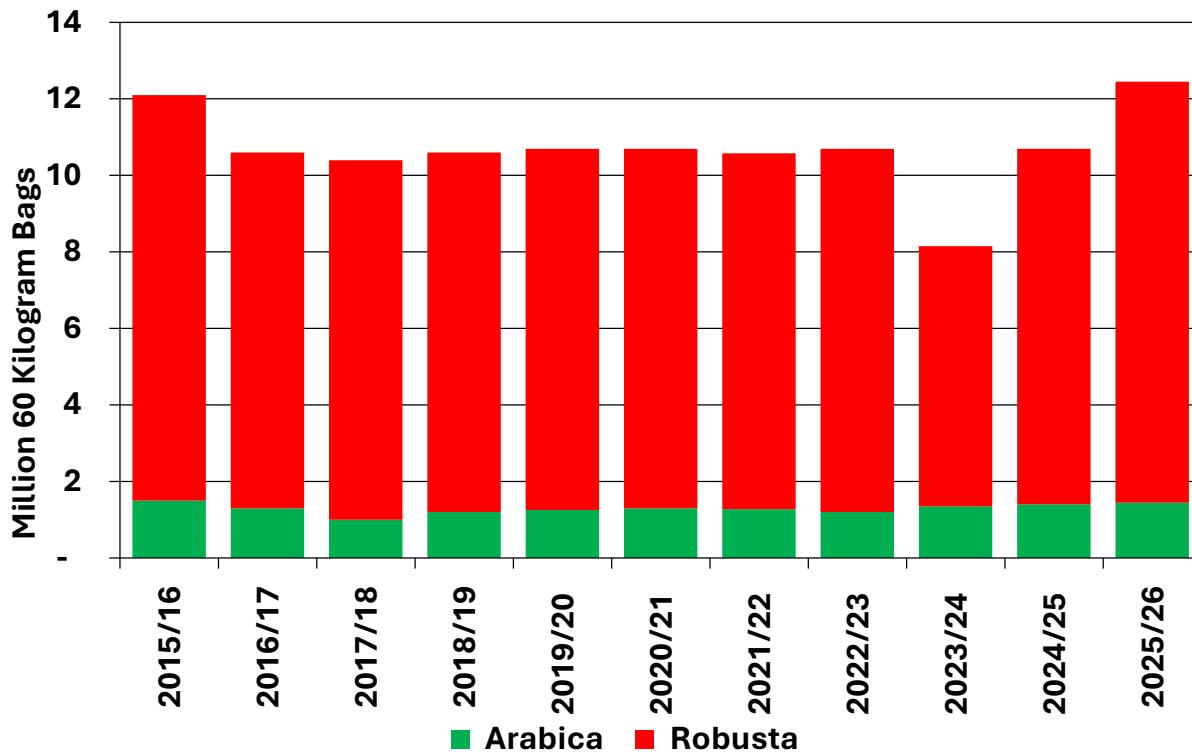


# Coffee: World Markets and Trade

## Indonesia Robusta Output Rebounds



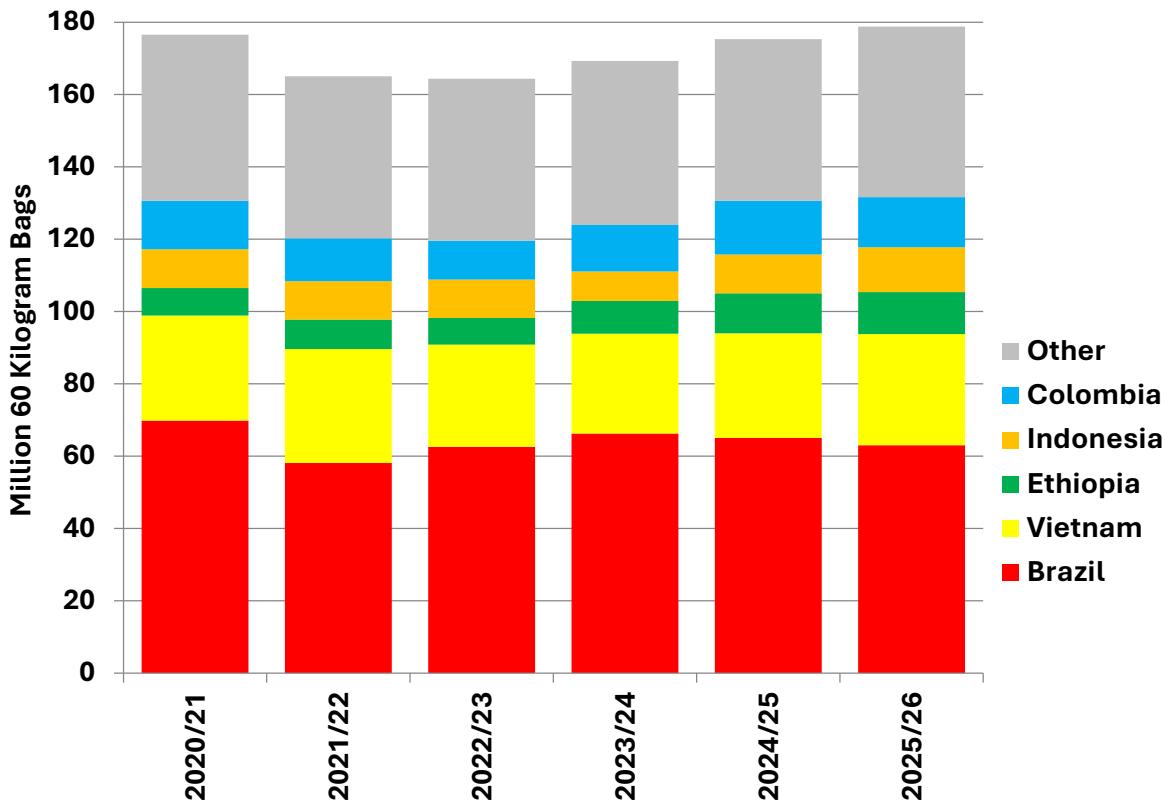
Indonesia Robusta coffee production in 2025/26 is forecast to increase 1.7 million bags (60 kilograms) to 11.0 million as yields improve on favorable weather and higher labor utilization during the harvest. Indonesia has been the world's third-largest Robusta producer after Vietnam and Brazil since 2000/01 when these two countries began expanding output dramatically. Indonesia's Arabica output is expected up slightly to 1.5 million bags, placing it behind 9 other producers.

Over the last 10 years, total coffee area in Indonesia has remained flat at an estimated 1.2 million hectares with no significant expansion expected in the foreseeable future. Sumatera accounts for about 75 percent of Indonesia's coffee production and is dominated by Robusta output in the south and limited Arabica production in the north. Over 95 percent of production comes from growers with plots averaging one hectare, most of whom do not rely on fertilizers or other inputs to boost yields. Growers primarily rely on family labor for non-harvest activities such as pruning, while cooperative labor pool arrangements are often used during the harvest.

Indonesia is forecast to increase green coffee exports by 1.7 million bags to 7.8 million on higher supplies, with top markets including the European Union, the United States, and Egypt. Whereas the European Union is the major destination for Robusta coffee, the United States is the primary market for Arabica. Soluble coffee exports are expected to slip nearly 100,000 bags to 1.0 million, with top markets including the Philippines, Malaysia, and Russia.

For more information, see the Indonesia Coffee Semi-Annual report in the FAS Global Agricultural Information Network (GAIN), at [Coffee Semi-Annual Jakarta Indonesia ID2025-0001](https://public.govdelivery.com/accounts/USDAFAS/subscriber/new)

# Record World Production Forecast



## 2025/26 Coffee Overview

**World** coffee production for 2025/26 is forecast 3.5 million bags higher than the previous year to a record 178.8 million due to continued recovery in Vietnam and record output in Indonesia and Ethiopia, more than compensating for losses in Brazil and Colombia. World coffee bean exports are forecast 2.3 million bags higher to 123.8 million as gains from Vietnam, Indonesia, and Honduras more than offset losses from Brazil and Colombia. With global consumption continuing to rise to a record 173.9 million bags, ending stocks are expected to drop for a fifth-consecutive year to just 20.1 million bags. In response, coffee prices as measured by the International Coffee Organization (ICO) monthly composite price index have nearly tripled during this period.

<https://ico.org/resources/public-market-information/>

**Brazil** combined Arabica and Robusta harvest is forecast to decline 2.0 million bags to 63.0 million. Arabica output is expected to drop 6.0 million bags to 38.0 million as drought and high temperatures in Minas Gerais and Sao Paulo adversely affected blossoming as well as fruit setting and development. The Robusta harvest is expected to be 4.0 million bags higher to a record 25.0 million as good rainfall volumes aided fruit development in the major producing states of Espírito Santo and Bahia. Lower available supplies are expected to reduce coffee bean exports by 4.0 million bags to 37.0 million.

**Vietnam** production is forecast to continue recovering to reach 30.8 million bags due to higher yields attributed to favorable weather. High prices allowed coffee growers to increase expenditures on fertilizers and other inputs to further raise yields. Area harvested is forecast to be nearly

unchanged, with nearly 95 percent of total output remaining as Robusta. Bean exports are forecast up 2.3 million bags to 24.6 million on higher supplies.

**Colombia** output is expected to fall by 1.0 million bags to 13.8 million as excessive rains and cloud cover disrupted the flowering period to lower yields. While these conditions were favorable for coffee leaf rust to proliferate, overall detection rates have been relatively low due to the high presence of disease-resistant varieties. Coffee bean exports mostly to the United States and European Union are forecast down 700,000 bags to 11.5 million on reduced output.

**Ethiopia** is forecast to increase output by 500,000 bags to a record 11.6 million bags. Over the last 3 years, growth has been driven by replacement of over half of the cultivated area with higher-yielding coffee varieties. Growers were also encouraged to improve yields by pruning after the harvest. Bean exports are forecast up 400,000 bags to 7.8 million on higher supplies.

**Central America and Mexico** production is expected to rise 1.1 million bags to 17.6 million primarily on rebounding output in Honduras, and to a lesser extent, Guatemala. Honduras accounts for one-third of the region's output. Higher coffee bean exports from these countries are expected to boost exports for the region by 1.0 million bags to 14.4 million.

#### **Revisions to 2024/25 Estimates**

World **production** is lowered 900,000 bags from the June 2025 estimate to 175.3 million.

- Colombia is raised 1.6 million bags to 14.8 million on higher yields due to additional precipitation that resulted in heavier coffee beans.
- Cote d'Ivoire is reduced 600,000 bags to 650,000 on lower yields.

World **bean imports** are revised up 3.0 million bags to 118.3 million.

- The European Union is raised 800,000 bags to 46.2 million on higher consumption.
- The United States is up 600,000 bags to 23.4 million on higher consumption.

The next release of this publication will be on July 22, 2026.

For additional information, please contact Tony Halstead at [Tony.Halstead@usda.gov](mailto:Tony.Halstead@usda.gov)

<b>Coffee HS Codes and Conversion Factors</b>			
<b>HS Code</b>	<b>Attribute</b>	<b>Description</b>	<b>Conversion Rate</b>
090111	Coffee, Green	Coffee, not roasted, not decaffeinated	1.00
090112	Coffee, Green	Coffee, not roasted, decaffeinated	1.00
090121	Coffee, Roasted	Coffee, roasted, not decaffeinated	1.19
090122	Coffee, Roasted	Coffee, roasted, decaffeinated	1.19
210111	Coffee, Soluble	Coffee extracts, essences and concentrates	2.60
210112	Coffee, Soluble	Coffee preparations with a basis of extracts, essences or concentrates	2.60

The *Coffee: World Markets and Trade* circular is based on reports from FAS Overseas Posts and on available secondary information. The individual country reports can be obtained on FAS Online at: <https://gain.fas.usda.gov/Pages/Default.aspx>.

Please visit <https://www.fas.usda.gov/data/coffee-world-markets-and-trade> to view archived reports.

#### **PSD Online**

The entire USDA PSD database is available online at: <https://www.fas.usda.gov/psdonline>.

#### **Additional Resources**

Please refer to the USDA-FAS Coffee website at: <https://www.fas.usda.gov/commodities/coffee> for additional data and analysis.

## Marketing Years for Producing Countries

### April-March

Angola  
Bolivia  
Burundi  
Ecuador  
Indonesia  
Madagascar  
Papua New Guinea  
Peru  
Rwanda

### July-June

Brazil  
Cuba  
Dominican Republic  
Philippines  
Tanzania

### October-September

Cameroon  
China  
Colombia  
Congo (Kinshasa)  
Costa Rica  
Cote d'Ivoire  
El Salvador  
Ethiopia  
Guatemala  
Guinea  
Honduras  
India  
Jamaica  
Kenya  
Laos  
Malawi  
Malaysia  
Mexico  
Nicaragua  
Panama  
Sierra Leone  
Thailand  
Togo  
Uganda  
United States  
Venezuela  
Vietnam

**Non-producing countries are on an October-September marketing year.**

**Coffee Summary**  
**Thousand 60-Kilogram Bags**

	2021/22	2022/23	2023/24	2024/25	Jun 2025/26	Dec 2025/26
<b>Arabica Production</b>						
Brazil	36,400	39,800	44,900	44,000	40,900	38,000
Colombia	11,800	10,700	12,760	14,800	12,500	13,800
Ethiopia	8,150	7,300	9,130	11,100	11,560	11,560
Honduras	4,800	5,700	5,050	5,000	5,800	5,800
Peru	4,200	3,475	3,912	3,700	4,200	4,200
Mexico	3,200	3,000	3,356	3,530	3,540	3,540
Guatemala	3,410	3,150	3,339	3,075	3,410	3,410
Nicaragua	2,718	2,430	2,187	2,400	2,420	2,420
China	1,800	1,800	1,800	1,900	1,900	1,900
Indonesia	1,280	1,200	1,350	1,400	1,450	1,450
India	1,583	1,667	1,480	1,400	1,350	1,350
Vietnam	1,100	1,000	1,000	1,000	1,000	1,200
Costa Rica	1,215	1,100	1,158	1,298	1,170	1,170
Uganda	990	990	1,000	1,030	1,060	1,060
Papua New Guinea	725	825	930	800	900	900
Other	3,718	3,646	3,888	3,770	3,862	3,755
<b>Total</b>	<b>87,089</b>	<b>87,783</b>	<b>97,240</b>	<b>100,203</b>	<b>97,022</b>	<b>95,515</b>
<b>Robusta Production</b>						
Vietnam	30,480	27,300	26,550	28,000	30,000	29,600
Brazil	21,700	22,800	21,400	21,000	24,100	25,000
Indonesia	9,300	9,500	6,800	9,300	9,800	11,000
Uganda	5,060	5,575	5,400	5,670	5,815	5,815
India	4,117	4,200	5,080	4,800	4,700	4,700
Malaysia	2,000	2,000	1,330	1,400	1,500	1,500
Cote d'Ivoire	1,110	1,020	1,325	650	1,300	1,300
Thailand	650	700	750	900	900	900
Tanzania	550	550	600	650	700	700
Laos	385	410	410	430	430	430
Other	2,603	2,551	2,460	2,313	2,413	2,388
<b>Total</b>	<b>77,955</b>	<b>76,606</b>	<b>72,105</b>	<b>75,113</b>	<b>81,658</b>	<b>83,333</b>
<b>Production</b>						
Brazil	58,100	62,600	66,300	65,000	65,000	63,000
Vietnam	31,580	28,300	27,550	29,000	31,000	30,800
Colombia	11,800	10,700	12,760	14,800	12,500	13,800
Indonesia	10,580	10,700	8,150	10,700	11,250	12,450
Ethiopia	8,150	7,300	9,130	11,100	11,560	11,560
Uganda	6,050	6,565	6,400	6,700	6,875	6,875
India	5,700	5,867	6,560	6,200	6,050	6,050
Honduras	4,800	5,700	5,050	5,000	5,800	5,800
Peru	4,200	3,475	3,912	3,700	4,200	4,200
Mexico	3,740	3,545	3,856	3,870	3,903	3,903
Guatemala	3,540	3,270	3,469	3,205	3,540	3,540
Nicaragua	2,838	2,590	2,347	2,560	2,580	2,580
China	1,800	1,800	1,800	1,900	1,900	1,900
Malaysia	2,000	2,000	1,330	1,400	1,500	1,500
Tanzania	1,200	1,200	1,350	1,350	1,450	1,450
Cote d'Ivoire	1,110	1,020	1,325	650	1,300	1,300
Costa Rica	1,215	1,100	1,158	1,298	1,170	1,170
Papua New Guinea	775	875	980	840	950	950
Thailand	650	700	750	900	900	900
Kenya	860	750	825	1,000	850	850
El Salvador	600	550	604	450	597	500
Venezuela	500	500	500	500	500	500
Philippines	450	475	450	450	450	450
Laos	385	410	410	430	430	430
Ecuador	260	354	370	355	350	350
Other	2,161	2,043	2,009	1,958	2,075	2,040
<b>Total</b>	<b>165,044</b>	<b>164,389</b>	<b>169,345</b>	<b>175,316</b>	<b>178,680</b>	<b>178,848</b>

Coffee marketing year for producer countries begins either in October (Colombia), April (Indonesia) or July (Brazil), as examples. Coffee marketing year for non-producer countries begins in October. To access a complete dataset for each country, please visit:  
<http://apps.fas.usda.gov/psdonline/psdQuery.aspx>

## Coffee Summary, Continued

Thousand 60-Kilogram Bags

	2021/22	2022/23	2023/24	2024/25	Jun 2025/26	Dec 2025/26
<b>Bean Exports</b>						
Brazil	35,576	32,200	43,100	41,000	38,000	37,000
Vietnam	26,110	26,000	22,000	22,350	24,600	24,600
Colombia	11,000	9,450	10,700	12,200	10,700	11,500
Indonesia	6,335	6,735	4,285	6,135	6,500	7,800
Ethiopia	4,831	3,910	5,605	7,415	7,765	7,765
Uganda	5,850	6,250	6,300	6,350	6,515	6,515
Honduras	4,650	5,310	4,715	4,765	5,500	5,500
Peru	4,065	3,325	3,935	3,440	3,925	4,100
India	4,937	3,924	4,360	3,708	3,560	3,560
Guatemala	3,335	3,000	3,151	2,860	3,210	3,210
Other	12,264	10,836	11,029	11,265	11,978	12,275
<b>Total</b>	118,953	110,940	119,180	121,488	122,253	123,825
<b>Roast and Ground Exports</b>						
European Union	2,680	2,990	3,134	3,060	3,200	3,200
Switzerland	1,850	1,765	1,891	1,925	1,700	1,900
Vietnam	550	450	400	500	700	700
Peru	0	0	63	265	270	270
Colombia	265	210	230	220	200	200
China	65	20	150	30	150	150
Indonesia	43	57	70	70	70	70
Brazil	54	45	50	50	50	50
Mexico	148	120	48	10	50	50
Ethiopia	0	0	25	30	35	35
Other	62	57	98	91	92	92
<b>Total</b>	5,717	5,714	6,159	6,251	6,517	6,717
<b>Soluble Exports</b>						
Brazil	4,055	3,900	3,600	3,700	3,700	3,700
Vietnam	2,350	1,890	2,000	2,350	2,600	2,600
Malaysia	2,975	2,500	2,300	2,400	2,500	2,500
India	2,310	2,490	2,535	2,545	2,420	2,420
European Union	1,805	1,715	1,930	2,385	2,300	2,300
Mexico	695	880	1,216	1,615	1,650	1,500
Indonesia	1,050	1,040	1,000	1,080	1,000	1,000
Thailand	990	900	1,095	650	1,000	1,000
Colombia	1,100	950	840	960	900	850
China	375	450	475	790	550	550
Other	1,201	1,190	1,135	1,159	1,143	1,133
<b>Total</b>	18,906	17,905	18,126	19,634	19,763	19,553
<b>Exports</b>						
Brazil	39,685	36,145	46,750	44,750	41,750	40,750
Vietnam	29,010	28,340	24,400	25,200	27,900	27,900
Colombia	12,365	10,610	11,770	13,380	11,800	12,550
Indonesia	7,428	7,832	5,355	7,285	7,570	8,870
Ethiopia	4,831	3,910	5,630	7,445	7,800	7,800
Uganda	5,850	6,250	6,300	6,350	6,515	6,515
India	7,258	6,420	6,906	6,260	5,986	5,986
Honduras	4,650	5,310	4,718	4,768	5,503	5,503
European Union	4,485	4,705	5,064	5,445	5,500	5,500
Peru	4,065	3,325	4,003	3,705	4,200	4,375
Other	23,949	21,712	22,569	22,785	24,009	24,346
<b>Total</b>	143,576	134,559	143,465	147,373	148,533	150,095

Coffee marketing year for producer countries begins either in October (Colombia), April (Indonesia) or July (Brazil), as examples. Coffee marketing year for non-producer countries begins in October. Roasted coffee was converted to green bean equivalent by multiplying the net weight of roasted coffee by 1.19. Soluble coffee was converted to green bean equivalent by multiplying the net weight of soluble coffee by 2.6. For each non-producing country, the trade balance between imports and exports is used in order to avoid double-counting for these figures.

## Coffee Summary, Continued

Thousand 60-Kilogram Bags

	2021/22	2022/23	2023/24	2024/25	Jun 2025/26	Dec 2025/26
<b>Bean Imports</b>						
European Union	46,615	44,515	43,990	46,200	45,200	47,000
United States	25,225	22,540	21,475	23,400	23,000	23,800
Japan	6,800	5,860	6,220	5,815	6,200	6,000
Russia	3,400	3,500	3,500	3,700	3,800	3,800
Switzerland	3,400	3,290	3,345	3,540	3,500	3,600
China	1,660	1,965	3,405	3,320	3,300	3,300
Canada	2,940	2,700	2,980	3,175	3,000	3,200
Korea, South	3,015	2,820	2,960	2,985	3,000	3,000
United Kingdom	2,725	2,285	2,450	2,385	2,400	2,400
Algeria	2,050	2,000	1,900	2,000	2,000	2,000
Other	20,658	20,910	20,097	21,758	21,187	21,839
<b>Total</b>	118,488	112,385	112,322	118,278	116,587	119,939
<b>Roast and Ground Imports</b>						
United States	580	640	770	980	1,000	1,000
United Kingdom	580	775	740	690	730	730
Ukraine	450	400	440	400	450	450
Korea, South	390	355	390	380	400	400
Russia	305	350	350	350	350	350
Vietnam	200	8	200	200	200	250
Australia	200	200	185	150	200	200
Canada	550	450	185	185	200	200
China	350	290	210	200	200	200
Saudi Arabia	210	200	200	225	200	200
Other	884	799	868	937	935	955
<b>Total</b>	4,699	4,467	4,538	4,697	4,865	4,935
<b>Soluble Imports</b>						
Philippines	5,700	5,200	5,000	5,000	5,500	5,500
China	2,170	1,975	1,870	1,800	1,900	1,900
Canada	1,840	1,960	1,815	1,750	1,900	1,800
United States	1,220	725	1,250	1,790	1,500	1,700
United Kingdom	680	920	1,000	1,420	1,200	1,200
Indonesia	725	983	1,000	950	1,000	900
Australia	365	290	415	665	500	600
Peru	120	90	296	283	290	465
Japan	500	535	590	465	500	450
Guatemala	344	345	433	435	437	437
Other	4,010	4,043	3,746	4,266	4,104	4,114
<b>Total</b>	17,674	17,066	17,415	18,824	18,831	19,066
<b>Imports</b>						
European Union	46,615	44,515	43,990	46,200	45,200	47,000
United States	27,025	23,905	23,495	26,170	25,500	26,500
Japan	7,415	6,505	6,905	6,370	6,800	6,550
Philippines	6,540	5,890	5,940	5,740	6,400	6,300
China	4,180	4,230	5,485	5,320	5,400	5,400
Canada	5,330	5,110	4,980	5,110	5,100	5,200
Russia	4,055	4,250	4,250	4,450	4,575	4,575
United Kingdom	3,985	3,980	4,190	4,495	4,330	4,330
Switzerland	3,400	3,290	3,345	3,540	3,500	3,600
Korea, South	3,405	3,175	3,350	3,365	3,400	3,400
Other	28,911	29,068	28,345	31,039	30,078	31,085
<b>Total</b>	140,861	133,918	134,275	141,799	140,283	143,940

Coffee marketing year for producer countries begins either in October (Colombia), April (Indonesia) or July (Brazil), as examples. Coffee marketing year for non-producer countries begins in October. Roasted coffee was converted to green bean equivalent by multiplying the net weight of roasted coffee by 1.19. Soluble coffee was converted to green bean equivalent by multiplying the net weight of soluble coffee by 2.6. For each non-producing country, the trade balance between imports and exports is used in order to avoid double-counting for these figures.

## Coffee Summary, Continued

Thousand 60-Kilogram Bags

	2021/22	2022/23	2023/24	2024/25	Jun 2025/26	Dec 2025/26
<b>Domestic Consumption</b>						
European Union	41,897	44,497	39,613	41,211	40,100	41,870
United States	26,708	24,623	23,545	26,220	25,550	26,550
Brazil	22,340	22,450	22,160	21,970	22,280	22,280
Philippines	7,190	6,465	6,590	6,190	6,850	6,750
Japan	7,210	6,886	6,996	6,528	6,700	6,718
China	4,920	5,280	5,765	6,123	5,850	5,850
Canada	5,330	5,110	4,980	5,110	5,100	5,200
Vietnam	3,200	3,200	3,900	4,800	4,000	4,900
Indonesia	4,750	4,771	4,775	4,873	4,810	4,810
Russia	4,055	4,250	4,250	4,450	4,575	4,575
United Kingdom	3,985	3,980	4,190	4,495	4,330	4,330
Ethiopia	3,364	3,430	3,500	3,625	3,700	3,700
Korea, South	3,405	3,175	3,350	3,365	3,400	3,400
Mexico	2,850	3,035	3,100	3,100	3,150	3,100
Australia	2,305	2,135	2,090	2,740	2,300	2,600
Colombia	2,145	2,150	2,225	2,150	2,220	2,270
Algeria	2,090	2,050	1,950	2,050	2,050	2,050
Turkey	1,285	1,590	1,545	1,820	1,735	1,750
Saudi Arabia	1,140	1,380	1,375	1,475	1,500	1,500
India	875	900	1,250	1,300	1,360	1,360
Switzerland	1,185	1,160	1,094	1,215	1,400	1,300
Ukraine	1,300	1,090	1,100	1,070	1,125	1,175
Morocco	990	805	840	1,005	1,070	1,060
Egypt	450	900	650	1,175	500	1,000
Jordan	730	725	845	800	975	950
Other	12,184	12,717	12,290	12,696	12,733	12,804
<b>Total</b>	<b>167,883</b>	<b>168,754</b>	<b>163,968</b>	<b>171,556</b>	<b>169,363</b>	<b>173,852</b>
<b>Ending Stocks</b>						
European Union	14,000	9,313	8,626	8,170	8,500	7,800
United States	6,378	5,700	5,700	5,700	5,700	5,700
Japan	2,898	2,517	2,426	2,268	2,300	2,100
Colombia	760	885	668	918	458	963
Indonesia	1,056	500	480	622	947	657
Brazil	540	4,620	2,085	440	1,685	485
China	358	303	558	400	400	400
Vietnam	3,580	839	889	1,089	839	389
Philippines	600	500	300	300	300	300
Uganda	454	469	244	269	299	299
Other	1,316	1,288	1,145	1,131	1,391	1,055
<b>Total</b>	<b>31,940</b>	<b>26,934</b>	<b>23,121</b>	<b>21,307</b>	<b>22,819</b>	<b>20,148</b>

Coffee marketing year for producer countries begins either in October (Colombia), April (Indonesia) or July (Brazil), as examples. Coffee marketing year for non-producer countries begins in October.