

European Coffee Report 2010/11



European Coffee Federation

CONTENTS

- CONTENTS 2
- INTRODUCTION..... 3
- NOTE ON THE TABLES..... 4
- ICO INDICATOR PRICES 5
- GREEN COFFEE STOCKS IN MAJOR EUROPEAN COFFEE PORTS..... 6
- THE EUROPEAN COFFEE MARKET IN 2010..... 7
- AUSTRIA..... 15
- BELGIUM 17
- DENMARK..... 20
- FINLAND 23
- FRANCE..... 26
- GERMANY..... 29
- GREECE 33
- IRELAND..... 35
- ITALY 37
- THE NETHERLANDS..... 40
- NORWAY 43
- PORTUGAL..... 45
- SPAIN 47
- SWEDEN 51
- SWITZERLAND 55
- UNITED KINGDOM 57
- SELECTED OTHER EU MEMBERS..... 60
- EU COFFEE IMPORT DUTIES 62
- EU VAT AND EXCISE DUTIES 63
- LIST OF ASSOCIATION MEMBERS AND COMPANY MEMBERS..... 64



EUROPEAN COFFEE FEDERATION (ECF)
 Sir Winston Churchilllaan 366 (19th Floor)
 P.O. Box 161
 2280 AD Rijswijk
 The Netherlands
 [t] +31 (0)70 336 51 65
 [f] +31 (0)70 336 51 67
 [e] ecf@ecf-coffee.org
 [w] www.ecf-coffee.org

INTRODUCTION

This is the thirty-second issue of the 'European Coffee Report'. The European Coffee Federation (ECF) continues this series with the report over 2010. Observant readers may have noticed the 'two year' title. Traditionally, the title denoted the year of the data covered, not the year of release. For instance: the 2009 report was issued in mid-2010. This was often considered as confusing. Additionally, the title made the report look outdated even at the date of release. For these reasons we changed the naming to a more representative 2010/11: the year covered and the year of release. As usual, the European Coffee Report contains a graph of the ICO Indicator Prices, a chapter on EU import and export figures and chapters on the individual Western European markets plus information on stocks, covering both terminal market and other stocks in the major European coffee ports. This information is collected with the highly appreciated assistance of the warehouse and port communities in the ports concerned. The information for most of the country chapters has again been provided by the ECF member associations. Their contribution to this series is invaluable and has enabled the European Coffee Report to develop into a unique and convenient single source of basic information on the European coffee market. The European Coffee Report is available only in electronic format on the ECF website.

For the sake of a uniform presentation and for ease of comparison, not all the details of the national reports could be incorporated, given that they vary widely in volume and contents. In order to give a more complete overview, the national reports were in part complemented with statistical material from other sources. This applies as well to those countries whose coffee associations are not members of ECF, but on which this report gives some information for the sake of completeness.

On the closing page of this report a list of the member associations of ECF can be found.

Disclaimer: this report is for information purposes only. No rights or obligations can be derived from its contents.

This report was finalised in August 2011

EUROPEAN COFFEE FEDERATION

NOTE ON THE TABLES

Bags are bags of 60 kilos
Tons are metric tons

The recalculation of roasted and soluble coffee uses the conversion factors of the International Coffee Agreement 2001, Annex 1:

- from roasted to green: multiply by 1,19
- from soluble to green: multiply by 2,6
- from green decaffeinated to green: multiply by 1,05

Green coffee equivalent is the sum total of the volume of green, green decaffeinated, roasted and soluble coffee recalculated to green coffee with the above conversion factors.

In the notation of figures, the convention of continental Europe is followed:

- thousands are separated by a dot (.)
- the decimal sign is the comma (,)

For large numbers the so-called 'long scale' is used: 10^6 = one million, 10^9 = one milliard, 10^{12} = one billion, 10^{15} = one billiard, 10^{18} = one trillion, etc

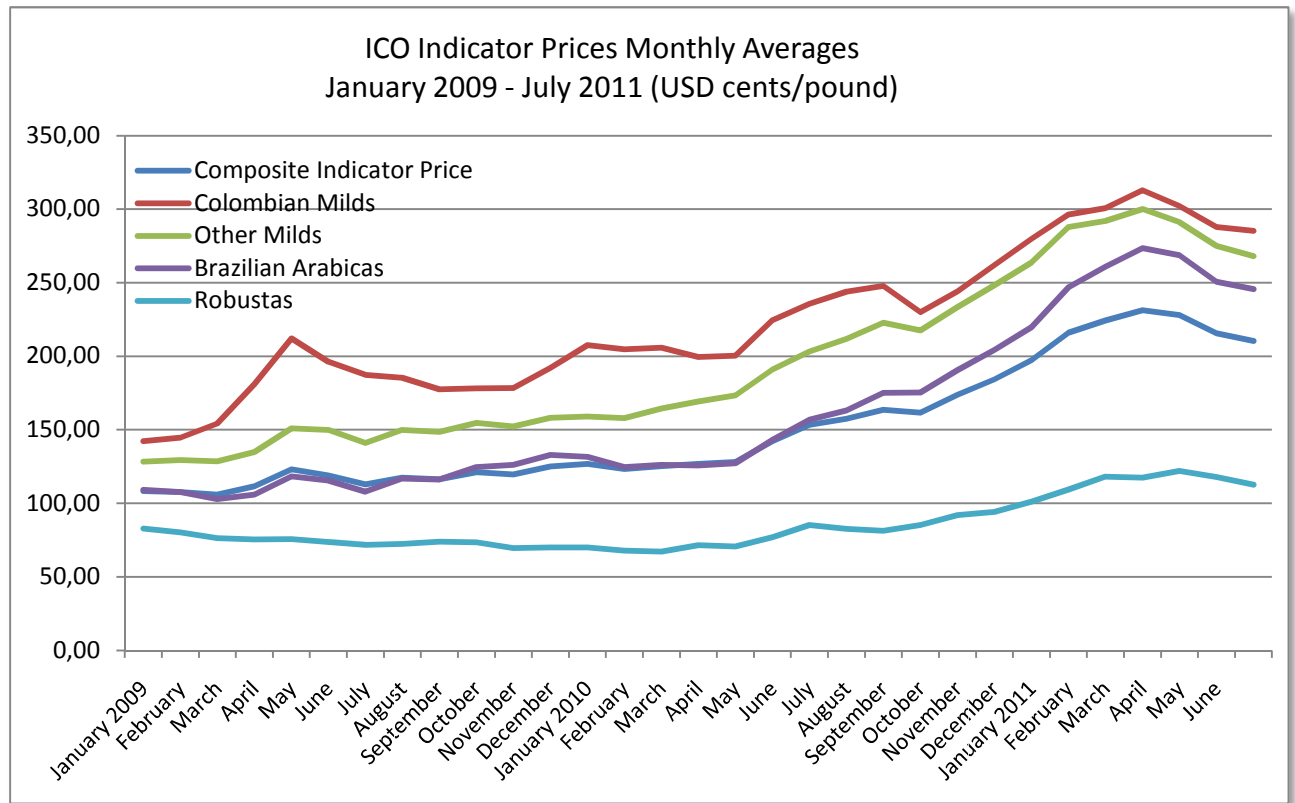
Abbreviations of currencies are those used for international banking purposes, based on ISO standards.

Eurostat import figures may differ from those from national sources

Distribution of green coffee imports by types of coffee is based on the following grouping of coffee producing countries applied by the International Coffee Organization:

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

ICO INDICATOR PRICES



As from 1 October 2009 the weighting is as follows:

Colombian Milds:	13%
Other Milds:	23%
Brazilian Naturals:	30%
Robustas:	34%

As from March 2011 the weighting is as follows (ICO document ICC 105-17):

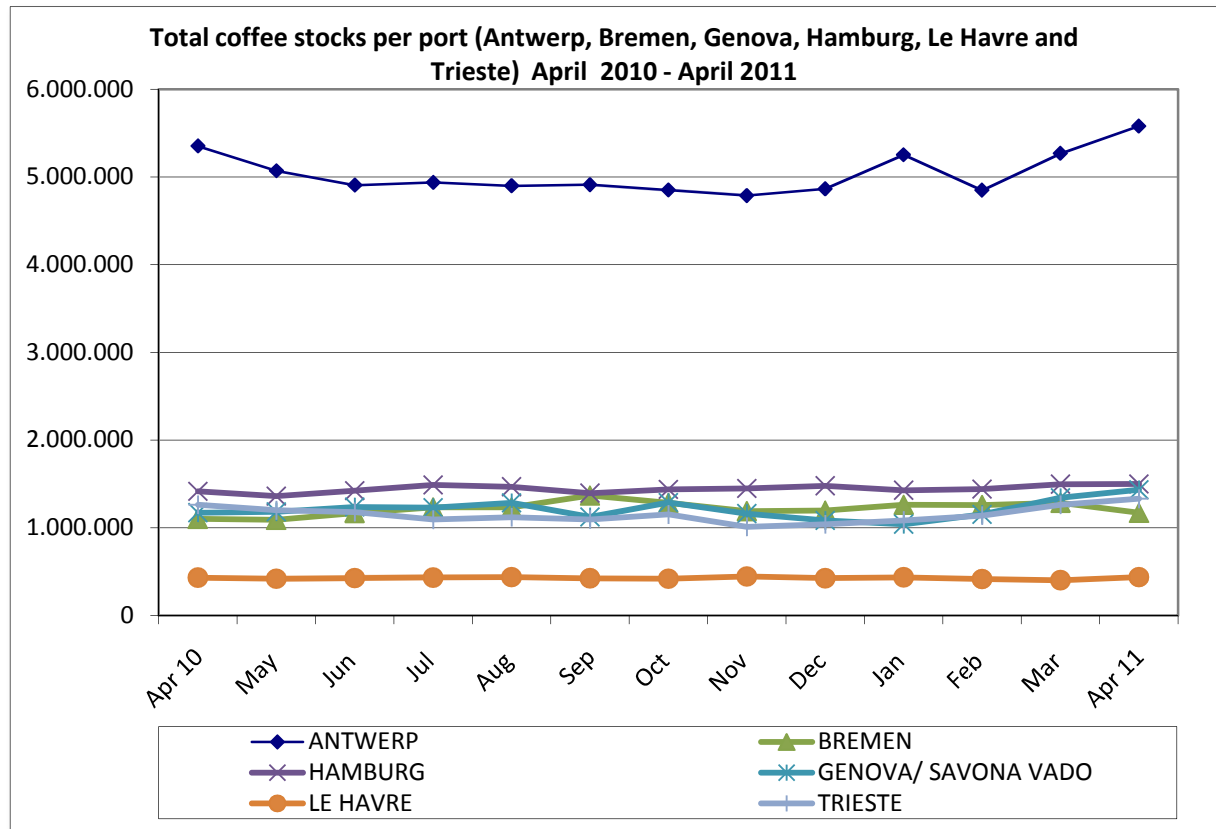
Colombian Milds:	12%
Other Milds:	23%
Brazilian Naturals:	31%
Robustas:	34%

GREEN COFFEE STOCKS IN MAJOR EUROPEAN COFFEE PORTS

Volumes are in bags of 60 kilos.

The ports covered are: Antwerp, Bremen, Hamburg, Genova/Savona Vado, Le Havre and Trieste.

Stocks include LIFFE and 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.



THE EUROPEAN COFFEE MARKET IN 2010

1. IMPORTS AND EXPORTS

EU data refer to the 27-member European Union. The traditional division between 'Western Europe' and 'Central and Eastern Europe' has changed over time with the increasing EU membership. The terms 'Western Europe' and 'Central and Eastern Europe' are not strictly defined, and the inclusion of a country in one or the other group has always been somewhat arbitrary. We designate EU plus Norway and Switzerland as 'Western Europe'.

Imports of green coffee into European countries from 2008 to 2010 - in tons and in bags of 60 kilos -						
	2008		2009		2010	
	tons	bags	tons	bags	tons	bags
Austria	62.488	1.041.460	24.694	411.562	30.114	501.900
Belgium	356.537	5.942.280	307.279	5.121.317	305.026	5.083.758
Bulgaria	22.167	369.445	22.505	375.075	22.984	383.063
Cyprus	1.718	28.633	1.350	22.495	1.606	26.758
Czech Republic	15.795	263.242	15.669	261.157	17.670	294.493
Denmark	33.670	561.165	34.214	570.238	37.180	619.672
Estonia	42	705	87	1.452	128	2.138
Finland	70.970	1.182.828	67.410	1.123.493	66.463	1.107.720
France	239.273	3.987.877	258.629	4.310.477	246.413	4.106.880
Germany	1.067.446	17.790.770	1.063.596	17.726.593	1.089.176	18.152.927
Greece	27.247	454.110	27.895	464.917	25.204	420.068
Hungary	12.932	215.528	12.920	215.338	13.114	218.563
Ireland	3.085	51.412	2.473	41.210	2.485	41.418
Italy	448.496	7.474.933	448.909	7.481.810	460.968	7.682.805
Latvia	2.296	38.263	3.305	55.078	3.207	53.455
Lithuania	314	5.238	293	4.888	425	7.085
Luxembourg	807	13.450	862	14.360	583	9.708
Malta	38	635	31	508	48	793
Netherlands	65.803	1.096.708	72.437	1.207.278	73.755	1.229.250
Poland	67.053	1.117.552	96.037	1.600.622	100.662	1.677.695
Portugal	43.411	723.513	46.194	769.905	43.312	721.868
Rumania	22.247	370.777	22.102	368.365	21.298	354.972
Slovakia	4.549	75.822	3.791	63.177	3.859	64.323
Slovenia	9.358	155.973	10.257	170.953	10.677	177.947
Spain	248.253	4.137.553	242.434	4.040.570	253.259	4.220.982
Sweden	109.636	1.827.265	106.755	1.779.253	116.652	1.944.205
United Kingdom	117.105	1.951.747	123.824	2.063.728	133.251	2.220.855
<i>EU27 total</i>	<i>3.052.733</i>	<i>50.878.885</i>	<i>3.015.949</i>	<i>50.265.820</i>	<i>3.079.518</i>	<i>51.325.303</i>
Norway	34.336	572.262	34.380	572.997	35.664	594.393
Switzerland	118.661	1.977.688	110.226	1.837.100	120.906	2.015.100
<i>Western Europe total</i>	<i>3.205.730</i>	<i>53.428.835</i>	<i>3.160.555</i>	<i>52.675.917</i>	<i>3.236.088</i>	<i>53.934.796</i>
Albania	6.921	115.349	7.330	122.167		
Belarus	17.454	290.905	10.236	170.607		
Bosnia and Herzegovina	24.460	407.662	20.540	342.337		
Croatia	24.320	405.326	23.643	394.049		
Kazakhstan	8.160	136.000				

Macedonia, FYR	8.184	136.402	8.776	146.261		
Moldova	1.622	27.026	1.663	27.714		
Russian Federation	243.426	4.057.098	209.206	3.486.766		
Serbia	41.404	690.064	35.757	595.956		
Turkey	29.979	499.656	32.018	533.633	37.522	625.369
Ukraine	109.738	1.828.961	92.464	1.541.072		
<i>Central and Eastern Europe total</i>	<i>515.667</i>	<i>8.594.449</i>				
Europe total	3.721.397	62.023.284				

Note: Figures show imports of green coffee, not decaffeinated for the EU and imports of coffee in all forms for other countries.

Sources: Eurostat for EU; ICO, national statistics and F.O. Licht for other countries.

In calendar year 2010 green coffee imports in Western Europe were 53,9 million bags, an increase of 2,4% compared to the 52,6 million bags in 2009 (figure revised from the previous report because of change in source of some of the data). The Western European market is dominated by the EU. Green coffee imports into the EU27 – including intra-EU trade - increased by 2,1% from 50,3 million bags in 2009 to 51,3 million bags in 2010. Please note that there are some slight variations with the data in last year's report. Eurostat commonly corrects its data after initial publication.

According to ICO data, Central and Eastern European imports of coffee in all forms in 2008 (the most recent year available for most of these countries) amounted to 7,4 million bags, 14,4% lower than the year before.

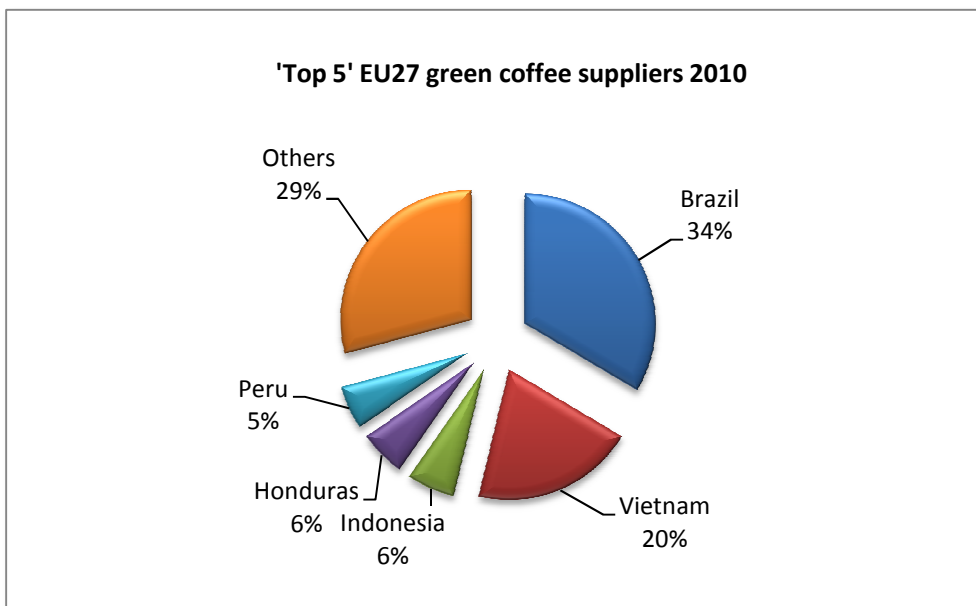
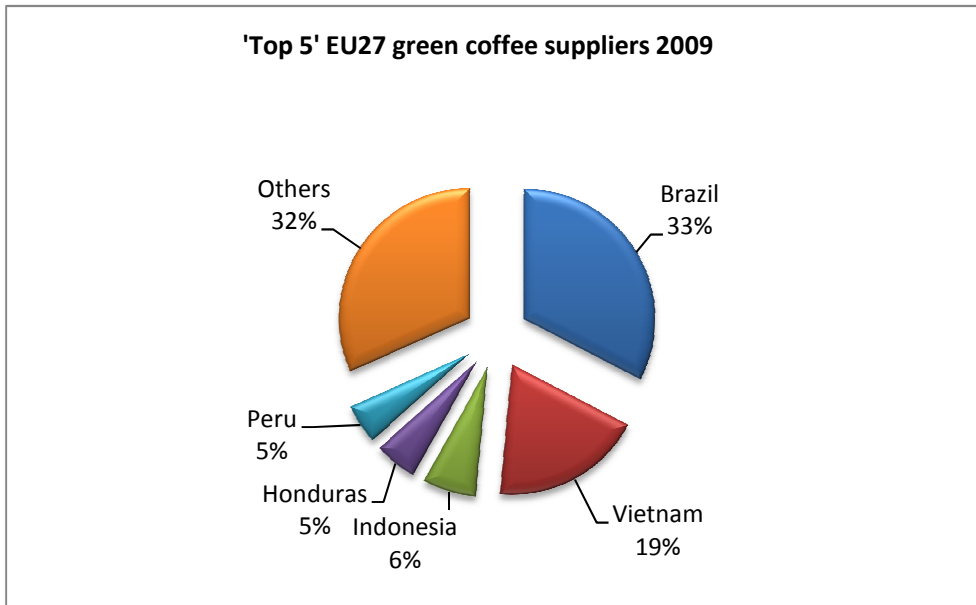
The 'top 20' sources of EU27 green coffee imports (excluding intra-EU trade) in 2008, 2009 and 2010 were as follows (listed in the order of 2010 imports):

Imports of green, not decaffeinated coffee into the EU27 (excluding intra-EU trade) by main origins						
	2008		2009		2010	
	bags	%	bags	%	bags	%
Brazil	13.708.290	30,0	14.618.953	32,6	15.013.568	32,7
Vietnam	8.499.700	18,6	8.421.548	18,8	9.035.717	19,7
Indonesia	2.764.210	6,1	2.966.900	6,6	2.652.957	5,8
Honduras	2.257.012	4,9	2.390.300	5,3	2.589.337	5,6
Peru	2.205.725	4,8	2.195.433	4,9	2.414.460	5,3
India	1.599.763	3,5	1.297.863	2,9	1.814.927	4,0
Uganda	1.996.485	4,4	2.156.870	4,8	1.751.752	3,8
Ethiopia	1.463.378	3,2	1.321.158	3,0	1.684.067	3,7
Colombia	3.956.898	8,7	2.193.445	4,9	1.503.463	3,3
Guatemala	1.008.697	2,2	784.720	1,8	908.432	2,0
El Salvador	704.937	1,5	740.015	1,7	642.275	1,4
Nicaragua	568.010	1,2	525.138	1,2	605.377	1,3
Kenya	497.440	1,1	640.640	1,4	529.535	1,2
Cameroon	481.038	1,1	375.420	0,8	526.082	1,1
Mexico	444.922	1,0	494.148	1,1	480.572	1,0
Côte d'Ivoire	305.943	0,7	311.453	0,7	431.707	0,9
Togo	132.225	0,3	154.802	0,3	412.385	0,9
Papua New Guinea	587.900	1,3	448.067	1,0	405.475	0,9
China	217.728	0,5	322.873	0,7	360.285	0,8
Tanzania	372.303	0,8	548.862	1,2	357.620	0,8
Others	1.879.098	4,1	1.868.065	4,2	1.788.510	3,9
EU27 excl. intra-EU	45.651.703	100,0	44.776.675	100,0	45.908.500	100,0

Source: Eurostat; some data changed compared to previous edition

In the past years Brazil, Vietnam and Colombia were consistently the top-3 suppliers to the EU. That changed in 2009, with Indonesia replacing Colombia as third-largest origin. In 2010 Brazil continued to be the major green coffee supplier to the EU. Its volume increased with close to 400.000 bags; its market share remained essentially unchanged. Vietnam retained its position as second supplier, with a higher volume (614.000 bags) and a somewhat higher import share (+0,9 percentage points). The share of Indonesia in EU imports dropped from 6,6% in 2009 to 5,8% in 2010. Colombia dropped to 9th place with a market share of 3,3%, down from 4,9% in 2009, and with a volume that was 690.000 bags lower. This is caused by significantly reduced crops in Colombia, due to adverse weather conditions and the temporary effects of the national rejuvenation programme. Older trees are replaced by new ones, which in the longer term assures an improved productivity, but it takes a few years before the new coffee trees are fully productive. In 2010 the top-5 was completed by Honduras and Peru. Both countries have replaced some of the volume traditionally sourced from Colombia. In the last three years imports from both countries have shown a more or less steady increase both in volume and share.

The next two graphs illustrate the (slight) changes in the 'top 5':



Because of its economic development and rapidly increasing impact on the global economy, there is always an interest in coffee imports from China. In 2005 this country supplied 101.330 bags to the EU27, in 2006 this increased marginally to 107.270 and in 2007 significantly (+52%!) to 163.143 bags. The pattern continued in 2008 (217.728 bags, +33% compared to the previous year), 2009 (323.033 bags, +48%) and 2010, be it in a much more modest pace (37.412 bags, +12%). Since 2009 China is one of the top-20 of EU suppliers.

Imports by type of coffee for the EU are now included in the European chapter. This is because data for each individual country are becoming less easy to determine. For intra-EU trade, the Eurostat country statistics do not reveal the country of production of green coffee. When arriving from the countries with major coffee ports, the origin may be recorded in the statistics as - say – Germany or Belgium. In many cases the share of the intra-EU trade is so high that no meaningful assessment can be made of the types of coffee imported. In order to have some idea of development in the EU as a whole, the following table has been added to this chapter:

EU27 imports per type of coffee - in % -		
	2009	2010
Arabicas	66,0	65,9
Brazilian Naturals	35,6	36,5
Colombian Milds	7,6	5,2
Other Milds	22,9	24,2
Robustas	33,8	34,0
Other/Unknown	0,2	0,2
Total	100,0	100,0

Source: Eurostat

The overall ratio Arabicas/Robustas has changed very little in the past year, but within the Arabica group, there has been a shift towards Brazilian Naturals and Other Milds.

The EU is not only an important importer of green coffee, but also a significant exporter of finished products. The EU imports of green decaffeinated coffee and roasted coffee are modest compared to the exports of the same products while the imports and the exports of soluble coffee are in the same order of magnitude.

EU27 imports and exports of green coffee and (semi)finished products from non-EU origins/to non-EU destinations - in tons -						
	2008		2009		2010	
	Import	Export	Import	Export	Import	Export
Green coffee (09011100)	2.739.102	12.433	2.686.601	15.902	2.754.510	19.186
Green coffee, decaffeinated (09011200)	3.019	92.220	2.508	81.192	2.077	84.962
Roasted coffee (09012100)	21.181	71.029	24.548	70.279	29.156	77.030
Roasted coffee, decaffeinated (09012200)	2.338	3.349	2.530	3.209	3.094	3.325
Soluble coffee (21011100)	43.816	39.046	41.061	39.225	43.720	39.166

Source: Eurostat

Note (1): Eurostat revised its 2008 and 2009 data since our previous publication

Note (2): in 2008 the customs code 21011100 (coffee extracts in dry and liquid form) replaced the earlier separate codes 21011111 (dry coffee extracts) and 21011119 (liquid essences and concentrates)

Compared to 2009 the re-exports in 2010 of green coffee increased by 21%. The **exports** of green decaffeinated coffee increased (+5%). Exports of roasted coffee were significantly higher for regular (+10%) and modestly higher for decaffeinated (+4%). Soluble coffee exports remained virtually unchanged. Green decaffeinated **imports** decreased with 17% in 2010 compared to 2009. Imports of roasted coffee increased substantially for both regular (+19%) and decaffeinated (+22%). Imports of soluble increased with 6%.

Looking in some more detail at the EU exports of finished products, in the years 2008-2010 the twenty main destinations of roasted coffee (non-decaffeinated plus decaffeinated), listed according to their ranking in 2010, were:

EU27 exports of roasted coffee (incl. decaf) to non-EU destinations - in tons and % -						
	2008		2009		2010	
	tons	%	tons	%	tons	%
United States	13.146	17,6	11.691	15,9	14.575	20,6
Russian Federation	9.325	12,5	9.187	12,5	8.743	12,4
Ukraine	9.601	12,9	8.885	12,1	8.242	11,7
Switzerland	8.749	11,7	9.971	13,5	8.122	11,5
Australia	3.838	5,1	3.810	5,2	3.720	5,3
Norway	3.087	4,1	2.810	3,8	2.852	4,0
Canada	2.440	3,3	2.161	2,9	2.173	3,1
Croatia	2.793	3,7	3.161	4,3	1.999	2,8
Iceland	1.221	1,6	1.063	1,4	1.392	2,0
Japan	1.376	1,8	1.041	1,4	1.275	1,8
Israel	1.253	1,7	1.199	1,6	1.167	1,7
Albania	1.236	1,7	1.410	1,9	1.103	1,6
Turkey	994	1,3	1.011	1,4	1.071	1,5
Bosnia and Herzegovina	998	1,3	1.140	1,5	1.052	1,5
South Africa	907	1,2	901	1,2	853	1,2
United Arab Emirates	961	1,3	1.097	1,5	848	1,2
Serbia	772	1,0	821	1,1	786	1,1
Ceuta	802	1,1	872	1,2	721	1,0
Belarus	970	1,3	960	1,3	693	1,0
Macedonia, FYR	541	0,7	637	0,9	608	0,9
Others	9.647	12,9	10.191	13,8	11.001	15,6
Total external trade	74.655	100,0	73.730	100,0	70.722	100,0

Source: Eurostat

In 2010 total exports of roasted coffee (including decaffeinated coffee) to non-EU destinations decreased by 4,1% in volume compared to the previous year. The US remained by far the largest non-EU destination. Both volume and share (+4,7 percentage points) increased. The second largest destination in 2010 was the Russian Federation (3rd in 2009), closely followed by Ukraine and Switzerland.

Regarding the EU exports of soluble coffee (officially: extracts, essences and concentrates of coffee) to non-EU destinations, the total volume remained virtually unchanged (-0,2%). In 2010 the three largest clients were the Russian Federation, Ukraine and Turkey. Exports to the Russian Federation increased with 68 % in volume, those to Ukraine with 6,8%. Turkey completed the top-three with a more modest but still growing volume. Exports to the United States dropped somewhat in 2010 after having increased in 2009. In volume terms, listed according to their 2010 ranking, the 10 largest destinations in the three most recent years were:

EU27 exports of soluble coffee to non-EU destinations (HS 21011100) - in tons and % -						
	2008		2009		2010	
	tons	%	tons	%	tons	%
Russian Federation	11.355	29,1	7.712	19,7	12.945	33,1
Ukraine	8.663	22,2	8.946	22,8	9.558	24,4
Turkey	1.810	4,6	2.131	5,4	2.328	5,9
Switzerland	1.476	3,8	1.335	3,4	2.018	5,2
United States	1.283	3,3	2.103	5,4	1.975	5,0
Canada	1.343	3,4	1.250	3,2	1.112	2,8
South Africa	673	1,7	573	1,5	869	2,2
Israel	946	2,4	1.185	3,0	862	2,2
Croatia	1.320	3,4	1.090	2,8	752	1,9
Australia	763	2,0	744	1,9	704	1,8
Others	9.415	24,1	12.158	31,0	6.041	15,4

Total external trade	39.046	100,0	39.225	100,0	39.166	100,0
-----------------------------	---------------	--------------	---------------	--------------	---------------	--------------

Source: Eurostat

Several coffee-producing countries have a sizeable production and export of soluble coffee. The following table, giving EU imports of soluble coffee from the five main non-EU origins, illustrates this: all of the five largest suppliers are coffee producing countries. Overall volume increased by 10,5%. In 2010 Brazil lost its first position to Ecuador and Colombia took third place from Côte d'Ivoire. Like in 2009 India completed the top 5.

EU27 imports of soluble coffee from non-EU origins (HS 21011100)						
- in tons and % -						
	2008		2009		2010	
	tons	%	tons	%	tons	%
Ecuador	10.436	25,2	10.177	23,7	11.548	24,3
Brazil	12.029	29,1	11.124	25,9	10.078	21,2
Colombia	3.967	9,6	3.521	8,2	3.679	7,7
Côte d'Ivoire	5.173	12,5	4.219	9,8	2.765	5,8
India	3.732	9,0	3.303	7,7	2.636	5,6
Others	6.003	14,5	10.624	24,7	16.774	35,3
Total external trade	41.340	100,0	42.970	100,0	47.480	100,0

Source: Eurostat

Finally in this section some data on the value of imports and exports of green, roasted and soluble coffee:

Value of EU27 imports and exports of green, roasted and soluble coffee										
- in mln EUR -										
	Green		Green decaf		Roasted		Roasted decaf		Soluble	
	2009	2010	2009	2010	2009	2010	2009	2010	2009	2010
Imports										
From non-EU origins	5.798	5.798	5	6	486	624	67	86	246	282
Including intra-EU trade	6.442	6.547	117	146	2.366	2.682	157	176	1.153	1.331
Exports	2008	2009	2008	2009	2008	2009	2008	2009	2008	2009
To non-EU destinations	42	59	218	267	364	445	20	22	369	344
Including intra-EU trade	863	1.046	371	420	2.394	2.769	128	147	1.328	1.313

Source: Eurostat

These data underline the economic relevance of the coffee sector for the EU food and drinks industry and trade balance. The value of the intra-EU trade of finished coffee products (roasted and soluble coffee) in 2010 was EUR 3,2 billion. In comparison, the value of exports to non-EU destinations of finished coffee products was much smaller, but still represents a relevant contribution to the EU export performance: EUR 810 million. At the same time the EU green coffee imports represent about half of the world trade, both in terms of volume and value, making the EU a significant trading partner of the coffee exporting countries.

2. PRODUCTION

The following table is a summary of the Eurostat Prodcom statistics over calendar years 2008 and 2009, summarising production of decaffeinated green, roasted, roasted decaffeinated and soluble coffee in volume and value.

Production of green decaffeinated, roasted and soluble coffee in selected EU and EFTA countries - in tons -								
	PRCCODE - 10831130 - Decaffeinated coffee, not roasted.		PRCCODE - 10831150 - Roasted coffee, not decaffeinated.		PRCCODE - 10831170 - Roasted decaffeinated coffee.		PRCCODE - 10831240 - Extracts, essences and concentrates, of coffee, and preparations with a basis of these extracts, essences or concentrates or with a basis of coffee.	
	2008	2009	2008	2009	2008	2009	2008	2009
Austria	0	0	35.226	19.511	131	98	9.464	10.475
Belgium	0	0	63.230	63.382	6.233	6.242	0	0
Bulgaria	0	0	12.643	14.926	195	0	0	0
Croatia	0	0	12.465	13.284	46	34	0	0
Czech Republic	0	0	16.099	0	0	0	0	385
Denmark	0	0	28.879	29.253	0	0	255	184
Finland	0	0	57.089	57.740	0	0	6	3
France	181	181	132.858	123.172	5.250	4.295	11.982	15.617
Germany	284.603	217.583	495.331	511.415	39.704	26.080	120.254	107.629
Greece	0	0	13.699	13.216	0	0	0	0
Hungary	0	0	0	0	0	0	22.657	19.305
Italy	18.995	18.446	388.760	383.547	21.861	23.126	591	583
Lithuania	0	0	93	91	1	1	0	0
Netherlands	0	0	109.126	109.631	8.430	8.132	0	0
Norway	0	0	31.849	31.639	261	265	0	0
Poland	0	0	49.040	48.773	0	0	8.194	8.224
Portugal	0	0	35.755	38.059	1.728	1.563	0	0
Romania	0	0	28.764	28.757	0	0	0	0
Slovakia	0	0	3.226	2.690	0	0	0	0
Spain	30.481	24.314	108.760	115.000	15.115	14.413	46.992	43.741
Sweden	0	0	96.709	102.061	0	0	0	0
United Kingdom	0	0	23.313	24.325	2.535	1.744	0	0
EU27TOTALS	335.486	261.905	1.717.806	1.715.842	102.897	86.926	317.987	294.425

Source: Eurostat

Note: The product codes are those of NACE rev 2.

Production of green decaffeinated, roasted and soluble coffee in selected EU and EFTA countries - in million EUR -								
	PRCCODE - 10831130 - Decaffeinated coffee, not roasted.		PRCCODE - 10831150 - Roasted coffee, not decaffeinated.		PRCCODE - 10831170 - Roasted decaffeinated coffee.		PRCCODE - 10831240 - Extracts, essences and concentrates, of coffee, and preparations with a basis of these extracts, essences or concentrates or with a basis of coffee.	
	2008	2009	2008	2009	2008	2009	2008	2009
Austria	0	0	103	75	1	1	19	20
Belgium	0	0	365	368	46	46	0	0
Bulgaria	0	0	44	51	1	0	0	0
Croatia	0	0	78	80	0	0	0	0
Czech Republic	0	0	0	0	0	0	0	1
Denmark	0	0	158	157	0	0	2	1
Finland	0	0	272	246	0	0	0	0
France	1	1	1.097	853	33	26	311	430
Germany	380	189	1.481	1.319	114	93	755	642
Greece	0	0	95	86	0	0	0	0
Hungary	0	0	0	0	0	0	117	83
Italy	20	20	2.713	2.710	180	193	8	8
Lithuania	0	0	1	1	0	0	0	0
Netherlands	0	0	647	662	0	0	0	0
Norway	0	0	168	171	2	2	0	0
Poland	0	0	189	163	0	0	42	42
Portugal	0	0	234	264	13	13	0	0
Romania	0	0	143	127	0	0	0	0
Slovakia	0	0	16	15	0	0	0	0
Spain	68	53	562	527	78	73	291	281
Sweden	0	0	414	372	0	0	0	0
United Kingdom	0	0	235	184	25	14	0	0
EU27TOTALS	471	264	8.954	8.365	551	515	2.990	2.600

Source: Eurostat

Note: The product codes are those of NACE rev 2.

The data for 2010 were not available at the time of writing, but the earlier figures have been completed and more country data are now available. As noted before: the Prodcom statistics need to be used with care. For a number of countries data are unavailable for reasons of confidentiality. Absence of a country or 'zero' reporting therefore can mean 'unavailable' as well as 'no production'. Only those countries for which at least some data are available have been included. In some cases the reporting is questionable: countries are mentioned as having soluble coffee production where industry sources do not indicate the existence of production facilities. Please note that the Prodcom categories are not the same as those of the Harmonised System used for external trade data.

AUSTRIA

1. IMPORTS OF GREEN COFFEE

Imports of not –decaffeinated green coffee in 2010 reached a volume of 501.900 bags (30.114 tons). This is an increase of 22% in comparison to 2009, when 411.562 bags (24.694 tons) were imported. The Austrian coffee sector is going through a readjustment phase following the closure of a major processing facility, resulting in a lower import requirement of green coffee after 2008.

Austria: Imports of not-decaffeinated green coffee						
- in bags and % -						
Countries of Origin	2007		2008		2009	
	bags	%	bags	%	bags	%
Brazil	49.897	4,8	46.027	11,2	47.673	9,5
India	25.453	2,4	28.185	6,8	29.380	5,9
Vietnam	34.415	3,3	21.083	5,1	27.958	5,6
Guatemala	3.985	0,4	6.183	1,5	8.530	1,7
Peru	4.695	0,5	8.955	2,2	8.455	1,7
Cameroon	15.493	1,5	11.325	2,8	6.173	1,2
Costa Rica	9.232	0,9	4.978	1,2	4.653	0,9
Laos	0	0,0	0	0,0	3.515	0,7
Honduras	10.043	1,0	5.353	1,3	3.247	0,6
China	2.912	0,3	2.132	0,5	2.208	0,4
Ethiopia	1.213	0,1	1.248	0,3	1.662	0,3
Nicaragua	2.065	0,2	2.645	0,6	1.405	0,3
El Salvador	2.642	0,3	4.090	1,0	1.135	0,2
Côte d'Ivoire	0	0,0	2.745	0,7	823	0,2
Mexico	0	0,0	2	0,0	432	0,1
Others	879.415	84,4	266.610	64,8	354.650	70,7
Total all origins	1.041.460	100,0	411.562	100,0	501.900	100,0

Source: Eurostat

Austria is a landlocked country and therefore the green coffee arrives through other EU countries. For statistical purposes such coffee loses its initial origin. This explains the very large percentage of 'other' origins: these are EU countries with seaports in easy reach of Austria, such as Germany. At the same time this means that the list of major origins in the table above paints only a partial picture. It is not known what countries of production are represented in the coffee arriving via other EU members and in what volume.

2. FOREIGN TRADE IN ALL FORMS

Austria: international trade in green, roasted and soluble coffee										
- in tons -										
	Green		Green decaf		Roasted		Roasted decaf		Soluble	
	2009	2010	2009	2010	2009	2010	2009	2010	2009	2010
Imports										
From non-EU origins	9.222	8.949	0	4	1.837	2.167	153	187	559	603
From EU origins	15.471	21.165	2.241	1.855	31.254	29.659	1.280	1.075	1.903	2.376
Total	24.694	30.114	2.241	1.859	33.091	31.826	1.433	1.262	2.462	2.979
Exports										
To non-EU destinations	32	52	11	11	2.432	2.002	325	210	273	249
To EU destinations	1.360	471	29	29	16.054	18.495	86	321	252	378
Total	1.392	523	40	40	18.486	20.497	411	531	525	627

Source: Eurostat

As reported previously, the closure of a large production facility resulted in shifts in the pattern of international trade. Looking at the 2009 and 2010 data, a more settled and consistent pattern seems to have emerged.

3. COFFEE CONSUMPTION

According to data of the International Coffee Organization (a different source compared to previous reports) Austrian total and per capita coffee consumption in recent years were as follows:

Austria: total coffee consumption - in bags -		Austria: per capita coffee consumption - in kilos -	
2001	1.012.664	2005	5,63
2002	926.027	2006	4,44
2003	719.572	2007	6,12
2004	995.824	2008	6,53
2005	772.066	2009	6,35
2006	612.471	2010 (estimated)	6,45
2007	846.816		
2008	907.887		
2009	885.716		
2010	902.854		

Source: ICO

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

According to data of the International Coffee Organization, Austrian retail prices in recent years were as follows

Austria: retail prices for roasted coffee - EUR/kilo -	
2001	6,76
2002	6,48
2003	6,36
2004	6,20
2005	5,89
2006	7,20
2007	7,59
2008	7,54
2009	7,69
2010	7,51

Source: ICO. The original dollar values have been converted to Euro using the European Central Bank (ECB) exchange rate annual averages as reported by Eurostat.

5. INFORMATION ON THE AUSTRIAN COFFEE AND TEA ASSOCIATION

The membership of the association covers 75% of the national coffee market.

6. VAT

In Austria the Value Added Tax (VAT - 'Mehrwertsteuer') for roasted coffee is 10% and for soluble coffee 20%.

BELGIUM

1. IMPORTS OF GREEN COFFEE

Please note that the source for the data for Belgium is mostly the Royal Belgium Coffee Roasters Association. Comparability with earlier versions is not assured.

Belgium: Imports of green not-decaffeinated coffee - in bags -		
	2010	
Countries of origin	bags	%
Brazil	1.442.017	28,37
Vietnam	839.080	16,51
Honduras	522.563	10,28
Peru	367.075	7,22
Uganda	223.650	4,40
Colombia	182.600	3,59
Indonesia	143.870	2,83
Ethiopia	135.040	2,66
Mexico	130.667	2,57
Guatemala	121.563	2,39
Nicaragua	106.365	2,09
Germany	92.380	1,82
Togo	90.125	1,77
Kenya	80.895	1,59
Rwanda	68.250	1,34
India	61.105	1,20
Laos	52.505	1,03
El Salvador	52.120	1,03
Tanzania	50.133	0,99
Others	321.755	6,33
Total all origins	5.083.758	100,00

Source: Royal Belgium Coffee Roasters Association

In 2010 the total non-decaffeinated green coffee imports from all origins remained quite stable compared to 2009 (-0,3%). Still in the lead is Brazil with a stable share of 28,37%, followed by Vietnam (16,51%) and Honduras (10,28%). An important change for the fourth place is Peru (with 7,22%).

2. FOREIGN TRADE IN ALL FORMS

Belgium remains an important point of entry for green coffee destined for other EU countries. There has been a remarkable increase of export of roasted coffee and roasted decaffeinated coffee to EU countries of about 20%.

Belgium: international trade in green and roasted coffee - in tons -								
	Green		Green decaf		Roasted		Roasted decaf	
Imports	2009	2010	2009	2010	2009	2010	2009	2010
From non-EU origins	302.131	297.607	19	24	736	913	117	143
From EU origins	5.149	7.419	6.227	7.353	17.891	18.923	2.397	2.347
<i>Total</i>	<i>307.279</i>	<i>305.026</i>	<i>6.245</i>	<i>7.377</i>	<i>18.627</i>	<i>19.836</i>	<i>2.513</i>	<i>2.490</i>

Exports	2009	2010	2009	2010	2009	2010	2009	2010
To non-EU destinations	1.813	1.701	9	10	949	1.027	60	46
To EU destinations	222.546	215.981	240	943	41.104	51.523	2.842	3.809
<i>Total</i>	<i>222.359</i>	<i>217.682</i>	<i>249</i>	<i>952</i>	<i>42.053</i>	<i>52.549</i>	<i>2.901</i>	<i>3.855</i>

Source: Royal Belgium Coffee Roasters Association

3. COFFEE CONSUMPTION

Belgian total and per capita consumption in recent years were as follows:

Belgium: total coffee consumption - in tons -	
2000	54.121
2001	55.334
2002	51.669
2003	53.333
2004	55.926
2005	54.703
2006	51.534
2007	50.258
2008	51.686
2009	52.505
2010	52.767

Source: Excises

Belgium: per capita coffee consumption - in kilos -	
2000	5,29
2001	5,40
2002	5,05
2003	5,21
2004	5,38
2005	5,24
2006	4,90
2007	4,75
2008	4,85
2009	4,88
2010	4,87

Source: Royal Belgium Coffee Roasters Association

The above data were derived as follows: the total coffee consumption based on excises revenues was divided by the number of inhabitants obtained from the Ministry of Economy. The number of inhabitants has increased by 6% over the last 10 years.

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

Based on ICO data, the development of retail prices for roasted coffee in recent years was as follows:

Belgium: retail prices for roasted coffee - EUR/kilo -	
2004	7,01
2005	6,86

2006	7,27
2007	7,58
2008	7,90
2009	8,19
2010	8,60

5. Source: Royal Belgium Coffee Roasters Association

6. EXCISE DUTIES AND VAT LEVEL

Belgium applies the following excise duties:

- Green coffee: EUR 0,1983 / kg net weight
- Roasted coffee: EUR 0,2479 / kg net weight
- Soluble coffee: EUR 0,6941 / kg dry matter

The Belgian VAT rate remains at 6%.

As you can notice, the level of VAT and the excise duties did not change. Nevertheless, the duties on soluble coffee have been extended to all products as described under HS Code 2101. This heading includes not only soluble coffee but also extracts, essences and concentrates of coffee and preparations with a basis of these products or with a basis of coffee, roasted chicory and other roasted coffee substitutes, and extracts, essences and concentrates thereof. In these preparations, the amount of coffee does not matter and products can be liquid or powder. For all these product an excise duty of 0,6941 Euro per kg total net weight is applied.

DENMARK

1. IMPORTS OF GREEN COFFEE

According to data provided by the Danish Coffee Association, imports of green not-decaffeinated coffee into Denmark from all sources were 35.592 tons (593.200 bags) in 2010, compared to 30.889 tons (514.817 bags) in 2009. This is an increase of 4.703 tons (78.383 bags) or 15%.

Brazil and Vietnam were Denmark's most important suppliers in 2010. Colombia retained the third spot. As has been the case since 2004, Peru and Honduras completed the 'top 5'.

Denmark: Imports of green not-decaffeinated coffee						
- in bags and % -						
	2008		2009		2010	
Countries of origin	bags	%	bags	%	bags	%
Brazil	238.176	42,3	103.593	17,9	95.630	16,1
Vietnam	37.251	6,6	33.808	5,8	40.247	6,8
Uganda	12.447	2,2	22.843	3,9	31.408	5,3
Peru	30.327	5,4	20.045	3,5	29.382	5,0
Colombia	44.441	7,9	22.831	3,9	18.592	3,1
Indonesia	9.398	1,7	12.332	2,1	12.233	2,1
Honduras	34.541	6,1	10.713	1,9	11.163	1,9
Mexico	9.883	1,8	3.742	0,6	7.278	1,2
Tanzania	3.836	0,7	11.771	2,0	5.137	0,9
Burundi	2.235	0,4	4.150	0,7	4.450	0,8
Ethiopia	2.976	0,5	857	0,1	4.370	0,7
Cameroon	--	--	--	--	2.990	0,5
Papua New Guinea	5.021	0,9	3.873	0,7	1.407	0,2
Nicaragua					1.432	0,2
Kenya	6.600	1,2	2.323	0,4	1.407	0,2
Others	125.601	22,3	261.936	56,5	326.075	55,0
Total	562.733	100,0	514.817	100,0	593.200	100,0

Source: Danish Coffee Association (2008 and 2009) and Eurostat (country data 2010)

When looking at the import volumes and shares, we have to express a word of caution. The category 'others' has more than doubled in 2009. Included in this category are EU countries with large seaports through which the coffee arrives in Denmark, such as Germany. For statistical purposes such coffee loses its initial origin. This means that the list of major origins in the table above paints only a very partial picture. It is not known what origins are represented in the coffee arriving via other EU members and in which volume. For the same reason it has become meaningless to present the usual table of imports by type (Colombian Milds, Other Milds, Brazilian naturals and Robustas).

2. FOREIGN TRADE IN COFFEE IN ALL FORMS

Denmark: international trade in green, roasted and soluble coffee										
- in tons -										
	Green		Green decaf		Roasted		Roasted decaf		Soluble	
Imports	2009	2010	2009	2010	2009	2010	2009	2010	2009	2010
From non-EU origins	15.848	16.506	1	0	256	393	13	19	0	430
From EU origins	18.367	20.899	1.299	3.155	13.190	14.499	150	178	0	1.846
Total	34.214	37.405	1.301	3.155	13.446	14.892	163	197	0	2.276
Exports	2009	2010	2009	2010	2009	2010	2009	2010	2009	2010

To non-EU destinations	8	15	0	0	1.452	1.637	4	7	236	240
To EU destinations	28	652	0	0	5.854	7.948	0	3	788	70
Total	36	667	0	0	7.306	9.585	4	9	1.025	310

Source: Eurostat;

Please note that the source for these data is different from those in the first table.

Regarding imports of processed coffee in 2010, Sweden and Germany covered the totality of Denmark's decaffeinated green coffee imports with a share of 30% and 70% respectively. Sweden remained by far the major supplier of roasted non-decaffeinated coffee imports with a share of 79%. Germany was the second source (8%), followed by the Netherlands (3,4%), Belgium (2,5%) and Switzerland (2,3%). In 2010 Italy was the major supplier of roasted decaffeinated coffee, with a share of 56%, followed by Germany (32%) and Switzerland (9%). Germany was the major supplier of soluble coffee (26%), followed by France (22%), the United Kingdom (12%), Switzerland (11%) and Colombia (8%).

3. COFFEE CONSUMPTION

According to data of the International Coffee Organization, the Danish consumption in recent years was as follows:

Denmark: total coffee consumption - in bags -	
2000	790.644
2001	868.401
2002	804.592
2003	724.039
2004	848.846
2005	794.550
2006	822.494
2007	794.284
2008	688.344
2009	678.553
2010	862.465

Source: ICO

Denmark: per capita coffee consumption - in kilos -	
2005	9,0
2006	9,3
2007	9,0
2008	7,8
2009	7,7
2010	9,7

Source: ICO for total consumption and UN for population

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

Based on ICO data, the development of retail prices for roasted coffee in recent years was as follows:

Denmark: retail prices for roasted coffee		
	DKK/kg	EUR/kg
2001	58,48	7,85
2002	53,57	7,21
2003	52,11	6,96

2004	56,42	7,01
2005	56,51	7,58
2006	58,00	7,78
2007	57,74	7,75
2008	60,34	8,09
2009	62,23	8,36
2010	67,33	9,04

Source: ICO. The original dollar values have been converted to Danish Kroner and (for ease of comparison) to Euros using the European Central Bank (ECB) reference exchange rate annual averages

5. COMMENTS ON PARTICULAR ASPECTS

The Danish coffee association promotion activities include providing scientific information to health care professionals.

6. EXCISE DUTIES AND VAT LEVEL

VAT is unchanged at 25% and the excise duties are DKK 5,45 per kilo for green coffee, DKK 6,54 for roasted coffee and DKK 14,17 for coffee extracts.

FINLAND

1. IMPORTS OF GREEN COFFEE

Unless otherwise indicated, the data in this chapter were supplied by the Finnish Coffee Roasters Association. In 2010 Finland imported 1.107.717 bags of green coffee, a decrease of 1,4% compared to 2009.

Finland: Imports of green coffee in 2000-2010 - in bags -	
Year	Imports
2000	1.001.017
2001	1.025.000
2002	1.004.465
2003	1.023.708
2004	1.058.831
2005	1.052.660
2006	1.077.847
2007	1.120.611
2008	1.182.799
2009	1.123.491
2010	1.107.717

The most important origins by volume were:

Finland: Imports of green coffee by country of origin - in 1000 bags -			
Countries of origin	2008	2009	2010
Brazil	500,6	467,1	494,5
Colombia	238,3	112,5	116,1
Nicaragua	92,0	87,4	81,5
Guatemala	78,2	80,0	72,3
Kenya	59,2	91,1	70,4
Peru	28,6	23,6	51,5
Honduras	75,2	98,4	50,5
Ethiopia	37,6	18,6	39,0
Vietnam	17,1	19,9	25,7
Tanzania	9,3	38,8	25,2
Mexico	1,2	21,8	21,7
Uganda	1,0	15,4	16,2
India	3,7	7,3	9,5
El Salvador	10,4	14,0	7,9
Burundi	4,2	11,1	4,5
Indonesia	3,9	1,3	2,9
Panama	0,0	0,0	2,8
Ruanda	0,3	1,4	2,6
Others	21,4	13,8	12,9
Total	1.182,8	1.123,5	1.107,7

The 'top 5' suppliers in 2010 were Brazil, Colombia, Nicaragua, Guatemala and Kenya.

Finland: Percentage distribution of green coffee imports by main sources 2008-2010 - in % -			
Countries of origin	2008	2009	2010
Brazil	42,3	41,6	44,6
Colombia	20,1	10,0	10,5

Nicaragua	7,8	7,8	7,4
Guatemala	6,6	7,1	6,5
Kenya	5,0	8,1	6,4
Peru	2,4	2,1	4,6
Others	15,8	23,3	20,0
Total	100,0	100,0	100,0

2. FOREIGN TRADE OF COFFEE IN ALL FORMS

Green coffee

Imports of green coffee reached 66.463 tons in 2010. The imports decreased by 1,4% from the previous year. The average C.I.F price was EUR 2,89/kg.

There were 148 tons *exports* of green coffee 2010 (122 tons in 2009).

Roasted coffee

Imports of roasted coffee were 7.343 tons in 2010, an increase of 41% from 2009.

Exports of roasted coffee increased from 2009 by 4,1% to 9.529 tons. The main export destination for roasted coffee was Baltic Countries and Russia (99,0%).

Finland: Foreign trade in coffee 2007-2009 - in tons -						
Forms of coffee	Imports			Exports		
	2008	2009	2010	2008	2009	2010
Green coffee	70.968	67.409	66.463	0	122	148
Roasted coffee	3.520	5.200	7.343	8.551	9.150	9.529
Instant coffee	1.328	1.113	1.268	9	48	147

3. IMPORT RATES AND NATIONAL TAXES

There are no national import rates or national taxes for coffee.

4. COFFEE CONSUMPTION

The consumption of roasted coffee was 9,9 kg/person in 2010.

5. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

Based on ICO data, the development of retail prices for roasted coffee in recent years was as follows:

Finland: retail prices for roasted coffee - EUR/kilo -	
2001	4,87
2002	4,29
2003	4,15
2004	4,14
2005	5,03
2006	5,16
2007	5,23
2008	5,58
2009	5,56
2010	6,12

Source: ICO. The original dollar values have been converted to Euro using the European Central Bank (ECB) reference exchange rate annual averages

6. EXCISE DUTIES AND VAT LEVEL

The value-added tax for coffee is the same as for other food stuffs, i.e. 13%. The value-added tax decreased from 17 to 12% during 2009 and increased to 13% in July 2010. There are no excise duties for coffee.

FRANCE

1. IMPORTS

Total non-decaffeinated green coffee imports into France from all origins in 2010 were 4.176.542 bags (250.593 tons). This was 3,1% less than the 4.310.477 bags (258.629 tons) imported in 2009. The main green coffee suppliers in terms of volumes and percentages were:

France: Imports of green, non-decaffeinated coffee by main origins						
- in bags and % -						
	2008		2009		2010	
	bags	%	bags	%	bags	%
Brazil	798.440	20,0	914.398	21,2	835.068	20,0
Vietnam	495.657	12,4	633.608	14,7	474.562	11,4
Ethiopia	130.338	3,3	157.058	3,6	211.810	5,1
Honduras	101.645	2,5	168.790	3,9	174.812	4,2
Colombia	216.127	5,4	217.880	5,1	144.697	3,5
Indonesia	120.535	3,0	167.843	3,9	117.797	2,8
Togo	16.050	0,4	23.803	0,6	117.570	2,8
Peru	81.960	2,1	77.128	1,8	109.737	2,6
Cameroon	52.137	1,3	41.233	1,0	69.115	1,7
Côte d'Ivoire	23.732	0,6	26.147	0,6	63.165	1,5
Uganda	89.002	2,2	67.345	1,6	57.978	1,4
Mexico	26.985	0,7	32.737	0,8	56.907	1,4
Guatemala	60.688	1,5	33.355	0,8	49.315	1,2
Guinea	24.800	0,6	49.542	1,1	48.542	1,2
India	71.685	1,8	41.870	1,0	46.692	1,1
Nicaragua	28.822	0,7	44.945	1,0	42.402	1,0
China	19.193	0,5	24.575	0,6	32.265	0,8
El Salvador	40.492	1,0	56.520	1,3	28.040	0,7
Madagascar	56.592	1,4	19.972	0,5	24.282	0,6
Costa Rica	30.152	0,8	18.882	0,4	22.222	0,5
Congo, Dem Rep	11.990	0,3	30.053	0,7	17.580	0,4
Intra EU	1.387.408	34,8	1.309.762	30,4	1.325.523	31,7
Others	103.448	2,6	153.030	3,6	106.463	2,5
Total all origins	3.987.877	100,0	4.310.477	100,0	4.176.542	100,0

Source: Eurostat

Brazil retained its position of first supplier in 2010. Its market share and volume dropped somewhat compared to 2009. This was also the case for second supplier Vietnam. Ethiopia, sixth supplier in 2009, took third place in 2010. Honduras remained the fourth source and Colombia dropped to the fifth position. As with other markets a word of caution is in order: roughly one-third of coffee reaches France via other EU members with large coffee ports, notably Belgium and Germany. Statistically this coffee loses its identity and the original source can no longer be determined.

2. FOREIGN TRADE FOR ALL FORMS OF COFFEE

Exports of processed coffee (in green bean equivalent):

France: international trade in green, roasted and soluble coffee										
- in tons -										
	Green		Green decaf		Roasted		Roasted decaf		Soluble	
	2009	2010	2009	2010	2009	2010	2009	2010	2009	2010
Imports										
From non-EU origins	180.043	171.061	95	197	10.159	12.324	1.444	1.686	1.404	1.827
From EU origins	78.586	79.531	7.717	11.193	74.947	82.627	2.287	2.066	11.033	11.553

Total	258.629	250.593	7.812	11.389	85.106	94.951	3.731	3.751	12.438	13.380
Exports										
To non-EU destinations	351	612	1.241	49	1.804	1.703	71	59	4.236	4.108
To EU destinations	3.117	1.704	3.626	2.757	13.083	14.446	618	931	8.856	10.296
Total	3.468	2.315	4.868	2.806	14.887	16.150	689	990	13.093	14.405

Source: Eurostat

Imports of all processed coffee increased in 2010 compared to 2009, in some cases significantly (green decaf +45%), in some cases moderately (regular roasted +12%, soluble +8%), in some cases marginally (roasted decaf +1%).

Exports of processed coffee showed a mixed performance with decreases (green decaf -42%) and increases (regular roasted +8%, roasted decaf +44%, soluble +10%).

3. COFFEE CONSUMPTION

According to data of the International Coffee Organization, the French coffee consumption in recent years was as follows:

France: total coffee consumption - in bags -	
2000	5.402.081
2001	5.252.819
2002	5.525.715
2003	5.393.680
2004	4.929.117
2005	4.787.358
2006	5.277.586
2007	5.627.754
2008	5.151.567
2009	5.676.750
2010	5.903.499

Source: ICO

France: per capita coffee consumption - in kilos -	
2005	4,7
2006	5,2
2007	5,5
2008	5,0
2009	5,5
2010	5,7

Source: ICO for total consumption and UN for population

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

Based on ICO data, the development of retail prices for roasted coffee in recent years was as follows:

France: retail prices for roasted coffee - EUR/kilo -	
2001	4,91
2002	4,83

2003	4,87
2004	4,82
2005	4,87
2006	5,21
2007	5,49
2008	5,79
2009	5,99
2010	6,01

Source: ICO. The original dollar values have been converted to Euro using the European Central Bank (ECB) reference exchange rate annual averages.

5. OTHER ASPECTS

- In 2009 soluble coffee represented 15% of coffee (green bean equivalent) consumed in France
- The espresso method of preparation is becoming increasingly popular: annually 16,7 milliard cups are consumed in this form
- Of the roasted coffee, over 80% of sales take place in medium-sized and larger supermarkets. The remaining 20% is divided between cafés/hotels/restaurants, other out-of-home, vending and speciality shops
- The share of decaffeinated coffee is estimated to be 7% of consumption
- The share of ethically traded and sustainably produced coffee. It is estimated to be 2,5%.

GERMANY

1. IMPORTS OF GREEN COFFEE

According to German data, imports of not-decaffeinated green coffee into the Federal Republic of Germany in 2010 reached a volume of 18,2 million bags (1.089.174 tons), an increase of 3,7% compared to the 17,5 million bags (1.049.970 tons) imported in 2009.

Germany: Imports of not-decaffeinated green coffee				
- in bags and % -				
	2009		2010	
	bags	%	bags	%
Brazil	5.994.070	34,25	6.313.612	34,78%
Vietnam	2.960.774	16,92	3.384.823	18,65%
Peru	1.218.042	6,96	1.335.967	7,36%
Honduras	1.090.636	6,23	1.130.833	6,23%
Indonesia	1.394.239	7,97	1.093.585	6,02%
Ethiopia	758.266	4,33	928.393	5,11%
Uganda	644.987	3,69	594.328	3,27%
El Salvador	487.357	2,78	436.722	2,41%
Papua New Guinea	412.944	2,36	379.673	2,09%
India	157.534	0,90	371.783	2,05%
Colombia	567.347	3,24	314.820	1,73%
China	244.281	1,40	278.797	1,54%
Guatemala	208.664	1,19	254.343	1,40%
Mexico	232.364	1,33	163.023	0,90%
Kenya	197.587	1,13	162.203	0,89%
Burundi	148.639	0,85	125.037	0,69%
Nicaragua	100.581	0,57	104.487	0,58%
Cameroon	38.947	0,22	101.240	0,56%
Others	642.234	2,50	679.238	3,74
Total all origins	17.499.493	100,00	18.152.907	100,00

Source: Statistisches Bundesamt, Deutscher Kaffeeverband

In 2010 Brazil remained the largest supplier and Vietnam the second largest. Colombia, third supplier in 2008, has dropped to eighth place in 2009 and eleventh in 2010. This was the consequence of the significantly lower crop volumes in Colombia. Imported volumes from Brazil increased with 5,3% (+319.542 bags). Those from Vietnam increased strongly by 14,3% (+424.029 bags). Volumes from Colombia dropped with 44,5%. Imports from Peru and Honduras, third and fourth supplier, grew with 9,7% and 3,7% respectively. Indonesia completed the top-five albeit with a lower volume (-300.654 bags).

2. FOREIGN TRADE IN COFFEE

Germany: Imports and exports of coffee in all forms					
- in tons -					
	Customs Code	Imports 2009	Imports 2010	Exports 2009	Exports 2010
Green coffee (not decaffeinated)	0901 11 00	1.050.505	1.089.174	174.023	197.994
Green coffee (decaffeinated)	0901 12 00	2.099	833	123.951	130.431
Roasted coffee (not decaffeinated)	0901 21 00	39.902	59.288	158.281	165.405
Roasted coffee (decaffeinated)	0901 22 00	755	1.185	9.188	8.218
Coffee extracts in dry and liquid form	2101 11 00	23.036	26.666	56.933	59.218
Preparations*	2101 12 92	13.388	15.988	14.617	13.190

Source: Statistisches Bundesamt *on the basis of extracts, essences and concentrates of coffee

According to Eurostat data, the 2010 import of decaffeinated green coffee was dominated three countries: Italy (63,5%) followed by the Netherlands (16,3%) and Belgium (14,3%). The main suppliers of roasted non-decaffeinated coffee were Poland (28,5%), Italy (24,8%) and the Netherlands (12,8%). The main sources for roasted decaffeinated coffee were the Czech Republic (25,9%), Belgium (24,5%) and the Netherlands (15,9%). Coffee extracts were mainly sourced from Belgium (27,5%), Ecuador (20,8%) and the United Kingdom (15,0%). The main export destinations of decaffeinated green coffee in 2010 were the United States (54,0%), Spain (12,2%) and Italy (6,9%). Exports of roasted non-decaffeinated coffee were mainly destined for Poland (16,7,6%), France (14,1%) and the Netherlands (13,4%). In 2010 the three largest export destinations for roasted decaffeinated coffee were France (20,9%), the Netherlands (15,6%) and Luxembourg (14,7%). Coffee extracts were mainly destined for the United Kingdom (15,3%), Poland (11,2%) and Ukraine (10,6%).

3. COFFEE CONSUMPTION

In 2010, the statistical total consumption was virtually unchanged, as was the per capita consumption which stands at 6,4 kilo (green coffee equivalent).

Germany: total and per capita consumption		
	Green coffee * - in tons -	Per capita consumption - in kilo green coffee equivalent -
1953	75.417	1,5
1960	191.005	3,5
1965	271.100	4,6
1970	295.789	4,9
1975	344.999	5,6
1980	410.748	6,7
1985	419.306	6,9
1990**	563.350	7,1
1991	590.101	7,4
1992	605.500	7,5
1993	601.200	7,4
1994	578.800	7,1
1995	564.600	6,9
1996	562.250	6,9
1997	551.480	6,7
1998	548.170	6,7
1999	549.520	6,7
2000	548.520	6,7
2001	549.530	6,7
2002	541.050	6,6
2003	532.030	6,5
2004	525.930	6,4
2005	502.835	6,1
2006	510.420	6,2
2007	512.020	6,2
2008	519.160	6,3
2009	527.160	6,4
2010	526.860	6,4

Source: Deutscher Kaffeeverband

* Green coffee processed for consumption on the German market

** from 1990: including inhabitants of the new Bundesländer

Germany: coffee market segments - in tons -		
	2009	2010
Roasted coffee	407.000	406.500
Of which:		
Roasted coffee, not decaffeinated	376.000	377.500
Roasted coffee, decaffeinated	31.000	29.000
Included in roasted coffee:		
Espresso/Caffè Crema	48.000	53.500
Coffee pads/-capsules	30.000	35.100
Soluble coffee*	16.600	16.600
Of which:		
Soluble coffee, not decaffeinated*	15.400	15.400
Soluble coffee, decaffeinated*	1.200	1.200
Of which:		
Soluble coffee in pure form	12.500	12.500
Soluble coffee in mixes*	4.100	4.100

Source: Deutscher Kaffeeverband

*For soluble coffee only the coffee component has been included in the calculations.

The market share of the segments single portions and espresso/caffè crema kept increasing.

Non-household consumption is difficult to assess statistically. According to market research, this segment accounts for 30% of the total market. However, a large part of this segment is covered by household packs. There are no exact data as to how many household packs are consumed in the out-of-home sector.

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

Germany: retail prices for roasted coffee - Euro/500g -	
1970	4,24
1980	4,94
1990	3,70
2000	3,43
2001	3,27
2002	3,06
2003	3,00
2004	2,91
2005	3,61
2006	3,79
2007	3,76
2008	3,84
2009	3,76

Source: ICO, Deutscher Kaffeeverband

5. ASSOCIATION MEMBERSHIP

As at 22 March 2011, the membership of the German Coffee Association consisted of:

Coffee Agents and Brokers:	7
Green coffee importers:	12
Warehousing companies:	3
Decaffeinators:	2
Producers of soluble coffee and soluble coffee beverages:	8
Coffee roasters:	57
Coffee associated members:	21
Supporting members:	20

6. COMMENTS ON PARTICULAR ASPECTS

The German Coffee Day provides a good opportunity to place coffee in the media and to organise events around coffee. 300 companies participated and organised different activities on September 24th 2010 in order to promote coffee and demonstrate its diversity.

The German Coffee Association continued its national Healthcare Professions Coffee Education Programme in 2010. Information material was distributed in six congresses and fairs. The aim of the programme is to counteract the prejudices against the health effects of coffee among the target group of opinion leaders in health questions.

7. VAT, EXCISE DUTIES

VAT on coffee is 7% (in retail). Germany has a specific excise duty on coffee. This is EUR 2,19 for 1 kg roasted coffee and EUR 4,78 for 1 kg soluble coffee. For products containing coffee the following excise duties apply:

Germany: excise duty for products containing coffee - in EUR -		
Volume of roasted or soluble coffee per kilo product	Roasted coffee	Soluble coffee
10 g to 100 g per kg	0,12	0,26
> 100 g to 300 g per kg	0,43	0,94
> 300 g to 500 g per kg	0,86	1,91
> 500 g to 700 g per kg	1,32	2,86
> 700 g to 900 g per kg	1,76	3,83

Source: Kaffeesteuergesetz (coffee tax law)

GREECE

1. IMPORTS OF GREEN COFFEE

In 2010 imports of green, not decaffeinated coffee from all sources into Greece were 25.228 tons (420.467 bags). In calendar year 2009 a volume of 27.859 tons (464.917 bags) was imported. This represents a rather large drop of 9,6%. The most important origins in the most recent three years were (listed in the 2010 order):

Greece: Imports of green, not-decaffeinated coffee by origin						
- in bags -						
Countries of origin	2008		2009		2010	
	bags	%	bags	%	bags	%
Brazil	300.130	66,1	311.788	67,1	287.147	68,3
Vietnam	35.980	7,9	42.833	9,2	39.550	9,4
India	42.242	9,3	41.755	9,0	36.345	8,6
Indonesia	19.805	4,4	17.288	3,7	9.257	2,2
Ethiopia	7.105	1,6	6.638	1,4	6.272	1,5
Colombia	9.410	2,1	7.340	1,6	4.182	1,0
Tanzania	0	0,0	1.170	0,3	2.393	0,6
Uganda	5.860	1,3	2.082	0,4	1.325	0,3
Costa Rica	783	0,2	1.105	0,2	655	0,2
Cameroon	1.623	0,4	918	0,2	653	0,2
Congo Dem Rep	0	0,0	650	0,1	607	0,1
Peru	0	0,0	22	0,0	537	0,1
Guatemala	365	0,1	652	0,1	518	0,1
Kenya	310	0,1	228	0,0	395	0,1
Congo	0	0,0	0	0,0	318	0,1
Others	30.497	6,7	30.447	6,5	30.313	7,2
Total all origins	454.110	100,0	464.917	100,0	420.467	100,0

Source: Eurostat

In 2010 Brazil remained by far the most important supplier, with a slightly increased share (+1,2 percentage points) but a lower volume (- 24.642 bags) The next three suppliers retained their position, but they all lost volume: Vietnam (-3.283 bags), India (-5.410 bags) and Indonesia (-8.032 bags). Colombia dropped to sixth place with a 43% lower volume. Imports from Tanzania, absent in the top 15 three years ago, doubled in 2010.

2. FOREIGN TRADE IN ALL FORMS

Greece: international trade in green, roasted and soluble coffee										
- in tons -										
	Green		Green decaf		Roasted		Roasted decaf		Soluble	
	2009	2010	2009	2010	2009	2010	2009	2010	2009	2010
Imports										
From non-EU origins	26.183	23.483	3	1	44	25	0	0	4.296	2.832
From EU origins	1.713	1.745	120	527	10.667	7.633	172	205	4.240	8.077
Total	27.895	25.228	123	528	10.712	7.658	172	205	8.535	10.909
Exports										
To non-EU destinations	269	96	0	0	236	259	0	0	83	94
To EU destinations	2.102	1.905	10	1	190	250	1	33	464	446
Total	2.371	2.000	10	1	426	509	1	33	547	540

Source: Eurostat

This table illustrates the high volume of finished coffee imports into Greece. Expressed in green coffee equivalent, the volume of the 2010 finished coffee imports (roasted + soluble) was 46% larger than the green coffee imports. In 2009 this figure was 25%. Total coffee imports of all forms into Greece increased marginally (+0,5) from 63.161 tons green coffee equivalent in 2009 to 63.476 tons in 2010. Greece's 2010 roasted coffee imports (regular + decaffeinated) came from Italy (53,1%), Germany (14,8%) and Portugal (10,7%). In 2010 Spain (33,9%), Côte d'Ivoire (25,3%) and Germany (20,7%) were the main sources for soluble coffee.

3. COFFEE CONSUMPTION

Based on ICO data, the consumption of coffee in Greece is as follows:

Greece: Total coffee consumption - in bags -	
Years	Total consumption
2001	547.851
2002	826.549
2003	928.563
2004	871.045
2005	870.119
2006	856.589
2007	1.014.597
2008	978.073
2009	973.876
2010	993.692

Greece: Per capita consumption - in kg green coffee equivalent -	
Year	Consumption
2005	4,7
2006	4,6
2007	5,4
2008	5,2
2009	5,2
2010	5,3

Source: ICO; UN for population data

4. VAT, EXCISE DUTIES

In Greece, the VAT on roasted and soluble coffee is 13%. There are no excise duties.

IRELAND

1. IMPORTS OF GREEN COFFEE

In 2010 imports of green, not decaffeinated coffee from all sources into Ireland were 2.493 tons (41.557 bags), a slight increase of 0,8% compared to the 2.473 tons (41.210 bags) imported in 2009.

Close to 90% of the green coffee imported into Ireland arrives through other EU members, mostly the United Kingdom (72%) and Germany (11%). This makes it impossible to determine the original country of export. With this limitation, the following table provides the most important producing country origins in the three most recent years (in 2010 order):

Ireland: Imports of green, not-decaffeinated coffee by origin - in bags -						
Countries of origin	2008		2009		2010	
	bags	%	bags	%	bags	%
Nicaragua	3.685	7,2	1.498	3,6	2.397	5,8
Indonesia	3.620	7,0	1.493	3,6	1.175	2,8
Colombia	3.185	6,2	960	2,3	642	1,5
Malaysia	0	0,0	83	0,2	120	0,3
Malaysia	0	0,0	83	0,2	120	0,3
South Africa	0	0,0	5	0,0	2	0,0
Others	40.922	79,6	37.087	90,0	37.102	89,3
Total all origins	51.412	100,0	41.210	100,0	41.557	100,0

Source: Eurostat

2. FOREIGN TRADE IN ALL FORMS

Ireland: international trade in green, roasted and soluble coffee - in tons -										
	Green		Green decaf		Roasted		Roasted decaf		Soluble	
	2009	2010	2009	2010	2009	2010	2009	2010	2009	2010
Imports										
From non-EU origins	281	260	0	0	90	84	2	0	0	0
From EU origins	2.192	2.233	101	69	1.353	1.228	50	41	1.690	2.157
Total	2.473	2.493	101	69	1.443	1.312	52	41	1.690	2.157
Exports										
To non-EU destinations	0	0	0	0	1	0	0	0	0	0
To EU destinations	114	101	1	0	229	248	1	0	38	42
Total	114	101	1	0	230	248	1	0	38	42

Source: Eurostat

This table illustrates the high percentage finished coffee imports into Ireland. Expressed in green coffee equivalent, 2010 green coffee imports were only 42% of the volume of the finished product imports (roasted + soluble). Total coffee imports of all forms into Ireland increased from 8.746 tons green coffee equivalent in 2009 to 9.780 tons in 2010 (+11,8%). The vast majority of Irelands soluble coffee imports (almost 88% in 2010) came from the United Kingdom. The Netherlands (6,7%) and Poland (2,8) supplied most of the remainder. In 2010 the UK represented 68% of Irelands roasted coffee imports. The second largest supplier – at a considerable distance - was Germany (20% in 2010).

3. COFFEE CONSUMPTION

Based on International Coffee Organization data, coffee consumption in Ireland is as follows:

Ireland: Total coffee consumption - in bags -	
Years	
2001	146.240
2002	136.116
2003	150.926
2004	224.743
2005	222.892
2006	202.660
2007	244.346
2008	115.107
2009	134.496
2010	156.596

Ireland: Per capita consumption - in kg green coffee equivalent -	
Years	
2005	3,2
2006	2,7
2007	3,2
2008	1,5
2009	1,8
2010	2,1

Source: ICO for consumption, UN for population

After the large and still unexplained apparent drop in total and per capita consumption in 2008, the 2009 and 2010 data showed a significant increase, even if the levels of previous years have not been reached.

ITALY

1. IMPORTS OF GREEN COFFEE

According to official data from the National Institute of Statistics (ISTAT), the quantity of green coffee imported into Italy in the year 2010 was 7.684.913 bags (461.095 tons) with an increase of 2,68% compared to 2009.

This increase should be ascribed to the consistent growth of roasted coffee exports by 9,29%.

In order to provide a more accurate and realistic analysis of the activity in this sector it is worthwhile taking into consideration data related to the import and export of coffee in all forms in the last seven years.

This comparison shows that the annual growth in the coffee processing sector for the period in consideration is about 2,65%. On the other hand, if movement of all forms of coffee is used as the basis for calculation, within the same period coffee imports have increased by 2,49%, exports by 8,08%.

Italy: Imports of green coffee							
- in bags -							
Country of Origin	2004	2005	2006	2007	2008	2009	2010
Brazil	2.330.265	2.408.309	2.555.270	2.622.211	2.632.506	2.629.697	2.649.239
Vietnam	902.292	982.050	1.118.287	1.363.381	1.322.467	1.367.306	1.518.780
India	844.969	748.934	893.873	943.971	769.871	729.856	986.978
Uganda	249.554	245.459	146.067	284.722	486.046	548.246	380.106
Indonesia	371.521	484.097	466.671	325.940	399.499	519.597	457.741
Colombia	253.460	352.293	399.286	414.546	402.951	214.159	85.046
Guatemala	209.282	153.635	174.292	183.956	208.262	193.137	228.063
Tanzania	49.153	95.299	73.174	79.280	79.993	186.111	151.231
Honduras	123.754	89.880	128.815	128.775	116.246	183.080	232.702
Cameroon	338.578	299.654	251.930	251.971	202.079	164.355	187.536
Ethiopia	108.052	141.412	105.468	125.381	135.231	134.898	132.030
Peru	25.173	38.556	29.448	50.813	84.119	99.291	120.741
Costa Rica	119.442	101.525	73.606	75.112	76.140	65.356	63.720
Congo Dem. Rep.	81.030	85.292	68.367	47.890	59.062	55.226	42.235
Ivory Coast	173.254	143.407	128.354	114.729	90.842	53.881	79.451
Nicaragua	40.995	35.735	42.301	56.772	50.163	45.253	61.887
El Salvador	24.138	39.230	25.215	41.820	33.185	45.045	35.079
Togo	28.299	36.137	40.758	44.502	50.351	30.157	50.305
Congo	57.491	24.522	30.109	71.003	61.062	25.147	25.661
Kenya	8.681	9.938	10.628	10.699	10.212	18.882	11.230
Mexico	13.966	11.888	13.028	17.234	8.024	17.051	16.307
Dominican Rep.	21.622	16.682	16.805	19.010	13.516	13.928	12.998
Burundi	4.689	43.081	40.856	6.490	8.430	13.440	1.668
Haiti	5.489	3.845	3.760	4.651	3.833	3.856	2.406
Others	72.357	74.191	99.112	117.764	170.791	127.188	151.773
Total	6.457.506	6.665.051	6.935.480	7.402.623	7.474.879	7.484.143	7.684.913

The data for the year 2010 contained in the above table compared with the previous year show that:

- Brazil maintains, with a large margin, its position as the number one supplier of coffee for the Italian market.
- imports from Vietnam have increased; this country has consolidated its position of second supplier of our market;

- imports from India, Guatemala, Honduras, Cameroon, Peru, Ivory Coast and Nicaragua have shown a sizeable growth;
- imports from Uganda, Indonesia, Colombia and Tanzania have decreased considerably;
- in terms of percentage, the origins that in 2010 have shown the greatest improvement within the Italian market are: India, Guatemala and Ivory Coast.

Italy: Imports of green coffee - in % -							
Country	2004	2005	2006	2007	2008	2009	2010
Brazil	36,09	36,13	36,84	1,49	35,32	35,14	34,47
Vietnam	13,98	14,74	16,04	0,78	17,69	18,27	19,76
India	13,09	11,24	12,89	12,75	10,33	9,75	12,84
Uganda	3,87	3,68	2,10	0,18	6,40	7,32	4,95
Indonesia	5,76	7,26	6,73	0,19	5,35	6,94	5,96
Colombia	3,93	5,29	5,76	5,60	5,42	2,86	1,11
Guatemala	3,24	2,31	2,51	2,49	2,82	2,58	2,97
Cameroon	5,25	4,50	3,64	3,40	2,72	2,20	2,44
Ethiopia	1,67	2,12	1,52	1,69	1,83	1,80	1,72
Costa Rica	1,85	1,52	1,07	1,01	1,02	0,87	0,83
Ivory Coast	2,69	2,15	1,85	1,55	1,21	0,72	1,03
Others	8,58	9,06	9,04	9,42	9,89	11,55	11,92
Total	100,00	100,00	100,00	100,00	100,00	100,00	100,00

With regard to the percentage distribution according to groups of coffee, there are significant movements for 'Colombian Milds' which are decreasing by 42,23% and 'Other Milds' which are increasing by 22,03%. 'Brazilian Naturals' coffees and 'Robusta coffees are slightly decreasing by 1,55% and 3,36%.

Italy: Imports of green coffee - distribution by coffee type -							
Type	2004	2005	2006	2007	2008	2009	2010
Colombian Milds	4,85	6,90	6,99	6,87	6,72	5,66	3,27
Other Milds	22,58	19,66	21,07	21,20	18,95	19,25	23,49
Brazilian Naturals	37,96	38,47	38,51	37,43	37,62	37,33	36,75
Robustas	34,61	34,97	33,43	34,50	36,71	37,76	36,49
Total	100,00	100,00	100,00	100,00	100,00	100,00	100,00

2. FOREIGN TRADE IN ALL FORMS

The year under analysis is characterised by a sizeable growth of green coffee imports and by the reduction of the foreign trade of processed coffee.

As can be seen from the following table the import of green coffee and the export of roasted coffee show a positive trend. The trade of coffee with countries in the European Union is particularly active.

Italy: Foreign trade in coffee in all forms - in tons-								
	Imports				Exports			
	2007	2008	2009	2010	2007	2008	2009	2010
Green coffee	444.157	448.630	449.049	461.095	5.950	5.748	5.819	6.786
Green decaffeinated coffee	7.740	7.970	8.078	8.617	764	827	720	751
Roasted coffee	14.366	16.712	12.401	10.911	98.446	101.618	102.145	111.630

Roasted decaffeinated coffee	440	700	630	828	3.177	3.279	3.002	3.357
Coffee Extracts	4.513	4.841	4.401	3.967	647	320	606	492
Preparations with coffee	1.616	1.864	2.657	3.071	7.401	6.681	5.958	4.106

Exports of roasted coffee, which in recent years has represented the major positive factor of the activity in the Italian coffee sector - since the increase in internal consumption is rather contained - has further increased reaching nearly 2,3 million bags green equivalent.

Thanks to this growth, Italian coffee roasting firms have strengthened their position in the group of major coffee exporters, consolidating the second place held for several years.

3. COFFEE CONSUMPTION

In 2010 the volume sales of the total home coffee market in Italy have been slightly increased (+0.8%) compared to the previous year.

If the market segmentation is analysed in detail, it has to be pointed out that the segments have different trends: the Moka segment (coffee with caffeine for coffee pot machines – about 70% of total household consumption in volume) and the Beans segment (7% of total household consumption in volume) follow the growth of the total market, while the Espresso segment (coffee blends for espresso machines – about 12% of total household consumption in volume) and the Decaffeinated segment (7% of total household consumption in volume) are decreasing by 1%.

Finally, the Pods segment, that reached the weight of 3,5% on the total market, rose by more than 30%.

Total packaged coffee (total market without the instant segment): sales location in percentage by type of client and point of sale (year 2010):

Type of Client	%	Type of Sales Outlet	%
Large Distributors	50	Supermarkets & Hypermarkets	66
Volunteer Union and Purchasing Groups	50	Self Services & Groceries	22
		Discount	12

In the 'out of Home' consumption the economic downturn that encourages the switch from foodservice to other low-cost solutions (i.e. vending and/or unconventional point of sales) continues in 2010. Foodservice volume is therefore expected to decrease.

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

In 2010 the average price of the total regular coffee was EUR 8,27/kg and it increased by 0,4% compared to 2009.

The average price of the Moka segment was EUR 7,26/kg and it decreased by 2%.

Even the price of the decaffeinated segment slightly decreased compared to the previous year: EUR 9,05/kg (-1,2%). The average price of the Espresso segment decreased by 3,1% to EUR 9,20/kg.

5. COMMENTS ON PARTICULAR SUBJECTS

During 2010 the *Consorzio Promozione Caffè* continued its public relations campaign and communication campaign, aimed at consolidating the positive effects generated throughout the campaign in preceding years. This activity is focused primarily towards consumer reassurance through public relations and communication initiatives targeted at opinion leaders, the media and the world of consumerism.

A large part of the budget was destined to the 'Education program on coffee, caffeine and health for the healthcare professionals', co-financed by ISIC. All these activities will be carried out in 2011.

6. VAT LEVELS

Coffee is subject to 20% Value Added Tax. Soluble coffee is subject to 10% Value Added Tax.

THE NETHERLANDS

1. IMPORTS OF GREEN COFFEE

In 2010 imports of green coffee into the Netherlands reached a volume of 2.858.376 bags (171.502 tons), a decrease compared to the previous year when 3.234.456 bags (194.067 tons) were imported. The table below shows the most important countries of origin.

The Netherlands: Imports of green coffee - in bags -		
Countries of origin	2009	2010
Brazil	1.301.688	1.045.679
Vietnam	442.542	555.322
Honduras	268.827	295.837
Peru	238.745	221.561
Uganda	269.785	141.418
Colombia	133.825	95.716
Guatemala	62.058	93.091
Kenya	82.299	62.089
Costa Rica	31.701	43.647
Mexico	61.806	28.200
Others	325.425	275.814
Total	3.218.702	2.858.374

Source: HPA (Central Commodity Board for Arable Products)

The figures in the table above are based upon registration of the origin of green coffee imported for roasting in the Netherlands.

The Netherlands: percentage distribution of net green coffee imports by main sources - in %-		
Countries of origin	2009	2010
Brazil	40,4	36,6
Vietnam	13,7	19,4
Honduras	8,4	10,3
Peru	7,4	7,8
Uganda	8,4	4,9
Colombia	4,2	3,3
Guatemala	1,9	3,3
Kenya	2,6	2,2
Costa Rica	1,0	1,5
Mexico	1,9	1,0
Others	10,1	9,6

Source: HPA

The figures in the tables above show that:

1. Brazil remains the main supplier of the Netherlands. Imports from Brazil are down compared to 2009 with a total share of imports reaching 36,6% or 1.045.679 bags.
2. In 2010 imports from Vietnam increased with 25,5%, totalling 555.322 bags.
3. The imports from Guatemala and Honduras increased with 31.033 bags and 27.010 bags respectively; whilst imports from Uganda and Colombia are down with 128.367 bags and 38.109 bags respectively.
4. Costa Rica joined the top ten with 43.647 bags imported in 2010.

The Netherlands: breakdown of net green coffee imports by type of coffee

- in % -

Type of coffee	2008	2009	2010
Arabicas	66	66	70
Colombian Milds	12	12	6
Other Milds	22	22	26
Brazilian Naturals	32	32	38
Robustas	29	29	28
Not defined	5	5	2

Source: HPA

2. FOREIGN TRADE IN COFFEE IN ALL FORMS

Forms of coffee	Imports		Exports	
	2009	2010	2009	2010
Green coffee (including decaffeinated)	194.067.335	171.502.531	6.635.587	14.459.915
Roasted coffee (including decaffeinated)	43.266.000	48.000.000	38.876.057	43.603.748

Figures imports green coffee (including decaffeinated) from HPA, other figures from CBS

Source: HPA and CBS (Central Bureau for Statistics)

3. COFFEE CONSUMPTION

The calculation of the consumption of coffee is based on the quantity of roasted coffee delivered by the roasting industry for domestic consumption, plus the imports of roasted coffee. On this basis total consumption in 2010 reached a volume of 120.130 tons, compared to 118.197 tons in 2009. The average annual per capita consumption in 2010 was 7,2 kg or 150 litres, compared to 7,1 kg or 148 litres in 2009. The index of the coffee deliveries shows the following trend:

Total sales of roasted coffee		
	x 1000 kg	Index
1970	77,9	100
1975	93,3	120
1980	103,2	132
1985	114,7	147
1990	125,0	160
1995	121,5	156
2000	116,4	149
2005	110,1	141
2007	113,6	146
2008	117,1	150
2009	118,2	152
2010	120,1	154

Source: CBS, HPA and private estimates

Per capita coffee consumption in the Netherlands			
	Kg	Litre	Cups
1970	5,6	117	2,6
1975	6,8	142	3,1
1980	7,3	15	3,3
1985	7,8	163	3,6
1990	8,4	174	3,8
1995	7,9	164	3,6
2000	7,3	153	3,4

2005	6,8	141	3,1
2007	6,9	145	3,2
2008	7,0	147	3,2
2009	7,1	148	3,3
2010	7,2	150	3,3

Source: CBS, HPA and private estimates

4. COMMENTS ON PARTICULAR ASPECTS

Websites www.koffie.info and www.thee.info

These websites provide relevant background information about history, production and the processing of coffee and tea. Also the websites contain other relevant aspects such as health and sustainability.

Information Bureau on Coffee and Health

In 2010 the association continued its activities in the field of the ICO/Health Care Professions Coffee Education Programme. Some of the Information Bureau's main activities in 2010 include the preparation of the new booklet 'Coffee and the brain' (published early 2011) and participation with a stand at a Nutrition Congress. Also the Information Bureau contacted several journalists when incorrect information on coffee was published in online or printed press. Objective and scientifically based information on coffee and health can be found on the Dutch website www.koffieengezondheid.nl. Primary target audiences of the programme are general practitioners, dietitians, nutritionists, academic specialists and medical press.

5. CUSTOMS DUTY AND OTHER IMPORT DUTIES

The import duties are conform EU rates. There are no additional taxes on roasted coffee or soluble coffee in the Netherlands, except 6% VAT.

NORWAY

1. IMPORTS OF GREEN COFFEE

In 2010 Norway imported 594.393 bags (35.664 tons) of not-decaffeinated green coffee, an increase of 3,7% compared to the 572.997 bags (34.380 tons) imported in 2009.

The top-three suppliers remained unchanged, even though volumes from number two, Colombia, dropped with 5,5%. Guatemala retained third place with a significantly higher (+26%) volume. Imports from number four supplier Mexico also showed an increase (+10%). Kenya completed the top-five albeit with a 33% drop in volume.

Norway: Imports of not-decaffeinated green coffee						
- in bags -						
	2008		2009		2010	
	bags	%	bags	%	bags	%
Brazil	262.109	45,8	267.853	46,7	274.774	46,2
Colombia	139.328	24,3	108.705	19,0	102.687	17,3
Guatemala	69.236	12,1	58.439	10,2	73.471	12,4
Mexico	19.758	3,5	35.946	6,3	39.361	6,6
Kenya	25.602	4,5	33.147	5,8	22.234	3,7
Ethiopia	9.976	1,7	2.065	0,4	19.670	3,3
Peru	9.202	1,6	17.179	3,0	16.301	2,7
India	12.210	2,1	11.154	1,9	15.822	2,7
Honduras	1.958	0,3	11.986	2,1	5.883	1,0
Vietnam	4.404	0,8	5.991	1,0	5.675	1,0
Indonesia	4.367	0,8	3.156	0,6	4.570	0,8
Nicaragua	6.300	1,1	4.167	0,7	4.393	0,7
Tanzania	4.854	0,8	4.990	0,9	3.563	0,6
Uganda	0	0,0	969	0,2	1.050	0,2
Zambia	0	0,0	0	0,0	960	0,2
Others	2.958	0,5	7.250	1,3	3.979	0,7
Total all origins	572.262	100,0	572.997	100,0	594.393	100,0

Source: Statistics Norway

2. FOREIGN TRADE IN ALL FORMS

In 2010 imports of not-decaffeinated green coffee were 35.664 tons, an increase of 3,7% compared to 2009. Imports of decaffeinated green coffee dropped from 286 to 186 tons (-35%).

The imports of roasted, not decaffeinated coffee was increased, those of roasted decaffeinated coffee were quite stable at a modest level. Total imports of all roasted coffee increased by 19%.

The most important suppliers of not-decaffeinated roasted coffee were Sweden (53%), the Netherlands (11%), Italy (9%), Switzerland (7%) and, perhaps somewhat surprisingly, Brazil (7%).

Imports of instant coffee were modestly higher in 2010 (+3%). Switzerland remained by far the most important supplier with 33%, followed by the Netherlands (23%), and Germany (10%).

Norway: Foreign trade in coffee						
- in tons-						
Forms of coffee	Imports			Exports		
	2008	2009	2010	2008	2009	2010
green coffee	34.336	34.380	35.664	55	254	424
green coffee, decaf	461	286	186	1	1	0
<i>green coffee, total</i>	<i>34.797</i>	<i>34.666</i>	<i>35.850</i>	<i>56</i>	<i>255</i>	<i>424</i>
roasted coffee	3.408	3.635	4.329	232	168	218

roasted coffee, decaf	22	25	25	0	0	0
roasted coffee, total	3.430	3.661	4.354	232	168	218
coffee extracts, essences	1.677	1.712	1.763	35	25	52

Source: Statistics Norway

3. COFFEE CONSUMPTION

The International Coffee Organization provides the following data on coffee consumption in Norway:

Norway: Total coffee consumption - in bags -		Norway: Per capita consumption - in kg green coffee equivalent -	
Years		Years	
2001	709.939	2005	9,6
2002	692.248	2006	9,0
2003	683.002	2007	9,7
2004	708.938	2008	9,0
2005	743.416	2009	9,0
2006	721.267	2010	9,3
2007	771.422		
2008	714.556		
2009	715.239		
2010	745.699		

Source: ICO

4. ASSOCIATION MEMBERSHIP

The motto of the Norwegian Coffee Association (www.kaffe.no) is: 46 years in the business for good coffee. Its main features include:

- An information centre for coffee, serving consumers, catering trade and members. This was opened in 1962, being the first one of this type in a coffee consuming country
- Quality standards for coffee and coffee brewing
- Coffee Brewer Certification Programme since 1976

Members represent 98% of the coffee roasted in Norway and 90% of the coffee consumed in Norway.

The association is composed of:

- Coffee importers / roasters: 13
- Coffee agents: 1
- Importers of approved brewing equipment: 16
- Associate members (companies related to the coffee business like shipping, transport and packaging): 23

5. VAT AND DUTIES

Data supplied by the Norwegian Board of Customs and Excise (as at 30th of April 2009):

Roasted and green coffee imported to Norway are charged with a Food production fee (Foodstuffs Duty – FSD) as follows: 1,14% + 14% value added tax (VAT)

Instant and Liquid coffee is charged with a Food production fee (Foodstuffs Duty – FSD) as follows: 0,71% + 14% value added tax (VAT)

PORTUGAL

1. IMPORTS OF GREEN COFFEE

Portuguese imports of green not-decaffeinated coffee from all sources in 2010 were 43.312 tons (727.868 bags), compared to 46.194 tons (769.905 bags) in 2009. This is a decrease of 6,2%. The fifteen major suppliers were (ranked in order of 2010 imports):

Portugal: Imports of green not-decaffeinated coffee - in bags -						
	2008		2009		2010	
Countries of origin	bags	%	bags	%	bags	%
Vietnam	101.832	14,1	119.760	15,6	142.372	19,7
Brazil	95.017	13,1	104.238	13,5	115.487	16,0
Uganda	80.825	11,2	92.117	12,0	76.543	10,6
Cameroon	61.365	8,5	77.465	10,1	71.007	9,8
India	52.920	7,3	50.718	6,6	63.518	8,8
Côte d'Ivoire	38.112	5,3	26.593	3,5	36.258	5,0
Costa Rica	34.055	4,7	22.363	2,9	20.358	2,8
Honduras	48.362	6,7	47.975	6,2	18.050	2,5
Indonesia	14.968	2,1	31.820	4,1	16.595	2,3
Peru	985	0,1	5.378	0,7	10.890	1,5
Guatemala	25.213	3,5	20.093	2,6	9.205	1,3
Laos	22.153	3,1	15.175	2,0	8.267	1,1
Timor-Leste	3.760	0,5	7.180	0,9	7.020	1,0
China	0	0,0	3.627	0,5	6.927	1,0
Colombia	36.060	5,0	22.830	3,0	5.870	0,8
Others	107.887	14,9	122.572	15,9	113.502	15,7
Total all origins	723.513	100,0	769.905	100,0	721.868	100,0

Source: Eurostat

In 2010 Vietnam, Brazil, Uganda and Cameroon retained their position as the four biggest suppliers. The first two increased their volume and share in Portuguese imports. Uganda and Cameroon lost both share and volume, but retained their positions. India completed the top-five with a higher share and volume.

2. FOREIGN TRADE

Portugal: International trade in green, roasted and soluble coffee - in tons -										
	Green		Green decaf		Roasted		Roasted decaf		Extracts	
Imports	2009	2010	2009	2010	2009	2010	2009	2010	2009	2010
From non-EU origins	41.383	38.438	0	56	950	1.202	132	165	1	0
From EU origins	4.811	4.874	2.290	2.228	4.408	3.468	200	237	1.162	1.828
Total	46.194	43.312	2.290	2.284	5.358	4.670	332	401	1.163	1.828
Exports	2009	2010	2009	2010	2009	2010	2009	2010	2009	2010
To non-EU destinations	75	94	0	0	870	1.122	30	38	19	16
To EU destinations	76	60	0	3	7.112	7.119	680	1.019	67	65
Total	150	154	0	3	7.981	8.241	710	1.057	86	81

Source: Eurostat

The pattern of imports and exports of the various forms of coffee has been relatively stable in the last two years. In 2010 imports of roasted non-decaf coffee dropped with 13% and exports increased with 3%. Imports of roasted decaffeinated coffee increased with 21% and exports with 49%. Imports of soluble coffee decreased with 57% while exports were 7% lower, albeit on a modest volume.

On the import side, for roasted coffee (regular plus decaffeinated) the main sources were Italy (30%), Switzerland (27%), Spain (24%) and Germany (18%). The main sources for imported coffee extracts in 2010 were Spain (68%), and the United Kingdom (20%).

On the export side, Spain was by far the most important export destination for roasted coffee (incl. decaffeinated) with 59% of the total volume, followed by Germany (9,4%) and Greece (9,1%).

3. COFFEE CONSUMPTION

The International Coffee Organization provides the following data on coffee consumption in Portugal:

Portugal: Total coffee consumption - in bags -		Portugal: Per capita consumption - in kg green coffee equivalent -	
Years	Total consumption	Year	Consumption
2001	745.496	2005	4,0
2002	719.582	2006	4,1
2003	657.369	2007	4,4
2004	685.402	2008	4,3
2005	655.544	2009	4,5
2006	671.447	2010	4,6
2007	716.861		
2008	691.735		
2009	721.363		
2010	749.062		

Source: ICO for consumption, UN for population

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

Based on ICO data, the development of retail prices for roasted coffee in recent years was as follows:

Portugal: Retail prices for roasted coffee - EUR/kilo -	
2001	9,45
2002	8,98
2003	8,88
2004	8,59
2005	8,54
2006	8,32
2007	8,23
2008	8,58
2009	8,45
2010	8,30

Source: ICO. The original dollar values have been converted to Euro using the European Central Bank (ECB) reference exchange rate annual averages

7. EXCISE DUTIES AND VAT LEVEL

The value-added tax for roasted coffee and for substitutes and mixtures of coffee, roasted in beans or powdered: is 13%. The value-added tax for soluble coffee is 23%. There are no excise duties for coffee.

SPAIN

1. IMPORTS OF GREEN COFFEE

In 2010 Spain imported 4.458.317 bags of green coffee (267.499 tons) which represents an approximate 1% drop compared to the previous year. In year 2009 a total volume of 255.157 tons were imported.

Spain: Imports of green coffee 1997 – 2010 - in bags of 60 kilos -	
Year	Volume
1997	3.490.161
1998	3.483.274
1999	3.633.701
2000	3.511.108
2001	3.772.666
2002	3.681.934
2003	3.785.850
2004	3.770.856
2005	4.020.600
2006	4.023.116
2007	4.370.450
2008	4.284.350
2009	4.252.616
2010	4.458.317

Source: Spanish Coffee Federation

The main suppliers were:

Spain: Imports of green coffee by origin - in bags -				
Countries of origin	2007	2008	2009	2010
Vietnam	1.758.083	1.549.168	1.578.233	1.577.683
Brazil	860.183	992.933	907.283	951.350
Uganda	256.000	309.016	297.250	245.783
Colombia	319.116	323.650	231.066	201.267
Côte d'Ivoire	215.316	127.066	148.116	198.883
India	171.183	164.600	115.250	142.500
Germany	209.583	186.733	280.983	394.167
Honduras	79.916	107.100	65.116	80.567
Nicaragua	103.016	97.566	98.466	112.783
Peru	47.850	62.666	31.349	38.071
Others	350.204	363.850	499.504	515.27
Total	4.023.116	4.284.350	4.252.616	4.458.317

Source: Spanish Coffee Federation

Since 2000 Vietnam is Spain's main supplier representing approximately 45% of total imports, therefore Spain's coffee imports are mainly made up of robusta beans representing 62% of total imports. This figure is partially explained by the fact that Spain is an important base for soluble coffee production in Europe. Up to an estimated 30% of green coffee imports are absorbed by the soluble coffee industry with a considerable share of its production being exported to other EU countries.

As for Arabica green coffee imports, in general they have experienced a slight increase, accounting for 37,29% of Spanish imports versus 35,98% of the previous year.

In percentages, the main suppliers to Spain in recent years have been as follows:

Spain: Percentage distribution of green coffee imports by main sources
- in % -

Countries of origin	2004	2005	2006	2007	2008	2009	2010
Vietnam	34,29	35,5	39,21	40,23	36,16	37,11	35,38
Brazil	17,59	18,9	18,36	19,68	23,18	21,33	21,34
Uganda	9,34	8,1	5,67	5,86	7,21	6,99	5,51
Colombia	6,35	5,9	7,16	7,30	7,55	5,43	4,51
Cote d'Ivoire	6,12	7,7	5,17	4,93	2,97	3,48	4,46
India	6,15	4,3	4,01	3,92	3,84	2,71	3,20
Germany	3,44	5,4	6,28	4,80	4,36	6,61	8,84
Honduras	2,35	1,9	1,92	1,83	2,50	1,53	1,81
Indonesia	2,21	2,8	2,28	0,70	0,86	4,65	3,78
Nicaragua	3,02	2,1	2,20	2,36	2,28	2,32	2,53
Others	9,14	7,4	7,73	8,41	9,09	7,84	7,78

Source: Spanish Coffee Federation

Spain: Percentage distribution of green coffee imports by types of coffee
- in % -

Types of coffee	2004	2005	2006	2007	2008	2009	2010
Arabicas	39,22	38,88	39,18	40,39	39,59	35,98	37,29
1. Colombian Milds	6,72	6,45	8,99	7,78	7,99	6,10	5,40
2. Other Milds	12,21	8,76	6,73	9,17	8,72	8,70	10,13
3. Brazilian Naturals	20,29	23,67	23,46	23,44	22,88	21,18	21,76
Robustas	60,78	61,12	60,82	59,61	60,41	64,02	62,71
Others	0	0	0	0	0	0	0

Source: Spanish Coffee Federation

2. FOREIGN TRADE IN COFFEE IN ALL FORMS

Spain: Foreign trade in coffee
- in tons -

Forms of coffee	Imports			Exports		
	2008	2009	2010	2008	2009	2010
Green coffee	257.061	255.157	267.499	17.251	25.632	28.416
Roasted	16.548	17.436	14.593	10.048	7.361	6.080
Soluble	8.159	8.081	9.780	22.621	22.008	29.795

During year 2010 green coffee imports have increased by 4,84%, consolidating the existing trend since 1993. On the contrary roasted coffee imports have experienced a sharp fall of -16,32%, whilst soluble coffee imports continue to grow at a fast rate (21,02%)

As for green coffee exports, during 2010 they have experienced a 10,86% increase, reaching once more the highest volume of exports since recorded. On the other hand, roasted coffee exports have experienced for a third year in a row a sharp fall of 17%. As for soluble coffee, exports have increased by 35,38%, accounting for an important volume of robusta green coffee imports.

3. COFFEE CONSUMPTION

Spain: Coffee consumption 2008/2010
- in tons -

	2008	2009	2010
<i>Home consumption</i>			
- Roasted	64.300	63.722	65.308

- Soluble	10.300	10.286	11.366
<i>Food service</i>			
- Roasted	65.284	62.770	58.313
- Soluble	2.337	2.020	1.790
<i>Green coffee equivalent</i>			
- Roasted	151.613	147.996	144.636
- Soluble	31.593	30.765	32.890
Total Green coffee equivalent	183.206	178.761	177.526

Even though green coffee imports have risen during the past years (although they experienced a slight drop in 2008 and 2009), coffee consumption has remained stable at around 4 kg per person per year. Higher green coffee imports basically respond, as stated above, to the important increase of soluble coffee exports (+35%) and therefore of Spanish local soluble coffee production. For the same reason Spain's net green coffee imports (imports-exports) have decreased over the past years even though total imports have increased.

Within the Spanish coffee market (always in green coffee equivalent), there is yet another slight drop (1%) during 2010, affected by the general economic situation but fortunately not as much as other food and drink manufactured products.

Even though there is an overall increase in home consumption (4%), thanks to the rapid and strong growth of the capsules/pods segment, there is an 8% drop in out of home consumption. At home, roasted coffee consumption experiences a 2,5% increase, whilst out home it drops 7,10%. As for soluble coffee, at home consumption increased 10,50% and fell 11,39% in the out of home market.

It is important to stress that it is only since June 2007 that the relevant Ministry is providing official and consistent out of home consumption data, as up until then the line item included other products besides coffee and tea. In any case, the current market distribution assigns 59,05% of the market share to home consumption and the remaining 40,95% to the food service industry.

Concerning roasted and soluble coffee market distribution, roasted coffee accounts (in green coffee equivalent) for 81,47% of the market, whilst soluble coffee accounts for the remaining 18,53%, following an identical trend to previous years.

As for different forms of consuming coffee, when at home, blended coffee (natural & *torrefacto*) accounts for 38,11% of total consumption, whilst natural coffee (no added sugars) account for 39,39% of the market share. When enjoying a cup of coffee out of home Spaniards also prefer their coffee blended with *torrefacto* (46,44%) or otherwise natural (39,89%). Finally it is interesting to note the steady increase of decaffeinated ground roasted coffee figures, representing approximately 20% of total home roasted coffee consumption, and 12% of food service industry consumption.

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

Retail coffee prices for roasted coffee have increased by 12% during year 2010, as for soluble retail prices these have remained constant. Source: Spanish Ministry of Agriculture

5. INFORMATION ON ASSOCIATION MEMBERSHIP

The Spanish Coffee Federation, FEC, has achieved a solid position as the federated body of all three national associations within the coffee industry, representing approximately 90% of the total Spanish coffee production and distribution.

- Spanish Coffee Roasters Association. AETC – Represents 85% of the industry
- Spanish Green coffee Association. ANCAFE – Represents 92% of the industry
- Spanish Soluble coffee Manufacturers Assn. AEFCS – Represents 100% of the industry

6. STATUS NATIONAL COFFEE AND HEALTH PROGRAMME

The Spanish Coffee Federation joined, in January 2008, the ICO Health Care Professions Coffee Education Programme (HCP-CEP) so as to provide health care professionals with sound information regarding coffee and health. Doctors generally tend to recommend their patients to reduce their coffee intake regardless of what illness may ail them, normally because of lack of information. Our target is to prove with scientific evidence that coffee can be part of a healthy diet.

Up until now FEC has set up an Advisory Board integrated by four members (GP, Nutritionist, Dietician & Neurologist) and two collaborators (Cardiology), has published up to 15 quarterly newsletters to be distributed by email to a medical data base, has participated in several seminars on coffee and neurology, and has participated in congresses organized by the Spanish Neurology Society's (SEN), the Spanish Primary Attention Association (SEMERGEN) and the Spanish Family and Community Medicine Society (SEMFYC) providing information on coffee and health.

FEC also sponsors since 2008 a research grant in collaboration with the Spanish Nutrition Foundation (III edition) and has recently published several articles (Coffee & Alzheimer/Parkinson/Hydration/Cancer/Diabetes/Liver function) in 'Medicina Clínica', 'Jano', 'Formación Médica Continuada' and 'Atención Primaria' edited by SEMFYC with over 10.000 members.

During 2010 we successfully published a 'coffee and a healthy lifestyle' monograph, endorsed by SEMFYC and with an introduction by the Spanish Nutrition Foundation.

The new web site www.cicas.es (Coffee and Health Information Centre) provides health care professionals with scientifically based coffee and health information.

Our 2011 goal is to introduce CICAS to the new technology, and create a whole new 2.0 communication platform.

7. DUTIES AND VAT LEVELS

Regarding fiscal matters, there are no excise duties imposed on coffee in Spain. As for the VAT rate, up until July 2010 it was 7%, having been increased since then to 8%.

SWEDEN

1. IMPORTS OF GREEN COFFEE

According to Statistics Sweden, the import of non-decaffeinated coffee reached 116.650 tons (1.944.167 bags) in 2010. This is about 9% more than in 2009. In that year the imports were 106.755 tons (1.779.250 bags).

Sweden: Imports of not-decaffeinated green coffee from origin countries - in tons actual weight -					
Countries of origin	2008	Change	2009	Change	2010
Brazil	44.762	-4%	43.174	-1%	42.825
Peru	11.563	-28%	8.374	17%	9.816
Colombia	17.283	-28%	12.403	-35%	8.099
Ethiopia	5.532	-60%	2.215	226%	7.210
Kenya	6.922	10%	7.601	-6%	7.177
Honduras	5.342	19%	6.340	-10%	5.688
Nicaragua	2.168	30%	2.825	20%	3.400
Mexico	905	75%	1.581	60%	2.528
El Salvador	517	-2%	505	255%	1.793
Uganda	1.073	-27%	785	113%	1.675
Djibouti	16	725%	132	1122%	1.613
Vietnam	2.045	-2%	2.006	-20%	1.597
Indonesia	1.088	-20%	869	39%	1.211
Burundi	789	320%	3.315	-82%	584
Guatemala	2.676	-60%	1.065	-51%	522
Costa Rica	170	44%	245	49%	366
Tanzania	395	79%	707	-55%	317
Rwanda	125	89%	236	9%	258
Malawi	188	-88%	22	882%	216
Guinea	162	-100%	0	na	213
India	377	-41%	221	-20%	177
Others origins	2.161	-25%	1.629	-35%	1.058
Other Europe*)	3.374	211%	10.506	74%	18.310
Total	109.635	-3%	106.755	+9%	116.650

Source: Statistics Sweden

* Volumes imported from other European countries, of which the country of production cannot be verified in the statistics

The 2010 import statistics are difficult to analyse. Imports of green coffee increased next to 10%, which the consumption did not. Neither did the exports of roasted coffee. Thus we have substantially increased stocks. Furthermore, the number two 'origin' is Other Europe, reflecting heavily increasing volumes re-exported to Sweden from other European countries. Statistics catch trading partners but not for sure the country of production.

As usual Brazil is the main supplier with a volume 1% less than the year before. Number two among known origins is Peru, increasing 17% and passing Colombia, now number three. Colombia has for many years been the second most important supplier, but high prices and quality problems have affected the volumes negatively. How much is however unknown, because you do not know how much Colombian coffee was shipped to Sweden from Other Europe.

Among the other of the top six origins, Ethiopia, Kenya and Honduras, the most remarkable is the comeback of Ethiopia, tripling its volumes and share of market and passing Kenya as number four in the ranking. Another runner up is Djibouti, increasing 1100%, coming from nothing in 2009 to the number eleven position in 2010. Also Nicaragua, Mexico and, not least, El Salvador are strengthening their positions.

The Robusta origins Vietnam and Indonesia decreased their volumes in 2007 after a few years of good increases. In 2008 – 2010 they have more or less unchanged shares of total volume (2 – 3% together). These Robusta volumes however do not reflect any big change in the Swedish consumption pattern but substantially increased export volumes of roasted coffee of different qualities. Sweden is still an almost 100% Arabica market.

Sweden: Imports of not decaffeinated green coffee from origin countries - percentage distribution by main sources -			
Countries of origin	2008	2009	2010
Brazil	40,8%	40,4%	36,7%
Peru	10,5%	7,8%	8,4%
Colombia	15,8%	11,6%	6,9%
Ethiopia	5,0%	2,1%	6,2%
Kenya	6,3%	7,1%	6,2%
Honduras	4,9%	5,9%	4,9%
Nicaragua	2,0%	2,6%	2,9%
Mexico	0,8%	1,5%	2,2%
El Salvador	0,5%	0,5%	1,5%
Uganda	1,0%	0,7%	1,4%
Djibouti	0,0%	0,1%	1,4%
Vietnam	1,9%	1,9%	1,4%
Indonesia	1,0%	0,8%	1,0%
Burundi	0,7%	3,1%	0,5%
Guatemala	2,4%	1,0%	0,4%
Costa Rica	0,2%	0,2%	0,3%
Tanzania	0,4%	0,7%	0,3%
Rwanda	0,1%	0,2%	0,2%
Malawi	0,2%	0,0%	0,2%
Guinea	0,1%	0,0%	0,2%
India	0,3%	0,2%	0,2%
Other origins	2,0%	1,5%	0,9%
Others*	3,1%	9,8%	15,7%
Total	100,0%	100,0%	100,0%

Source: Statistics Sweden.

*Volumes imported from other EU countries are reported as *Others* since the country of production cannot be verified in the statistics.

Sweden: Imports of not decaffeinated green coffee - percentage distribution by types of coffee -			
Type of coffee	2008	2009	2010
Arabica	91,3%	85,5%	80,0%
Colombian Milds	22,6%	19,4%	13,6%
Other Milds	22,8%	23,4%	22,2%
Brazilian Naturals	45,9%	42,6%	44,3%
Robusta	3,7%	3,2%	3,4%
Not specified	5,0%	11,4%	16,6%
Total	100,0%	100,0%	100,0%

Source: Statistics Sweden and the Swedish National Coffee Association

These data are not available in any official statistics but estimated on the basis of the origins. The shares are very stable and a decrease of one origin is most often balanced by an increase of another one within the same group. After some years when Brazilian Naturals increased to the cost of Colombian and Other Milds this trend was broken in 2007 with Milds increasing and Naturals decreasing as well as Robusta. In 2009 this development

goes on with Brazilian Naturals losing volume. Other Milds increase to the cost of Colombian Milds. In 2010 the most remarkable change is the Colombian decrease and the increase of volumes imported from other Europe without origin in the statistics. Some of them may be Colombian, unknown how much.

The share of Robusta reflects exports, mainly to Denmark and the Baltic countries (and to a small extent the espresso trend in Sweden).

2. FOREIGN TRADE IN ALL FORMS OF COFFEE

Sweden: Foreign trade in coffee - in tons actual weight -						
	Imports			Exports		
	2008	2009	2010	2008	2009	2010
Green coffee	109.635	106.686	116.650	574	1.715	1.076
Green coffee (decaf)	659	741	984	2	0	0
Roasted coffee	8.169	8.809	10.018	24.088	22.830	23.194
Roasted coffee (decaf)	19	11	0	835	744	761
Instant coffee	~2.900	~2.900	3.066	605	453	552

Source: Statistics Sweden and the Swedish National Coffee Association

Sweden is a big exporter of roasted coffee since 2005, due to structural changes in the Scandinavian coffee industry. Two roasting plants were closed in Denmark and these volumes were moved to Swedish plants. Thus Denmark since 2005 is the biggest export market with not far from 50% of the volume in 2010.

The export volumes are very stable, on average 23.500 tons/year. The largest destination after Denmark was the USA (17% of total exports), followed by the other Nordic countries (15%), the Baltic countries (8%) and Great Britain (3%).

Imports of roasted coffee increased with 14% to 10.000 tons and came in 2010 mainly from the Netherlands, Denmark and Germany (53%, 13% and 12% respectively). Imports from Italy were 10% of the total import volume, reflecting the espresso trend.

Net imports of instant coffee (only pure instant is registered), are slightly increasing and are now about 2.500 tons. The figures from 2008 and 2009 are best estimates based on internal statistics, since official figures from these years are not available.

3. COFFEE CONSUMPTION

Consumption usually is estimated to be equivalent to net import, since stock changes are not registered or visible. Net imports are very stable and bigger changes probably reflect changes in stocks more than changes in consumption, which now seems to be back on the relatively high level of the very early nineties. As a matter of fact net imports last years have increased just enough to deliver the per capita consumption to the population growth. Total consumption was slightly decreasing during the nineties but has recovered since 2001. The total size of the Swedish net imports in 2010 was 97.048 tons roasted coffee equivalent, giving a total per capita volume of all forms of coffee of 10,3 kilos. (Roasted coffee is calculated as 85% of green coffee weight. A multiple of 4 is used in Sweden to calculate instant coffee as roasted.). Of coffee calculated this way, about 13% was instant coffee.

However in 2010 the net imports increased heavily (about 15%, all types of coffee included), which the exports or the consumption did not. Obviously we have got substantially bigger stocks. Since changes in stocks cannot be captured, the consumption figures this time are based on moving averages for the net imports during the last three years, which show that the per capita consumption still is quite stable. The figures *cups/day* are calculated as 7,5 grams coffee/cup of 0,125 litre. A multiple of 4 is used to calculate instant coffee as roasted volume. A factor 0,85 is used to calculate green coffee to roasted.

Sweden: Per capita consumption of coffee				
		2008	2009	2010
Roasted ground coffee	kg/capita	8,41	8,24	8,51
Instant	gr/capita	239	256	259

All coffee as roasted	kg/capita	9,36	9,26	9,55
	cups/capita/day	3,4	3,4	3,5
	liters/capita/year	156	154	159
Roasted ground coffee	kg/capita	8,41	8,24	8,51

Source: Statistics Sweden and the Swedish National Coffee Association

The consumption of ecological coffee is about 14% and still increasing. The certification programs for responsibility or sustainability (Fair Trade, Utz Certified and Rain Forest Alliance) have gained market and their total market share was well above 12%. Double certifying is common and about 90% of these certified coffees are certified as ecological as well. Certified coffees have their strongest position on the out of home market, where their share is about 33%.

Espresso is doing well too on this typical filter coffee market, stabilizing its share about 2 – 3%, thanks to the coffee shop trend.

The consumption of decaffeinated coffee is negligible: less than 1%. Practically all the imported volume of decaffeinated green coffee is re-exported as roasted coffee.

4. DEVELOPMENT OF RETAIL PRICES FOR ROASTED COFFEE

According to Statistics Sweden data, the average retail price for roasted coffee was SEK 63,18 per kilo in 2010, increasing 6%. However the official statistics underestimate discounts and campaign prices which are frequent in Sweden and a weighted average price per kilo is about 10% lower. The table does reflect the trend of price level, which was decreasing the first half of this decade. 2006 was the first year since 1998 when the average price increased, a shift which was confirmed the following years.

Sweden: Retail prices roasted ground coffee			
Year	SEK/kg	Year	SEK/kg
2001	57,60	2006	51,12
2002	54,60	2007	52,20
2003	52,30	2008	54,10
2004	49,90	2009	59,54
2005	49,18	2010	63,18

Source: Statistics Sweden

5. COMMENTS ON PARTICULAR SUBJECTS

The Swedish National Coffee Association (*Svensk Kaffeinformation*), the organization of coffee roasters and importers, is working towards the public mainly by its web site www.kaffeinformation.se (partly available in English), where you also may find some more statistics about the Swedish market. Members of The Swedish National Coffee Association are roasters and importers with their own brand. The members cover about 93% of the total market.

6. DUTIES AND VAT LEVELS

The import duties are EU rates. There are no other taxes on coffee in Sweden but the VAT, which on food and drinks is 12% in retailing and 25% in restaurants, coffee shops etc.

SWITZERLAND

1. IMPORTS OF GREEN COFFEE

According to F.O. Licht's International Coffee Report data green coffee imports into Switzerland reached a total of 2.015.100 bags in 2010. This is an increase of close to 10% compared to the 1.837.100 bags imported in 2009.

The main supplying producing countries (2010 ranking) were:

Switzerland: Imports of green coffee - in bags -		
	2009	2010
Brazil	593.100	606.000
Colombia	259.600	298.100
Vietnam	162.500	179.300
India	138.200	146.300
Honduras	89.600	109.900
Guatemala	91.900	103.100
Costa Rica	78.600	89.900
Ethiopia	61.800	80.200
Indonesia	62.500	57.100
Mexico	43.000	44.500
Others	256.300	300.700
Total	1.837.100	2.015.100

Source: F.O. Licht's International Coffee Report

Volumes from the main supplier, Brazil, increased slightly (+2%) and those from the number two, Colombia, significantly (+15%). Imports from number three, Vietnam, increased with 10%. Remarkable are the strong performances of Honduras (+23%) and Ethiopia (+30%).

The following table contains the same information as above, expressed in percentages:

Switzerland: Imports of green coffee - in % -		
	2009	2010
Brazil	32,3	30,1
Colombia	14,1	14,8
Vietnam	8,8	8,9
India	7,5	7,3
Guatemala	4,9	5,5
Honduras	5,0	5,1
Costa Rica	4,3	4,5
Indonesia	3,4	4,0
Ethiopia	3,4	2,8
Mexico	2,3	2,2
Others	14,0	14,9
Total	100,0	100,0

2. FOREIGN TRADE IN COFFEE IN ALL FORMS

Switzerland: Coffee trade						
- in 1000 bags green bean equivalent -						
	Imports			Exports		
	2009	2010	% change	2009	2010	% change
Green coffee	1.837,1	2.015,1	9,7	18,5	18,5	0,0
Roasted coffee	185,1	205,5	11,0	540,9	687,0	27,0
Soluble coffee	100,4	127,4	26,9	526,9	622,0	18,0

Source: F.O. Licht's International Coffee Report

On the whole, changes in imported and exported volumes of processed coffee were quite significant.

3. COFFEE CONSUMPTION

The International Coffee Organization provides the following data on Swiss consumption:

Switzerland: Total coffee consumption		Switzerland: Per capita consumption	
- in bags -		- in kg green coffee equivalent -	
Years		Years	
2001	816.090	2005	8,9
2002	821.026	2006	7,4
2003	852.430	2007	7,8
2004	722.016	2008	9,1
2005	1.099.332	2009	7,7
2006	931.889	2010	8,2
2007	988.974		
2008	1.149.302		
2009	965.545		
2010	1.028.912		

Source: ICO for production data, UN for population figures

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

Switzerland: retail prices roasted coffee	
- In CHF per kg -	
2009	10,76
2010	13,96

Source: ICO. The original dollar values have been converted to Swiss Francs using Swiss National Bank exchange rate annual averages. After a three-year hiatus, Swiss retail figures have become available again starting 2009.

5. VAT AND OTHER DUTIES

Import duties and national fees (in CHF per 100 kilo gross weight) are:

	Normal tariff	Developing countries	LDC's	Compulsory stocks contribution
Green coffee:	0,00	0,00	0	3,75
Green coffee, decaffeinated:	0,00	0,00	0	3,75
roasted coffee:	63,00*	46,75**	0	4,50
roasted coffee, decaffeinated:	63,00*	46,75**	0	4,50
soluble coffee:	182,00*	127,50**	0	8,85

*: 0,00 for European and least developed countries **: not for Brazil

Note: LDC is Least Developed Country

Source: RéserveSuisse

UNITED KINGDOM

1. IMPORTS OF GREEN COFFEE

Imports into the United Kingdom during 2010 of non-decaffeinated green coffee showed a marked increase.

United Kingdom: Imports of green coffee non-decaffeinated				
- in bags of 60 kilos -				
Countries of origin	2007	2008	2009	2010
Vietnam	589.825	465.314	457.423	471.070
Colombia	465.603	446.211	306.781	271.208
Brazil	243.297	313.922	431.071	394.061
Indonesia	148.731	240.667	260.700	414.082
Peru	102.829	63.301	61.566	86.124
Kenya	38.715	53.357	44.370	46.173
Ethiopia	36.743	48.504	35.345	55.744
Honduras	33.784	38.125	128.679	158.044
Costa Rica	19.928	26.508	19.678	28.470
Guatemala	18.909	21.223	22.896	46.700
Nicaragua	13.189	21.199	15.989	26.323
El Salvador	13.630	18.547	18.953	33.101
India	13.437	17.930	10.391	21.130
Tanzania	7.809	11.363	7.913	11.543
Uganda	19.918	10.769	17.059	15.297
Mexico	8.220	7.589	5.833	21.193
Papua New Guinea	3.356	4.875	3.362	2.115
Zimbabwe	3.228	2.873	1.521	0
Ivory Coast	--	--	16.683	833
Others/Unknown	48.493	34.774	75.217	49.803
Total	1.843.811	1.847.051	1.971.434	2.153.014

Source: British Coffee Association

Main suppliers remain the same. Indonesia overtook Brazil as the second leading importer. Colombia volume was much reduced due to supply issues. Central Americans were all increased volume as were India and Ethiopia. The most substantial decline were supplies from Papua New Guinea and Ivory Coast. The changes reflect the strong market conditions.

United Kingdom				
Percentage distribution of green coffee non-decaffeinated imports by main origin				
- in % -				
Countries of Origin	2007	2008	2009	2010
Vietnam	31,99	25,19	24,72	21,89
Colombia	25,25	24,16	15,56	12,59
Brazil	13,19	17,00	21,86	18,30
Indonesia	8,07	13,03	13,22	19,23
Peru	5,58	3,43	3,12	4,00
Kenya	2,10	2,89	2,25	2,14
Ethiopia	1,99	2,63	1,79	2,59
Honduras	1,83	2,06	6,53	7,34
Costa Rica	1,08	1,44	1,00	1,32
Guatemala	1,03	1,15	1,16	2,17
Nicaragua	0,72	1,15	0,81	1,22
El Salvador	0,74	1,00	0,96	1,54
India	0,72	0,97	0,53	0,98
Tanzania	0,42	0,62	0,40	0,53
Uganda	1,08	0,58	0,86	0,71

Mexico	0,46	0,41	0,30	0,98
Papua New Guinea	0,19	0,26	0,17	0,10
Zimbabwe	0,17	0,16	0,08	0
Ivory Coast	--	--	0,85	0,04
Others/Unknown	2,62	1,88	3,83	2,33
Total	100,00	100,00	100,00	100,00

Source: British Coffee Association

United Kingdom: Imports by types of coffee (ICO)						
- in % -						
Types of coffee	2006	2007	2008	2009	2010	
Arabicas	52	56	60	56	56	
Colombian Milds	23	28	28	16	16	
Other Milds	14	13	13	16	19	
Brazilian Naturals	15	15	19	24	21	
Robustas	47	42	39	40	42	
Others/Unknown	1	2	1	4	2	

Source: British Coffee Association

Arabica retains 56% of the import share with a small increase in Robusta but overall there is little real change.

2. FOREIGN TRADE IN ALL FORMS

United Kingdom: Foreign Trade in Coffee								
- in tons -								
	Imports				Exports			
	2007	2008	2009	2010	2007	2008	2009	2010
Green	110.629	110.803	118.256	129.181	2.495	3.199	3.327	5.799
Green Decaf	212	303	281	528	71	157	115	150
Roasted	1.061	1.066	1.064	1.919	3.675	5.482	8.978	10.010
Roasted Decaf	228	194	205	296	339	234	295	281
Soluble/Extracts	10.388	8.123	10.051	7.664	18.944	15.572	11.270	17.833

Source: British Coffee Association

Imports of Green increased substantially and this is reflected in the marked increase in export volumes. In soluble imports Brazil remains the main importer with Ecuador a second but with decreasing volumes. Exports of Green rose substantially as did roasted volumes. Soluble exports increased by well over 30% after a substantial decline in 2009. Russia continues as the main market. Roasted imports demonstrated a substantial volume increase matched by export volumes.

3. COFFEE CONSUMPTION

UK consumption marginally increased reflecting the small but steady increase in the last few years. Instant remains the main coffee consumed still, at around 75% of the total market. Roast and Ground is increasing in volume especially in 'ORECA' market and the 'capsule' presentation.

The active programme developed over many years is showing changes in consumption patterns with increased interest from under 25's and older members of society.

4. DEVELOPMENT OF PRICES FOR ROASTED COFFEE

The huge increase in Green prices over the year was initially absorbed by the industry but inevitably the increased costs have resulted in an increase of on-shelf price. The future changes will depend on the commodity market moving forward.

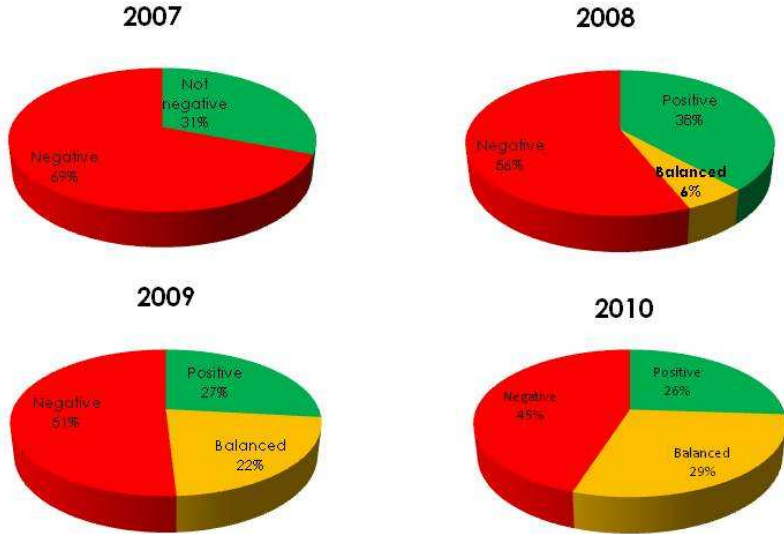
5. INFORMATION ON ASSOCIATION MEMBERSHIP

The BCA continues to represent all aspects of the coffee industry in the UK. Membership grew slightly during 2010 as we predicted, the economic climate having a definite impact in attracting new members to the Association. We do expect membership to grow during 2011, but again at a slow rate. Priority is also given to keeping the loyalty of current membership.

6. HEALTH

The programme is aimed at both Health Care Professionals and Consumers, and is still continuing to overcome the negative perception of coffee and health. Thus preventing any decline in coffee consumption, this has been demonstrated in Section 3 above. The targeted PR campaign continues to show an increase in positive/balanced information written about coffee and a reduction in negative coffee/caffeine and health. The focus for 2010 was to ensure our target audiences remain engaged in coffee and health messages. Utilise health as the 'entry point' to build awareness and education. Maintain BCA share of voice with media, healthcare professionals and our target audience influencers with a refreshed message focus. The UK media are still prolific writers on health, and often or not this will be about coffee/caffeine; this is across all types of publications and media. On average they generate well over 100 articles per month, and this seems to be increasing on a monthly basis. In the detailed graphs below you can see the percentage shift change in media coverage from 2007 to 2010.

Coffee Coverage Overview:



7. EXCISE DUTIES AND VAT LEVEL

The UK VAT level on coffee remained unchanged at 0%.

SELECTED OTHER EU MEMBERS

1. KEY IMPORT DATA 2010

Bulgaria					
Green Coffee (Incl Decaf)		Roasted Coffee (Incl Decaf)		Extracts, essences	
Vietnam	5.883	Italy	1.838	Brazil	411
Indonesia	5.046	Germany	662	Germany	212
Brazil	2.267	Romania	229	France	76
Honduras	2.115	Hungary	117	United Kingdom	62
Peru	1.653	Poland	107	Poland	52
Others	6.266	Others	514	Others	127
Total	23.229	Total	3.467	Total	941
Czech Republic					
Green Coffee (Incl Decaf)		Roasted Coffee (Incl Decaf)		Extracts, essences	
Brazil	5.187	Poland	9.957	Spain	1.509
Vietnam	3.192	Germany	2.987	Poland	1.409
Indonesia	2.510	Slovakia	2.897	Slovakia	1.204
Slovakia	1.601	Italy	657	France	455
Honduras	1.206	Hungary	648	Germany	355
Others	5.619	Others	1.609	Others	569
Total	19.315	Total	18.755	Total	5.501
Hungary					
Green Coffee (Incl Decaf)		Roasted Coffee (Incl Decaf)		Extracts, essences	
Germany	12.095	Slovakia	6.429	Germany	1.277
Netherlands	573	Austria	2.528	Brazil	1.271
Italy	192	Germany	1.854	Spain	721
Austria	121	Italy	354	Poland	476
UK	111	Netherlands	319	India	436
Others	23	Others	488	Others	1.505
Total	13.115	Total	11.971	Total	5.686
Poland					
Green Coffee (Incl Decaf)		Roasted Coffee (Incl Decaf)		Extracts, essences	
Germany	83.690	Germany	22.802	Germany	7.834
Vietnam	4.211	Italy	1.611	Ecuador	3.762
Laos	3.544	Czech Republic	1.416	UK	2.080
Brazil	2.226	Latvia	1.229	Iran	1.827
Uganda	1.621	Netherlands	623	Spain	1.536
Others	5.637	Others	2.884	Others	4.345
Total	100.928	Total	30.565	Total	21.384
Romania					
Green Coffee (Incl Decaf)		Roasted Coffee (Incl Decaf)		Extracts, essences	
Vietnam	6.192	Germany	6.311	Brazil	865
Indonesia	3.184	Bulgaria	4.550	Germany	574
Brazil	2.832	Italy	2.075	Israel	487
Uganda	1.681	Netherlands	786	Spain	479
Germany	1.087	Austria	654	UK	330
Others	6.544	Others	2.104	Others	775

Total	21.520	Total	16.479	Total	3.510
Slovenia					
Green Coffee (Incl Decaf)		Roasted Coffee (Incl Decaf)		Extracts, essences	
Brazil	5.367	Italy	1.151	Austria	443
Vietnam	1.931	Austria	416	Germany	127
Italy	921	Bosnia and Herzegovina	351	Czech Republic	15
India	730	Croatia	226	Netherlands	9
Indonesia	474	Germany	77	Italy	6
Others	1.296	Others	101	Others	2
Total	10.718	Total	2.322	Total	603
Slovakia					
Green Coffee (Incl Decaf)		Roasted Coffee (Incl Decaf)		Extracts, essences	
Belgium	1.365	Germany	15.260	Czech Republic	559
Germany	1.273	Hungary	4.953	Poland	417
Vietnam	536	Czech Republic	3.093	Spain	409
Brazil	148	Poland	893	Switzerland	156
Ethiopia	145	Austria	800	Germany	97
Others	451	Others	418	Others	140
Total	3.918	Total	25.416	Total	1.778

Source: Eurostat

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

2. CONSUMPTION

Total coffee consumption			
- in bags of 60 kg -			
	2008	2009	2010
Bulgaria	444.718	409.276	395.358
Czech Republic	621.413	525.168	471.719
Hungary	493.978	445.286	382.082
Poland	691.735	721.363	749.062
Romania	806.767	774.945	795.875
Slovakia	341.035	212.745	337.067
Slovenia	194.170	198.275	205.066

Source: ICO

EU COFFEE IMPORT DUTIES

Import duties for green and processed coffee into the EU from the 20 most important EU suppliers listed alphabetically - in % -					
	Green 0901110000	Green decaffeinated 0901120000	Roasted 0901210000	Roasted decaffeinated 0901220000	Extracts, essences 2101110000
Brazil	0,0	4,8*	2,6*	3,1*	9,0
Cameroon	0,0	0,0**	0,0**	0,0**	0,0**
China	0,0	4,8*	2,6*	3,1*	3,1*
Colombia	0,0	0,0*	0,0*	0,0*	0,0*
Côte d'Ivoire	0,0	0,0**	0,0**	0,0**	0,0**
El Salvador	0,0	0,0*	0,0*	0,0*	0,0*
Ethiopia	0,0	0,0*	0,0*	0,0*	0,0*
Guatemala	0,0	0,0*	0,0*	0,0*	0,0*
Honduras	0,0	0,0*	0,0*	0,0*	0,0*
India	0,0	4,8*	2,6*	3,1*	3,1*
Indonesia	0,0	4,8*	2,6*	3,1*	3,1*
Kenya	0,0	0,0**	0,0**	0,0**	0,0**
Mexico	0,0	0,0***	0,0***	0,0***	0,0***
Nicaragua	0,0	0,0*	0,0*	0,0*	0,0*
Papua New Guinea	0,0	0,0**	0,0**	0,0**	0,0**
Peru	0,0	0,0*	0,0*	0,0*	0,0*
Tanzania	0,0	0,0**	0,0**	0,0**	0,0**
Togo	0,0	0,0*	0,0*	0,0*	0,0*
Uganda	0,0	0,0**	0,0**	0,0**	0,0**
Vietnam	0,0	4,8*	2,6*	3,1*	3,1*

Source: DG External Trade Export Helpdesk website as at 11 August 2011

* Generalised System of Preferences

** Economic Partnership Agreements

*** Bilateral Trade Agreement

Please note that compliance criteria and/or documentary requirements apply in order to qualify for preferential tariff rates. The above is provided for information only. No responsibility can be accepted by the ECF for any inadvertent errors or omissions.

Interested in an origin not mentioned in this table or in more details, such as links to the applicable import regime? Please see the European Commission Export Helpdesk website <http://exporthelp.europa.eu/>.

EU VAT AND EXCISE DUTIES

ROASTED, NON-DECAFFEINATED COFFEE, UNLESS INDICATED OTHERWISE		
COUNTRY	VAT%	EXCISE DUTIES
Austria	10,0	
Belgium	6,0	Green: EUR 0,1983/kg; roasted 0,2479/kg; soluble 0,6941/kg
Bulgaria	20,0	
Cyprus	5,0	
Czech Republic	10,0	
Denmark	25,0	Green: DKK 5,45/kg; roasted: DKK 6,54/kg; soluble DKK 14,17/kg
Estonia	20,0	
Finland	13,0	
France	5,5	
Germany	7,0	Roasted: EUR 2,19/kg; soluble EUR 4,78/kg
Greece	13,0	
Hungary	25,0	
Ireland	0,0	
Italy	20,0	
Latvia	22,0	LVL 100/100 kg pure coffee
Lithuania	21,0	
Luxembourg	3,0	
Malta	0,0	
Netherlands	6,0	
Poland	23,0	
Portugal	13,0	
Romania	24,0	Green: EUR 153/ton; roasted: EUR 225/ton; soluble: EUR 900/ton
Slovakia	20,0	
Slovenia	8,5	
Spain	8,0	
Sweden	12,0	
United Kingdom	0,0	

Source: DG External Trade Export Helpdesk website as at 19 August 2010

Up-to-date information on VAT and excise duties can be found on the European Commission Export Helpdesk website <http://exporthelp.europa.eu/>. Please note that Indirect taxes' rates and exemptions are established by the Member States' legislation, therefore full accuracy can only be obtained from consultation of their official sources. No responsibility can be accepted by the ECF for any inadvertent errors or omissions.

LIST OF ASSOCIATION MEMBERS AND COMPANY MEMBERS

Secretariat

• Mr. J.A.J.R. Vaessen
 Sir Winston Churchilllaan 366 (19th floor)
 P.O. Box 161, 2280 AD Rijswijk
 The Netherlands
 Tel: +31-(0)70-336 51 65 Fax: +31-(0)70-336 51 67
 E-mail: ecf@ecf-coffee.org

Austria

• FIAA Food Industries Association of Austria –
 Kaffee und Teeverband
 Zaunergasse 1-3, A-1030 Wien
 Tel. +431 712 21 2144 Fax. +43 1 712 21 2135
 E-mail: kaffeetee@speed.at

Belgium

• Union Professionnelle du Commerce Anversois
 d'Importation du Café "UPCAIC"/
 Beroepsvereniging van de Antwerpse Koffie-
 Invoerhandel "BVDAKI"
 Generaal Lemanstraat 74, bus 11
 B-2600 Antwerp
 Tel +32 3 281 60 16 Fax +32 3 281 60 19
 E-mail: bvdaki-upcaic@skynet.be

• Royal Belgian Coffee Roasters Association
 Brusselsesteenweg 564
 B-3090 Overijse
 Tel. +32 2 657 18 09 Fax. +32 2 657 59 77
 E-mail: utc-vvk@koffiecafe.be

Denmark

• Association of Danish Coffee and Tea Importers
 Nyhavn 6,
 DK-1051 Copenhagen K.
 Tel. + 45 33 11 93 13 Fax. + 45 33 32 08 48
 E-mail: NG@adv-nyhavn.dk

Finland

• Finnish Coffee Roasters Association
 P.O. Box 115
 FIN-00241 Helsinki
 Tel. +358 9 148 871 Fax. +358 9 148 87 201
 E-mail: marleena.tanhuanpaa@etl.fi
 Website: www.kahvi.net and www.etl.fi

France

• Syndicat Français du Café
 194 rue de Rivoli
 F-75001 Paris
 Tel. + 33 144 778 558 Fax. +33 142619 534
 Mail: cafe@alliance7.com
 Website: www.alliance7.com

Germany

• Deutscher Kaffee-Verband e.V.
 Steinhöft 5-7, D-20459 Hamburg
 Tel. + 49 40 374 2361-0 Fax. +49 40 374 2361-11
 E-mail: info@kaffeeverband.de
 Website: www.kaffeeverband.de

Italy

• Federazione Caffè Verde
 Corso Venezia 49, I-20121 Milano
 Tel. + 39 02 77 50 232, Fax. + 39 02 76 13 825
 E-mail : info@federazionecaffevede.it

• Associazione Commercio Caffè, Droghe e
 Coloniali "ASSOCAF"
 Piazza San Matteo N. 15/5
 I-16123 Genova
 Tel/Fax +39 010 24 74 800
 E-mail: assocaf@assocaf.it

• Associazione Caffè Trieste/Trieste Coffee
 Association
 Via San Nicolò 7, I-34121 Trieste
 Tel/Fax +39 040 56 79 20
 E-mail: info@asscaffe.it

• Associazione Italiana Industrie Prodotti
 Alimentari (AIIPA)
 Corso di Porta Nuova 34
 IT-20121 Milano
 Tel. + 39 02 65 41 84 Fax. + 39 02 65 48 22
 E-mail : v.bordoni@aiipa.it, g.forni@aiipa.it

• Associazione Italiana Torrefattori
 Corso Venezia 49, I-20121 Milano
 Tel. + 39 02 77 50 232 Fax. + 39 02 77 50 381
 E-mail: info@altoga.it

The Netherlands

• Koninklijke Nederlandse Vereniging voor Koffie en
 Thee
 Sir Winston Churchilllaan 366F (19th floor)
 NL-2285 SJ Rijswijk
 P.O. Box 161
 NL-2280 AD Rijswijk
 Tel +31 70 336 51 61 Fax: +31 70 336 51 67
 E-mail: knvkt@knvkt.nl
 Website: www.knvkt.nl

Norway

• Norwegian Coffee Association
 Niels Juels gate 16
 N-0272 Oslo
 Tel. +47 2313 1850 Fax. +47 2313 1851
 E-mail: egil@kaffe.no
 Website: www.kaffe.no

Portugal

• AICC – Associação Industrial e Comercial do
 Café/Portuguese Coffee Roasters Association
 Rua Padre Francisco Alvares No 1 – 1 Dt. Letra A
 1500-476 Lisboa
 Tel. +351 21 774 16 74 Fax +351 21 778 53 44
 E-mail: a.i.c.cafe@mail.telepac.pt

Spain

• Spanish Coffee Federation
c/o Ms. Eileen Gordon
C/Gral. Alvarez de Castro 20, E-28010 Madrid
Tel +34 91 448 82 12 Fax +34 91 448 85 01
E-mail: aetc@federacioncafe.com
Website: www.federacioncafe.com

Sweden

• Svensk Kaffeinformation
c/o Mr Håkan Björglund
Box 55680
S-102 15, Stockholm
Tel. + 46 87 626 520 Fax. + 46 87 626 512
E-mail: hakan.bjorglund@li.se

Switzerland

• Swiss Coffee Trade Association
1 place St-Gervais
P.O. Box 5425
CH 1211 Geneva 11, Switzerland
Tel +41 22 839 77 32 Fax +41 22 702 92 26
E-mail: scta@sucafina.ch

United Kingdom

• British Coffee Association
P.O. Box 5
Chipping Norton D.O. Oxon OX75UD
Tel. + 44 160 864 49 95 Fax. + 44 160 864 49 96
E-mail: info@britishcoffeeassociation.org

Company Members:

• Bernhard Rothfos GmbH
Mr. W. Heinrich
Am Sandtorpark 4, 20457 Hamburg Germany
Tel. +49 403 61 230 Fax +49 403 61 23 400
E-mail: heinricy@rothfos.de

• Deutsche Extrakt Kaffee GmbH
Mr. H. Bebensee,
Buschwerder Hauptdeich 10,
21107 Hamburg Germany
Tel +49 40 37 88 90 Fax +49 40 36 43 11,
E-mail: bebensee@kord-hh.com
and harmgardt@kord-hh.com

• J.Th. Douqué's Koffie BV
Mr. J.T.H.H.M. Douqué
P.O. Box 552, 1180 AN Amstelveen
The Netherlands
Tel. +31 20 62 22 477 Fax +31 20 62 21 868
E-mail: JTHHM@douque.com

• ECOM Agroindustrial Corp. Ltd
Mr. E. Esteve,
P.O. Box 64, CH-1009 Pully, Switzerland
Tel. +41 217 21 72 46 Fax +41 217 11 10 75
E-mail: eesteve@ecomtrading.com

• EFICO s.a.
Mr. P.F. Installé
Italiëlei 181, B-2000 Antwerp, Belgium
Tel.+ 32 323 37 865 Fax +32 322 64 738
E-mail: efico@efico.com

• Kraft Foods Europe
Lindbergh-Allee 1, CH - 8152 Glattpark,
Switzerland

• Louis Dreyfus Commodities Suisse S.A.
Mr. Hans Van
Swissair Centre - 29, Rte de l'Aéroport
Case postale 236 1215 Geneva 15 / Switzerland
Tel. +41 22 799 2833 Fax. +41 22 592 7332
E-mail : hans.van@ldcom.com

• Luigi Lavazza S.p.A.
Ms. Valentina Maglio
Strada Settimo 410, I-10156 Torino
Tel. +39 011 239 8326 Fax +39 011 239 8290
E-mail: v.maglio@lavazza.it

• Nestlé Portugal
Mr. A. Saraiva de Reffóios
R. Alexandre Herculano 8-8A
Linda-a-Velha
2795-010 Portugal
Tel. +351 21 414 8885 Fax +351 21 414 3700
E-mail: António.Reffoios@pt.nestle.com

• Sara Lee/DE,
Mr. R. Schwab
Baarerstrasse 12, 6301 Zug, Switzerland
Tel. +41 41 726 15 85, Fax +41 41 710 05 63

• Sucafina sa
Mr. X. Fagart
1 Place St Gervais
CP 5425 Geneva Switzerland
Tel. +41 22 839 7778 Fax +41 22 702 9221
E-mail: xf@sucafina.ch

• Tchibo GmbH
Mr. Klaus Krämer
Überseering 18, D-22290 Hamburg Germany
Tel. +49 40 63 87 23 49 Fax +49 40 63 87 21 70
E-mail: klaus.kraemer@tchibo.de

• VOLCAFE LTD
Mr. P. Moser
Gertrudstrasse 1
CH-8401 Winterthur Switzerland
Tel. +41 522 64 94 94 Fax 41 522 64 94 00
E-mail: pmoser@volcafe.ch