ECONOMIC DIPLOMACY DIVISION

Indian Coffee in Germany

A market study report

CGI Hamburg

Foreword

But First Coffee: It's a phrase that perfectly captures the German mindset, where things begin only after a cup of coffee! The numbers also reinforce this lifestyle-trait of Germans, who consume more than 250 million cups of coffee in a day! Germany is the 4th largest coffee consuming country globally and the largest coffee market in Europe, which accounts for 40% of the global coffee consumption. Historically the ports of Hamburg and Bremen have been the biggest coffee traders in Europe and have now become the second largest coffee trading ports in the world.

India is Germany's 7th largest coffee exporter, however, accounts for only 3.5% share of total coffee imports, compared to the market leaders such as Brazil and Vietnam, whose share is 38% and 22% respectively.

The per capita coffee consumption in Germany is about 163 liters with 80% consumption taking place at home. Whole roasted coffee beans are the most purchased form of coffee. It is expected that while coffee consumption will remain stable, some changes in coffee consumption habits are expected. German consumers enjoy buying whole roasted beans coffee and it is expected that there will be a gradual move away from supermarket coffees to specialty coffee segments. Instant coffee and coffee mixtures are also gaining market share.

The objective of this Study is to help Indian coffee producers understand the trends of the dynamic coffee market not just in Germany, but also in the DACH region and wider Europe. I believe that this Study will prepare them for an entry into the complex European market due to its phytosanitary restrictions, EUDR and transparency requirements. The Study has been complemented with the sustained efforts of this Consulate towards expanding the market for Indian coffee. We have reached out to the largest coffee traders including Tchibo, J.J. Darboven, and Neumann Kaffee Gruppe for sourcing coffee from India. We have made concerted efforts to promote Indian specialty coffee, through a sustained outreach to specialty coffee roasteries, the specialty coffee association as well as specialized baristas. This has helped in increasing awareness, building brand value and positive narrative of Indian coffee in the German market.

I am happy to note that, during this period, Germany's imports of coffee from India have increased over 30% i.e., from 218 million Euros to 315 million Euro in 2025.

Based on the gaps identified through this Study and from our engagement with various stakeholders, the Consulate has taken multiple initiatives that need to be sustained over time to ensure that these efforts fructify into higher exports of green coffee, specialty coffee as well as coffee-based products.

I hope that all our friends, both in India and Germany, will wake up and smell the coffee, because the India-Germany coffee trade is already brewing hot! And this Study is a contribution of this Consulate in that endeavor.

Soumya Gupta
Consul General
Hamburg
30 March 2026

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Consulate General of India
Hamburg
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"COFFEE IS A LANGUAGE IN ITSELF." — JACKIE CHAN

Coffee has grown far beyond being simply a regional beverage, across the world, millions of people begin their day with a cup of coffee, and this daily habit supports a vast international supply chain connecting farmers, traders, roasters, and consumers. Europe plays a particularly significant role in this system, as it represents the **largest coffee-consuming region in the world**, accounting for roughly **40% of global coffee consumption**, which equals about **3.26 million tonnes annually**.

Within this European market, **Germany** stands out as a key player. It is not only the **largest coffee market in Europe**, but also the **fourth-largest coffee-consuming country globally**, with an estimated market value of around **€20 billion per year**. Coffee is deeply embedded in everyday life in Germany: approximately 89% of the population drinks coffee, and on average people consume about 3.4 cups per day.

Beyond its strong domestic consumption, Germany also plays a crucial role in the European coffee trade. In 2024, the country imported approximately **1.16 million tonnes of green coffee**, making it **the largest coffee importer in Europe** and a major entry point for coffee entering the continent. Key port cities, particularly **Hamburg**, act as important gateways where green coffee beans arriving from producing countries are unloaded, stored, roasted, and then distributed to markets across Europe.

Green Coffee

figure1 illustrates the long-term development of global green coffee supply and demand between 2019 and 2025, measured in 60 kg million bags.

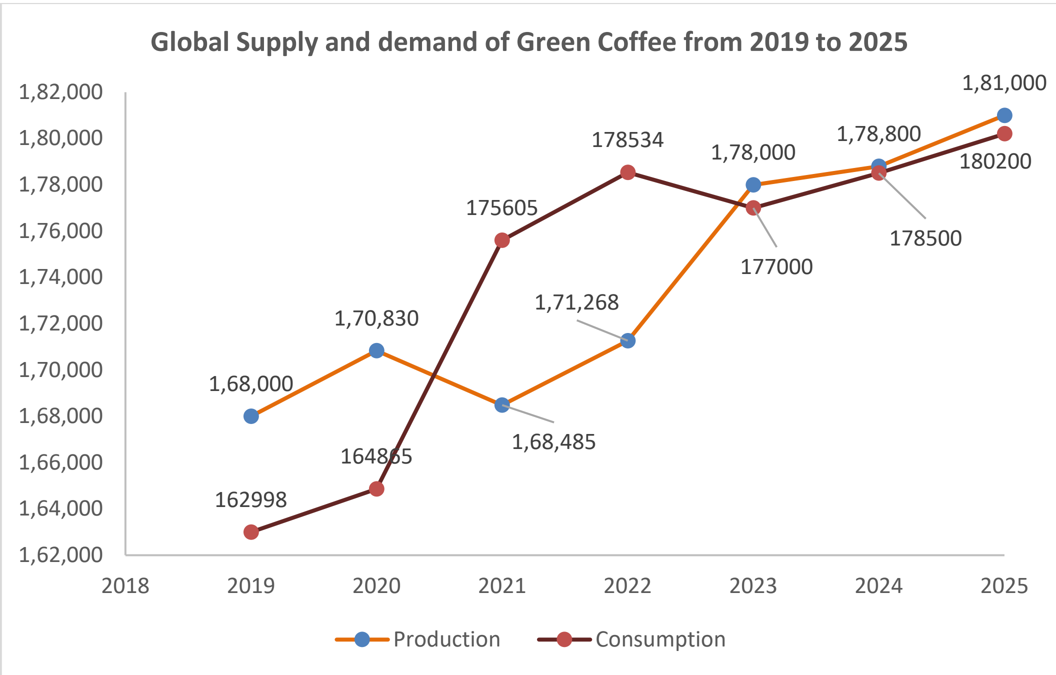

Figure 1: Global Supply and demand of Green Coffee from 2019 to 2025

The graph illustrates the development of global green coffee production and consumption between 2019 and 2025. Overall, both production and consumption show an upward trend, although production fluctuates slightly across the period.

In 2019, global production stood at about 168.9 million 60-kg bags, while consumption was slightly lower at around 166.3 million bags. In 2020, production declined marginally to 167.7 million bags, while consumption increased to 170.3 million bags, meaning there was a supply deficit. This imbalance can partly be attributed to the COVID-19 pandemic, which shifted coffee consumption from cafés to households, increasing retail demand.

By 2021, production recovered to 175.7 million bags, closely matching consumption at 175.6 million bags as global markets adjusted and the hospitality sector gradually reopened. In 2022, production fell again to around 168.5 million bags, while consumption continued to rise to approximately 178.5 million bags, widening the gap between supply and demand. This shortfall was largely influenced by climate-related disruptions in major producing countries such as Brazil, as well as ongoing logistical and supply chain constraints.

From 2023 onward, production gradually increased again, reaching around 178 - 180 million bags by 2025, while consumption continues its steady growth to about 181 - 183 million bags. This reflects growing global demand for coffee, particularly in emerging markets in Asia and Latin America, as well as the expansion of specialty coffee consumption worldwide.

As per records, 12,218,231 hectares of area worldwide are used for coffee harvesting. India maintains a coffee harvesting area of 437,862 hectares. India increased it production by 2.9% between 2022 and 2023. As per Tchibo coffee report 2025, India is projected to account for **3.5%** of the world's annual green coffee production. This represents a substantial long-term growth trend, with production expected to rise by **12.5%** compared to the 2020/21 baseline.

Country	2018	2019	2020	2021	2022	2023	Change
Brazil	65,131	58,211	68,960	59,000	63,000	70,125	**+7.7%**
Vietnam	30,283	30,487	28,2	32,39	29,221	33,185	**+9.6%**
Colombia	13,866	14,1	13,394	11,683	10,617	12,527	**-9.7%**
Indonesia	9,618	11,433	11,826	11,554	11,428	9,639	**+0.2%**
Ethiopia	7,511	7,343	7,581	7,853	7,932	8,011	**+6.7%**
Uganda	4,704	5,509	6,704	6,033	5,624	6,266	**+33.2%**
India	**5,325**	**4,967**	**5,566**	**5,700**	**5,867**	**6,237**	**+17.1%**
Honduras	7,153	5,931	6,200	5,011	5,547	5,586	**-21.9%**
Mexico	4,351	3,985	4,000	4,412	4,17	4,465	**+2.6%**
Peru	4,263	3,836	3,817	4,35	3,924	4,000	**-6.2%**
Guatemala	4,007	3,606	4,100	3,733	3,458	3,228	**-19.4%**

Brazil dominates the green coffee market as the largest producer. In a dataset from 2018 to 2023/2024 it is observed that its highest recorded output of 70,125 was in 2023/24 with a net gain of 7.7% over the entire period. Followed by Vietnam climbing from 30,283 to 33,185 over the same period. Colombia, the third-ranked producer but a declining trend of 9.7% is noticed. Indonesia, the fourth-largest producer, remained broadly stable, however he latest record of 9,639 is the lowest in the entire period.

Ethiopia and Uganda, by contrast, grew without interruption year on year. Among the mid-tier producers, Mexico, Peru, and Guatemala moved sideways, never straying far from their 2018 baselines. Against this mixed backdrop where the giants Brazil and Vietnam dominate, other show moderate trend, India stands out as a quiet but consistent riser.

India's growth trajectory stands out favorably against declining or stagnating producers such as Colombia (down 9.7% from 2018), Honduras (down 21.9%), and Guatemala (down 19.4%), positioning India as one of the few mid-tier producers with a clear and sustained upward production trend across the across the entire period.

Arabica VS Robusta

The global coffee landscape underwent a notable transformation between 2013 and 2023, characterized by a steady pivot away from the historically dominant Arabica bean toward the hardier Robusta variety.

According to the International Coffee Organization, Arabica's share declined from **59.3% in 2013 to 57.4% in 2023**, reaching a low of **55.9% in 2021**. In contrast, Robusta increased from **40.7% to 42.6%**, peaking at **over 44% in 2021**.

This shift reflects faster growth in Robusta production. Since 2011, Robusta output has increased by **26.3%**, compared to **19.7% for Arabica**. Overall global coffee production is projected to reach **176.2 million bags in 2024/25**, representing a **21.4% increase**, with growth driven more strongly by Robusta than Arabica. A brief explanation is given on the image 2 and on the following table.

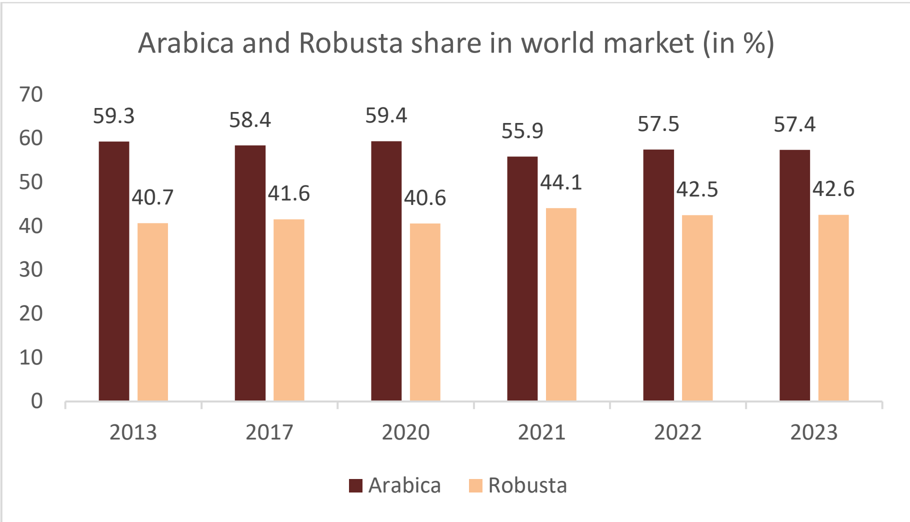

Figure 2: Arabica vs Robusta from 2013 to 2023

According to the International Coffee Organization (ICO), global coffee exports reached 33.76 million bags during the first quarter of coffee year 2025/26, reflecting a 5.5% year-on-year increase driven primarily by robusta shipments and recovering global demand.

Metric	Arabica Coffee	Robusta Coffee
Growth Rate (2011-2025)	19.7%	**26.3%**
Market Share Change	-3.2 %	**+4.7 %**
Recent Share (2023)	57.4%	42.6%
Forecasted Bags (24/25)	99,855k bags	76,380k bags

Europe

Europe represents a significant market for both Arabica and Robusta coffee varieties. In 2024, European imports consisted of approximately 70% Arabica and 30% Robusta. Brazil, Europe's primary coffee supplier, with nearly 70% of its production consisting of Arabica beans. Whereas Vietnam is the world's leading producer of Robusta coffee and the biggest supplier of Robusta to Europe.

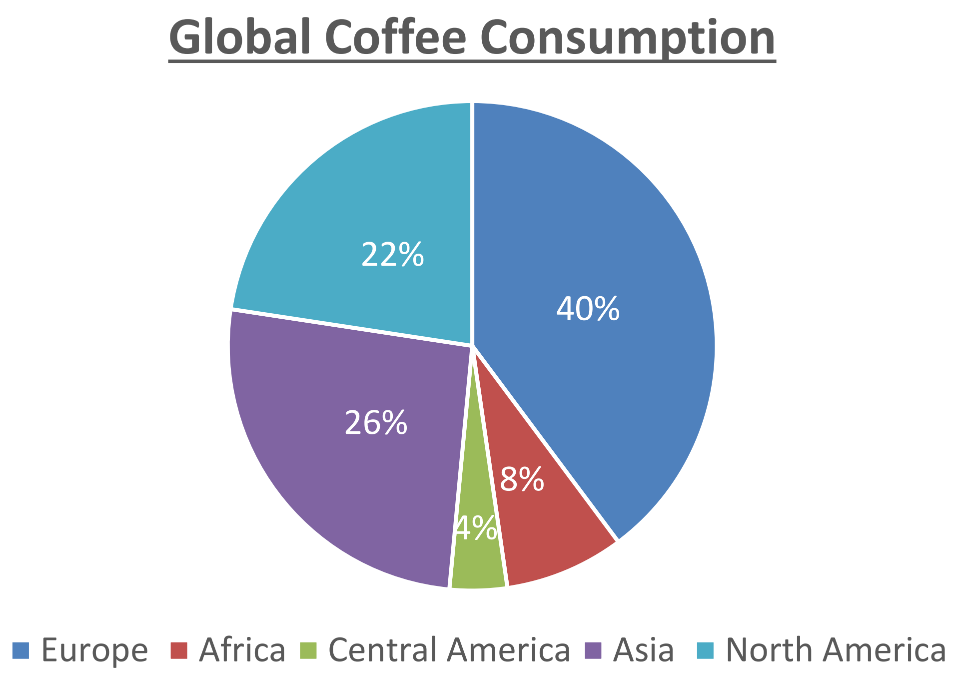

Figure 3: Global Coffee Consumption

Introduced to Central Europe during the 17th century, primarily through Ottoman trade routes and Mediterranean merchants. Currently, Europe is one of the largest coffee markets, accounting for about 40% of global consumption. **In 2023/2024 alone Europe accounted for 30.7% of global coffee consumption i.e. 3.26 million tonnes. Europe is the world's largest coffee consumption market with a 40% share of the global coffee consumption.** Asia-Pacific second largest, with a share of 25.8%, followed by North America (17.5%) and South America (15.8%).

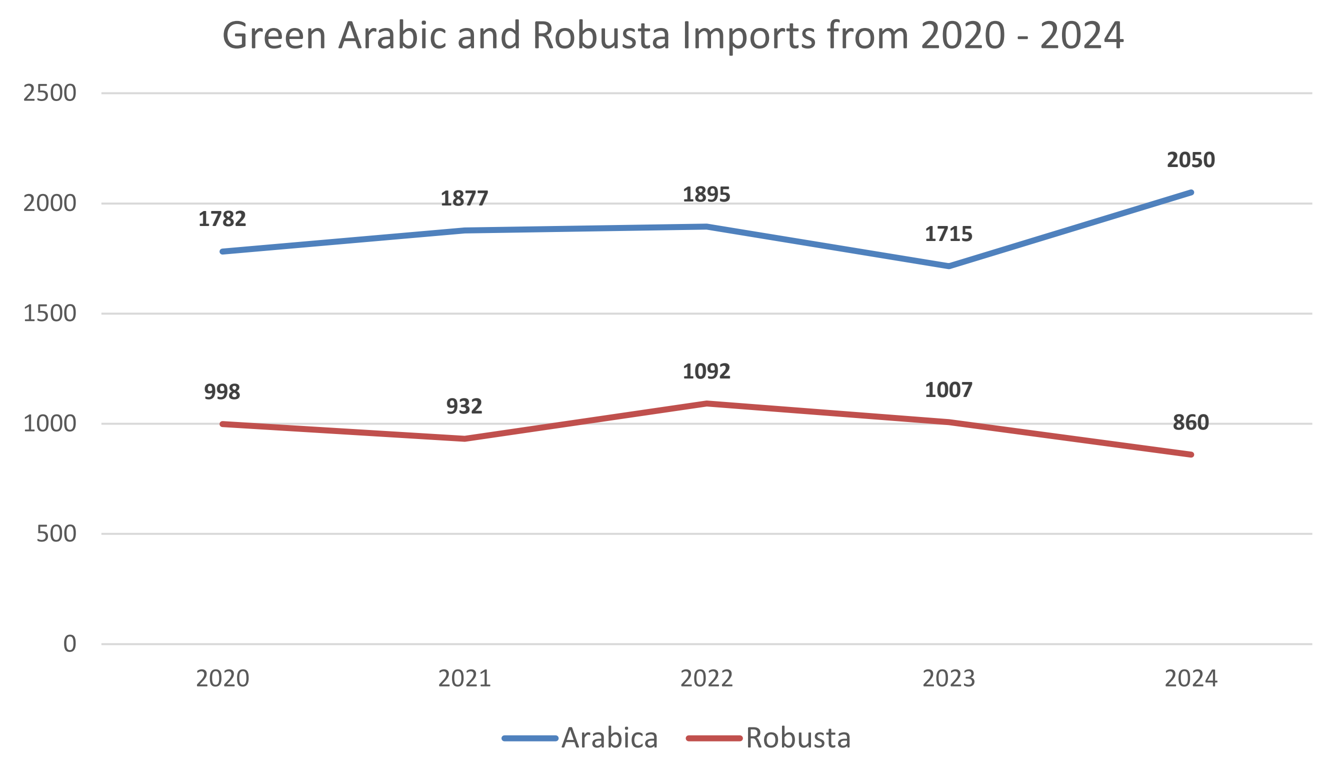

Figure 4: European import of green coffee from 2020 to 2024 (in tonnes)

DACH – Germany (D), Austria (A), Switzerland (CH)

The major players of Coffee in Europe is the DACH region. The term DACH refers to the German-speaking countries. Approximately 300 million cups of coffee are consumed daily, equivalent to roughly 100 billion cups annually. The large consumption volume reflects not only population size but also deeply rooted café traditions, workplace coffee culture, and high disposable incomes that support frequent coffee purchases both at home and in out-of-home settings. Economically, an estimated €20 billion annual turnover, which includes retail sales, café operations, roasting activities, and coffee-related services, underlining the sector's importance beyond simple beverage consumption.

Germany

Germany is Europe's largest importer of green coffee and one of the most important global coffee trade hubs. More than 90% of coffee imported into Germany is sourced directly from producing countries, with origin markets across Latin America, Africa, and Asia.

This demand of Coffee is due to its daily consumption as 89% of Germans drink coffee, slightly higher than France (86%). On average, German consumers drink 3.4 cups of coffee per day, in 2024 per capita consumption averaged 163 liters.

Germany like other countries in Europe prefer to import green coffee, this is because of a large domestic roasting culture. Germany's roasting industry is extensive and evolving, comprising approximately 2,500 roasting companies, ranging from large industrial processors to small specialty roasters. In 2023, Germany roasted 507,000 tonnes of coffee. This represents 22% of European coffee production. Furthermore, Germany has the second-largest roasting industry in Europe. Italy is first, with 556,500 tonnes. France is third, with 139,300 tonnes.

Germany – Europe’s most important market

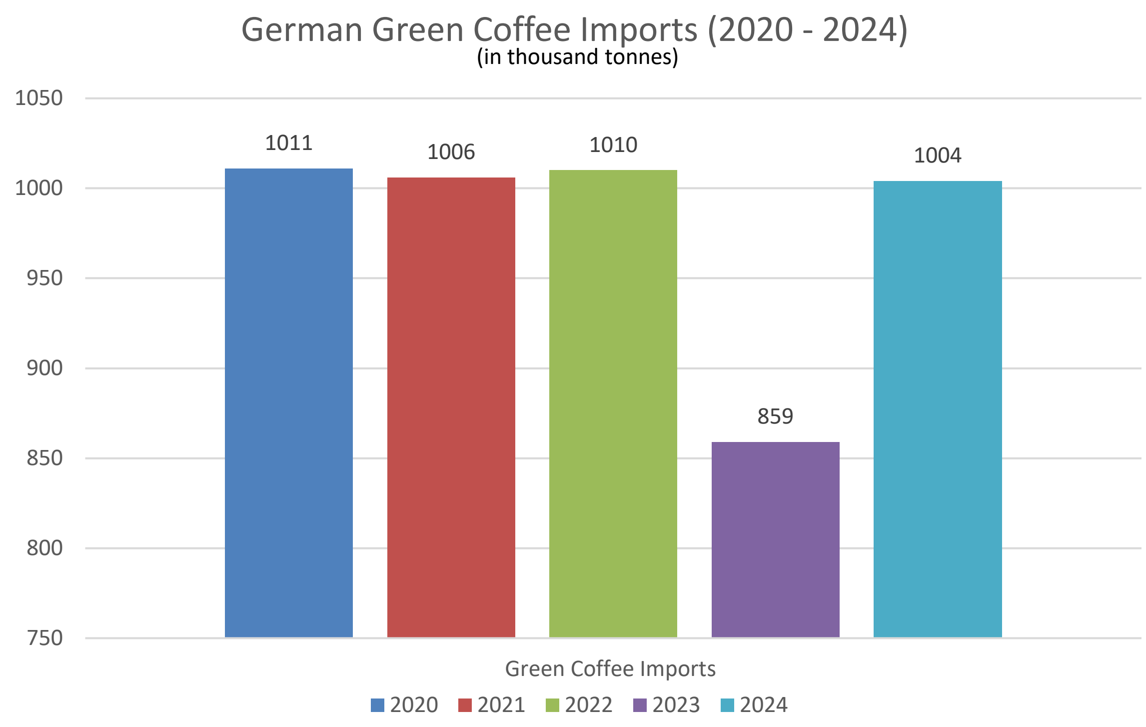

Figure 5: Germany’s green coffee imports from producing countries (2020 – 2024)

Germany is the largest coffee market in Europe, especially regarding trade and imports. In 2024, Germany imported just over 1 million tonnes of green coffee from producing countries (16.67 million 60 kg bags). This volume has been steady since 2020, besides a dip in 2023. In 2023, green coffee imports from producing countries fell to 859,000 tonnes. This dip was caused by a global coffee shortage and price volatility. European companies used their large stocks to meet demand. Germany reduced its exports to other European countries. As a key redistribution hub, Germany also cut shipments to neighboring European markets during this time. Import volumes bounced back fully in 2024 as global supply conditions improved.

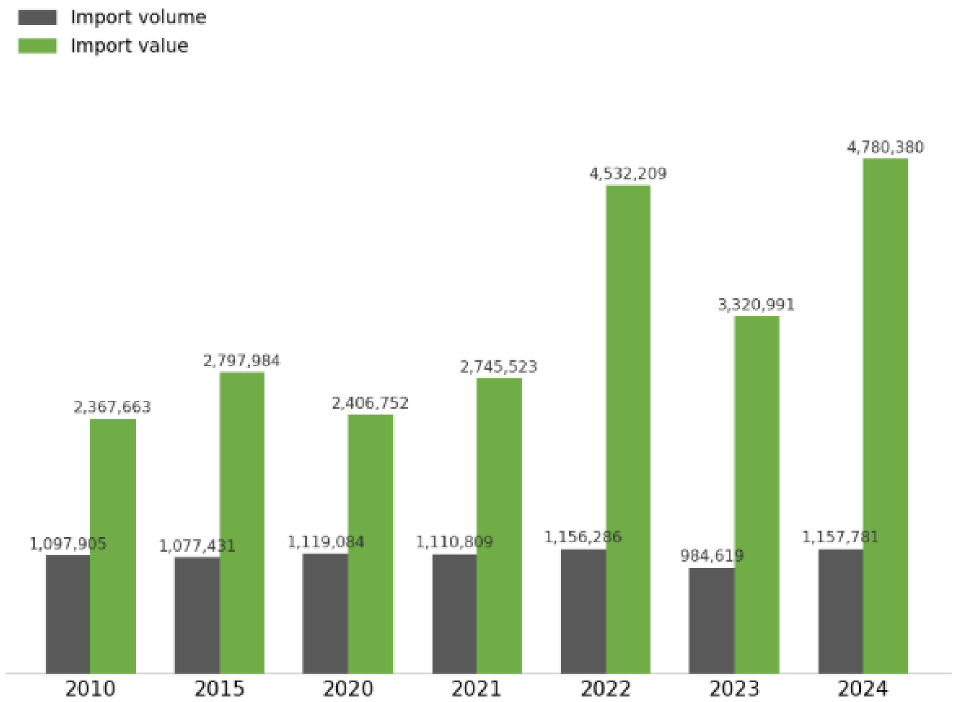

Figure 6: Green Coffee import volume (in tons) vs Green coffee Import (in thousand of euros)

Similar results were observed in the Tchibo report of 2025. The figure presents the development of Germany's green coffee import volume and imports value between 2010 and 2024. In 2010, Germany imported 1,097,905 tonnes of green coffee with an import value of €2.37 billion. Imports remained relatively stable over time, reaching 1,077,431 tonnes in 2015, 1,119,084 tonnes in 2020, and 1,110,809 tonnes in 2021. Import volumes increased to 1,156,286 tonnes in 2022, followed by a decline to 984,619 tonnes in 2023, before rising again to 1,157,781 tonnes in 2024.

In contrast, the value of imports increased more strongly during the same period. Import value rose from €2.80 billion in 2015 to €4.53 billion in 2022, declined to €3.32 billion in 2023, and reached €4.78 billion in 2024. Overall, between 2010 and 2024, import volumes increased by 5.5%, while the total import value increased by 101.9%, reflecting higher market prices and demand for higher-value coffee.

Most of Germany's coffee imports, about 91%, come directly from producing countries, a strong direct trade relationships with origin markets. Brazil is the top supplier, exporting roughly 489,000 tonnes of green coffee to Germany. Other key supplying countries include Vietnam (182,000 tonnes), Honduras (64,000 tonnes), Uganda (51,000 tonnes), Colombia (50,000 tonnes), and Peru (47,000 tonnes). This variety highlights Germany's diverse sourcing strategy across both Arabica and Robusta-producing regions.

Most green coffee beans enter Germany through the Port of Hamburg and Bremen. Both these Hanseatic cities claim as the epitome of coffee trade in Germany.

Many large importers have their headquarters in Hamburg. Neumann Kaffee Gruppe (NKG), the world's largest coffee trader. The other notable mentions here are Hamburg Coffee Company, List + Beisler, and Rehm & Co.

Bremen is also the home some of the biggest coffee chains in Germany. The important players are Jacobs Kaffee, Melitta, and Ecom and Rehm & Co. are some of the largest German coffee traders.

Hamburg: Europe’s Coffee Gateway

Hamburg’s rise as a global coffee power began in the late 17th century, leveraging its position as a premier international port to funnel colonial goods like tea, spices, and sugar into Europe. At present, Hamburg is a critical node in the global supply chain, the Port of Hamburg handles the lion’s share of the nation's green coffee imports.

By the 19th century, Hamburg emerged as Europe’s leading trading hub. The **Speicherstadt** the world’s largest warehouse complex became the nerve center for beans arriving from Latin America, Africa, and Asia. This era established the specialized logistics, quality inspections, and roasting institutions that still define the industry.

Coffee Culture in Bremen

Bremen has a unique place in Germany’s coffee history and current coffee culture. As a historic Hanseatic trading city, Bremen became one of Europe’s key coffee centers due to its strong maritime trade connections. Today, the city is closely linked to coffee trade and consumption. Almost every second imported coffee bean entering Germany passes through Bremen. It is estimated that one in three cups of coffee consumed in Germany is related to the city’s coffee trade and processing.

The coffee culture in Bremen goes beyond trade into daily social life. The city has its own local term for enjoying coffee "kaffeesieren" which means meeting for coffee and cake as a social event. Many independent cafés and roasting houses preserve this tradition by offering freshly roasted beans, guided coffee experiences, and educational activities like barista courses and seminars. These efforts show how Bremen blends historical coffee customs with modern specialty coffee practices, reinforcing its role as both a cultural and professional hub for coffee enthusiasts.

Sustainability and social responsibility are also key aspects of Bremen's coffee culture. Local initiatives support fair trade sourcing to help small producers and promote long-term, transparent trading relationships. Environmental awareness is evident in projects like reusable coffee-to-go cup systems, designed to cut down waste from urban coffee consumption. Additionally, community-based ideas such as "suspended coffee," where customers prepay drinks for those in need, highlight how coffee culture in Bremen serves not just as a business but as a social practice rooted in solidarity and shared community identity.

Important Contacts in Hamburg and Bremen

Company Name	Address	Contact Person	Email ID
Specialty Coffee Association	Maria-Louisen-Str. 103, 22301	Killian Seger	k.seger@scagermany.coffee

	Hamburg, Germany		
Inter American	Coffee Plaza · Am Sandtorpark 4	Mr. Inacio Teixeira	inacio.teixeira@nkg.coffee
JJ Darboven	Pinkertweg 13. 22113 Hamburg	Mr. Phillip Guht	pguht@darboven.com
Speicherstadt Kaffeerösterei	Speicherstadt Kaffeerösterei Hacienda San Nicolás GmbH Kehrwieder 5 20457 Hamburg	Thimo Drews, CEO	t.drews@speicherstadt-kaffee.de
Melitta Coffee	Zechenstr. 60. 32429 Minden	Stefanie Heidemann and Robin Franke	stefanie.hedemann@melitta.de / rfranke@cafina.ch
Hakofo	Am Sandtorkai 77	Johann Blüthmann, Max Ramm	m.ramm@hacofco.de , info@Hacofco.de
Deutsche Extrakt Kaffee GmbH	Cafeastraße 1, 21107 Hamburg	Norwig Kranz	NKr@dek.de
Quijote Kaffee GmbH	Marckmannstraße 30, Hamburg	Mr. Christian Lesche, Mr. Sven Ostendorf, Mr. Jörn von Ahn	rohkaffee@quijote-kaffee.de
Deutscher Kaffeeverband e.V.	Steinhöft 5-7, 20459 Hamburg	Mr. Preibisch	hein@kaffeeverband.de

Coffee Consumption in Germany

Germany is one of the largest coffee markets in the world. It ranks as the fourth-largest coffee-consuming country, behind the United States, Brazil, and Japan. The German coffee sector has an estimated annual market value of about €20 billion. Around 25% of revenues come from retail sales, while the out-of-home segment makes up roughly 75%. This reflects the high value placed in cafés and food service establishments. In contrast, volume distribution shows the opposite trend about 75% of coffee is bought through retail channels, while 25% is consumed outside the home.

Coffee is an important part of daily life in Germany. About 89% of the population drinks coffee, which is slightly higher than in France (86%) but lower than in Italy and Spain, where consumption reaches around 95%. On average, Germans drink 3.4 cups of coffee each day, amounting to nearly 200 million cups consumed daily across the nation. Annual per-capita consumption averages 5.4 kg, which is more than the European average of roughly 5 kg, although it is still lower than levels in some Nordic countries.

A survey of German coffee drinkers aged 18 - 75 was conducted by Tchibo one of largest coffee player in Europe. The survey provided a quantitative insight into daily consumption levels and preferred coffee types, illustrating measurable consumption patterns across demographic groups.

In daily consumption, the survey showed that the average coffee intake in Germany is 3.3 cups per person per day. The distribution of consumption indicates that 24% of respondents drink three cups per day, making it the most common consumption level, followed by 23% who consume two cups daily. Higher consumption levels are also significant: 18% drink four cups per day, 11% drink five cups, and 10% consume more than five cups daily. Meanwhile, 14% of respondents drink one cup or less per day.

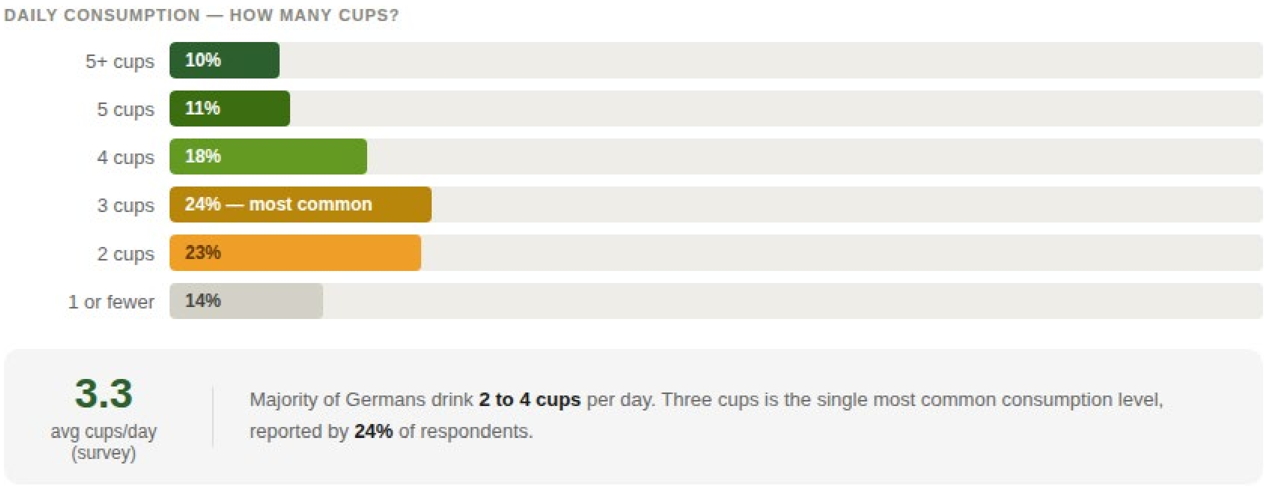

Figure 7: Daily consumption habit of Coffee Germany people

The demographic breakdowns further quantify consumption differences. Male respondents consume an average of 3.6 cups per day, compared with 3.1 cups among female respondents. Regional averages show Northern and Western Germany at 3.5 cups per day, Eastern Germany at 3.3 cups, and Southern Germany at 3.1 cups.

Age differences are also measurable: individuals aged 56 - 65 consume the highest average at 3.8 cups per day, while the 18 - 21 age group records the lowest average consumption at 2.1 cups per day.

Data on coffee type preferences complements further. Filter coffee is the most widely consumed type, with 51% of respondents reporting regular consumption. This is followed by cappuccino at 38%, latte macchiato at 31%, and caffè crema also at 31%. Milk-based coffee beverages such as café au lait, melange, and galão are consumed by 27%, while espresso accounts for

26% of regular consumption. Additional categories include instant coffee (17%), chilled coffee drinks from supermarkets (11%), and decaffeinated coffee (7%). Specialty beverages such as flat white (6%), cold brew (4%), and nitro coffee (2%) show comparatively lower consumption levels.

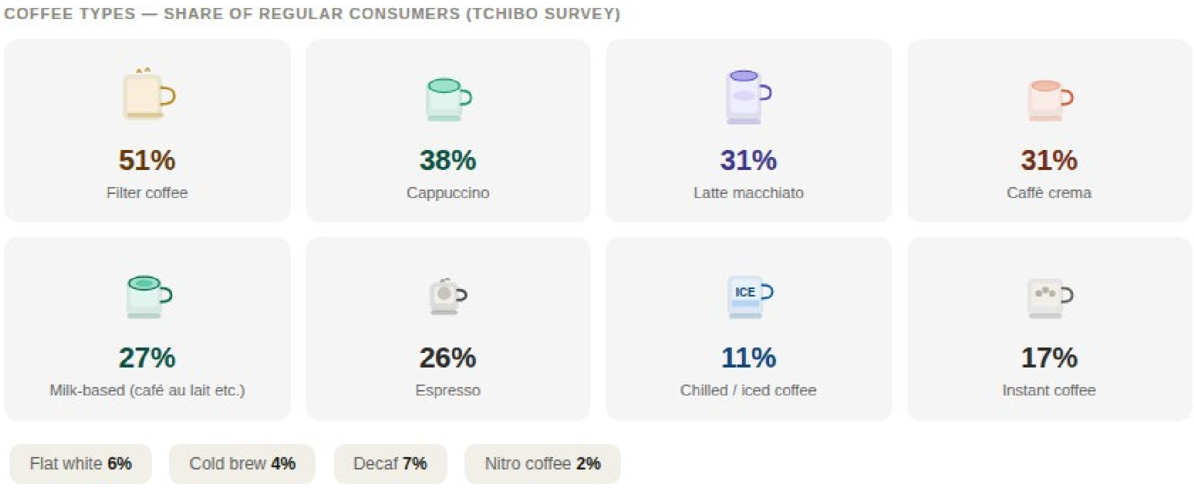

Figure 8: Percentage share of different coffee types

Age-group preferences further quantify variations in coffee type consumption. Among 18 – 21-year-olds, 53% report drinking latte macchiato regularly. In the 22 - 35 age group, cappuccino is the most consumed beverage at 54%. Among individuals aged 66 - 75, 63% report consuming filter coffee regularly, representing the highest preference for this category.

Gender-based data also shows measurable differences in coffee type preference: 31% of men report drinking espresso, while 43% of women report drinking cappuccino.

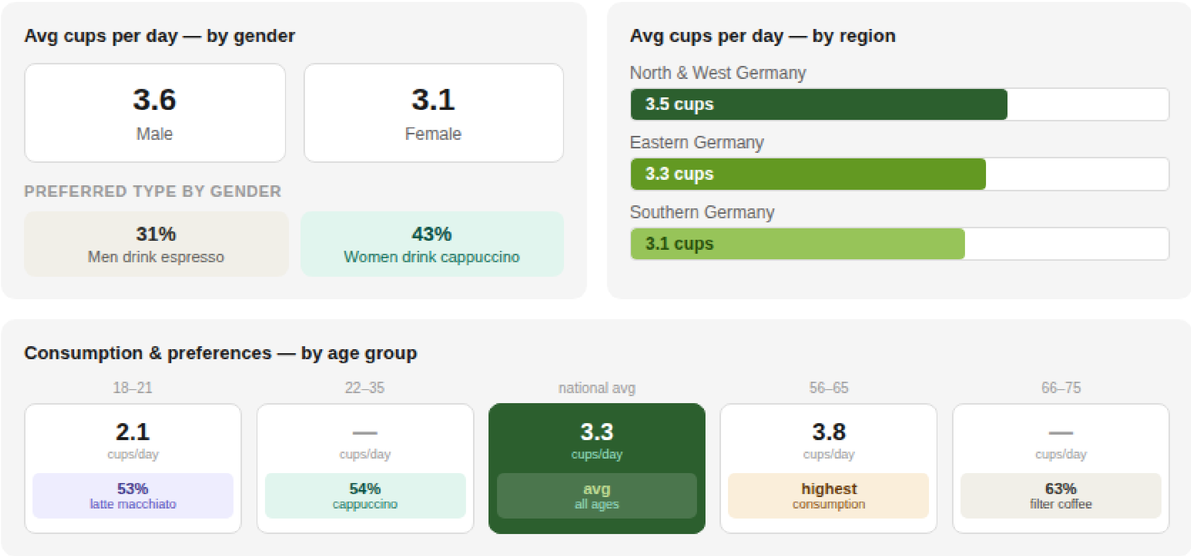

Figure 9: Demographics breakdown of coffee consumption

Taken together, the data re-establishes that daily consumption in Germany averages above three cups per person as mentioned earlier, with most consumers drinking two to four cups per day, while filter coffee and milk-based beverages represent the largest share of regularly consumed coffee types across the population.

German Coffee Market Segment

The German coffee market is characterised by a multi-layered value chain involving importers, traders, roasters, retailers, and food service providers. A significant share of coffee is handled by large multinational trading companies, which primarily act as importers and exporters. While **supermarkets account for many retail sales**, cafés and out-of-home consumption channels continue to represent a substantial portion of the market. Coffee typically reaches consumers through several intermediaries, reflecting the complexity of the supply chain.

The German coffee market can be divided into four main segments: **lower end, middle end, high end, and upper end**. These segments differ in terms of price sensitivity, product quality, and consumer preferences.

Re-export Dynamics

Germany functions not only as a consumption market but also as a major re-export hub. Approximately **30% of imported green coffee is re-exported**, and a considerable share of roasted coffee is also shipped to other countries. In addition, Germany imports a notable volume of roasted coffee, mainly from other European countries, indicating its dual role as both an importer and exporter within the coffee trade.

Lower-End Segment

The lower-end segment represents the **largest share of the German coffee market**. Consumer demand in this segment is highly price-sensitive, and its growth has been influenced by **rising global coffee prices and broader economic conditions**. Discount supermarket chains such as ALDI and Lidl play a central role in this segment, often offering private-label coffee products through their own roasting operations.

Middle-End Segment

Compared to other European markets, Germany has a relatively **smaller middle-range segment**. In this segment, **certification plays a significant role**, reflecting strong consumer demand for sustainably and ethically sourced coffee products.

High-End and Upper-End Segments

The **high-end and upper-end segments are experiencing growth**, driven by increasing demand for specialty coffee and higher-quality products. The market for **whole bean coffee is expanding**, supported by the widespread use of automated coffee machines in German households. Consumer behaviour indicates a growing willingness to purchase premium coffee for home consumption, a trend that accelerated during the COVID-19 pandemic.

Traders such as Rehm & Co and Cafe Imports operate in these segments, focusing on specialty coffee. Examples of roasters in the high and upper segments include Bonanza Coffee Roasters, The Barn, and Machhörndl Kaffee.

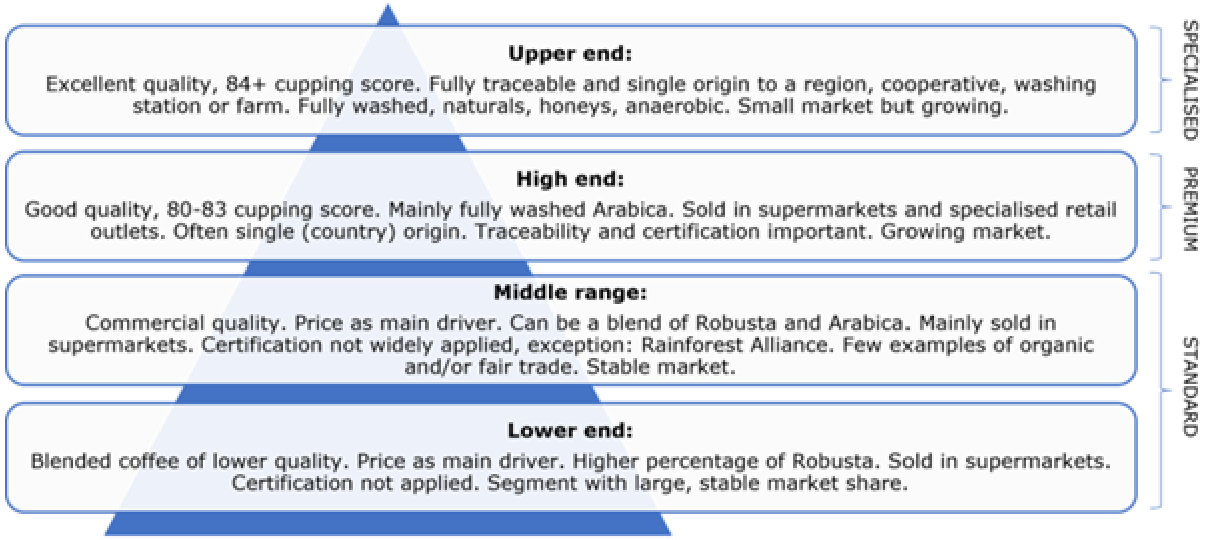

Figure 10: Germany coffee market segment by quality

Roasted Coffee Market in Germany

Germany maintains a large, mature, and relatively stable roasted coffee market. In the figure illustrates the development of roasted coffee consumption in Germany across retail and out-of-home sectors between 2018 and 2024.

from 453,500 tonnes in 2018 to 469,600 tonnes in 2019, and further to 477,200 tonnes in 2020. Consumption continued to rise slightly in 2021 (479,300 tonnes) and reached a peak in 2022 at 479,700 tonnes, indicating strong domestic demand.

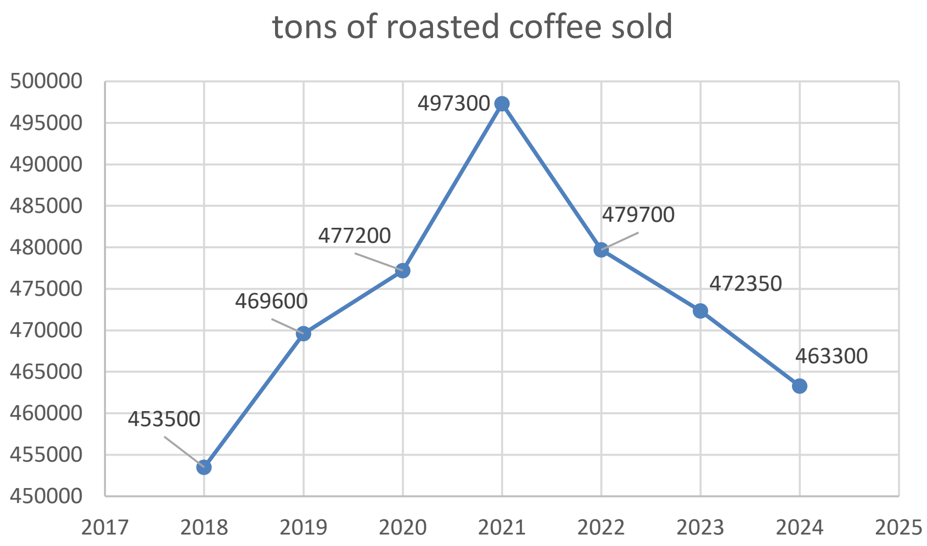

Figure 11: Total Roasted Coffee sold across Germany from 2019 to 2025

A moderate decline is visible after 2022, with market volume falling to 472,350 tonnes in 2023 and further to 463,300 tonnes in 2024. Despite this decrease, the graphic highlights that consumption levels in 2024 have largely stabilised around pre-pandemic levels, suggesting market normalization following pandemic-related shifts in consumption behaviour. During lockdown periods, coffee consumption shifted strongly toward retail channels as out-of-home consumption declined; the subsequent adjustment reflects the rebalancing between home preparation and café consumption.

Total Roasted Coffee	Consumed at Home	Consumed out-of-home
463,300 (tons) Total roasted coffee consumed down 1.9% vs 2023	339,400 (tons) Consumed at home 73.3% of total volume	123,900 (tons) Consumed out-of-home cafés, restaurants, workplaces

Germany Coffee Market landscape in 2024

Figure 12: The breakdown of at-home consumption segment – 339,400 Tons

In 2024, people in Germany drank a lot of roasted coffee about 463,300 tons. That's a small drop of 1.9 percent compared to the previous year. Most of this coffee, around 339,400 tons, was enjoyed at home, showing how important making coffee at home is in Germany. When it comes to home brewing, whole bean coffee is the favorite, making up nearly half the market (48.7 percent). Ground roasted coffee is next with 41.5 percent, while coffee pods and capsules are less popular, with 5.3 percent and 4.5 percent of the market.

People are also drinking more coffee outside their homes. In 2024, about 123,900 tons of roasted coffee were enjoyed in places like cafés, bakeries, restaurants, workplaces, and catering events. Of this total, 49,500 tons were bought in stores but taken elsewhere to drink, while 74,400 tons came straight from roasters or wholesalers who supply coffee to businesses.

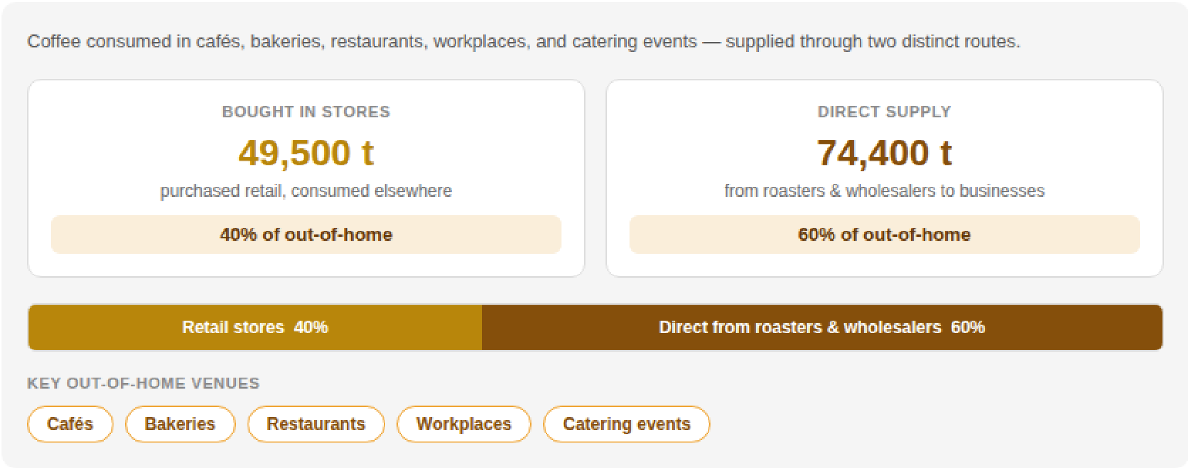

Figure 13: The breakdown of out-of-home consumption – 123,900 Tons

In terms of purchasing locations, food retail and online sales remain the main purchasing channels, accounting for 388,900 tons of roasted coffee sales in 2024. This includes supermarkets, discount stores, hypermarkets, drugstores, specialty coffee shops, and purchases from local roasters.

Coffee segments in Germany

The German food retail coffee market covers four distinct product segments: roasted and ground filter coffee, whole beans, coffee capsules, and coffee pods. Between 2019 and 2024, the total market volume moved from 389,300 tons to 388,900 tons. Within that largely flat overall picture, the volumes within each individual segment shifted considerably.

The market reached its highest recorded point in 2021 at 430,300 tons, representing a 10.5% rise from 2019. From that peak, total volume fell steadily over the following three years, declining by 9.6% to reach 388,900 tons in 2024.

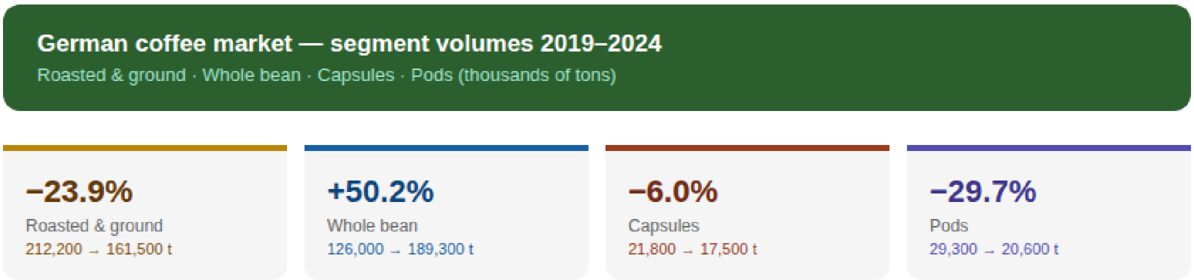

Figure 14: Consumption statistics of each product segment from 2019 to 2024

Roasted and ground filter coffee is the largest segment in the market by volume. In 2019, it recorded 212,200 tons, which at the time represented 54.5% of total roasted coffee sales. By 2024, that figure had dropped to 161,500 tons, accounting for 41.5% of total market volume.

The decline was consistent year on year: 212,600 tons in 2020, 201,900 tons in 2021, 183,700 tons in 2022, 172,400 tons in 2023, and 161,500 tons in 2024. Over the six-year period, this segment lost 50,700 tons in absolute volume, a reduction of 23.9%.

Whole bean coffee is the only segment to record continuous volume growth across the entire period. It started at 126,000 tons in 2019 and rose to 189,300 tons in 2024, an increase of 63,300 tons or 50.2% over six years.

The year-by-year progression was: 158,800 tons in 2020, 176,500 tons in 2021, 180,400 tons in 2022, 185,800 tons in 2023, and 189,300 tons in 2024.

The volume gap between ground filter coffee and whole beans narrowed from 86,200 tons in 2019 to 28,200 tons in 2024.

Coffee Capsules represented the smallest segment throughout the period. Volume stood at 21,800 tons in 2019, rose to 22,700 tons in both 2020 and 2021, then declined to 19,600 tons in 2022, 17,900 tons in 2023, and 17,500 tons in 2024.

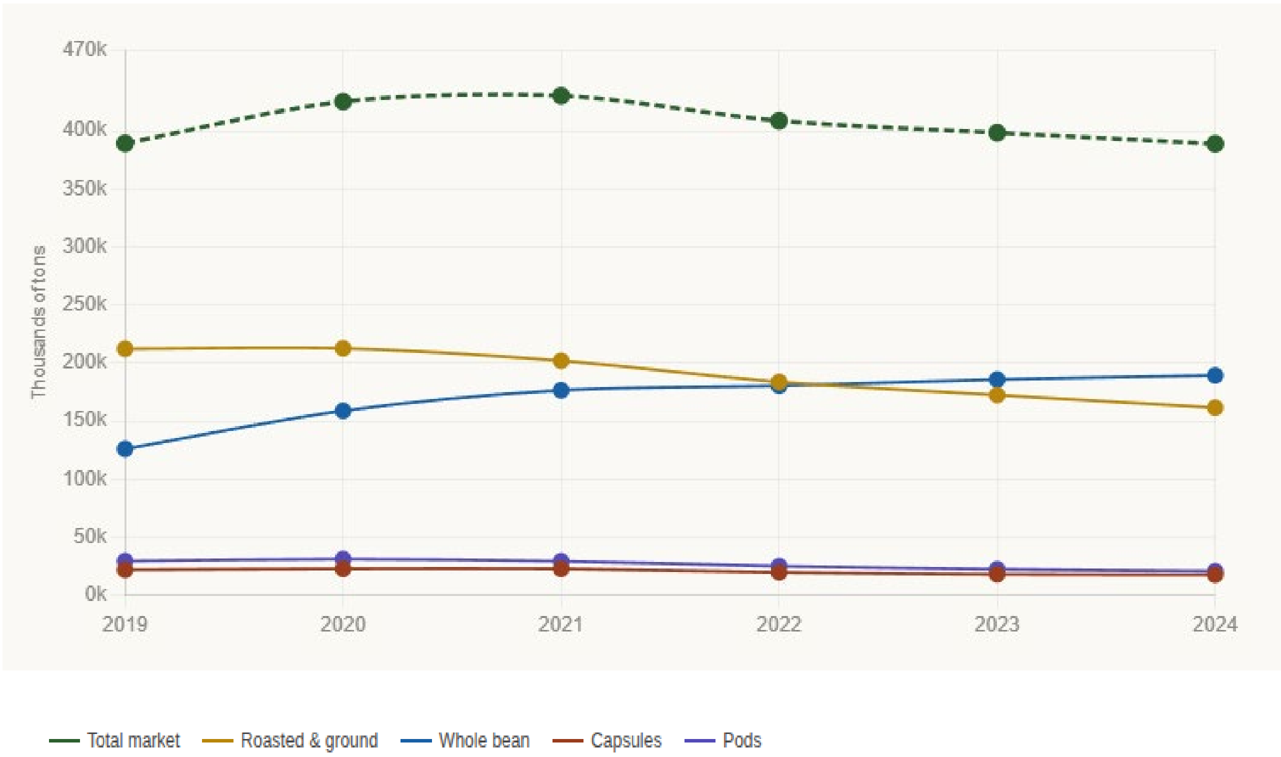

Figure 15: Trend analysis of each segment 2019 – 2024 (thousand of tons)

From the 2020–2021 peak of 22,700 tons, the segment recorded a fall of 5,200 tons by 2024, equivalent to a 22.9% reduction. Against the 2019 baseline, the net change across the full period was a decline of 1,300 tons, or 6.0%.

Coffee Pods began the period at 29,300 tons in 2019 and briefly rose to 31,100 tons in 2020 before declining each year thereafter. Volume fell to 29,200 tons in 2021, 25,000 tons in 2022, 22,250 tons in 2023, and 20,600 tons in 2024.

Segment	2019	2020	2021	2022	2023	2024	Change
Ground Filter Coffee	212,200	212,600	201,900	183,700	172,400	161,500	-23.9%
Whole Beans	126,000	158,800	176,500	180,400	185,800	189,300	50.2%
Coffee Capsules	21,800	22,700	22,700	19,600	17,900	17,500	-6%
Coffee Pods	29,300	31,100	29,200	25,000	22,250	20,600	-29.7%
Total	**389,300**	**425,200**	**430,300**	**408,700**	**398,350**	**388,900**	**-0.1%**

From the 2020 peak, the segment lost 10,500 tons by 2024, a reduction of 33.8%. Against the 2019 baseline, the net loss over the six-year period was 8,700 tons, representing a 29.7% decline.

As a share of total market volume, ground filter coffee fell from 54.5% in 2019 to 41.5% in 2024. Whole beans rose from 32.4% in 2019 to 48.7% in 2024. Coffee pods moved from 7.5% in 2019 to 5.3% in 2024. Coffee capsules declined from 5.6% in 2019 to 4.5% in 2024.

By 2024, whole beans had closed to within 8 percentage points of ground filter coffee's market share, compared to a 22-point gap in 2019.

Roasted Coffee Market 2024: Market Shares of Segments in Home Preparation

The German roasted coffee market for home preparation in 2024 measured by weight in tons, the total market stood at 388,900 tons.

Whole beans held the largest share of the market in 2024 at 48.7%, equivalent to 189,300 tons. This position reflects a significant shift from 2019, when whole beans accounted for 32.4% of the market at 126,000 tons. Over the six-year period, the segment added 63,300 tons in volume and gained 16.3 percentage points in market share.

Ground roasted coffee held the second largest share in 2024 at 41.5%, equivalent to 161,500 tons. In 2019, this segment led the market with a 54.5% share at 212,200 tons. Between 2019 and 2024, it lost 50,700 tons in volume and shed 13 percentage points of market share. The gap between whole beans and ground roasted coffee, which stood at 22.1 percentage points in 2019, had narrowed to 7.2 percentage points by 2024.

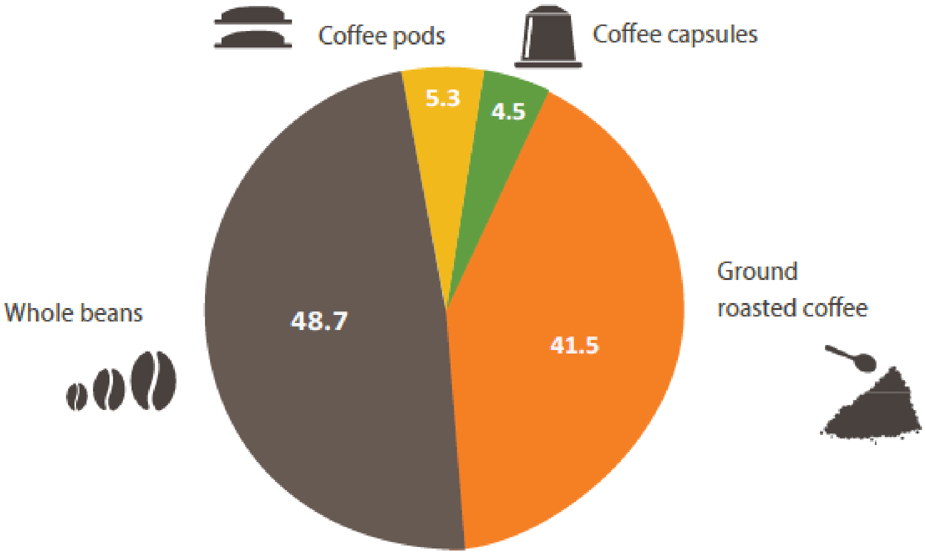

Figure 16: Market Share of Roasted Coffee in Household of Germany

Coffee pods accounted for 5.3% of the market in 2024, equivalent to 20,600 tons. In 2019, the segment held a 7.5% share at 29,300 tons. Over the period, it recorded a loss of 8,700 tons and a reduction of 2.2 percentage points in share. The segment peaked at 31,100 tons in 2020 before declining in each subsequent year.

Coffee capsules held the smallest share of the market in 2024 at 4.5%, equivalent to 17,500 tons. In 2019, the segment stood at 5.6% share and 21,800 tons. Between 2019 and 2024, it lost 4,300 tons and 1.1 percentage points of market share. The segment reached its highest recorded volume of 22,700 tons in 2020 and 2021 before falling each year through to 2024.

Together, coffee pods and coffee capsules represented a combined 9.8% of the total market in 2024, down from a combined 13.1% in 2019, a reduction of 3.3 percentage points over the six-year period.

Market for Instant Coffee

Germany's instant coffee market recorded total sales of 19,250 tons in 2024, reflecting pure coffee volume only. This represents a year-on-year growth of 1.3% (+240 tons) compared to the prior year, demonstrating the market's steady resilience and sustained consumer demand across both retail and out-of-home channels.

Food Retail is the dominant channel for instant coffee in Germany is food retail, accounting for 15,970 tons that is **83%** of all instant coffee sales. This channel spans discounters, hypermarkets, drugstores, local roasters, and specialty shops. The scale of this channel confirms that the majority of German consumers prepare instant coffee at home, driven by convenience and value.

Pure instant coffee is the market's undisputed leader, accounting for 13,400 tons of **all food retail instant coffee volume**. Notably, this category grew 2.1% (+280 tons) year-on-year, outpacing the overall market growth rate of 1.3%. Many German consumers continue to favour traditional instant coffee for its no-frills simplicity, reliability, and affordability. The product's appeal is direct: just powder and hot water.

Coffee mix drinks i.e., powdered cappuccinos, iced coffees, and latte macchiatos all together contributed 1,920 tons of pure coffee content, representing 12% of food retail coffee volume. However, the full product volume shows a strikingly different story: total product weight reaches 24,000 tons, of which pure coffee accounts for only approximately 8%.

The remaining 92% of product weight consists of milk powder and sugar. Coffee mix drinks are, in essence, milk-and-sugar products with coffee as a secondary ingredient. Consumers in this segment are primarily purchasing a convenient, indulgent beverage experience rather than a coffee-forward product.

Mixtures single-serving sachets pre-portioned with instant coffee, milk powder, and/or sugar contributed 65 tons of pure coffee, equivalent to 0.4% of food retail coffee volume. Yet the total product volume for this category reaches 7,300 tons, with pure coffee representing less than 1% of total product weight.

This category epitomises convenience first consumption: a ready-to-dissolve, single-serve format in which coffee flavour is present but heavily moderated by dairy and sweetness. Mixtures cater to consumers who prioritise ease and mildness above all else.

The remaining 3,280 tons (17%) of Instant Coffee were sold through out-of-home channels, including bakeries, cafés, coffee shops, bars, restaurants, hotels, communal canteens, and workplaces. While secondary in volume, this channel broadens instant coffee's presence across varied consumption occasions and social settings beyond the home.

Specialty Coffee

Europe represents the world’s largest specialty coffee market, valued at approximately $20.6 billion and accounting for around 30% of global specialty coffee consumption. The region has experienced steady growth in consumer interest, driven by increasing demand for high-quality coffee, sustainable sourcing, and unique flavour profiles. Specialty coffee shops and online retailers are expanding rapidly across Europe, reflecting consumers’ willingness to pay premium prices for higher quality and ethically sourced coffee.

The COVID-19 pandemic significantly accelerated this trend, particularly in the at-home specialty coffee segment. As consumers sought to replicate café experiences at home, demand for whole beans, home brewing equipment, and online specialty coffee retailers increased. This shift has persisted beyond the pandemic, contributing to sustained market growth. According to industry forecasts, the European specialty coffee market is expected to grow at an average annual rate of approximately 13% between 2022 and 2030, highlighting strong long-term growth potential.

Expansion of Specialty Coffee Retail Channels

Specialty coffee demand is growing across multiple market channels. Small independent roasters, specialty cafés, and online coffee retailers are expanding throughout Europe. Additionally, mainstream coffee retailers are increasingly incorporating specialty coffee products into their portfolios to meet changing consumer preferences. The growth of specialty coffee outlets also indicates a broader shift toward premiumization in the coffee sector.

The European branded coffee shop market grew by 3.2% in 2022, reaching more than 40,000 outlets. Many of these locations offer premium or specialty coffee, demonstrating the increasing importance of quality-focused coffee consumption in the region.

Consumer Trends Driving Growth

Figure 17: Several key consumer trends are driving the specialty coffee market in Europe:

Younger consumers are playing an important role in this shift. This demographic group shows strong interest in sustainability, environmental impact, and product origin. Additionally, consumers in North-Western Europe generally have higher purchasing power and demonstrate greater willingness to pay premium prices for specialty coffee.

Sustainability and Ethical Sourcing

Sustainability is becoming a central component of the European specialty coffee market. Consumers increasingly prefer organic, Fairtrade, and ethically sourced coffee. Specialty coffee often emphasizes transparency, traceability, and direct relationships between producers and roasters. Direct trade, sometimes referred to as relationship coffee, is gaining popularity as it enhances transparency and supports long-term partnerships between buyers and producers.

Specialty Coffee Trends in Germany

The specialty coffee segment is among the fastest growing within Germany's broader coffee market, with expansion observed across both out-of-home and at-home consumption. Germany holds the position of the second-largest coffee shop market in Europe, with more than 2,300 outlets recorded in 2022. Alongside this, sales of whole coffee beans have grown considerably, reflecting a sustained shift in consumer behaviour toward home brewing and a greater engagement with coffee quality.

Sustainability is a defining characteristic of German consumer preferences in this segment. Approximately 12 percent of coffee consumed in Germany carries a sustainability certification, and 78 percent of German consumers have indicated a willingness to pay a premium for organic coffee. Germany is also one of the leading European markets for Fairtrade coffee, with 34 percent of consumers reporting that their daily coffee is organic, Fairtrade, or both. These figures point to a consumer base that places meaningful weight on the ethical and environmental credentials of the coffee it purchases.

Growth of Independent Specialty Roasters

Germany has seen a notable increase in the number of small, independent specialty roasters offering high-quality single-origin coffees. These roasters typically purchase smaller volumes of premium coffee and place strong emphasis on sustainability, traceability, and direct trade relationships with producing regions. Well-established roasters such as The Barn, Five Elephant, and Flying Roasters have played a significant role in shaping the character of the German specialty scene, while importers including Touton and Cafe Imports remain active and influential in sourcing for this segment. The continued growth of independent roasters supports both market diversification and the broader premiumisation trend.

Niche segments are also beginning to emerge, including semi-wild and wild forest coffee. While still small in volume, these categories align closely with consumer values around environmental conservation, exclusivity, and ethical sourcing, and reflect the direction in which a portion of the market is moving.

The German Specialty Coffee Market

Germany's specialty coffee market is one of the most significant in Europe, broadly comparable in scale to the United Kingdom, which holds the position of Europe's largest specialty coffee market. Industry estimates place the German specialty segment at approximately 3.5 billion euros, representing around 17 percent of the total German coffee market by value, though a considerably smaller share by volume. A clear shift in consumer orientation is evident: according to the Tchibo Kaffeereport, 16 percent of German consumers now drink less coffee than previously but make a deliberate effort to choose better quality.

Growth in this segment has been both swift and sustained. The COVID-19 pandemic acted as an accelerant, with consumers confined to their homes but maintaining their coffee standards, a behavioural shift whose effects remain visible today. The number of specialty coffee cafés registered on European Coffee Trip grew from 294 in 2021 to 490 at the time of reporting, representing an increase of nearly 70 percent within a few years. Reflecting a preference for considered purchasing, 16 percent of German consumers choose to buy their coffee from a specialised shop rather than a supermarket, underlining the commercial importance of the independent retail channel.

One of the market's defining qualities is its appetite for diversity. Approximately 35 percent of German consumers actively seek out new coffee varieties, a disposition that creates commercial space for origins offering rare cultivars, distinctive processing methods, or differentiated flavour profiles. This is particularly relevant among micro roasters, specialised traders, and their customer base.

Market Outlook

The outlook for the specialty coffee segment in Germany remains broadly positive. Growth continues to be driven by premiumization, increasing sustainability awareness, the expansion of specialty coffee outlets, and rising consumer interest in quality coffee experiences both at home and out-of-home. These conditions represent a continued opportunity for specialty coffee suppliers, particularly those able to offer high-quality, traceable, and sustainably produced coffee.

It is noted, however, that Germany is currently navigating a period of economic uncertainty, including an energy crisis, volatile global coffee prices, and wider trade tensions. These factors introduce a degree of caution into market projections and are relevant context for any assessment of near-term commercial opportunity.

Entering the German Coffee Market

Entering the German green coffee market demands adherence to a set of technical, regulatory, and commercial standards that go well beyond product quality alone. European food safety legislation requires full traceability of imported commodities, and buyers increasingly expect certifications that validate both quality and ethical sourcing practices. Certifications such as Rainforest Alliance, Fairtrade, and UTZ are commonly expected by mainstream buyers, while specialty importers often prioritise direct trade relationships supplemented by detailed farm profiles, cupping reports, and flavour documentation.

Mandatory Requirements

A coffee entering Germany, must undergo several levels of scrutiny, regulations, and requirements. They ensure food safety, regulatory compliance, and supply-chain transparency, while meeting growing buyer and consumer demand for traceable, deforestation-free coffee. Alongside legal obligations such as the European Deforestation Regulation (EUDR), European buyers increasingly value clear “farm-to-cup” narratives that communicate origin and sustainability, making robust labelling and traceability systems critical for market access and acceptance.

Green coffee labelling requirements

Green coffee exported to Germany must carry labels written in English that provide clear, accurate and non-misleading information so that individual batches can be identified and traced throughout the supply chain, in line with

EU food information rules and German enforcement practice. Labels should remain legible and securely affixed so that the information cannot be altered without detection, thereby supporting transparency and buyer confidence in the product's origin and quality. As a minimum, green coffee labels must state the product name, the International Coffee Organization (ICO) identification code, the country of origin, the coffee grade and the net weight in kilograms, while for certified coffee they must also clearly indicate the name and code of the inspection or certification body together with the certification number, enabling buyers and authorities to verify claims and trace the certified lot back to the production source.

Figure 18 Examples of Green Coffee labelling

Green coffee is commonly shipped in woven jute or hessian bags made from natural fibres, which provide strength and durability during transport but offer limited protection against oxygen and moisture, so they are often complemented by inner liners or more advanced packaging to better preserve quality. Many suppliers use high-barrier liners such as GrainPro and Videplast inside jute bags, or other impermeable materials, to reduce post-harvest losses, protect against mould development and insect damage, cut net carbon footprints, decrease solid waste and enable chemical-free storage, which makes these solutions particularly attractive for higher-end market segments and specialty coffees. Beyond traditional jute bags, exporters may use one-tonne polypropylene super sacks, large polyethylene container liners of around 21.6 tonnes, or vacuum packing for smaller premium lots, all of which can increase logistical efficiency while better maintaining bean quality during transit from producing ccountries to EU ports.

Packaging requirements for transport and quality preservation

Figure 19: Examples of coffee packing: jute bag packaging and simple plastic liners and containers for smaller quantities of specialty and commercial coffee

Quality requirements

Green and roasted coffee generally undergo physical evaluation to determine their quality. Roasted coffee also undergoes a sensory evaluation.

The quality assessment is usually based on the following criteria:

Sl No.	Criteria
1	Altitude and region;
2	Botanical variety;

3	Processing method (wet/washed, dry/natural, honey, pulped naturals)
4	Screen size
5	Number of defects or imperfections
6	Bean density
7	Cup quality

A moisture check and water activity analysis are also part of the assessment. Sample roasting is sometimes done to assess the quality and uniformity of green coffee.

The process of quality assessment is the same for all types of green beans. The exact criteria, however, are different. Both high-end and low-end coffee beans are checked for bean density (mass divided by volume). High-end coffees need higher bean density.

Traceability, hygiene and food safety requirements

Traceability and hygiene are central to EU and German legal requirements for coffee, ensuring that products entering the market are safe, high-quality, and free from harmful contaminants. Compliance begins with General Food Law, which guarantees food safety and hygiene across the supply chain. Coffee that fails to meet EU safety standards is prohibited from entering the market, and exporters from countries not recognized for meeting these standards may face import restrictions:

Many buyers require suppliers to implement Good Agricultural Practices (GAP) through voluntary certifications such as GLOBALG.A.P., which ensures safe and traceable agricultural products and reduces risks from pesticides, mycotoxins, and other contaminants. Traceability is also essential for complying with new sustainability regulations and for managing quality across the supply chain.

For raw coffee beans, strict safety systems like HACCP (Hazard Analysis and Critical Control Points) are not always required. But for processed coffee or coffee storage, buyers usually expect HACCP-based systems, called Quality Management Systems (QMS). These systems check where problems could occur (like contamination with toxins or chemicals) and set rules to prevent them.

Contaminants of concern include:

Ochratoxin A (OTA) – a natural toxin that can grow in beans if stored or dried incorrectly.

PAHs (polycyclic aromatic hydrocarbons) – chemicals that can form during roasting.

Glyphosate – a herbicide used in farming.

Maintaining clean processing, drying, storage, and handling is essential to meet EU law and buyer expectations.

Coffee can pick up contaminants during farming, processing, or transport. The EU sets limits to keeping coffee safe.

The following table provides a detailed overview.

Contaminant / Issue	EU Regulation	What It Means / Limits	Practical Notes for Exporters
Pesticides	Regulation EC 396/2005	Sets **maximum residue levels (MRLs)** for allowed pesticides in coffee	Use pesticides carefully, stay below MRLs, and keep records; buyers may test batches
Glyphosate (herbicide)	Regulation 2023/2660	Legal use extended until **2033**; considered safe when used properly	Follow application guidelines; maintain documentation of usage
Ochratoxin A (OTA)	Regulation EU 2022/1370	Max **3 µg/kg** for roasted/ground	Proper drying, storage, and transport reduce OTA contamination

		coffee, **5 µg/kg** for instant coffee	
Polycyclic Aromatic Hydrocarbons (PAHs)	EU Food Safety Standards	Monitored during roasting; no specific numeric limit in coffee	Ensure roasting methods minimize formation of PAHs
Pathogens (bacteria)	EU Food Safety Standards	Coffee must be free from harmful bacteria	Maintain hygiene during processing and storage
Extraction solvents	EU Food Safety Standards	Residues must be below safe levels	Ensure solvents used in decaffeination are within legal limits
Hydrocarbons / Other chemicals	EU Food Safety Standards	Should not exceed safe exposure limits	Monitor storage, packaging, and transport
Acrylamide	EU Food Safety Standards	Formed during roasting; must be minimized	Optimize roasting to reduce acrylamide formation

While there are no legally fixed limits for green coffee beans, the European Coffee Federation (ECF) recommends a maximum moisture content of 12.5% for both Arabica and Robusta beans to reduce the risk of Ochratoxin A (OTA) contamination. Additionally, the ECF provides a decision-making flowchart (see

Figure 13; as recreated from the guidelines) that buyers can use to evaluate the OTA risk in coffee samples, which may influence whether the coffee is accepted or rejected after testing.

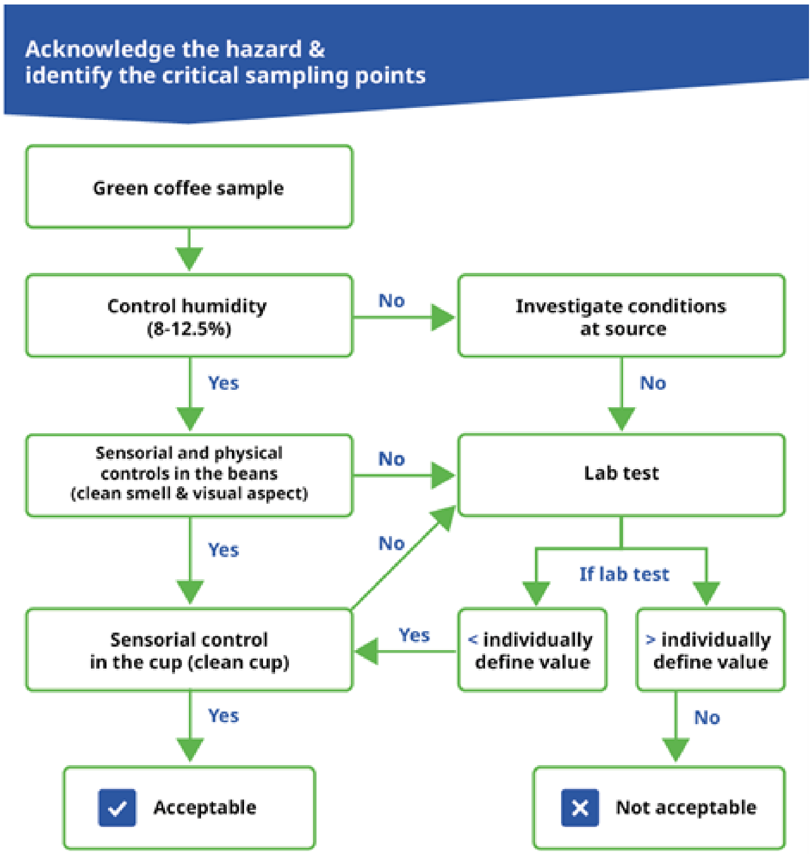

Figure 20: A decision tree to check green coffee

Requirements for organic coffee

Exporting organic coffee to the European market requires compliance with specific regulatory standards. To be marketed as organic, coffee must adhere to the EU Regulation (EC) 2018/848, which defines the rules for organic production and labelling. In addition to meeting production standards, organic coffee shipments are subject to verification at the EU border. Each shipment must be accompanied by an electronic Certificate of Inspection (e-COI), which is issued and managed through the Trade Control and Expert System (TRACES). This certificate must be validated by an authorised control body before the consignment leaves the country of origin.

In the German market, organic coffee can be labelled using either the EU organic logo or the Bio-Siegel label. While both labels follow the same regulatory requirements, the Bio-Siegel is specifically used in Germany and has high recognition among consumers, particularly in retail environments such as supermarkets. This dual-labelling option supports market visibility while ensuring compliance with EU-wide organic standards.

Figure 21: The label of German Bio Seigel

Sensory Assessment: Coffee Cupping

Roasted coffee quality is commonly evaluated through a sensory method known as *cupping*. While buyers may apply different evaluation standards, the Specialty Coffee Association (SCA) provides widely accepted. One of the most used tools is the **Coffee Taster's Flavour Wheel**, which supports a structured assessment of aroma, flavour, and overall quality.

Figure 22: Specialty Coffee Cupping Wheel

The system uses a 100-point scale, and here's what those numbers usually mean:

Below 80 points: Standard or commercial-quality coffee

80–84.99 points: Entry-level specialty coffee

85 points and above: High-quality specialty coffee

90 points and above: Exceptional or rare specialty coffee

Although there is no legally binding definition of specialty coffee, most European buyers particularly in the specialty segment require a **minimum cupping score of 85**. This threshold signals superior sensory quality, consistency, and careful post-harvest handling.

Hygiene Requirements for Roasting

Roasted coffee entering the European Union is subject to official food safety controls, including inspections conducted either at the border or within the EU market. These checks are to ensure that imported products comply with established legal and safety requirements. Roasters must implement procedures based on **Hazard Analysis and Critical Control Points (HACCP)** principles.

HACCP involves identifying potential contamination risks, establishing control points, and ensuring that coffee meets required safety standards. Continuous monitoring and documentation are essential components of this system, supporting compliance and maintaining product safety throughout the roasting process.

Trade Tariffs

Imports of roasted coffee into the European Union are subject to tariffs. The standard duty is **7.5% for roasted coffee** and **9% for decaffeinated roasted coffee**. These rates may vary depending on the exporting country and the presence of trade agreements with the EU. The responsibility for paying these tariffs lies with the importer rather than the exporter.

The German Coffee Tax

Germany imposes a specific tax on roasted and instant coffee. The tax amounts to **€2.19 per kilogram for roasted coffee** and **€4.78 per kilogram for instant coffee**. In **2021**, this tax generated approximately **€1 billion in revenue**.

The tax is applied at the point where coffee is roasted, affecting both domestic roasters and importers of roasted coffee. For example, retailers importing roasted private-label coffee into Germany are also required to pay this tax. However, the tax does not apply to **green coffee that is merely transiting through Germany**, nor to coffee products that are roasted within Germany but exported to other countries.

Supply Chain of the coffee in Germany

Germany has already established a regulatory framework for responsible sourcing through the **Supply Chain Act (Lieferkettengesetz)**, which came into force in 2021. This legislation requires large companies operating in Germany to exercise due diligence in ensuring that human rights standards are respected throughout their supply chains. As of 2024, the law applies to companies with more than 1,000 employees. Under this framework, businesses are required to identify the origin of their raw materials and goods, assess potential risks related to human rights and environmental impacts, take corrective or preventive measures where necessary, establish grievance mechanisms for affected stakeholders, and publish annual reports detailing their actions.

The sections of the supply chain and their role

Germany's coffee market offers multiple channels for exporters, primarily through importers, roasters, and agents, with entry varying by coffee quality and volume capacity. Supermarkets dominate sales, mainly for standard-quality coffee, while specialty segments grow via direct trade.

Importers

Importers act as essential supply chain managers in the global coffee trade, curating broad portfolios from diverse origins while often pre-financing shipments, ensuring quality control, hedging price fluctuations, and bridging producers with buyers. Companies like Neumann Kaffee Gruppe (NKG) integrate export and import operations through warehouses in producing countries, where farmers and cooperatives deliver coffee that NKG then ships to European facilities, typically without exporters knowing the final destinations.

Marketplaces

Marketplaces are platforms that connect actors that link various actors, primarily connecting farmers directly to roasters and enabling producers or cooperatives to bypass traditional intermediaries for potentially higher prices. Although only a minimal volume of coffee reaches German roasters via these channels, notable global examples include Algrano, Raw Material, and Beyco. No dedicated German marketplaces exist for farmer-to-roaster links, yet these international platforms operate worldwide to support such transactions.

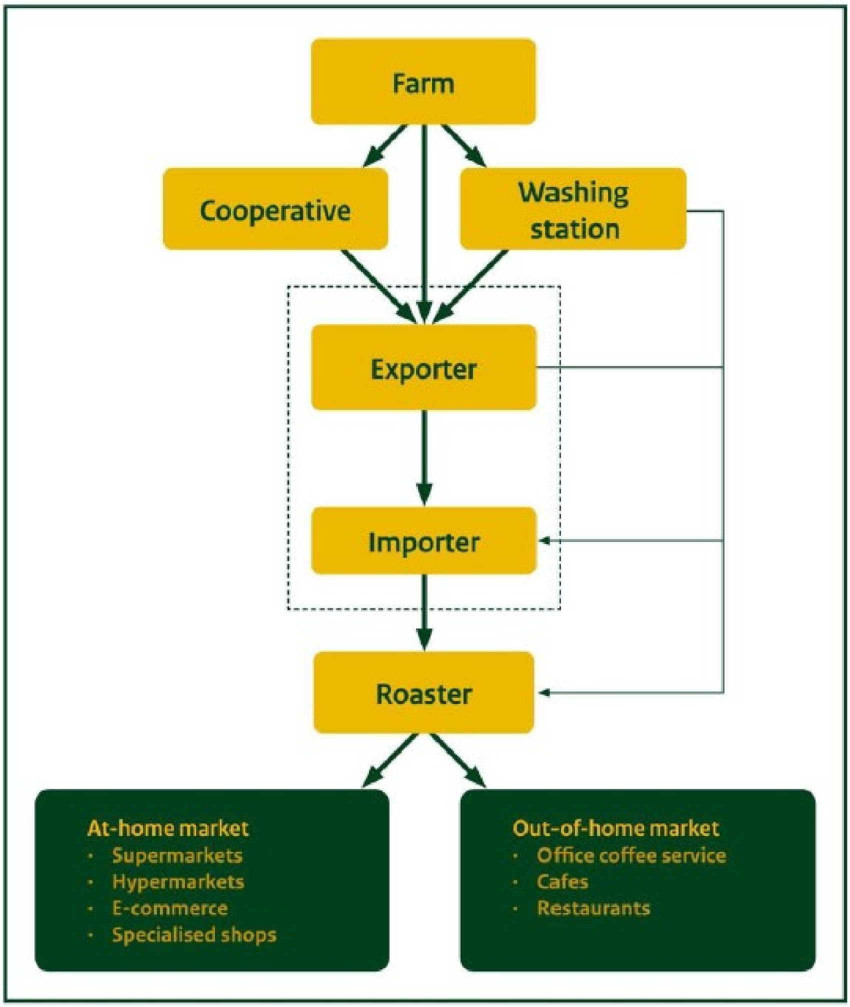

Figure 23: The network of distribution channel of coffee entering in Germany

Retailer Dominance

Germany is Europe's largest grocery retail market, and it is highly concentrated among a few powerful retailers. Companies such as EDEKA, REWE, ALDI, and Lidl dominate the market and significantly influence coffee pricing and product availability. In 2021, these four retailers together controlled approximately 70% of Germany's grocery sales, giving them strong negotiating power over multinational coffee brands and suppliers.

Discount retailers, particularly ALDI and Lidl, have played a major role in shaping the coffee market. Their success is largely driven by cost-efficient business models, limited assortments, and a strong focus on private-label products offered at competitive prices. Coffee is frequently used as a promotional product, sometimes sold at very low margins or even at a loss, to attract customers into stores.

By 2022, discount retailers captured around 35% of the grocery market share. However, their rapid growth began to slow as traditional supermarkets responded with similar strategies, including expanding their private-label offerings and introducing aggressive promotional pricing. This increased competition intensified price pressure across the entire coffee market.

In 2023, major supermarket chains implemented permanent price reductions on key products, including coffee. In response, discount retailers adapted their strategies by improving store layouts, expanding into urban locations, and offering a broader range of organic and branded products. These developments indicate a shift in the German retail landscape, where both discounters and traditional supermarkets compete not only on price but increasingly on quality, sustainability, and product variety.

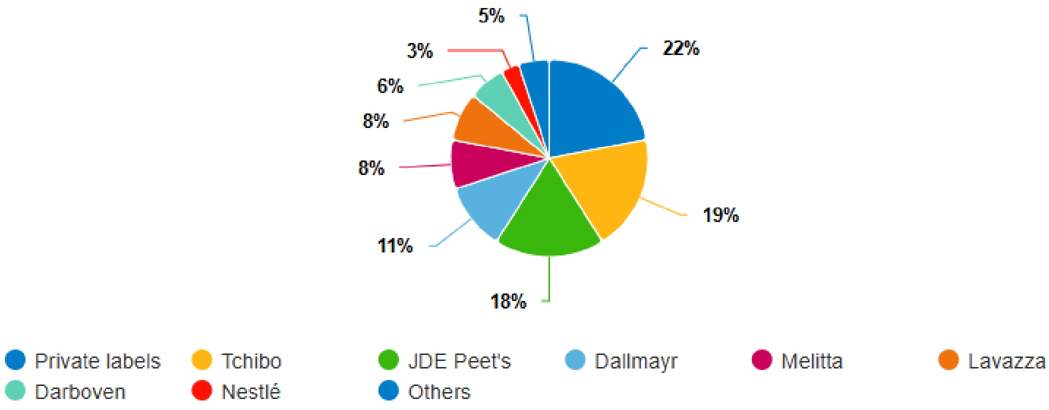

Figure 24: The market share of total coffee sales in Germany - 2024 (in %)

Leading Roasters in the Market

Germany ranks as Europe's second-largest coffee roasting hub. JDE Peet's, the world's second-largest roaster and Germany's top player, operates sub-brands like Senseo, Tassimo, and KaffeeHAG. Tchibo, a prominent German brand, stands out for its extensive nationwide retail stores. Interestingly, café coffee day in India was influenced from Tchibo. Nestlé, a global leader, is known locally for Nescafé and Nespresso; Melitta ranks among the world's top ten roasters, while Dallmayr holds a strong premium market position. A detailed explanation is given in the figure 10 above.

Small Roasters in Germany

While large roasters dominate the market, Germany is home to around 2,500 small or very small roasters. Many operate locally or regionally and focus on specialty coffee, such as Backyard Coffee and Bergbrand. Small roasters often emphasize quality, traceability, and unique flavour profiles. The German Coffee Association database provides a comprehensive overview of these roasters.

Growth Potential of Indian Coffee in Germany

The German coffee market presents several structural conditions that are relevant to Indian coffee exports. Five key factors indicate a potential opportunity for India to increase its presence in this market.

Sourcing diversification

Germany is among the largest coffee-importing countries in Europe. European buyers have historically sourced significant volumes from Brazil and Vietnam. There is a recognised interest among traders and importers in diversifying sourcing across a broader range of origins, driven by supply concentration concerns and production risks associated with climate variability.

Key event for participation.

Deutscher Kaffeeverband - Kaffee-Kongress & Neujahrsempfang: (22nd January 2026, the dates for 2027 are yet to be announced). Founded in 1969, the DKV represents the industry's leading companies and shapes market conditions across Germany.

World of Coffee – Brussels: The most strategically relevant World of Coffee stop for European market engagement. It is set to be held in from 25 -27 June 2026.

SCTA Forum & Dinner — 17th Edition: In 1 – 2nd October 2026: The Swiss Coffee Trade Association Forum and Dinner are a prestigious gathering of the global green coffee trade. The SCTA coordinates trade-related activities, advocates sustainability and human rights standards, and convenes senior figures from across the international supply chain.

Allegra European Coffee Symposium: Set to hosted in Berlin in 24 – 26th November 2026, it unites coffee and hospitality leaders for three days of strategic insights, market innovation, and networking.

Other Event participation

Germany's major cities host several trade fairs and industry events throughout the year that are relevant to coffee promotion. Events such as GastroIvent Bremen, Internoga, and Agritechnica have provided platforms where interest in Indian coffee has been observed. The Specialty Coffee Association (SCA) Germany hosts the German Coffee Championship, which similarly presents an avenue for the promotion of Indian coffee among industry professionals.

The Consulate General of India in Hamburg has organised two coffee cupping events, attended by representatives from significant industry players including HAFCO, Melitta, and Tchibo. These events have demonstrated early engagement from established German coffee companies and indicate that institutional channels can play a meaningful role in facilitating introductions between Indian coffee and the German trade.

Lastly, it will be a good option to explore collaboration and partnership with coffee traders and roasteries especially through social media campaign.

Conclusion

Indian coffee accounts for about 3-3½ % of the total coffee market of Germany and stands at being the 6th or 7th largest coffee exporter to Germany. However, it is still unknown to most of coffee consumers that India is a largest coffee exporting nation.

While it is essential to increase our share of green coffee exports it is also important to build a narrative or brand in Indian coffee's quality. The following gaps need to be fulfilled and following are certain action points:

1. Facilitating a delegation visit expected to take place to be led by the German Coffee Association in 2027

2. Undertaking a well-planned coffee delegation visit from India to promote Indian coffee through a roadshow in Berlin and Hamburg

3. Extensive outreach to various coffee events (list given separately) through presence, keynote speeches as well as cupping session

4. Engaging influencers in the coffee industry including barista champions, specialty roasteries to promote Indian coffee

5. Making available detailed information material to showcase availability quality and cupping scores and the fact that Indian coffee is EUDR ready to purchase

6. A sustained outreach to gather momentum for our coffee exports

In terms of the specialty coffee segment, this opportunity is particularly significant. The fact that Indian coffees, including Araku Valley and Monsoon Malabar, have already managed to find shelf space in select German roasteries indicates that product quality and buyer interest are already in place. However, it is also true that this presence is in its early stages and is yet to translate into a recognized position. The overall circumstances in the German coffee market, in terms of regulatory changes, increased demand for differentiated origins, and growth in the specialty segment, are in line with what Indian coffees, if properly leveraged and promoted, possess. The groundwork is in place. What is now required is a structured and sustained approach towards capitalizing on it.

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