Market evolution: Coffee (CN 0901) — 2015–2025

Introduction

This report examines the European Union’s external trade in coffee (CN 0901: coffee, whether or not roasted or decaffeinated; coffee husks and skins; coffee substitutes containing coffee in any proportion) between 2015 and 2025. The analysis draws exclusively on annual data for extra-EU flows. Over the decade, the EU’s coffee market underwent a fundamental transformation: trade values more than doubled, propelled almost entirely by surging unit prices, while import sourcing grew more concentrated, export destinations diversified, and a sharp, synchronised price shock in 2022 reset the price level for all major trading partners.

1. Value Surge Driven by Escalating Coffee Prices

The aggregate import and export values have more than doubled, driven overwhelmingly by rising unit values rather than volume expansion

Between 2015 and 2025, the value of extra-EU coffee imports rose from EUR 8.6 billion to EUR 18.7 billion (+118.9%), while exports jumped from EUR 1.6 billion to EUR 3.6 billion (+125.4%). In stark contrast, import quantities increased only marginally (+7.5%) and export volumes grew by a quarter (+25.9%). Consequently, the import unit price climbed from EUR 3 133 per tonne to EUR 6 379 per tonne (+103.6%), and the export unit price from EUR 5 797 per tonne to EUR 10 377 per tonne (+79.0%). The widening gap between import and export prices weighed on the trade deficit, which moved from –EUR 7.0 billion to –EUR 15.1 billion (–117.4%).

Indicator	2015	2025	Change
Imports (value, EUR)	8 556 896 338	18 731 091 161	+118.9%
Imports (quantity, t)	2 731 412	2 936 159	+7.5%
Imports unit price (EUR/t)	3 133	6 379	+103.6%
Exports (value, EUR)	1 592 987 412	3 591 182 294	+125.4%
Exports (quantity, t)	274 785	345 904	+25.9%
Exports unit price (EUR/t)	5 797	10 377	+79.0%
Trade balance (EUR)	–6 963 908 926	–15 139 908 867	–117.4%

Source: EU trade overview

Imports of green (unroasted) coffee dominate the supply chain, while roasted coffee leads exports, reflecting the EU's role as a processing hub

The product-segment breakdown confirms the structural pattern. On the import side, "Coffee (excl. roasted and decaffeinated)" (CN 090111) — essentially green beans — accounted for the overwhelming bulk of volume and value: in 2025 it represented 2.84 million tonnes and EUR 16.9 billion, with an average price of EUR 5 942 per tonne (up from EUR 2 622 per tonne in 2015). Roasted coffee (CN 090121) imports were much smaller at 67 213 tonnes, though its unit price reached EUR 23 416 per tonne. On the export side, roasted coffee (CN 090121) was the principal shipment (220 406 tonnes, EUR 2.6 billion), with green coffee exports remaining modest. The EU thus imports raw commodity and exports higher-value processed coffee, a role that intensified as both import and export unit prices surged.

Source: Product segment comparison

The trade deficit has widened markedly, underscoring the EU's structural dependence on external suppliers

Because import values grew faster than export values, the trade deficit more than doubled. The EU's net import reliance, a measure of apparent consumption covered by extra-EU flows, moved from –4.5% in 2015 to –6.1% in 2025 (more negative, indicating a larger deficit relative to the market size). At the same time, trade intensity — total extra-EU trade relative to EU production value — soared from 6.3% to 25.9% (+310.1%), while export propensity rose from 5.3% to 17.3% (+224.1%). These metrics show that the EU's coffee sector became considerably more integrated with external markets.

Sources: Net import reliance, Trade intensity, Export propensity

2. Shifting Geographical Patterns: Diversified Exports and Concentrated Imports

Import sourcing has become more concentrated, while export destinations have diversified significantly

The Hirschman-Herfindahl index (HHI) for extra-EU imports rose from 1 381 to 1 645 (+19.1%), signalling greater supplier concentration. In contrast, the export HHI fell from 1 211 to 857 (–29.3%), indicating a broader spread of destination markets. The top suppliers remained the same, but their weight increased: Brazil's share grew strongly, while

Uganda recorded the largest relative gain (+383.9%). Among export destinations, the United States, the United Kingdom, and Switzerland all expanded, and Ukraine's purchases surged by 293.3%.

Partner	Import value 2015 (EUR)	Import value 2025 (EUR)	Change
Brazil	2 405 988 193	6 395 168 977	+165.8%
Viet Nam	1 135 371 794	2 947 888 814	+159.6%
Honduras	586 761 145	988 518 941	+68.5%
Uganda	259 820 503	1 257 248 165	+383.9%
Colombia	565 776 791	1 177 505 900	+108.1%
India	282 364 666	605 605 689	+114.5%
Peru	335 757 258	573 724 130	+70.9%

Partner	Export value 2015 (EUR)	Export value 2025 (EUR)	Change
United States	351 782 725	621 857 232	+76.8%
United Kingdom	346 687 436	630 157 815	+81.8%
Russian Federation	121 296 021	210 582 529	+73.6%
Switzerland	157 256 142	335 477 687	+113.3%
Ukraine	56 683 327	222 938 363	+293.3%
Australia	85 938 814	80 687 461	–6.1%
Norway	52 787 289	107 419 785	+103.5%

Source: Top partners by value

EU Member States show a clear division of labour, with a few large traders dominating both imports and exports

Germany, Italy, France, Belgium, Spain, the Netherlands, and Sweden together handle the vast majority of extra-EU coffee flows. Germany and Italy, in particular, experienced exceptionally strong growth in imports (+110.2% and +149.2%, respectively) and exports (+113.5% and +131.8%). The Netherlands stands out with an import value increase of +733.9%, reflecting its role as a gateway and re-export hub. On the export side, Poland and Belgium saw the most rapid growth (+427.3% and +211.2%). Revealed comparative advantage (RSCA in 2025) shows that Italy, Bulgaria, and Lithuania are the most specialised coffee-exporting EU members, while Malta, Cyprus, and Ireland are the least specialised, consistent with the concentration of roasting and trading activities in a handful of countries.

Sources: Top reporters by value, Most specialised reporters

The EU’s net import reliance has deepened, and trade intensity relative to production has soared

The negative net import reliance ratio slid from –4.5% to –6.1%, confirming that the EU consumed more imported coffee than it exported to non-EU markets. Simultaneously, extra-EU trade intensity jumped from 6.3% to 25.9%, and export propensity from 5.3% to 17.3%. Domestic production value rose by 87.1% (from EUR 8.0 billion to EUR 14.9 billion) while produced quantity rose only 5.0%, mirroring the price inflation observed in trade. The EU thus became more dependent on imports for its raw material, while increasingly processing and re-exporting coffee at higher unit values.

Sources: Production volumes and values, Concentration HHI

3. The 2022 Commodity Price Shock and Persistent Supply Volatility

A synchronised price shock hit imports from all major coffee origins in 2022, and unit values have not returned to pre-shock levels

The most defining supply-side event of the decade was a broad-based surge in import unit prices centred on 2022. The price shifts for the largest suppliers were concurrent and severe:

Supplier	Price shift (%)	Abnormality score	2022 import price (EUR/t)	Pre-shock average price (EUR/t)
Brazil	+93.8	10.8	4 164	2 149
Honduras	+81.1	8.1	5 039	2 783
Colombia	+77.1	6.6	6 071	3 427
Uganda	+58.0	39.5	2 544	1 610

Brazil alone accounted for 29.9% of import value, so this shock had a direct and massive impact on the aggregate import bill. While the abnormality scores are highest for a few small-volume origins (Georgia, Somalia, Kosovo), the systemic character of the 2022 event across virtually every major supplier makes it the central price shock of the period. After 2022, unit prices continued to climb, reaching EUR 6 360 per tonne for Brazil in 2025, EUR 7 244 for Honduras, EUR 7 227 for Colombia, and EUR 4 792 for Uganda, showing no return to baseline.

Sources: Volatility bars (imports), Supply shock events

Quantity flows display considerable year-to-year variability for several key suppliers, contributing to price uncertainty

Beyond the price surge, import volumes from several origins exhibited high coefficients of variation (CV). Uganda (0.244), Tanzania (0.245), Indonesia (0.286), Nicaragua (0.238), and Ethiopia (0.224) all recorded pronounced quantity swings. This volatility, combined with the price shocks, highlights the EU's exposure to weather-related and logistical disruptions in producing countries. On the export side, quantity variability was most pronounced for Türkiye (0.521), Belarus (0.674), and the Republic of Korea (0.345), though these destinations account for smaller shares of total EU coffee exports.

Source: Volatility bars (exports)

While extreme price shocks were detected for some small-volume sources, the widespread 2022 event is the defining supply-side disruption

The automatic shock detection flagged numerous price-shift events for tiny trade flows (value share 0.0%), such as Georgia's import price spike in 2019, Kosovo in 2022, and Uganda's export price in 2018. However, these had negligible macroeconomic relevance. The truly consequential disruption is the systemic 2022 price increase that affected all major green-coffee suppliers simultaneously and permanently lifted the EU's import price floor. This transformation of the pricing environment is the single most important development for the EU coffee market over the 2015–2025 horizon.

Conclusion

Between 2015 and 2025, EU coffee trade underwent a profound shift. Value flows more than doubled, driven almost exclusively by surging unit prices, with import quantities barely changing. The import side became more concentrated around a few key origins, while export markets diversified. The 2022 synchronised price shock — affecting Brazil, Vietnam, Honduras, Colombia and other top suppliers — pushed prices to new highs from which they have not retreated, fundamentally altering the cost structure for EU importers and processors. At the same time, the EU strengthened its role as a processing hub, exporting growing volumes of roasted coffee at steadily increasing unit values. These dynamics underscore a European coffee sector that is more deeply integrated with global markets, more dependent on a concentrated set of raw material suppliers, and operating at a permanently higher price level.

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If you need advice on European trade policy, or representation for your interests in Brussels, feel free to contact me at support@tradedashboard.eu. You can find my CV at this address.