coffee imports tend to concentrate on traditionally large importers or those countries where the busiest ports in Europe are located.

After leaving the EU in 2020, **imports of green coffee to the United Kingdom diminished during 2021 (-4.9% yoy), returning to “normal” levels in 2022 with 176,618 tonnes (+19.2% yoy).** Although still far from its peak level of imports (189,590 tonnes in 2018). During the analysis period, green coffee imports to the UK increased by roughly 21,000 tonnes. Only 5.7% of green coffee imported in 2022 by the United Kingdom came from EU27 countries.

**Outside the EU27 area, Switzerland remains a key importer of green coffee in Europe with close to 200,000 tonnes in 2022,** adding more than 18,000 tonnes during the analysis period (+10.2%). The Russian Federation is the other relevant non-EU market in terms of imports volume (over 205,000 tonnes in 2021) and growth during the analysis period (+7,000 tonnes or +3.5%).

**Shipping after the pandemic has been transformed and the need for efficiency gains gave large ports in Europe an advantage over cost, distance to market or other criteria.** This fact could explain the reduction in direct imports of green coffee to countries such as Sweden (-10.0% during the analysis period), Poland (-27.7%), Finland (-12.6%) or Bulgaria (-13.4%). Coffee consumption in these countries has not decreased with these figures just representing imports being funnelled towards the largest European ports mainly located in Germany, Italy, Belgium, and The Netherlands. The same hypothesis would explain France's case (-7.5% during the analysis period) with Antwerp or Rotterdam boosting their role as green coffee entry points to France and the EU as a whole. Other landlocked countries such as Hungary or Czechia have substantially reduced their green coffee imports during the analysis period: -85.1% and -36.2%, respectively. Green coffee imports by some smaller EU members have virtually disappeared: Malta (1,4 tonnes), Luxembourg (55.9 tonnes) and Croatia (160,5 tonnes).

## 4.1. Origins of green coffee imported into the EU27 area

The table below lists the 'top 20' countries of origin for green coffee imported into the EU27 area as a whole (excluding intra-EU trade) during the analysis period (2020-2022). Countries are ranked according to 2022 volumes:

COUNTRY	2020		2021		2022	
	IN TONNES	% OF TOTAL	IN TONNES	% OF TOTAL	IN TONNES	% OF TOTAL
BRAZIL	932,311	33.7%	1,033,105	37.1%	1,041,696	35.3%
VIET NAM	632,449	22.8%	533,059	19.1%	648,005	22.8%
UGANDA	165,860	6.0%	212,289	7.6%	214,649	7.3%
HONDURAS	216,405	7.8%	191,085	6.9%	158,430	5.4%
INDIA	108,194	3.9%	122,506	4.4%	151,471	5.1%
PERU	96,358	3.5%	84,618	3.0%	130,285	4.4%
COLOMBIA	153,632	5.6%	142,211	5.1%	124,278	4.2%
INDONESIA	77,376	2.8%	85,941	3.1%	102,152	3.5%
ETHIOPIA	77,427	2.8%	83,113	3.0%	92,474	3.1%
NICARAGUA	42,695	1.5%	41,924	1.5%	38,170	1.3%
TANZANIA	30,628	1.1%	40,182	1.4%	35,496	1.2%
GUATEMALA	27,851	1.0%	33,079	1.2%	31,442	1.1%
MEXICO	30,172	1.1%	27,776	1.0%	25,533	0.9%
PAPUA NEW GUINEA	17,102	0.6%	19,912	0.7%	21,725	0.7%
CHINA	19,954	0.7%	14,808	0.5%	21,106	0.7%
KENYA	21,311	0.8%	15,951	0.6%	20,056	0.7%
CÔTE D'IVOIRE	25,910	0.9%	13,195	0.5%	13,163	0.4%
CAMEROON	15,808	0.6%	15,286	0.5%	9,734	0.3%
COSTA RICA	11,234	0.4%	13,276	0.5%	9,373	0.3%
EL SALVADOR	6,733	0.2%	6,949	0.3%	8,802	0.3%
OTHERS	58,473	2.2%	54,111	1.9%	49,654	1.7%
<b>EU27 TOTAL (excl. intra-EU)</b>	<b>2,767,880</b>	<b>100.0%</b>	<b>2,784,374</b>	<b>100.0%</b>	<b>2,947,693</b>	<b>100.0%</b>

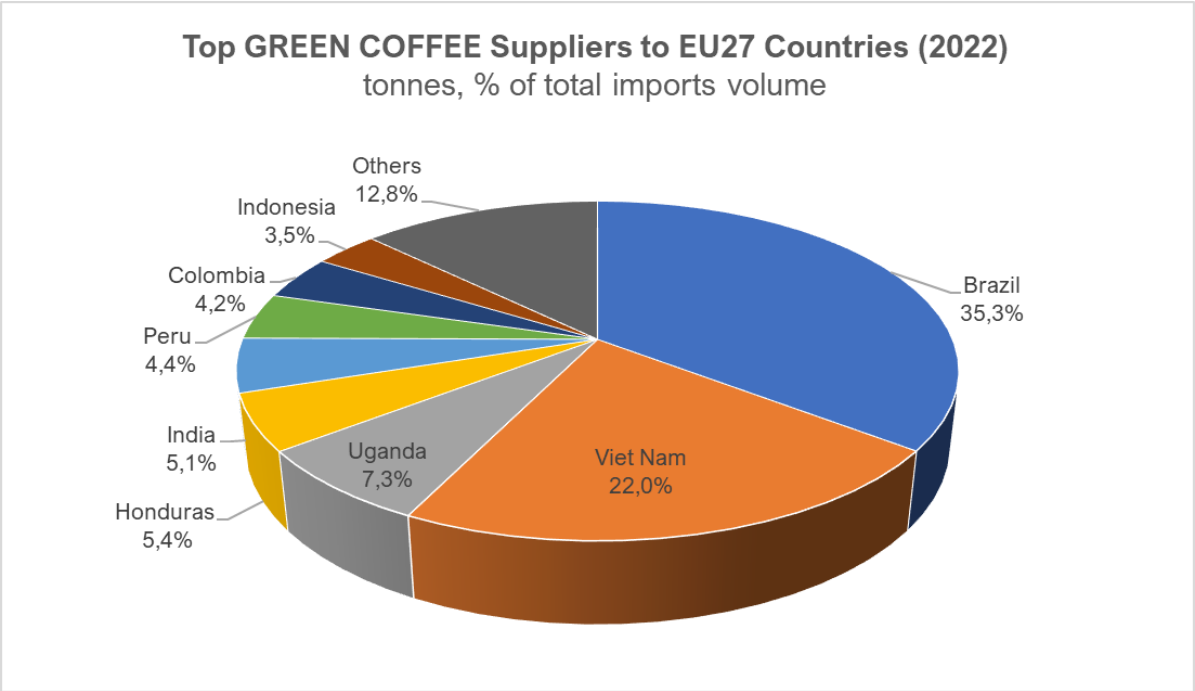
Source: Eurostat

**Brazil remains the largest supplier of green coffee to EU27 countries with its market share now well consolidated over one third of total EU27 imports (35.3% in 2022).** Brazil supplied 1,041,696 tonnes of green coffee in 2022 after adding 109,385 tonnes during the period of analysis 2020-2022 (+11.7% on aggregate).

**Viet Nam supplied another 648,005 tonnes of green coffee to the EU27 area or 22.8% of its total imports.** However, Viet Nam's figures are far from its peak export levels reached in 2018 with more than 758,000 tonnes acquired by EU27 countries and a market share above 25% in the region. In any case, **Brazil and Viet Nam have consistently ranked as the top-two suppliers to EU27 countries during the last decade**, typically supply over 55% of the total green coffee imported by this economic area (58.1% in 2022).

Each of the other green coffee origins supplying the EU hold a market share below 10%, with Uganda and Honduras regularly swapping places – third and fourth – depending mostly on harvesting conditions. However, Uganda seems to have consolidated its exports at a substantially higher level during the analysis period. Uganda exported 214,649 tonnes of green coffee to EU27 countries after increasing by 29.4% during the analysis period (+48,789 tonnes), becoming the “coffee powerhouse” of Africa. **Uganda alone supplies more coffee to the EU27 than the rest of Africa combined.** Although origins in East Africa such as Ethiopia (+15,000 tonnes) or Tanzania (+5,000 tonnes) showed a positive trend, traditional West African producers saw their exports to EU27 countries decline during the analysis period: Côte d’Ivoire (-12,000 tonnes) and Cameroon (-6,000 tonnes).

**Honduras remains the fourth largest green coffee supplier to EU27 countries, although exported volumes are in sharp decline,** and so is this origin’s share of the EU27 market, falling from its 2020 peak at 7.8% to 5.4% in 2022. Figures in tonnes are more explicit and **green coffee exports from Honduras plummeted by close to 27% during the analysis period** or 68,000 tonnes less coming into the EU27 market from the Centro American country.

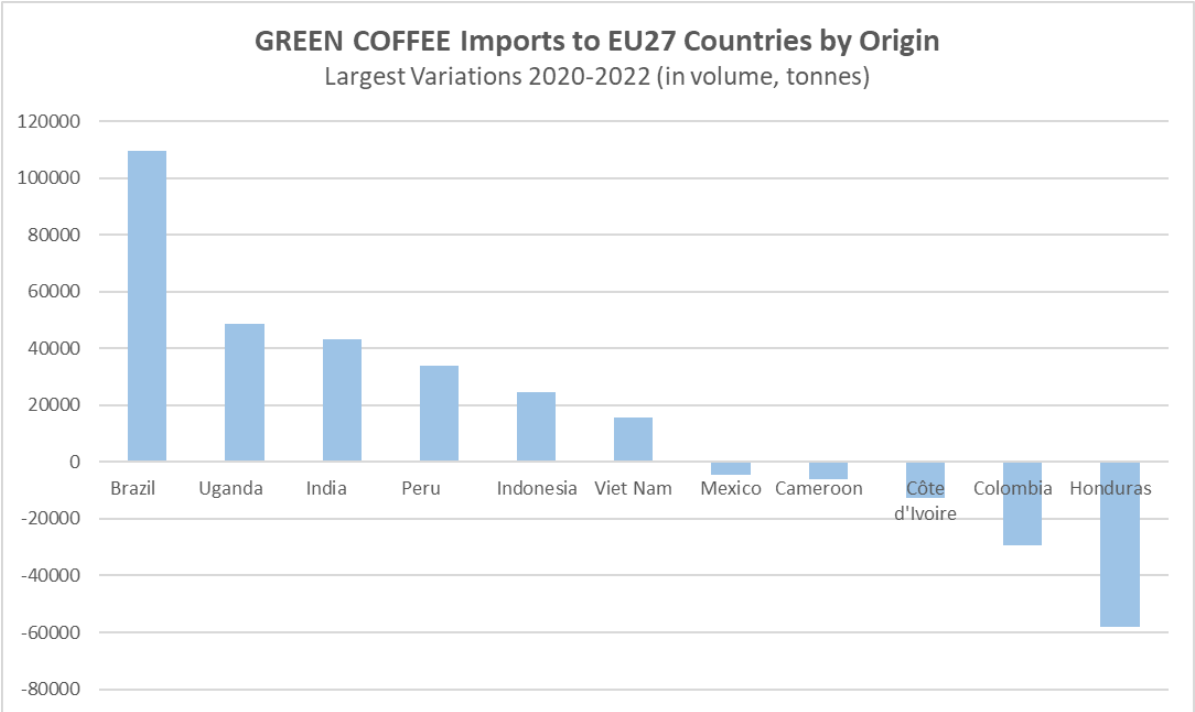


Source: Eurostat

Among the American green coffee origins, the trends in Colombia and Peru could be analysed in tandem since their green coffee exports to EU27 countries are almost perfect opposites. Colombia used to rank as the fourth largest supplier (193,600 tonnes in 2016, 6.5% market share) and ranks now in 2022 as the 7th supplier to the EU27 market with 124,278 tonnes and a 4.2% market share. During the analysis period, **Colombia’s exports decrease by close to 30,000 tonnes (-19.1%) while Peru’s increased by approximately 34,000 tonnes (+35.2%), turning the Andean country in the 6th largest supplier to EU27 countries.** In the Americas, Nicaragua remains a large green coffee exporter to the EU27 trade bloc supplying around 40,000 tonnes per year. It has to be noted that Nicaragua only supplied 23,000 tonnes in 2016 and has stabilised its exports around the ‘40,000 mark’ during the last five years.

**While the picture in Africa and the Americas is mixed, the trend in Asia leaves no room for speculation: growth everywhere.** Apart from the champion of the region, Viet Nam, green coffee exports from India steadily recovered after the pandemic to reach 151,471 tonnes in 2022 with a 5.1% share of the EU27 market. This figure is very close to the 2018 peak level and makes of India the 5th

largest supplier to EU27 countries after adding more than 43,000 in exports in 2022 compared to 2020. Indonesia supplied 102,152 tonnes of green coffee to the EU27 trade bloc in 2022 (+25,000 tonnes or +32% during the analysis period), while Papua New Guinea joined the Asian wave although at a more modest level (+5,600 tonnes or +27% during the analysis period). China adds another 21,000 tonnes to Asian exports of green coffee to EU27 countries. However, both China and Indonesia’s exports are far below their pre-pandemic levels (approximately 50% and 30%, respectively) and this fact could be explained by the relevance of their domestic and regional markets.



Source: Eurostat, ECF

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 in the EU. For the case of intra-EU trade, Eurostat’s country statistics do not reveal the country of production of green coffee. After arriving at major coffee ports in the EU, the origin of green coffee may be recorded thereafter as ‘Germany’ when it reaches the Port of Hamburg, or ‘Belgium’ when offloaded at the Port of Antwerp. The share of intra-EU trade is quite high with Germany and Belgium ranking as two of the top origin of green coffee imports to the EU. Therefore, analysis of green coffee imports into the EU27 trade bloc based on Eurostat data is meant to indicate trends rather than fully accurate figures. Chapter 9 includes intra-EU trade data allowing to further analyse the relevance of intra-EU traded coffee by country.

## 4.2. Type of green coffee imported into the EU27 area

The overall ratio of Arabica-to-Robusta green coffee imports seems to remain stable throughout the years at slightly below two-thirds to one-third: 60.9% of Arabica coffee compared to 35.2% of Robusta coffee was imported by EU27 countries in 2022.

EU27 Imports per Type of GREEN COFFEE		
% of total green coffee imports (volume, tonnes)		
	2021	2022
<b>Arabicas</b>	<b>61.7%</b>	<b>60.9%</b>
Brazilian Naturals	37.1%	35.3%
Colombian Milds	7.1%	6.1%
Other Milds	17.5%	19.5%
<b>Robustas</b>	<b>32.8%</b>	<b>35.2%</b>
<b>Others</b>	<b>5.5%</b>	<b>3.9%</b>
<b>TOTAL</b>	<b>100.0%</b>	<b>100.0%</b>

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

Within the 'Arabicas', the share of 'Brazilian Naturals' fell slightly being compensated by the increase in 'Other Milds' imported from origins such as Honduras, India, and Peru. 'Colombian Milds' also decreased following the trend set by green coffee imports from Colombia, its main origin. Imports of Robusta coffee are driven by growing imports from Uganda, Viet Nam, and Indonesia.



## 5. EU27 IMPORTS: GREEN DECAFFEINATED COFFEE, ROASTED COFFEE, ROASTED DECAFFEINATED COFFEE AND SOLUBLE COFFEE

EU27 Imports and Exports of GREEN COFFEE and (SEMI)FINISHED COFFEE PRODUCTS						
From non-EU origins/To non-EU destinations (In tonnes, 2020-2022)						
	2020		2021		2022	
	Imports	Exports	Imports	Exports	Imports	Exports
Green coffee (09011100)	2,782,324.8	50,101.2	2,784,374.3	59,346.0	2,947,693.1	64,962.9
Green coffee, decaffeinated (09012200)	11,685.0	84,404.2	18,076.1	82,396.9	15,923.3	73,946.6
Roasted coffee (09012100)	85,888.3	197,372.4	82,914.5	206,658.5	75,802.0	211,547.8
Roasted coffee, decaffeinated (09012200)	5,120.1	4,090.1	4,669.2	4,414.0	4,158.7	5,235.5
Coffee extracts (21011100)	63,576.9	75,620.7	55,392.7	76,796.1	58,224.6	76,344.8

Source: Eurostat

**Green coffee imports represent more than 95% of the total volume of coffee and coffee-related products imported into the EU27 area.** In spite of this, the analysis of other coffee products is also relevant in order to better understand the European coffee market. Although roasted and soluble coffee trade is modest in volume it is much more relevant in terms of value and market position.

**Green decaffeinated coffee imports have substantially increased during the last decade.** They jumped by 54.7% in 2021 to 18,076 tonnes, probably compensating the low volume in 2020. EU27 countries imported 15,923 tonnes of green decaffeinated coffee in 2022 (-11.9% yoy), a lower figure but still approximately 50% higher than in 2015.

EU27 Imports of ROASTED COFFEE (INCL. DECAF) 2020-2022			
From non-EU Origins			
HS09012100 and HS09012200, in tonnes			
COUNTRY	2020	2021	2022
SWITZERLAND	60,712.4	60,976.6	60,387.8
UNITED KINGDOM	22,182.9	17,749.5	12,383.5
KENYA	832.6	1,069.1	1,291.0
BOSNIA AND HERZEGOVINA	1,149.6	1,201.7	1,109.4
SERBIA	880.6	809.6	825.0
SYRIAN ARAB REPUBLIC	1,017.4	1,030.9	527.8
NORWAY	707.6	586.1	477.3
TÜRKIYE	610.7	609.8	438.1

Source: Eurostat

**Imports of roasted coffee into the EU27 trade bloc have also followed an upward trend during the last decade,** peaking in 2020 when they reached approximately 91,000 tonnes. In 2021 and 2022 this trend has been reversed with an accumulated reduction during the analysis period of 12.1% to 79,961 tonnes. Roasted coffee imports follow a 95:5 ration patterns for regular and decaf coffee.

Imports of roasted coffee in the EU27 area were traditionally the result of trade with one large commercial partner and a very junior partner: Switzerland and the United States, respectively. **Switzerland remains the largest supplier of roasted coffee to EU27 countries with 60,387.9 tonnes in 2022 or 75% of EU27's total imports** of roasted coffee. Imports from Switzerland have remained stable throughout the analysis period (60,000 tonnes) and similar figures were registered in 2016 or 2017. **The United States, however, is no longer a relevant supplier of roasted coffee to the EU27 area.** US roasted coffee exports were already rapidly declining before the pandemic and have now simply become irrelevant. Instead, **Brexit has made of the United Kingdom the second largest supplier of roasted coffee to the EU27 area with 12,383 tonnes in 2022.** This figure is in any case substantially lower than in 2020 when it supplied 22,183 tonnes, an accumulated reduction during the analysis period of 44%. Brazil is another supplier that has disappeared from the map, while the traditional niche suppliers (Bosnia and Herzegovina, Serbia, and Syria) still furnish between 500 and 1,200 tonnes per year. **Kenya has emerged as the third supplier of roasted coffee to the EU27 area with 1,291 tonnes in 2022,** still a modest figure but growing rapidly at an accumulated 55% during the analysis period.

**Soluble coffee imports were following a downward trend before the pandemic** (47,584 tonnes in 2018), **but changes in consumer behaviour drove coffee consumption at-home to record levels.** Soluble coffee benefited from this trend and imports of soluble coffee rocketed to 63,577 tonnes in 2020. **Imports of soluble coffee to the EU27 area in 2020 were also somewhat distorted by the effects of Brexit,** since the United Kingdom instantly became the bloc's largest supplier with more than 22,000 tonnes. After returning to closer to average levels in 2021, imports of soluble coffee picked up again in 2022 to 58,225 tonnes (+5.1% yoy). Brazil and India have traditionally been the EU27 area's largest suppliers of soluble coffee. As explained the United Kingdom is the top exporter of soluble coffee to the bloc with a 20.3% market share in 2022 (down from 34.8% in 2020). **India has surpassed Brazil and is now the second largest supplier to the EU27 trade bloc with 9,241 tonnes in 2022 (+20.4% yoy).** Brazil's exports have followed the opposite route, consistently shrinking year after year to 7,785 tonnes in 2022 (-12.1% on aggregate during the analysis period). In 2016 Brazil's market share of EU27's soluble coffee imports reached 23.5% while it stands today at only 13.4%.

EU27 Imports of SOLUBLE COFFEE From non-EU Origins (HS 21011100) 2020-2022, in tonnes and as a % of total imports						
	2020		2021		2022	
	Tonnes	%	Tonnes	%	Tonnes	%
UNITED KINGDOM	22,138.0	34.8%	10,401.0	18.8%	11,827.4	20.3%
INDIA	8,119.0	12.8%	7,673.0	13.9%	9,241.2	15.9%
BRAZIL	8,853.0	13.9%	8,535.0	15.4%	7,784.6	13.4%
VIET NAM	7,670.0	12.1%	7,885.0	14.2%	7,469.8	12.8%
SWITZERLAND	3,668.0	5.8%	5,727.0	10.3%	6,112.2	10.5%
ECUADOR	3,729.0	5.9%	4,200.0	7.6%	5,518.1	9.5%
OTHERS	9,399.9	14.8%	10,971.7	19.8%	10,283.4	17.7%
<b>TOTAL</b>	<b>63,576.9</b>	<b>100.0%</b>	<b>55,392.7</b>	<b>100.0%</b>	<b>58,224.6</b>	<b>100.0%</b>

Source: Eurostat

## 6. EU27 COFFEE EXPORTS: DATA IN VOLUME

The EU27 trade bloc is not only a major importer of green coffee, but also a significant exporter of green coffee and coffee-based finished products, specially roasted coffee. EU27's imports of green decaffeinated coffee and regular roasted coffee are modest compared to exports of those same products, while the imports and the exports of decaffeinated roasted coffee and coffee extracts (soluble coffee) are within the same order of magnitude.

The trade balance for green decaffeinated coffee clearly favours the EU27 area with exports topping imports by approximately 58,000 tonnes in 2022, although this figure has been shrinking during the analysis period.

Roasted coffee's trade balance is even more favourable to the EU27 trade bloc in terms of volume, and it must be noted that its impact is even larger if considered in terms of value. EU27 countries exported close to 217,000 tonnes of roasted coffee in 2022, exceeding imports by approximately 137,000 tonnes. This superavit has consistently increased during the past decade with a 25% increase on aggregate during the period of analysis (2020-2022).

EU27 Exports of GREEN COFFEE and (SEMI)FINISHED COFFEE PRODUCTS To non-EU destinations in tonnes, 2020-2022			
	2020	2021	2022
Green coffee (09011100)	50,101.2	59,346.0	64,962.9
Green coffee, decaffeinated (09011200)	84,404.2	82,396.9	73,946.6
Roasted coffee (09012100)	197,372.4	206,658.5	211,547.8
Roasted coffee (decaf) (09012200)	4,090.1	4,414.0	5,235.5
Coffee extracts (21011100)	75,620.7	76,796.1	76,344.8

Source: Eurostat

Re-exports of **green coffee** from EU27 countries increased by 9.5% to 64,963 tonnes in 2022, with the EU27 trade bloc consolidating a strong position as re-exporter of green coffee. Exports of green coffee from EU countries has climbed by more than 50% since 2016.

Exports of **green decaffeinated coffee** continued to slide down to 73,947 tonnes in 2022 (-10.3% yoy). After a decade of decline, green decaffeinated exports have been substantially reduced falling by more than 25% on aggregate since 2016.

Exports of **roasted coffee** in 2022 kept to the pace of growth followed during the last decade. EU27 countries exported 216,783 tonnes of roasted coffee (+2.7% yoy). During the analysis period, the EU27 area has added more than 16,000 tonnes in additional exports of roasted coffee, a figure that climbs up to a staggering 95,000 tonnes if we compare with 2016 exports.

**Soluble coffee** exports inched down to 76,345 tonnes (-0.6% yoy) but remain significantly above pre-pandemic levels. As explained above, trade in soluble coffee expanded during the pandemic and has consolidated at higher levels during the analysis period.

## 6.1 Roasted coffee exports

Looking in some more detail at EU exports of roasted coffee during the analysis period, it is worth analysing which countries are the major customers for EU roasted coffee (regular and decaffeinated). Those export markets are listed below and classified according to their ranking in 2022.

EU27 Exports of ROASTED COFFEE (incl. DECAFFENATED ROASTED COFFEE) To non-EU destinations in tonnes and as a % of total exports, 2020-2022						
COUNTRY	2020		2021		2022	
United Kingdom	48,512.1	24.1%	38,055.9	18.0%	39,386.4	18.2%
Russian Federation	26,897.5	13.4%	30,128.0	14.3%	25,737.3	11.9%
Ukraine	23,570.1	11.7%	24,387.0	11.6%	21,649.0	10.0%
United States	17,100.8	8.5%	19,921.9	9.4%	18,488.7	8.5%
Switzerland	12,273.5	6.1%	12,396.8	5.9%	12,042.4	5.6%
Türkiye	4,765.8	2.4%	7,317.4	3.5%	9,875.4	4.6%
Belarus	3,496.3	1.7%	3,574.8	1.7%	8,591.7	4.0%
Canada	6,973.8	3.5%	6,489.3	3.1%	6,767.8	3.1%
Australia	7,656.4	3.8%	6,339.9	3.0%	6,432.1	3.0%
Norway	6,224.2	3.1%	6,347.8	3.0%	6,272.7	2.9%
United Arab Emirates	2,779.4	1.4%	4,014.0	1.9%	5,237.3	2.4%
South Korea	4,313.9	2.1%	4,501.6	2.1%	4,543.3	2.1%
China	3,408.7	1.7%	3,978.9	1.9%	4,512.6	2.1%
Israel	3,308.3	1.6%	4,321.8	2.0%	4,236.3	2.0%
Serbia	2,272.4	1.1%	2,987.3	1.4%	3,705.1	1.7%
Saudi Arabia	2,278.8	1.1%	3,417.1	1.6%	3,686.7	1.7%
Albania	2,217.8	1.1%	2,767.1	1.3%	2,817.2	1.3%
Morocco	2,570.1	1.3%	3,193.1	1.5%	2,756.0	1.3%
Libya	1,300.4	0.6%	2,213.9	1.0%	2,586.5	1.2%
Others	20,912.1	10.4%	27,328.6	12.9%	29,678.1	13.7%
<b>TOTAL</b>	<b>201,462.5</b>	<b>100.0%</b>	<b>211,072.5</b>	<b>100.0%</b>	<b>216,783.3</b>	<b>100.0%</b>

Source: Eurostat

### Two key events altered exporting trends for EU's roasted coffee during the analysis period: Brexit and the invasion of Ukraine.

Brexit has turned the United Kingdom in EU27 countries' first customer for roasted coffee, Exports in 2020 reached 48,512 tonnes, probably as a consequence of a conservative stocks build-up approach by British operators. Exports to the UK decreased to 38,056 tonnes in 2021 and stabilised at slightly below 40,000 tonnes in 2022. Still, **the United Kingdom is set to remain EU27's largest export market with a market share of 18.2% in 2022.**

The Russian Federation has traditionally been EU27 countries' largest customer for roasted coffee. Exports to the Russian Federation consistently increased during the last decade and peaked in 2021 at 30,128 tonnes. However, **the invasion of Ukraine has instantly reversed this trend and deliveries of roasted coffee to Russia sunk by 14.6% in 2022 to 25,737 tonnes.** That means a reduction of 4,391 tonnes of roasted coffee exported from the EU27 trade bloc. Still, the Russian Federation represents 11.9% of EU exports of roasted coffee. In the meantime, EU27's exports to Belarus have increased in 2022 by 5,017 tonnes (+140.3%) to a whopping 8,592 tonnes. Belarus is now the 7<sup>th</sup> largest customer for the EU27 area.

**Ukraine remains as the third largest export market for roasted coffee originating in the EU27 area.** Exports to Ukraine almost doubled during the 2016-2021 period (+82% on aggregate) peaking at 24,387 tonnes in 2021. Exports to Ukraine declined in 2022 to 21,649 tonnes (-11.2%) as a consequence of the Russian invasion, but still absorbs 10% of total EU exports of roasted coffee.

The United States is the fourth largest export market for EU27's coffee roasters. **Deliveries to the US have been on the increase for the last decade, peaking at 19,922 tonnes in 2021.** Exports to the US dropped by 7.2% in 2022 to 18,488 tonnes representing an 8.5% market share of EU27's exports. Switzerland is also a traditional customer for EU27's roasters representing a very stable export market with yearly sales of between ten and twelve thousand tonnes (12,042 tonnes in 2022, -2.9% yoy).

<b>EU27 ROASTED COFFEE Exports – Largest Absolute Variations</b>			
Total volume in tonnes, 2020-2022			
<b>TOP 5</b>	<b>Tonnes</b>	<b>BOTTOM 5</b>	<b>Tonnes</b>
Türkiye	5,110	United Kingdom	-9,126
Belarus	5,095	Ukraine	-1,921
United Arab Emirates	2,458	Australia	-1,224
Serbia	1,433	Russian Federation	-1,160
Saudi Arabia	1,408	Switzerland	-231

Source: Eurostat

**Among the new markets for EU27's coffee roasters, Türkiye is rapidly becoming a key export market adding 5,110 tonnes during the analysis period.** Exports to Türkiye reached 9,875 tonnes in 2022 (+35% yoy) with a 4.6% market share. Exports to Türkiye have more than doubled during the last five years. In the Middle East, the United Arab Emirates (+2,458 tonnes) and Saudi Arabia (+1,408 tonnes) are also rapidly climbing in the ranking of key exports market for European coffee roasters, while Serbia (+1,433 tonnes) has more than doubled its roasted coffee imports from EU27 countries since 2016.

Considering other relevant markets for the EU27 area, Canada (6,768 tonnes in 2022), Norway (6,768 tonnes) or South Korea (4,543 tonnes) remain large customers for EU27's coffee roaster with a stable market profile, while exports to Australia (EU27 area 9th largest market) are in sharp decline (-16.0% during the analysis period).

<b>EU27 ROASTED COFFEE Exports – Largest Variations (%)</b>			
As a percentage of total volume in tonnes, 2020-2022			
<b>TOP 5</b>	<b>%</b>	<b>BOTTOM 5</b>	<b>%</b>
Belarus	+145.7%	United Kingdom	-18.8%
Türkiye	+107.2%	Australia	-16.0%
Libya	+98.9%	Ukraine	-8.2%
United Arab Emirates	+88.4%	Russian Federation	-4.3%
Serbia	+63.0%	Switzerland	-1.9%

Source: Eurostat

## 6.2 Soluble coffee exports

Regarding the EU27 area's exports of soluble coffee (officially: extracts, essences and concentrates of coffee included in HS21011100), **total exports remained virtually unchanged in 2022 (-0.6%) with deliveries staying at 76,345 tonnes to non-EU destinations.**

Exports of soluble coffee have been conditioned by the same two factors – Brexit and the invasion of Ukraine –already mentioned in the previous section as well as their effects on roasted coffee exports. Their influence on soluble coffee exports is comparable.

**Exports to the Russian Federation have plummeted to 4,524 tonnes in 2022.** This figure represents -44.5% change during the analysis period and almost two thirds of soluble coffee sales to the Russian Federation have been lost since they peaked at 12,075 tonnes in 2016. In 2018 the Russian Federation absorbed 20.5% of total EU exports of soluble coffee while they only represent 5.9% in 2022.

**Exports to the Ukraine have also fallen sharply in 2022 to 5,660 tonnes (-18.4% yoy).** However, Ukraine remains as the third largest market for EU27-produced soluble coffee with a 7.4% market share.

**Brexit has propelled the United Kingdom to the leading position among export markets for EU27 producers of soluble coffee.** After reaching 25,351 tonnes in 2020 (33.5% of total exports), deliveries to the UK have steadily declined during the analysis period to 22,118 tonnes in 2022. This figure still represents 29% of EU27's total exports of soluble coffee.

EU27 Exports of SOLUBLE COFFEE						
To non-EU Destinations						
HS 21011100, 2015-2017, in tonnes and as a percentage of total exports						
COUNTRIES	2020		2021		2022	
	Tonnes	%	Tonnes	%	Tonnes	%
UNITED KINGDOM	25,351.1	33.5%	23,520.9	30.6%	22,117.6	29.0%
TÜRKIYE	4,482.6	5.9%	6,479.2	8.4%	9,203.9	12.1%
UKRAINE	6,640.7	8.8%	6,940.8	9.0%	5,660.2	7.4%
SOUTH AFRICA	5,460.3	7.2%	5,657.4	7.4%	4,869.8	6.4%
AUSTRALIA	5,403.0	7.1%	5,480.1	7.1%	4,580.5	6.0%
RUSSIAN FEDERATION	8,152.5	10.8%	6,076.7	7.9%	4,524.1	5.9%
EGYPT	2,266.7	3.0%	2,403.0	3.1%	2,628.5	3.4%
UNITED STATES	3,249.1	4.3%	4,138.9	5.4%	2,211.0	2.9%
NORWAY	1,675.7	2.2%	1,836.5	2.4%	1,762.9	2.3%
UNITED ARAB EMIRATES	720.8	1.0%	781.8	1.0%	1,392.7	1.8%
CHINA	637.1	0.8%	785.5	1.0%	1,067.0	1.4%
SERBIA	923.1	1.2%	879.2	1.1%	882.0	1.2%
SWITZERLAND	1,810.5	2.4%	1,544.8	2.0%	855.1	1.1%
SAUDI ARABIA	594.4	0.8%	1,178.9	1.5%	741.8	1.0%
MOROCCO	682.8	0.9%	789.7	1.0%	691.1	0.9%
OTHERS	7,570.3	10.0%	8,302.7	10.8%	13,156.6	17.2%
<b>TOTAL</b>	<b>75,620.7</b>	<b>100.0%</b>	<b>76,796.1</b>	<b>100.0%</b>	<b>76,344.8</b>	<b>100.0%</b>

Source: Eurostat

South Africa, Australia, and the United States traditionally completed the 'Top 5' destinations for EU27's soluble coffee (with The Russian Federation and Ukraine). Sales to this 'Anglo-Saxon Bloc' area steadily declining, with the case of Australia following a multiyear trend (-1,500 tonnes since 2018) while South Africa and the United States posted sharp falls in 2022: -14.0% and -46.6%, respectively (yoy). South Africa remains as EU27's fourth largest market, while Australia is now the fifth (third in 2018) and the United States is the eight (fifth in 2018).

**Türkiye has emerged as the second largest market for EU27's soluble coffee with 9,204 tonnes exported to the country in 2022 (+42.1% yoy).** Deliveries to Türkiye have experienced a six-fold increase since 2018 with close to 8,000 tonnes of soluble coffee added to exports. Türkiye's share of EU27's total exports of soluble coffee has blown up from 3.1% in 2018 to 12.1% in 2022. Other markets presenting a favourable outlook are the United Arab Emirates (+672 tonnes during the analysis period), China (+430 tonnes), and Egypt (+362 tonnes). On the negative side, exports to Switzerland have plummeted to 855 tonnes in 2022 (-955 tonnes during the analysis period).

## 7. EU 27 COFFEE TRADE: IMPORTS AND EXPORTS IN VALUE

This section features some relevant data aimed at adequately valuating the importance of the coffee sector within the EU food and drinks industry.

The table below shows the value of imports and exports of green coffee, green decaffeinated coffee, roasted regular coffee, roasted decaffeinated coffee, and soluble coffee in the EU27 area during the analysis period.

<b>EU27 Coffee Trade in Value 2020-2022 (EUR million)</b>																
Green Coffee, Green Decaffeinated Coffee, Roasted Coffee, Roasted Decaffeinated Coffee, Soluble Coffee																
	GREEN COFFEE			GREEN DECAF COFFEE			ROASTED COFFEE			ROASTED DECAF COFFEE			SOLUBLE COFFEE			
	2020	2021	2022	2020	2021	2022	2020	2021	2022	2020	2021	2022	2020	2021	2022	
<b>Imports</b>																
EU extra trade	5,798.2	6,478.1	11,053.7	29.7	45.7	60.1	1,541.1	1,582.7	1,567.1	132.8	212.5	111.4	435.1	413.9	606.7	
EU intra trade	1,075.4	1,181.1	1,912.3	106.8	101.9	133.9	4,424.0	4,915.3	6,122.8	238.5	176.8	282.4	858.8	900.7	1,197.9	
<b>Exports</b>																
EU extra trade	153.8	194.7	312.9	257.2	288.3	393.2	1,478.8	1,505.3	1,825.3	51.6	47.0	61.2	708.7	709.6	880.9	
EU intra trade	1,118.4	1,301.2	2,132.9	191.9	200.9	274.3	4,574.8	5,112.0	6,191.4	247.3	250.4	259.6	920.4	943.5	1,251.5	

Source: Eurostat

These data make a distinction between intra EU trade and extra EU trade. Coffee is not only one of the most traded commodities in the world markets, but it is also subject to an intense trade between EU27 countries. The value of intra-EU exports of green coffee (normal and decaffeinated) jumped to EUR 2.4 billion in 2022 (+60.4% yoy), while those of finished coffee products (roasted regular coffee, roasted decaffeinated coffee and soluble coffee) reached EUR 7.7 billion in 2022 (+18.2% yoy). These figures need to be put into perspective in order to understand the intensity of coffee trade within the EU27 trade bloc. Countries within the EU27 area exported EUR 0.7 billion worth of green coffee (normal and decaffeinated) in 2022, while exports of finished coffee products (roasted regular coffee, roasted decaffeinated coffee and soluble coffee) stayed at just under EUR 2.8 billion in that same year.



## 8. COFFEE CONSUMPTION BY COUNTRY IN THE EU27

The following tables and graphs are derived from data provided by Euromonitor International. The data may differ from those obtained from other sources. This may be the result of the application of diverse definitions or diverging methodologies. "Coffee" is here the aggregation of fresh coffee (beans, pods, and ground coffee) and instant coffee (soluble). Please note that foodservice sales of coffee are volumes sold to the on-trade (foodservice) sector and do not represent values of coffee sold to the consumer.

Total Coffee Sales in EU27 Markets 2020-2022 In volume ('000 tonnes) and in value (EUR million)						
	2020		2021		2022	
	Volume	Value	Volume	Value	Volume	Value
Austria	41	783	45	918	48	1,002
Belgium	46	632	48	652	50	698
Bulgaria	19	282	19	305	20	344
Croatia	21	175	22	183	22	200
Czechia	25	400	24	416	25	495
Denmark	33	448	33	459	34	514
Estonia*	05	140	06	152	06	163
Finland	46	374	48	407	49	480
France	220	4,207	230	4,474	232	4,958
Germany	450	4,995	450	5,359	450	6,171
Greece	33	349	34	372	34	514
Hungary	29	353	30	367	30	412
Ireland	08	250	09	283	10	320
Italy	184	2,339	186	2,348	186	2,476
Latvia*	04	155	05	156	05	164
Lithuania	12	175	12	181	12	247
Netherlands	98	1,103	98	1,111	98	1,175
Poland	104	1,068	106	1,094	106	1,326
Portugal	27	566	29	668	31	630
Romania	47	436	47	484	48	598
Slovakia	14	273	15	284	14	301
Slovenia	14	172	15	182	15	200
Spain	136	1,761	144	1,867	144	2,004
Sweden	84	502	85	517	87	537

Source: © Euromonitor International. Value data in EUR million (current prices) and y-o-y exchange rates have been applied to non-Euro currencies. Value is calculated as 'Retail value' estimated as per Retail Sales Price (RSP).

\*Data for Estonia and Latvia have been modelled.

**The EU27 coffee market showed on aggregate a very stable profile in terms of volume during the analysis period (2020-2022), as it would be expected from a trade bloc which includes European countries with mature markets. However, this stability in volume (+2.3% yoy in 2021 and +0.9% yoy in 2022) has not been matched by the evolution of the coffee market in value. Inflation is affecting the coffee sector as any other industry in the European economy and the coffee market value climbed to EUR 25.93 billion in 2022 (+11.6% yoy), adding on to the 5.9% yoy growth experienced by the coffee market in the EU27 area during 2021.**

As for the evolution in different countries within the EU27 area, Latvia and Estonia remain as very dynamic markets, although their market volumes are comparatively very low (0.3% of the EU27 market

each). Other countries showing a positive trend during the analysis period are: Austria (+28% in value, +17% in volume), Ireland (+28% in value, +25% in volume), and Portugal (+15% in volume, +11% in value). In countries such as Lithuania (+41% in value, 0% in volume), Romania (+37% in value, 2% in volume), Greece (47% in value, 3% in volume), Finland (28% in value, 7% in volume), or Poland (24% in value, 2 % in volume), inflation seems to be driving the expansion of the coffee market value with little or no added volume to coffee sales.

Overall, major EU27 markets have experienced very modest growth in terms of volume during the analysis period 2020-2022 (0 to 4% yoy), while market values have expanded significantly due to inflation: Germany (24% in value, 0% in volume); France (18% in value, 5% in volume); Italy (6% in value, 1% in volume); and Spain (14% in value, 6% in volume).

COFFEE in RETAIL vs. Coffee in FOODSERVICES					
Market Share in EU27 Markets 2022					
as a percentage of total coffee volume sold					
COUNTRY	Retail (%)	Foodservices (%)	COUNTRY	Retail (%)	Foodservices (%)
Austria	87	13	Italy	74	26
Belgium	79	21	Latvia*	88	12
Bulgaria	82	18	Lithuania	89	11
Croatia	59	41	Luxembourg	81	19
Cyprus	81	19	Malta	79	21
Czechia	92	08	Netherlands	82	18
Denmark	80	20	Poland	88	12
Estonia*	87	13	Portugal	58	42
Finland	88	12	Romania	82	18
France	86	14	Slovakia	96	04
Germany	90	10	Slovenia	85	15
Greece	51	49	Spain	63	37
Hungary	86	14	Sweden	71	29
Ireland	84	16	<b>EU27 TOTAL</b>	<b>81</b>	<b>19</b>

Source: © Euromonitor International

\*Figures for Estonia and Latvia have been modelled

In terms of market channels, the share of retail and foodservices (essentially representing out-of-home consumption) differs substantially between markets, ranging from a 49% share of the foodservices channel in Greece to just 4% in Slovakia. The foodservice channel is also prominent in those countries where tourism is a key industry: Portugal (42%), Croatia (41%), Spain (37%), and Italy (26%). In exchange, the retail channel prevails not only in Slovakia (96%), but also in Czechia (92%), Germany (90%), or Poland (88%). **If we compare data for EU27 countries on aggregate with those collected by Euromonitor in 2017, the foodservices channel has lost market share on aggregate.** On one hand, it has not yet fully recovered in tourist destinations after the pandemic, especially in the Iberia region: Portugal (-12 percentage points), and Spain (-4 percentage points). On the other hand, large markets such as France (-3 percentage points) or Germany (-2 percentage points) also showed a negative evolution, as it happened in countries such as Ireland (-11 percentage points) and The Netherlands (-6 percentage points).

**FRESH vs. INSTANT COFFEE**  
**Market Size by Channel 2022**  
total retail volume in tonnes

COUNTRIES	RETAIL		FOODSERVICES	
	Fresh	Instant	Fresh	Instant
Austria	37,931.5	3,527.0	6,130.2	0.0
Belgium	36,139.0	3,154.9	10,021.7	245.6
Bulgaria	9,817.1	6,354.5	2,982.1	601.8
Croatia	10,342.3	2,491.2	7,467.8	1,482.1
Cyprus	2,328.9	639.8	583.5	124.6
Czech Republic	14,833.3	7,788.5	1,862.2	156.5
Denmark	25,054.2	2,318.6	6,871.1	0.0
Estonia	n.a.	n.a.	n.a.	n.a.
Finland	41,772.6	957.7	6,065.2	0.0
France	186,196.6	12,812.0	30,598.3	2,160.0
Germany	402,929.6	50,879.2	47,390.3	3,063.5
Greece	13,572.1	4,081.7	15,330.5	1,841.0
Hungary	15,884.3	9,943.5	3,911.7	172.8
Ireland	6,792.0	1,453.5	954.8	607.7
Italy	134,377.5	3,920.2	45,968.4	2,136.7
Latvia	n.a.	n.a.	n.a.	n.a.
Lithuania	8,832.2	2,073.2	1,114.4	257.9
Luxembourg	2,357.6	247.3	582.0	29.6
Malta	1,042.9	118.8	272.5	40.7
Netherlands	75,935.5	4,659.2	16,769.4	819.8
Poland	72,249.6	21,020.5	11,549.7	1,071.3
Portugal	15,577.2	2,333.7	12,603.8	264.6
Romania	32,024.9	7,596.3	6,605.2	1,968.6
Slovakia	9,291.9	4,598.4	517.6	76.2
Slovenia	10,649.3	1,884.0	1,794.3	386.0
Spain	77,575.9	12,792.4	52,498.4	1,131.5
Sweden	59,060.0	2,511.6	24,895.9	185.6

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".

Coffee pods<sup>1</sup> in all their formats have revolutionised the way we consume coffee in Europe and around the world, especially at home or in the office. The pandemic has only served as a booster for this format given the increased level of coffee consumption at home. Coffee pods represented 16% of the EU27 market in terms of volume (tonnes of coffee sold) in 2022. **Although five out of six kilos of coffee are consumed via a different format, in value terms coffee pods generate 40% of total retail sales in the EU27 area.** Therefore, coffee pods are a key source of revenue for coffee roasters, especially when considering coffee sales to households (retail channel).

<b>TRADITIONAL COFFEE vs. COFFEE PODS</b>				
Market Share in the EU27 Markets 2021-2022				
as a percentage of total coffee volume (tonnes)				
Countries	2021		2022	
	Traditional Coffee	Coffee Pods	Traditional Coffee	Coffee Pods
Austria	80	20	82	18
Belgium	69	31	69	31
Bulgaria	93	07	93	07
Croatia*	99	01	99	01
Cyprus*	92	08	92	08
Czechia	94	06	94	06
Denmark	98	02	98	02
Estonia	n.a.	n.a.	n.a.	n.a.
Finland	99	01	99	01
France	66	34	66	34
Germany	87	13	87	13
Greece	97	03	97	03
Hungary	95	05	95	05
Ireland	39	61	39	61
Italy	85	15	85	15
Latvia	n.a.	n.a.	n.a.	n.a.
Lithuania	98	02	98	02
Luxembourg	77	23	77	23
Malta	81	19	80	20
Netherlands	64	36	65	35
Poland	98	02	98	02
Portugal	66	34	73	27
Romania	98	02	97	03
Slovakia	95	05	95	05
Slovenia	99	01	99	01
Spain	84	16	84	16
Sweden	99	01	99	01
<b>EU27 TOTAL*</b>	<b>84</b>	<b>16</b>	<b>84</b>	<b>16</b>

Source: © Euromonitor International

\*EU27 total figures do not include data from Estonia and Latvia.

<sup>1</sup> Pods are portions of fresh ground coffee encapsulated in a container, which can be metal, plastic or paper. Both soft pods (pads) and hard pods (capsules) are included.

Not all countries in the EU27 area have fallen in love with coffee pods. **Great “coffee nations” such as the Nordic countries and the Baltics remain loyal to coffee beans or ground coffee with the market share of coffee pods staying below 2% in 2022** (in volume terms). These countries tend to value high quality fresh coffee beans even when consuming coffee at home and the large size (mL) of their average coffee drink makes pods relatively less attractive in these markets. **Central and Eastern European countries are similarly less inclined to consume coffee in pods with a market share for this system consistently below 10%.** Coffee consumption in these countries certainly follows a more traditional pattern (method of preparation) and the cost per pod may still be a deterrent in these middle-income markets.

<b>TRADITIONAL COFFEE vs. COFFEE PODS</b>				
<b>Market Share in the EU27 Markets 2021-2022</b>				
<b>as a percentage of total coffee retail value</b>				
	<b>2021</b>		<b>2022</b>	
	<b>Traditional Coffee</b>	<b>Coffee Pods</b>	<b>Traditional Coffee</b>	<b>Coffee Pods</b>
Austria	56	44	58	42
Belgium	54	46	53	47
Bulgaria	79	21	77	23
Croatia*	92	08	92	08
Cyprus*	73	27	74	26
Czechia	88	12	87	13
Denmark	92	08	92	08
Estonia	n.a.	n.a.	n.a.	n.a.
Finland	95	05	95	05
France	36	64	35	65
Germany	75	25	75	25
Greece	81	19	81	19
Hungary	82	18	80	20
Ireland	78	22	22	78
Italy	46	54	44	56
Latvia	n.a.	n.a.	n.a.	n.a.
Lithuania	96	04	95	05
Luxembourg	44	56	43	57
Malta	47	53	46	54
Netherlands	48	52	49	51
Poland	93	07	93	07
Portugal	23	77	26	74
Romania	93	07	92	08
Slovakia	85	15	87	13
Slovenia	98	02	98	02
Spain	41	59	41	59
Sweden	91	09	91	09
<b>EU27 TOTAL*</b>	<b>60</b>	<b>40</b>	<b>61</b>	<b>39</b>

Source: © Euromonitor International

\*EU27 total figures do not include data from Estonia and Latvia.

Note: Value data in EUR million (current prices) and y-o-y exchange rates have been applied to non-Euro currencies. Value is calculated as 'Retail value' estimated as per Retail Sales Price (RSP). 'Traditional coffee' includes fresh coffee beans, fresh ground coffee and instant coffee, including ground and instant decaffeinated coffee. 'Coffee pods' includes all fresh ground coffee in pods.

**Germany marks the 'great coffee pods divide' in Europe.** Although pods represent 13% of the market (volume) and 25% of sales (value), Germans still prefer traditional brewing systems for their cups of coffee. **In the rest of Western Europe, coffee pods have achieved higher market shares in terms of volume (2022):** Italy (15%), Spain (16%), Austria (18%), Portugal (27%), Belgium (31%), France (34%), and The Netherlands (35%). In many of these countries, value sales of coffee pods represent now more than 50% of the market: The Netherlands (51%), Italy (56%), Spain (59%), France (65%), and Portugal (74%).

Finally, while coffee pods are now ubiquitous in European households and will remain so in the near future, **coffee beans are also making a comeback both in foodservices and at home.** The market share as a percentage of total value sales in 2022 reached 13.4%, up from 12.6% in 2021. In terms of volume, coffee beans represented 26.0% of total coffee sold in the EU27 area (excluding Estonia and Latvia) during 2022, up from 24.2% in 2021.

## 9. EU27 COUNTRIES KEY NATIONAL IMPORT DATA

### IMPORT STATISTICS 2022 (by country of origin, incl. intra-EU trade, in tonnes)

<b>AUSTRIA</b>					
Green Coffee (incl. Decaf)		Roasted Coffee (incl. Decaf)		Soluble Coffee	
Germany	4,062.6	Germany	16,965.8	Germany	2,680.1
Viet Nam	3,066.0	Italy	9,979.6	Switzerland	222.2
Italy	2,022.0	Slovakia	9,641.2	India	212.1
Brazil	1,987.9	Switzerland	3,236.3	Belgium	141.0
Belgium	901.7	Netherlands	704.0	Italy	129.4
Others	1,844.2	Others	2,256.1	Others	531.4
<b>TOTAL</b>	<b>13,884.4</b>	<b>TOTAL</b>	<b>42,783.0</b>	<b>TOTAL</b>	<b>3,916.2</b>

<b>BELGIUM</b>					
Green Coffee (incl. Decaf)		Roasted Coffee (incl. Decaf)		Soluble Coffee	
Brazil	133,097.4	Germany	12,229.4	Germany	1,422.8
Viet Nam	67,561.0	Netherlands	11,329.1	Netherlands	1,052.6
Honduras	28,578.9	France	5,317.0	France	881.5
Peru	26,920.8	Italy	4,513.0	India	518.8
Colombia	15,650.1	Poland	1,763.2	Poland	472.7
Others	113,652.1	Others	4,133.7	Others	1,708.4
<b>TOTAL</b>	<b>385,460.3</b>	<b>TOTAL</b>	<b>39,285.4</b>	<b>TOTAL</b>	<b>6,056.8</b>

<b>BULGARIA</b>					
Green Coffee (incl. Decaf)		Roasted Coffee (incl. Decaf)		Soluble Coffee	
Viet Nam	6,105.6	Italy	6,943.8	Brazil	528.5
Brazil	4,131.1	Poland	1,268.9	Poland	236.3
Indonesia	3,406.2	Germany	846.3	France	121.9
Germany	2,780.3	Spain	406.4	Hungary	119.3
India	2,625.6	Romania	177.1	Germany	94.3
Others	6,330.3	Others	800.9	Others	239.7
<b>TOTAL</b>	<b>25,379.1</b>	<b>TOTAL</b>	<b>10,443.4</b>	<b>TOTAL</b>	<b>1,340.0</b>

<b>CROATIA</b>					
Green Coffee (incl. Decaf)		Roasted Coffee (incl. Decaf)		Soluble Coffee	
Slovenia	9,431.1	Italy	2,380.8	Poland	423.0
Italy	2,137.0	Slovenia	2,116.2	Spain	422.0
Germany	858.8	Germany	527.4	Germany	301.0
India	71.5	Greece	400.4	Brazil	216.6
Brazil	59.2	Austria	348.4	Switzerland	102.7
Others	120.9	Others	516.2	Others	258.7
<b>TOTAL</b>	<b>12,678.5</b>	<b>TOTAL</b>	<b>6,289.4</b>	<b>TOTAL</b>	<b>1,724.0</b>

<b>CYPRUS</b>					
Green Coffee (incl. Decaf)		Roasted Coffee (incl. Decaf)		Soluble Coffee	
Brazil	863.7	Greece	914.7	Greece	535.4
Greece	193.4	Italy	199.9	Netherlands	65.1
Ethiopia	57.6	United Kingdom	128.8	India	43.2
India	47.5	Germany	110.1	Russian Federation	38.3
Colombia	39.9	Netherlands	97.1	Germany	37.3
Others	104.3	Others	327.9	Others	174.3
<b>TOTAL</b>	<b>1,306.4</b>	<b>TOTAL</b>	<b>1,778.5</b>	<b>TOTAL</b>	<b>893.6</b>

<b>CZECHIA</b>					
Green Coffee (incl. Decaf)		Roasted Coffee (incl. Decaf)		Soluble Coffee	
Germany	13,341.3	Germany	16,761.5	Germany	3,374.9
Countries / territories not specified*	2,082.8	Poland	9,203.0	Spain	2,972.5
Belgium	1,126.9	Italy	3,356.2	Belgium	1,999.4
Italy	149.6	France	2,468.6	Netherlands	1,887.8
Slovakia	54.4	Austria	2,086.5	Poland	1,740.7
Others	107.3	Others	6,169.5	Others	1,369.1
<b>TOTAL</b>	<b>16,862.3</b>	<b>TOTAL</b>	<b>40,045.3</b>	<b>TOTAL</b>	<b>13,344.4</b>



<b>DENMARK</b>					
Green Coffee (incl. Decaf)		Roasted Coffee (incl. Decaf)		Soluble Coffee	
Brazil	4,814.2	Germany	8,972.0	Netherlands	1,392.2
Germany	2,555.1	Sweden	8,455.0	Germany	780.7
Uganda	1,237.7	Italy	1,772.1	Hungary	251.1
Mexico	1,185.2	Belgium	1,073.0	Sweden	250.4
Viet Nam	1,059.5	Kenya	1,001.7	United Kingdom	229.2
Others	5,069.2	Others	3,348.4	Others	887.6
<b>TOTAL</b>	<b>15,920.9</b>	<b>TOTAL</b>	<b>24,622.2</b>	<b>TOTAL</b>	<b>3,791.2</b>

<b>ESTONIA</b>					
Green Coffee (incl. Decaf)		Roasted Coffee (incl. Decaf)		Soluble Coffee	
Lithuania	110.7	Finland	2,383.9	Lithuania	159.6
Poland	100.3	Lithuania	1,776.0	Latvia	38.3
Belgium	81.1	Latvia	1,088.3	Poland	24.2
Brazil	80.7	Italy	219.2	Finland	12.2
Netherlands	74.6	Poland	150.2	India	9.0
Others	49.7	Others	349.5	Others	14.8
<b>TOTAL</b>	<b>497.1</b>	<b>TOTAL</b>	<b>5,967.1</b>	<b>TOTAL</b>	<b>258.1</b>

<b>FINLAND</b>					
Green Coffee (incl. Decaf)		Roasted Coffee (incl. Decaf)		Soluble Coffee	
Brazil	24,514.5	Sweden	6,008.4	Germany	203.8
Colombia	8,984.1	Netherlands	5,799.5	Switzerland	187.3
Honduras	5,671.2	Germany	5,599.7	Sweden	172.5
Kenya	2,137.3	Denmark	225.6	Denmark	73.9
Nicaragua	1,577.1	Estonia	217.8	Spain	62.6
Others	8,330.8	Others	549.9	Others	31.2
<b>TOTAL</b>	<b>51,215.0</b>	<b>TOTAL</b>	<b>18,400.9</b>	<b>TOTAL</b>	<b>731.3</b>

FRANCE					
Green Coffee (incl. Decaf)		Roasted Coffee (incl. Decaf)		Soluble Coffee	
Brazil	54,113.7	Switzerland	37,029.1	Spain	3,584.6
Belgium	52,663.0	Netherlands	32,206.2	Germany	3,394.9
Viet Nam	27,565.3	Italy	25,864.6	United Kingdom	1,457.6
Honduras	10,729.1	Germany	22,476.1	Netherlands	704.7
Ethiopia	9,652.5	Belgium	19,988.4	Poland	551.5
Others	56,850.4	Others	16,850.5	Others	2,796.1
<b>TOTAL</b>	<b>211,574.0</b>	<b>TOTAL</b>	<b>154,414.9</b>	<b>TOTAL</b>	<b>12,489.4</b>

GERMANY					
Green Coffee (incl. Decaf)		Roasted Coffee (incl. Decaf)		Soluble Coffee	
Brazil	405,117.0	Italy	61,434.5	Belgium	7,149.9
Viet Nam	240,615.3	Switzerland	10,976.9	Poland	5,785.8
Honduras	75,423.4	Netherlands	9,262.5	Ecuador	3,164.9
Ethiopia	55,570.7	Poland	7,610.4	Switzerland	2,847.3
Peru	54,510.6	France	7,590.1	Netherlands	2,774.8
Others	316,598.8	Others	13,415.8	Others	13,186.4
<b>TOTAL</b>	<b>1,147,835.8</b>	<b>TOTAL</b>	<b>110,290.2</b>	<b>TOTAL</b>	<b>34,909.1</b>

GREECE					
Green Coffee (incl. Decaf)		Roasted Coffee (incl. Decaf)		Soluble Coffee	
Brazil	21,237.9	Italy	8,618.6	Spain	4,421.6
Viet Nam	3,401.3	Germany	1,746.5	Netherlands	495.1
India	3,213.4	France	1,155.4	France	381.6
Colombia	2,193.7	Bulgaria	1,118.9	United Kingdom	159.7
Germany	1,671.7	Belgium	431.5	Germany	138.8
Others	7,193.7	Others	1,374.2	Others	239.3
<b>TOTAL</b>	<b>38,911.7</b>	<b>TOTAL</b>	<b>14,445.1</b>	<b>TOTAL</b>	<b>5,836.1</b>

HUNGARY					
Green Coffee (incl. Decaf)		Roasted Coffee (incl. Decaf)		Soluble Coffee	
Germany	2,451.5	Slovakia	8,201.0	Spain	3,030.7
Belgium	2,204.9	Germany	3,927.3	Viet Nam	951.5
Netherlands	388.6	Poland	3,500.4	France	498.1
France	95.2	Italy	1,852.7	Poland	364.9
Viet Nam	58.2	Bulgaria	1,575.3	Germany	282.8
Others	239.6	Others	2,983.2	Others	862.8
<b>TOTAL</b>	<b>5,438.0</b>	<b>TOTAL</b>	<b>22,039.9</b>	<b>TOTAL</b>	<b>5,990.8</b>

IRELAND					
Green Coffee (incl. Decaf)		Roasted Coffee (incl. Decaf)		Soluble Coffee	
Brazil	2,959.4	United Kingdom	3,097.9	United Kingdom	1,943.8
Netherlands	1,556.1	Germany	2,501.8	Spain	117.8
Peru	947.7	France	839.0	Poland	90.4
Colombia	947.0	Spain	387.0	Germany	70.0
Indonesia	564.5	Netherlands	364.4	India	31.4
Others	2,274.6	Others	827.1	Others	56.7
<b>TOTAL</b>	<b>9,249.3</b>	<b>TOTAL</b>	<b>8,017.2</b>	<b>TOTAL</b>	<b>2,310.1</b>

ITALY					
Green Coffee (incl. Decaf)		Roasted Coffee (incl. Decaf)		Soluble Coffee	
Brazil	199,921.0	France	8,772.7	Spain	1,515.7
Viet Nam	151,014.1	Germany	8,746.3	India	1,304.0
Uganda	109,632.8	Belgium	3,038.6	Germany	601.5
India	64,373.5	Slovenia	1,711.2	Viet Nam	472.2
Indonesia	23,202.5	Spain	1,549.9	France	449.6
Others	126,303.9	Others	4,644.8	Others	899.0
<b>TOTAL</b>	<b>674,447.8</b>	<b>TOTAL</b>	<b>28,463.5</b>	<b>TOTAL</b>	<b>5,242.0</b>

LATVIA					
Green Coffee (incl. Decaf)		Roasted Coffee (incl. Decaf)		Soluble Coffee	
Brazil	922.1	Lithuania	3,595.6	Lithuania	544.7
Sweden	534.3	Germany	2,514.4	Poland	201.1
Germany	203.1	Sweden	1,038.5	India	172.9
Poland	170.4	Italy	557.0	Germany	23.2
Uganda	76.5	Poland	439.1	Cyprus	14.6
Others	289.4	Others	904.0	Others	29.4
<b>TOTAL</b>	<b>2,195.8</b>	<b>TOTAL</b>	<b>9,048.6</b>	<b>TOTAL</b>	<b>985.9</b>

NETHERLANDS					
Green Coffee (incl. Decaf)		Roasted Coffee (incl. Decaf)		Soluble Coffee	
Belgium	96,297.6	Germany	29,704.9	Germany	4,151.7
Brazil	51,264.1	Belgium	8,986.8	United Kingdom	4,057.8
Germany	21,196.1	Poland	8,731.9	Brazil	1,598.9
Viet Nam	14,542.3	Italy	6,254.6	France	1,365.6
Colombia	10,286.5	Luxembourg	4,821.4	Belgium	1,302.3
Others	49,043.7	Others	16,839.9	Others	5,481.8
<b>TOTAL</b>	<b>242,630.3</b>	<b>TOTAL</b>	<b>75,339.5</b>	<b>TOTAL</b>	<b>17,958.1</b>

<b>LITHUANIA</b>					
Green Coffee (incl. Decaf)		Roasted Coffee (incl. Decaf)		Soluble Coffee	
Germany	1,243.8	Germany	6,345.8	Germany	358.5
Brazil	536.4	Denmark	5,318.9	Poland	230.9
Spain	250.0	Italy	3,027.3	Brazil	180.5
Viet Nam	242.0	Estonia	2,373.2	Spain	87.4
Poland	178.1	Poland	2,088.7	Denmark	81.8
Others	1,110.8	Others	3,952.7	Others	258.5
<b>TOTAL</b>	<b>3,561.1</b>	<b>TOTAL</b>	<b>23,106.6</b>	<b>TOTAL</b>	<b>1,197.6</b>

<b>LUXEMBOURG</b>					
Green Coffee (incl. Decaf)		Roasted Coffee (incl. Decaf)		Soluble Coffee	
Belgium	488.6	Germany	12,780.7	Belgium	78.8
France	111.2	Belgium	1,917.6	Germany	72.7
Colombia	34.9	Italy	1,604.5	Netherlands	40.1
Germany	28.6	Netherlands	970.4	Poland	2.6
India	19.2	Portugal	337.4	France	2.1
Others	32.7	Others	537.3	Others	1.6
<b>TOTAL</b>	<b>715.2</b>	<b>TOTAL</b>	<b>18,147.9</b>	<b>TOTAL</b>	<b>197.9</b>

<b>MALTA</b>					
Green Coffee (incl. Decaf)		Roasted Coffee (incl. Decaf)		Soluble Coffee	
Italy	39.2	Italy	603.8	Brazil	122.6
Germany	7.4	Germany	93.4	United Kingdom	91.4
Netherlands	6.6	United Kingdom	47.0	Italy	49.8
Denmark	2.4	Spain	39.6	Morocco	47.2
United Kingdom	0.7	Portugal	19.7	France	30.1
Others	1.0	Others	25.1	Others	56.3
<b>TOTAL</b>	<b>57.3</b>	<b>TOTAL</b>	<b>828.6</b>	<b>TOTAL</b>	<b>397.4</b>

<b>POLAND</b>					
Green Coffee (incl. Decaf)		Roasted Coffee (incl. Decaf)		Soluble Coffee	
Germany	78,800.6	Germany	33,741.8	Germany	12,086.3
Viet Nam	9,361.3	Italy	18,262.6	India	4,330.8
Brazil	8,962.6	Netherlands	4,089.3	Spain	4,190.8
Belgium	5,442.8	Lithuania	2,396.0	Brazil	2,428.2
Netherlands	2,937.1	Belgium	1,316.1	Viet Nam	2,209.4
Others	7,171.8	Others	7,846.6	Others	5,252.8
<b>TOTAL</b>	<b>112,676.2</b>	<b>TOTAL</b>	<b>67,652.4</b>	<b>TOTAL</b>	<b>30,498.3</b>

<b>PORTUGAL</b>					
Green Coffee (incl. Decaf)		Roasted Coffee (incl. Decaf)		Soluble Coffee	
Viet Nam	12,988.6	Spain	5,415.3	Spain	569.7
Spain	8,510.9	France	2,660.7	Germany	413.4
Uganda	7,473.9	Italy	2,355.4	France	175.7
Brazil	5,431.9	Germany	995.7	Hungary	37.2
India	2,728.8	Netherlands	430.5	Netherlands	28.6
Others	13,303.9	Others	757.5	Others	51.1
<b>TOTAL</b>	<b>50,438.0</b>	<b>TOTAL</b>	<b>12,615.1</b>	<b>TOTAL</b>	<b>1,275.7</b>

<b>ROMANIA</b>					
Green Coffee (incl. Decaf)		Roasted Coffee (incl. Decaf)		Soluble Coffee	
Brazil	2,785.9	Germany	9,779.2	Poland	525.2
Uganda	2,166.6	Italy	9,063.0	Brazil	398.7
Viet Nam	2,034.1	Bulgaria	6,458.3	Viet Nam	369.6
Germany	2,025.7	Poland	4,413.0	Germany	357.4
Colombia	1,841.4	Hungary	1,433.8	Spain	347.6
Others	6,695.8	Others	4,794.3	Others	1,274.8
<b>TOTAL</b>	<b>17,549.5</b>	<b>TOTAL</b>	<b>35,941.6</b>	<b>TOTAL</b>	<b>3,273.3</b>

<b>SLOVAKIA</b>					
Green Coffee (incl. Decaf)		Roasted Coffee (incl. Decaf)		Soluble Coffee	
Belgium	1,418.3	Germany	15,144.8	Czechia	1,690.7
Germany	1,238.5	Poland	9,288.8	Poland	664.4
Czechia	472.1	Hungary	5,542.5	Germany	43.3
Viet Nam	91.3	Romania	4,221.2	Hungary	23.0
Brazil	77.3	Czechia	2,654.4	India	15.0
Others	150.9	Others	3,125.9	Others	39.8
<b>TOTAL</b>	<b>3,448.4</b>	<b>TOTAL</b>	<b>39,977.6</b>	<b>TOTAL</b>	<b>2,476.2</b>

<b>SLOVENIA</b>					
Green Coffee (incl. Decaf)		Roasted Coffee (incl. Decaf)		Soluble Coffee	
Brazil	11,655.5	Italy	2,341.6	Croatia	92.5
India	6,382.8	Croatia	795.0	Germany	89.6
Viet Nam	3,802.1	Bosnia and Herzegovina	591.4	Austria	53.4
Uganda	1,852.2	Serbia	245.8	Poland	42.5
Colombia	1,173.9	Germany	242.4	Italy	26.2
Others	2,723.0	Others	393.8	Others	47.1
<b>TOTAL</b>	<b>27,589.5</b>	<b>TOTAL</b>	<b>4,610.0</b>	<b>TOTAL</b>	<b>351.3</b>

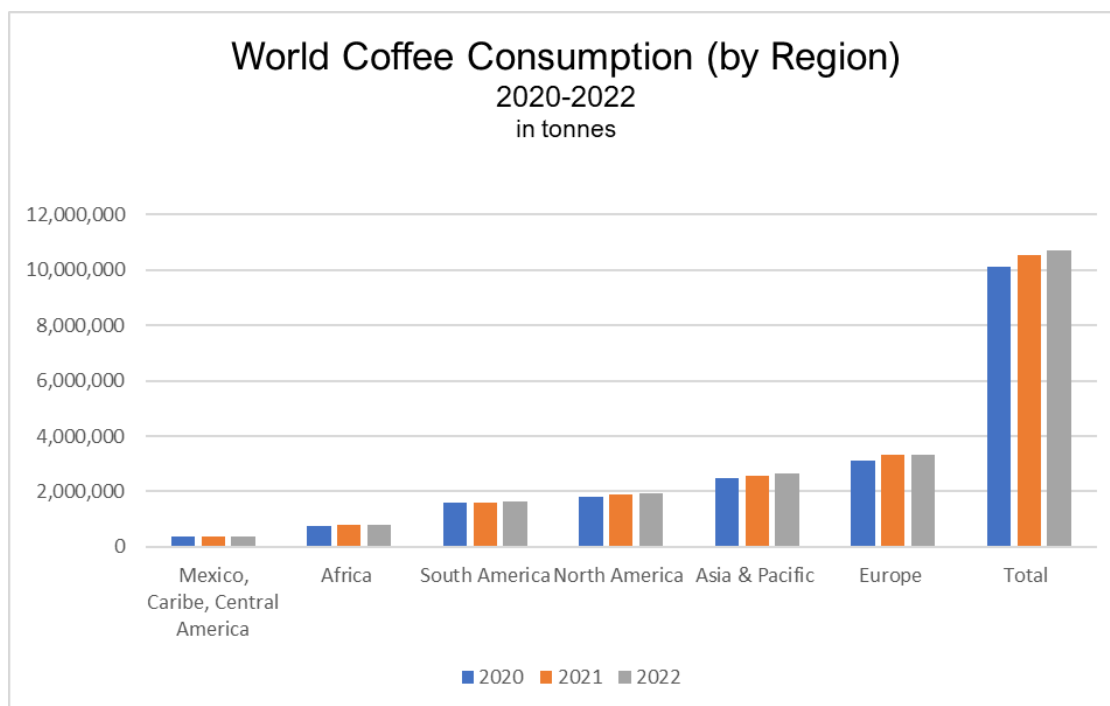
<b>SPAIN</b>					
Green Coffee (incl. Decaf)		Roasted Coffee (incl. Decaf)		Soluble Coffee	
Viet Nam	113,549.8	France	9,026.2	Viet Nam	1,555.3
Brazil	69,519.3	Germany	5,996.0	Netherlands	901.6
Germany	41,823.0	Portugal	4,820.5	Mexico	795.8
Belgium	25,213.8	Italy	2,861.7	India	341.6
Indonesia	20,500.4	Switzerland	2,512.2	Brazil	301.8
Others	72,854.9	Others	3,421.1	Others	1,401.9
<b>TOTAL</b>	<b>343,461.2</b>	<b>TOTAL</b>	<b>28,637.7</b>	<b>TOTAL</b>	<b>5,298.0</b>

<b>SWEDEN</b>					
Green Coffee (incl. Decaf)		Roasted Coffee (incl. Decaf)		Soluble Coffee	
Brazil	37,894.3	Netherlands	3,693.6	Switzerland	1,201.3
Peru	13,422.9	Italy	2,683.6	Czechia	770.6
Honduras	8,025.3	Germany	1,666.6	Germany	443.0
Germany	5,548.3	Switzerland	1,109.2	Netherlands	435.5
Netherlands	5,494.1	Denmark	988.4	Spain	429.3
Others	32,048.5	Others	2,276.7	Others	1,355.9
<b>TOTAL</b>	<b>102,433.4</b>	<b>TOTAL</b>	<b>12,418.1</b>	<b>TOTAL</b>	<b>4,635.6</b>

Source: Eurostat

## 10. EU MARKET IN PERSPECTIVE

Based on data from the International Coffee Organization (ICO), the graph below shows the evolution of coffee consumption in major regions in the world during the analysis period:



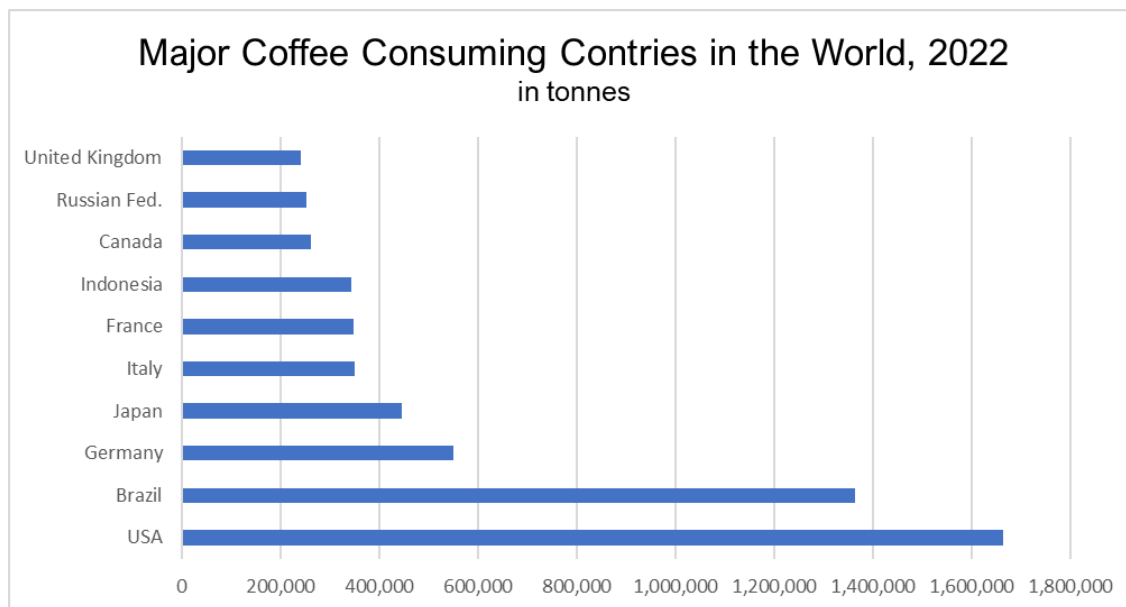
Source: ICO

Total world coffee consumption increased by 597,900 tonnes during the analysis period (2020-2022), with Europe adding 189,060 tonnes and Asia Pacific 172,380 tonnes. Both regions on aggregate account for 60% of total growth in volume during 2022. However, sustained growth in Europe has just allowed the continent to reach pre-pandemic consumption levels in 2022: 3.33 million tonnes (same figure as in 2018). Growth in 2022 stayed at a meagre 0.1% yoy.

North America's consumption has pushed above pre-pandemic levels with 1.92 million tonnes consumed in 2022 (1.91 in 2018) showing a similar recovery pattern to that of Europe, although with a better outlook (+1.3% yoy in 2022).

The Asia Pacific region is showing a healthier growth pattern than the previously mentioned regions with consumption increasing by 4% (CAGR) during the analysis period (+3.1% yoy in 2022). Although consumption levels are lower, the Africa region is posting sustained positive growth since 2017, and so is the 'Mexico, Caribe and Central America' region.

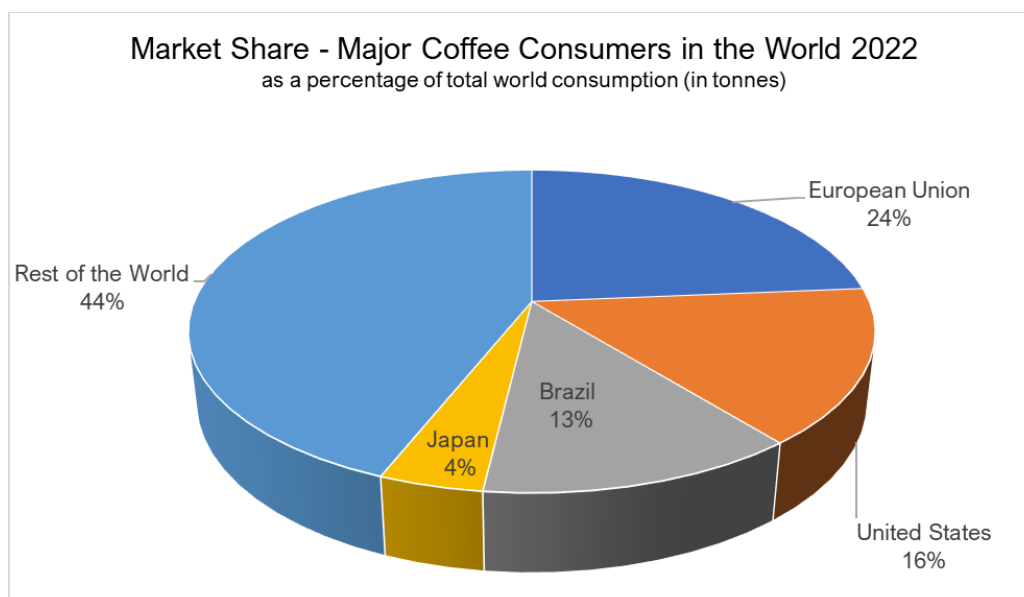
ICO data show that the United States is the largest coffee consumer in the world with 1.66 million tonnes in 2022, representing 16% of total world consumption of coffee. Brazil is not only the largest producer and exporter of coffee, but also the second largest consumer market in the world with 1.36 million tonnes of coffee brewed in the country during 2022, or 13% of total world consumption. The EU27 area consumed on aggregate 2.54 million tonnes of coffee in 2022, or 24% of the coffee drunk in the world. Germany (0.55 million tonnes), Italy (0.35 million tonnes), and France (0.35 million tonnes) are the leading consuming countries within the EU27 trade bloc.



Source: ICO

As for consuming countries in Asia, Japan is the largest coffee market with 445,000 tonnes consumed in 2022. However, Japan has not managed to bounce back to pre-pandemic consumption levels and posted a modest 1.3% yoy growth in 2022. Indonesia is a major coffee producing country that also enjoys drinking coffee: 343,000 tonnes in 2022 (+5.1% yoy).

Canada's coffee consumption swiftly recovered after the pandemic, reaching 260,000 tonnes in 2022 (+1.9% yoy). Current consumption levels are almost 10% above pre-pandemic levels, making of Canada one of the best performers among Western countries. Another large consumer, the United Kingdom, suffered a double blow with Brexit and the pandemic. Consumption dropped (-7.2% yoy) in 2019 and plummeted (-21.6% yoy) in 2020, but British coffee consumption bounced back (+41.5% yoy in 2021) and has managed to surpass pre-pandemic levels in 2022 with 241,000 tonnes.

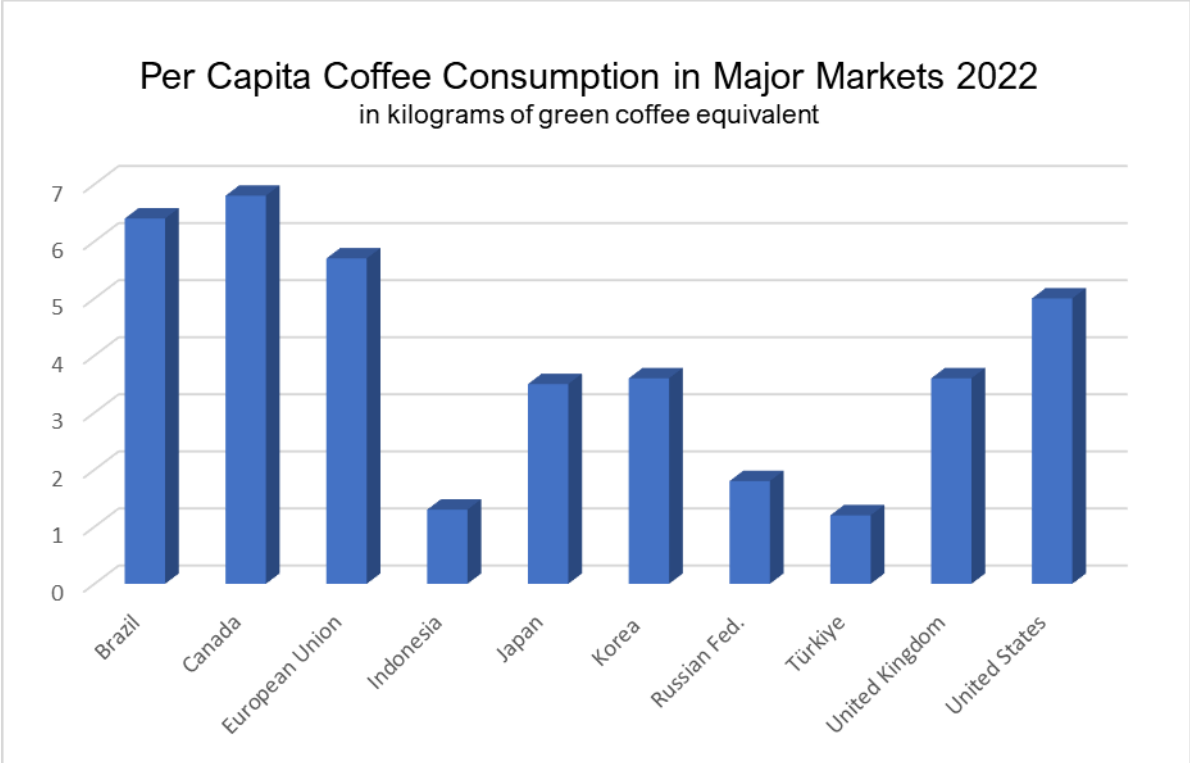


Source: ICO



Finally, the Russian Federation remains a top coffee consumer in the world although the pandemic and the invasion of Ukraine have substantially affected consumption levels. At 252,000 tonnes in 2022, Russians consumed approximately 20% less coffee than in 2019.

Combining ICO consumption data and World Bank population information, the per capita consumption in selected countries in 2022 would stay as follows:



Source: ICO, World Bank

Canada tops the ranking with 6.8 kg of coffee consumption per capita, closely followed by Brazil (6.4 kg) and the European Union (5.7 kg). However, the EU27 trade bloc's data hide in the average figure the largest per capita consuming countries in the world, all above Canada's level: Finland (11.8 kg), Denmark (8.7 kg), The Netherlands (8.2 kg), Sweden (8.2 kg), and Belgium (6.8 kg). Other Nordic countries also top this ranking: Norway (9.9 kg) and Iceland (9.0 kg).

## 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"> <li>- Non-roasted coffee: EUR 0.2001 / kg net weight.</li> <li>- Roasted coffee: EUR 0.2502 / kg net weight.</li> <li>- 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.</li> </ul>
Bulgaria	20	
Croatia	25	<ul style="list-style-type: none"> <li>- Roasted coffee: EUR 0.80 / kg net weight.</li> <li>- Extracts, essences and concentrates of coffee: EUR 2.65 / kg net weight (for coffee extracts: EUR 2.65 / kg dry matter).</li> <li>- Preparations of coffee: EUR 0.80 / kg net weight.</li> <li>- Preparations based on extracts, essences and concentrates of coffee: EUR 2.65 / kg net weight.</li> <li>- Coffee substitutes containing coffee: EUR 0.80 / kg net weight.</li> </ul>
Cyprus	5	
Czechia	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	13	<ul style="list-style-type: none"> <li>- Roasted coffee: EUR 3.00 / kg.</li> <li>- Non-roasted coffee: EUR 2.00 / kg.</li> </ul>
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	- The import of non-reusable plastic packaging is taxed at a rate of EUR 0.45 / kg net of non-recyclable plastic per net kilogram of non-recyclable plastic. All tariff headings may be subject to this tax, as they are all likely to contain products subject to the tax. If it does not contain non-reusable plastic packaging, the product is not subject to the tax.
Sweden	12	

Source: Access2Markets (EC's trade helpdesk website) as of 24 April 2023

Up-to-date information on VAT and excise duties can be found on the European Commission's Trade Helpdesk website (Access2Markets): <https://trade.ec.europa.eu/access-to-markets>. Please note that indirect taxes, rates, and exemptions are established by each of the Member States' legislation. Therefore, full accuracy can only be obtained by consulting official sources. No responsibility can be accepted by ECF for any inadvertent errors or omissions.



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