

The European market potential for coffees roasted at origin

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Europe is a large coffee market and it has a very significant coffee-roasting industry. Most of the coffee consumed by Europeans is roasted in Europe itself. Imports of roasted coffees from origin are increasing but remain very small. Growth in consumer awareness of value addition at origin and alternative distribution and market entry channels have resulted in some brands successfully entering the market. Still, it is a difficult market to enter, mainly because you will find strong competition from a large range of European roasters and brands operating in the mainstream and specialty coffee market. This means you should be ready to invest in marketing and branding and find ways to differentiate your product in this saturated market.

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1. Product description

Harmonised System (HS) codes are used to classify products and to calculate international trade statistics, such as imports and exports. The focus of this study is roasted coffee. This product is classified under HS codes 090121 (Coffee, roasted, not decaffeinated) and 090122 (coffee, roasted, decaffeinated). The available data do not distinguish between bulk, high-quality or specialty coffees.

This study focuses on coffees which are roasted at origin. This implies that we are talking about a finished product, which must comply with strict EU market entry requirements related to food safety and hygiene.

Roasting coffee at origin is a way to diversify exports from green coffee to roasted coffee. Still, over 90% of coffee exported from producing countries is green coffee. There are [several reasons why exporting coffees roasted at origin has been difficult](#):

- Freshness of roasted coffee / quality preservation: Roasted coffee has a shorter shelf life than green coffee. Advanced improvements in packaging for roasted coffee has made this less of a concern, but the perception generally persists that coffees roasted at origin are less fresh than coffees roasted in the consuming market.
- Market dominated by established roasters, blends and brands: On the European market, most coffee brands consist of blends. Roasters are protective of the components and percentages of its blends, and reluctant to change them. Europe imports about a third of all green coffee traded worldwide; this ensures that roasters benefit from large volumes coming from various origins, so that they are able to make good-quality, consistent and cost-effective blends.
- Just-in-time delivery: Retailers usually do not carry large stocks and tend to change delivery orders to roasters if they note changing customer demand. This may also refer to different packaging requirements, in terms of size or materials used. This requires a level of flexibility and a quick reaction time from exporters of

coffees roasted at origin, which is often difficult to achieve from a distance.

Still, there are examples of successful exporters of coffees roasted at origin that have penetrated the European market. Among other factors, these brands tend to have a line of different degrees or darkness of the roast. The degree and duration of the roast has a direct impact on the coffee's flavour profile.

There are different consumer preferences for coffee on the European market. These can be loosely categorised as followed: consumers in southern European countries traditionally prefer darker roasting containing Robusta, whereas northern European consumers favour a lighter roasting and milder coffees. However, lighter roasts are generally preferred within the specialty segment across Europe due to the use of higher-quality Arabica beans with fewer defects. For more information about specific consumer preferences and market characteristics, refer to a specific country on our [Coffee Market Intelligence](#) page.

2. What makes Europe an interesting market for coffees roasted at origin?

European coffee consumption is the highest in the world. Imports of roasted coffees specifically from producing countries are still small but show a stronger increase than the total imports of roasted coffee. This may indicate that European consumers are more interested in value-added products and higher-quality coffees. Exporters of roasted coffee need to be aware that Europe has a large roasting industry, making it difficult to enter the market.

Europe has the highest consumption of coffee globally

Europe has the highest consumption of coffee in the world, when looking at green coffee beans. In 2021, Europe accounted for [32% of global consumption](#), followed by Asia & Oceania (22%) and North America (18%).

Data from the International Coffee Organization (ICO) show that European consumption of green coffee amounted to almost 3,244 thousand tonnes in 2020-2021. The EU and Switzerland together consumed 2,480 thousand tonnes of green coffee. To compare, the United States of America consumed 1,619 thousand tonnes of green coffee in the same period.

Demand for green coffee in Europe is expected to remain relatively stable in the long term as the coffee market is mature and saturated. ICO data show that [European consumption of green coffee increased](#) at an annual average rate of 0.5% from 2017/2018 to 2020/2021.

In terms of roasted coffee, Europe has the highest per capita consumption in the world, amounting approximately to [5 kg](#) of coffee per person per year. In 2021, the largest coffee-consuming countries in Europe are Luxembourg ([11 kg](#)), the Netherlands (8.2 kg) and Finland (8.2 kg). Roasted coffee amounts to around 85% of coffee consumption in Europe; the remaining share is mainly accounted for by instant/soluble coffee.

Imports of coffees roasted at origin are increasing steadily

According to Eurostat data, Europe imported 910 thousand tonnes of roasted coffee in 2021. Intra-European imports account for almost the entire volume of EU imports. Less than 1% of these imports was sourced directly from coffee-producing countries, amounting to about 3.4 thousand tonnes.

Although this is a very small share, coffees roasted at origin have shown a positive trend for the past five years. In fact, European roasted coffee imports from producing countries grew by 11% per year on average between 2017 and 2021. In the same time frame, total imports of roasted coffee increased at a much lower average annual rate of 3.8%.

This positive trend may be driven by the growing demand for ethical products as well as specialty coffees. [Coffee Barometer](#) states that consumers (especially in Western Europe) are increasingly switching from standard to premium products and are willing to pay higher prices for coffees with high cupping scores, single

origins, or different presentations. The specialty coffee segment potential creates opportunities for coffees roasted at origin and targeting consumers searching for something different. See the section on trends for more information on this growing segment.

Denmark, United Kingdom (UK), the Netherlands and Germany had the highest imported volumes of coffees roasted at origin in 2021. Together, these countries imported around 2.5 thousand tonnes, which corresponds to 73% of total European imports of coffee roasted at origin.

Europe has a large coffee-roasting industry

Although Europe has registered growing import volumes of roasted coffee from producing countries, exporters need to be aware that Europe has a large and well-advanced coffee-roasting industry as well. The world's roasted coffee market is mainly dominated by a few large roasters located in Europe and the United States. Europe's roasted coffee industry is led by ten multinational roasting companies which are [responsible for roasting 35% of the world's coffee](#). Some of these multinationals are [Nestlé](#), [Starbucks](#), [JDE Peet's](#), [Tchibo](#), [Lavazza](#) and [Strauss](#).

According to Prodcum data, over 1,860 thousand tonnes of roasted coffee (not decaffeinated) were produced in the EU in 2020. EU roasted coffee production was worth over €10 billion in 2020, and it grew at an average annual rate of 3% between 2015 and 2020. However, as some data on coffee roasting is confidential, this figure may not be complete.

Italy and Germany are the largest producers of roasted coffee in the EU, with an output of 596 thousand tonnes and 555 thousand tonnes, respectively. Together, they account for almost 62% of total EU production.

Europe is also the largest exporter of roasted coffee in the world. In 2021, coffee exports from Europe amounted to 1,113 thousand tonnes. Between 2017 and 2021, European roasted coffee exports had an average annual growth of 4% in volume and 6% in value. The leading exporters in terms of export value are Switzerland (31% of export value in 2021), Italy (17%) and Germany (15%). Most of the roasted coffee is exported to other European countries and the United States, with a small volume exported to developing countries and emerging markets.

Tips:

Access [EU Access2Markets](#) to analyse European trade dynamics yourself and to determine your export strategy. By selecting a specific country as your reporting country, you will be able to follow developments such as trade flows with established suppliers, the emergence of new suppliers and changing patterns in direct and indirect imports.

If you are looking for market information online, activate the "Translation" function of your browser to make the studies available in your native language.

See the website of the [International Coffee Organization](#) for more information about the global and European coffee industry. The [European Coffee Federation](#) provides information on the European coffee market, although the most recent report available is from 2018/2019.

See our study of [trade statistics for coffee](#) for more detailed information about the European trade in green coffee beans.

3. Which European countries offer most opportunities for coffees roasted at origin?

Defining the countries that offer most opportunities for coffees roasted at origin will depend on a few aspects:

- Higher-quality coffees and ethical products are gaining market share.
- Market demand for coffees roasted at origin is also driven by consumers who have an interest in the origin of their products and are aware of social sustainability issues within the coffee sector. These consist of countries with more mature but dynamic markets, where consumers welcome new business models and are willing to try new products.
- Import volumes of coffees roasted at origin give an indication. The countries with a mix of all the characteristics mentioned before are Denmark, the United Kingdom, the Netherlands, Germany and Spain.

Despite the opportunities, entering these competitive markets is still difficult, as roasted coffee producers will compete with the large coffee-roasting industry in Europe. European producers have excellent market and consumer knowledge as well as wide networks.

Denmark: largest importer of coffees roasted at origin

Denmark is a relatively small coffee market, but it has Europe's highest share of imports of roasted coffee from producing countries. In 2021, the country imported around 982 tonnes of roasted coffee from producing countries, representing an average annual increase of 36% from 2017-2021. Almost all imports came from Kenya, specifically from [African Coffee Roasters](#).

African Coffee Roasters was created as an initiative of Coop Denmark in 2015 and started its commercial production in 2016. This company roasts and packages coffee in Kenya and ships it out directly, mainly to Denmark. The company offers Rainforest Alliance, Fairtrade and organic-certified coffees.

The dominance of this brand on the Danish market may pose competition for other exporters of coffees roasted at origin, while it also opens up the market and boosts further consumer education about social and value-added products like coffees roasted at origin. In general, sales of coffee with sustainability certifications and criteria show continuous growth in Denmark, mostly due to consumer demand for food with positive social and environmental impacts. In 2018, [72%](#) of Danish consumers stated that sustainability is a leading theme in their purchasing decisions.

Denmark is among the world's largest coffee-consuming nations, with [7.4 kg](#) per person per year. In addition, the Danish market is strongly oriented toward organic, with about [13%](#) of its entire market being organic in 2020. To enter the Danish market, having organic certification might facilitate market entry.

UK: ethical consumer spending on the rise

In 2021, the UK was the second-largest European importer of roasted coffee from producing countries. Imports fluctuated considerably in the last five years, reaching a total of 766 tonnes of coffees roasted at origin in 2021. Imports from Colombia increased from 19 tonnes to 210 tonnes between 2017 and 2021, whereas coffees roasted in Brazil decreased from 906 tonnes to 364 tonnes over the same period.

[Awareness of sustainability issues](#) and its relation to the production of food has grown among British consumers. Sustainability concerns are seen as the [most important consumer trend](#) affecting the British coffee sector in 2020. In 2021, [almost a third of UK consumers](#) chose brands with (perceived) ethical practices and values. As a result, consumer spending on ethical food and drink has [significantly increased](#) over the years. This is an important indication for increased consumer interest for impact-driven companies and products, and potential for products like coffee roasted at origin.

Specifically for the coffee market, there are a few players who tap into this trend. For instance, [Café+](#) sells

freshly roasted coffee from Colombia to the UK market. Its coffees are Rainforest Alliance, Fairtrade and/or organic-certified.

The Netherlands: market with eye for specialty and ethical coffees

With imports of 387 tonnes in 2021, the Netherlands is the third-largest importer of roasted coffee from producing countries, 11% of the European total. The main coffee-producing exporting countries are India (97 tonnes), Kenya (71 tonnes), Ethiopia (68 tonnes) and Vietnam (48 tonnes). In the last five years, Dutch imports increased at an average annual rate of 27%, well above the European average.

Probably the most well-established brand of coffee roasted at origin on the Dutch market is [Moyee Coffee](#) (Ethiopia/the Netherlands). According to the company's most recent impact report, [12.3 million cups](#) of Moyee coffee were consumed in 2020, compared to 3.7 million cups in 2015. This is an increase of 332%. Note that not all cups were consumed in the Netherlands alone. Although it is Moyee's base and largest consumer market, the brand managed to expand its reach to other markets like Ireland, and since 2020 it is also gaining a small market presence in the United Kingdom, Germany and France. Moyee is part of the Dutch [FairChain Foundation](#), which supports a business model that contributes to a fair distribution of wealth across all participants in the value chain.

The Netherlands has one of the highest per capita consumption rates of 2020, at [8.2 kg](#). The roasted coffee market in the Netherlands is expected to grow at an average annual rate of [3.8%](#) until 2025. Also, consumer spending on coffee is increasing, by [20%](#) between 2015 and 2020.

This indicates a consumer shift to higher-quality coffees in the Netherlands, including specialty coffee. The increasing interest in higher-quality coffee consumption at home has resulted in a more diverse premium coffee offer by retailers. This trend can be seen both in supermarkets that include specialty coffees in their assortment, such as [Albert Heijn](#), as well as online actors that offer specialty coffee for at-home consumption. Examples include the online roaster/retailer [Wakuli](#), offering specialty coffee from farm to a consumer's doorstep, as well as the specialty coffee e-retailer [Dutch Coffee Dealer](#).

With an increase of specialty coffee consumption and availability, Dutch consumers have become more interested in where, how and by whom their coffees were grown. This could offer opportunities for coffees roasted at origin. It has become essential for specialty coffee producers to tell the story behind their product, its origin and other relevant environmental and social aspects.

Germany: impact-driven companies driving up coffees roasted at origin

Germany is the largest coffee roaster in Europe, as well as the largest importer of green coffee. Still, the country also imports roasted coffee, also directly from producing countries. Again, like in any market, it is only a very small niche market. In 2021, Germany imported 375 tonnes of roasted coffee from producing countries, an average annual increase of 27% from 2017.

Sustainability is a very important topic on the German market. German consumers increasingly demand coffees with positive social and environmental impact. Important topics on the German market include concerns about child labour, fair wages and good working conditions. Before the COVID crisis, more than [50%](#) of German coffee consumers indicated that they are willing to pay more for sustainably sourced coffees.

Germany is also home to several alternative trading organisations which promote value addition at origin, such as [Gepa](#) and [El Puente](#). Gepa offers three different coffees roasted at origin. It is an interesting niche market catering for German consumers that have interest in impact-driven purchases. There are several brands of coffee roasted at origin on the German market, such as [Solino](#) (Ethiopia/Germany), [Moema](#) (Brazil/Germany) and [Annan](#) (Germany), which offers coffee roasted at origin from Ethiopia, Rwanda, Uganda and Tanzania.

France and Spain: interesting emerging markets

Other markets with interesting dynamics for coffees roasted at origin are France and Spain. In France, there are some market dynamics that reflect the interest in local value addition. For example, the [Agency for Valorization of Agricultural Products \(AVPA\)](#) is a French association aiming to enhance the value of agricultural products and to recognise the excellence of producers and producing countries. As part of their program, AVPA organises the [Coffees Roasted at Origin International Contest](#). France has also been a historically important market for fair trade concepts, driving up possible interest for coffees roasted at origin. French imports of coffees roasted at origin amounted to 121 tonnes in 2021, up from 56 tonnes in 2017. The largest producing supplier of roasted coffee to France is Brazil, with 57 tonnes, followed by Colombia with 22 tonnes.

Generally speaking, consumer awareness of fair and ethical trading concepts is more widespread in the north and west of Europe, and less so in the south. What makes Spain an interesting market for exporters of roasted coffee is its ties with Latin America, which shows specific opportunities for exporters in this region. Specifically, there is a relatively large number of ethnic distribution channels targeting the Latin America (Spanish-speaking) community. Examples of such retailers are [Tu Tienda Latina](#) and [Latín Cor](#). The Colombian brand [Juan Valdez](#) is also expanding its presence in Spain.

Tips:

Refer to our [specific country studies](#) to read more about the specific markets mentioned above, as well as additional markets that might be of interest to you.

Consider joining competitions like AVPA's [Coffees Roasted at Origin International Contest](#). Participation in such events may be an interesting way to test and showcase your roasted coffee on the European market.

Check out (online) shops in specific target markets to discover the range of origins, qualities and profiles of roasted at origin coffees available in Europe. For example: [Kaffee Zentrale](#) (Germany) and [Alternative Café](#) (France).

4. Which trends offer opportunities or pose threats on the European market for coffees roasted at origin?

Although the European market for roasted coffee imported from producing countries is very small, a growing interest in specialty and single-origin coffees offers some opportunities for exporters. Coffee roasted at origin answers to sustainability and fair trade dynamics across Europe where consumers are interested in supporting local value addition and having a stronger connection to producing countries.

Growing demand for specialty coffees

The specialty coffee segment is a small niche, but one that commands high quality and high value. Consumption of higher-quality blends, consisting of more expensive and specialty Arabica coffees, is growing at a fast pace in Europe.

Although European-wide data on specialty coffee imports or outlets are unavailable, individual countries are showing a growing number of coffee bars and chains, small roasters, small local brands and baristas. This growth reflects the increasing consumer interest in specialty coffees. For example, the [online magazine European Coffee trip](#) continuously expands its overview of specialty coffee destinations, now including 551 roasters and over 2,500 cafes. To compare, by the end of 2017, about 270 roasters and 900+ cafes were listed.

For exporters of specialty coffees roasted at origin, this might represent opportunities. Several of them focus on high-quality products, at a higher value, outside of mainstream markets; an example is [Amor Perfecto](#) (Colombia).

At the same time, this same development could be a threat to exporters. The increase in signature blends and micro and nano lots available on the European market are in green coffee form, because often the perception is that roasting in Europe provides for the freshest and highest-quality coffees. As a counter-argument, the same Amor Perfecto as mentioned above explains on its website why [roasting at origin actually adds to freshness](#).

Growing demand for single-origin coffee

The European market is dominated by coffee blends from around the world. However, the coffee market is experiencing an increase in consumer interest and consumption of single-origin coffee. This trend goes hand-in-hand with the increasing interest of European consumers in specialty coffees that are [willing to pay higher prices for coffees highlighting single origins and telling a special story](#).

In the specialty sector, single origin is often [associated with high-quality](#) and uniqueness. It is acknowledged that the coffee is produced or sourced from a specific location (farm, cooperative or region), and therefore presents unique characteristics like taste and aroma, and that could change seasonally. Many consumers prefer single-origin coffee as it is seen to offer [superior taste profiles](#) compared to blends.

The specialty coffee industry has introduced single-origin coffee mainly through coffee bars. Some [coffee shops have chosen to offer a rotating single-origin](#) so their customers can experience a variety of coffee flavours from all over the world. Big commercial roasters also play a role in sourcing single-origin coffee beans. For example, Starbucks, the world's largest coffee chain, [played a crucial role introducing single-origin coffees](#).

This trend opens opportunities as it helps grow consumer awareness about specific origins, also enabling coffee-roasting countries/actors to obtain greater profits by adding value to their coffee. However, marketing strategies and distribution play a crucial role in selling the coffee's origin and its particularities. Exporters also need to ensure traceability of their coffees, as consumers [want to know where exactly their coffee comes from](#).

Growing demand for sustainability

Demand for sustainable coffee continues to increase in the European coffee market. Both sales and production of sustainable coffee continued at a pace well beyond conventional coffee. Coffee roasted at origin has some characteristics of sustainable value chains, like direct trade and close contact between producers and buyers, possibly opening doors and creating extra interest for coffees roasted at origin.

While certification according to international standards such as [Rainforest Alliance](#) has become an entry requirement in the mainstream coffee market, demand for certified coffee is not as common in specialty coffee. Importers may even consider such certification counterproductive. They rather monitor social responsibility and good agricultural practices through direct relationships with producers. From their perspective, certifications may add unnecessary costs for farmers.

However, specialty buyers and retailers may still require certification as an important proof of commitment to sustainability. The main standards for these niche markets are [EU organic](#) and Fair Trade (for example, [Fairtrade International](#) and [Fair for Life](#)).

A key sustainability issue for coffees roasted at origin may be the growing demand for carbon-footprint reduction, as these coffees are sometimes transported by air. Companies may opt for air freight as this decreases the risk of quality deterioration during transport. A product's carbon footprint consists of the sum of greenhouse gases accumulated during the full life cycle of a product such as roasted coffee. If a company reaches a [carbon neutral status](#), they can apply for certification and use this in their marketing. Roasted coffee is lighter to transport than green coffee, which might be an [argument for roasting at origin in combination with carbon reduction](#). However, then it should be transported by ship and not by air, which might jeopardise the

freshness of the roasted coffee.

Growing consumer awareness is driving interest in coffees roasted at origin

Just like other commodities, coffee faces international trade imbalances. The large share of green coffee exported by producing countries is of mainstream to low quality, which means little added value and low prices. The asymmetric income distribution between producing and importing countries [threatens the livelihood of smallholder producers](#).

However, European consumer awareness of sustainability and fair trade is increasing. Consumers are more interested in [fair pricing, profit sharing](#) and support of local economies. Marketing stories that highlight this aspect are especially interesting to consumers in North-Western Europe, where the penetration of fairly traded products and consumer awareness is highest. An increase in ethical shops and fair trade retailers in this region supports that growth.

The Fairtrade movement has addressed this issue mainly focused on fair pricing for the raw material. Private and social initiatives like the [Fair Chain Foundation](#) (applied by Moyee, Ethiopia) and the [Direct Fair Trade](#) concept applied by Moema (Brazil) have also promoted processing coffee at origin as a solution for producers to gain higher income on the product.

Several brands on the European market that roast coffee at origin market themselves as going beyond fair trade. This implies that these brands give room for producers in developing economies to roast their coffees as a means for value addition at origin. Examples include:

- [Moyee Coffee](#) (Ethiopia/the Netherlands), which markets their coffee as the 'World's First Fairchain Coffee'. Moyee explains that by giving their farmers a better price for their beans, roasting and packing coffee at origin, 50% of the value in the chain remains in Ethiopia.
- [Solino](#) (Ethiopia/Germany) also roasts and packs coffee in Ethiopia to add value and create jobs in its Trade not Aid approach. Coffee experts regularly travel to Ethiopia to train employees in coffee roasting.
- [GEPA](#) (Germany), with its collection [#mehrWertFürAlle](#) / More value for all, GEPA offers three coffees roasted at origin (Guatemala, Honduras and Rwanda). With this collection, the fair trade company states it triples value added at origin.

Other initiatives also promote and market products fully produced in origin countries such as coffee. Examples include [Proudly Made in Africa](#) (Ireland) that promotes high-quality products fully made in Africa, and the [Agency for the Valorisation of Agricultural Products](#) (France) that organises an annual coffee roasted at origin contest. In its 2021 contest, nearly 200 coffees from 25 countries were tasted.

Tips:

Promote the sustainable and ethical aspects of your production process and business philosophy.

Keep in mind that market developments related to sustainability and certification vary widely in different European countries. Before engaging in a certification programme, make sure to check that a label has sufficient demand in your target market and whether it will be cost-beneficial for your product, always in consultation with your potential buyer.

Remember that packaging is one of the most important and difficult tools you can use to communicate with your consumers. As such, you need to develop a good proposition which is aligned to your marketing strategy. Read this article to learn more about [designing the perfect packaging for your roasted coffee](#).

Learn more about cupping scores on the website of the [Specialty Coffee Association](#) (SCA). You can also consider getting a [Q-grader certificate](#) to be able to cup and score your Arabica coffee according to international standards. If you produce or export Robusta coffees, it is also possible to become an R-grader.

See our study on [Exporting specialty coffee to Europe](#) for more information on the specialty coffee market.

See [our study on doing business with European coffee buyers](#) for more tips on marketing and promoting coffee.

See [our study on trends in coffee](#) to learn more about current trends in the European market.

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