

**Required Report:** Required - Public Distribution

**Date:** December 02, 2025

**Report Number:** ID2025-0039

**Report Name:** Coffee Semi-annual

**Country:** Indonesia

**Post:** Jakarta

**Report Category:** Coffee

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**Report Highlights:**

Indonesia's 2025/26 coffee production is expected to rise to 12.5 million bags on improved yields due to favorable weather, increased inputs, and better farm maintenance. The estimate for green bean exports is revised up to 7.8 million bags on higher exportable volume, increased international demand, and Indonesian rupiah depreciation.

## **Production**

Indonesia's coffee production for 2025/26 is revised up to 12.5 million bags, from Post's previous estimate of 11.3 million bags. This increase is based on improved yields, specifically in the lowland of robusta regions which recovered from the severe weather of the 2023/24 season faster than expected. Yield also improved due to favorable weather plus improved farm inputs and pruning, as farmers allocated more resources. Smallholder farmers, representing the majority of Indonesian coffee farmers, received increased margins in the last two years from higher coffee prices. Therefore, Post forecast combined Robusta and Arabica production at 12.5 million bags for 2025/26, 18 percent higher than 2024/25.

In the southern Sumatera region, including Lampung, Bengkulu, and South Sumatera province, the main harvesting period for robusta coffee typically occurs from May to August. This region is the largest contributor to Indonesia's robusta production, benefiting from its favorable climate and established farming practices. Meanwhile, other robusta-producing areas in Java, such as East Java and Central Java, generally see their primary harvests between June and September, though local variations may occur depending on microclimates and elevation. Arabica is mainly grown in Northern Sumatera's mountains, with harvests twice yearly (March-May and October-December). Smaller Arabica crops exist in Java, Bali, and Sulawesi. Post maintains its previous arabica production forecast for 2025/26 at 1.5 million bags, up by 50,000 bags from last year.

According to the National Weather Agency ([BMKG](#)), in early October 2025, Indonesia experienced varied rainfall with 44 percent of regions entering the rainy season to date. Key coffee-producing areas in northern Sumatra remain mostly dry with low to moderate rainfall expected through early November 2025. The BMKG also predicted that some areas in southern Sumatra run the risk of experiencing heavy monthly rainfall exceeding 300 millimeters (11.8 inches) from November 2025 to January 2026. This could raise humidity levels, potentially degrading the quality of beans unless processors take additional mitigating steps.

## **Consumption**

Post's forecast for Indonesia's 2025/26 coffee consumption is unchanged at 4.8 million bags, up 10,000 bags from 2024/25 on continued demand from roasteries and processors. However, due to higher bean prices and weak consumer buying power, many domestic consumers switched to less expensive products including coffee sourced from lower cost origins as well as variations blending arabica and robusta beans. Street vendors and mobile hawkers using electric carts spearhead sales among urban workers and low- and middle-income consumers, offering affordable coffee products. Therefore, Post expects consumption growth to remain positive in the low to medium coffee grade segment, offsetting decreased consumption of higher end products.

## **Trade**

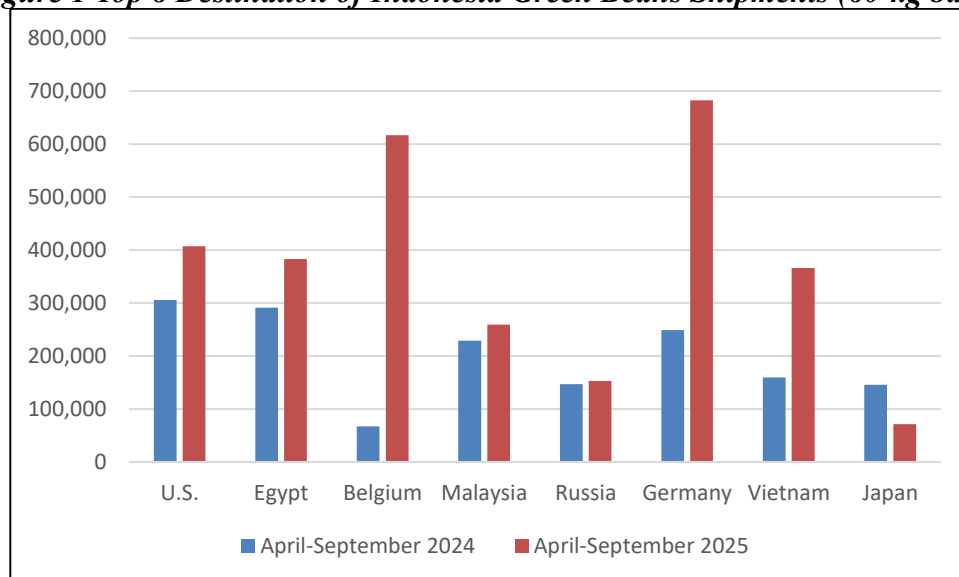
Post revises up its 2025/26 estimate of Indonesia's green bean exports to 7.8 million bags, up 27 percent from 2024/25 on higher exportable volume and increased international demand. Shipments between April to August 2025 reached 3.5 million bags, 83 percent higher than corresponding period last year.

The United States remains a major export destination for Indonesia green coffee beans in the first half of 2025/26 despite importing only 9 percent of Indonesia's total green bean exports, compared to 12 percent over the same period in the previous year. Shipments to the United States are expected to recover following the removal of reciprocal tariffs for coffee in November 2025, which were in place from early August 2025. Exports to the United States increased through July 2025, then declined by 48 percent in August compared to the previous month. From 2021 to 2025, the United States accounted for 13 to 15 percent of Indonesian green bean exports. Combined with the U.S. market, the following destinations make up 65 percent of total shipments in this year:

Egypt (8 percent), Belgium (14 percent), Malaysia (6 percent), Russia (3 percent), Germany (1 percent), Vietnam (8 percent), and Japan (2 percent) (see Figure 1).

In addition to higher global demand, the depreciation of the Indonesia rupiah (IDR) against the U.S. dollar (USD) supported Indonesia coffee exports. During April to August 2025, the rupiah fell 3 percent against the U.S. dollar compared to the same period last year.

**Figure 1 Top 8 Destination of Indonesia Green Beans Shipments (60-kg bags)**



Source: Trade Data Monitor, LLC

Indonesia's coffee imports in 2025/26 are expected to decline by 336,000 bags green bean equivalent (GBE), from 1.6 million bags GBE in 2024/25 to 1.3 million bags GBE due to increased procurement of local beans by roasters. Indonesia's green bean imports in 2025 originated primarily from Vietnam and Brazil, accounting for 46 and 25 percent, respectively.

**Table 1. Arabica Spot at Medan, 2019-2025 (IDR/kg)**

	2019	2020	2021	2022	2023	2024	2025
Jan	52,101	54,862	60,558	115,135	83,195	99,373	182,152
Feb	49,683	50,733	61,201	120,659	94,239	102,860	222,884
Mar	48,342	55,802	64,574	109,210	94,299	101,778	218,541
Apr	46,849	62,087	66,070	110,717	95,268	122,088	213,411
May	47,156	55,112	73,426	108,798	94,804	115,931	211,184
Jun	51,637	49,194	76,932	115,627	92,614	126,734	186,005
Jul	52,010	52,600	83,641	110,862	82,766	132,513	164,607
Aug	48,415	60,338	89,133	112,860	81,598	129,851	185,903
Sep	49,328	62,736	92,147	115,505	80,395	133,269	216,236
Oct	49,062	55,339	97,821	105,585	83,344	134,268	219,802
Nov	53,557	55,249	107,508	88,805	93,531	148,299	
Dec	62,365	59,127	114,524	88,384	102,543	174,831	

Source: Commodity Futures Trading Regulatory Agency (Bappebti)

**Table 2. Robusta Spot at Lampung, 2019-2025 (IDR/kg)**

	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>
Jan	22,528	18,529	19,208	36,713	31,831	56,069	94,724
Feb	22,462	17,980	19,635	35,316	33,933	55,854	104,371
Mar	22,226	18,352	20,693	34,569	35,219	59,018	102,373
Apr	20,628	18,195	20,555	32,441	38,642	72,712	98,659
May	19,829	17,701	22,043	32,504	42,340	69,183	92,487
Jun	20,469	16,943	24,333	32,950	44,939	78,739	77,196
Jul	20,135	18,353	27,666	31,702	45,401	84,688	66,446
Aug	18,998	21,951	28,552	34,919	44,114	82,914	75,000
Sep	18,812	22,606	32,259	36,132	44,526	93,811	85,290
Oct	17,862	19,073	33,041	34,302	42,037	84,037	84,128
Nov	19,491	20,089	35,249	31,026	44,700	81,332	
Dec	20,238	20,593	36,428	32,143	47,790	92,146	

Source: Commodity Futures Trading Regulatory Agency (Bappebti)

**Table 3. Exchange Rate (IDR/\$)**

	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>
Jan	14,163	13,732	14,062	14,341	15,267	15,627	16,270
Feb	14,035	13,776	14,044	14,350	15,138	15,660	16,351
Mar	14,211	15,195	14,417	14,348	15,288	15,711	16,456
Apr	14,143	15,867	14,551	14,375	14,844	16,125	16,827
May	14,393	14,906	14,334	14,615	14,827	16,083	16,418
Jun	14,227	14,196	14,351	14,702	14,932	16,337	16,307
Jul	14,044	14,582	14,507	14,983	15,044	16,257	16,286
Aug	14,242	14,725	14,390	14,850	15,252	15,756	16,309
Sep	14,111	14,848	14,258	14,989	15,367	15,324	16,523
Oct	14,118	14,758	14,191	15,435	15,760	15,515	16,591
Nov	14,069	14,237	14,270	15,665	15,599	15,820	
Dec	14,017	14,166	14,327	15,608	15,511	16,039	

Source: Bank of Indonesia

*Table 4. Production, Supply and Distribution: Coffee*

Coffee, Green	2023/24		2024/25		2025/26	
Market Begin Year	Apr-23		Apr-24		Apr-25	
Indonesia	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
<b>Beginning Stocks</b>	500	500	480	480	657	713
<b>Arabica Production</b>	1,350	1,350	1,400	1,400	1,450	1,450
<b>Robusta Production</b>	6,800	6,800	9,300	9,300	9,800	11,000
<b>Other Production</b>	-	-				
<b>Total Production</b>	8,150	8,150	10,700	10,700	11,250	12,450
<b>Bean Imports</b>	940	940	557	631	400	350
<b>Roast &amp; Ground Imports</b>	20	20	20	17	20	15
<b>Soluble Imports</b>	1,000	1,000	950	966	1,000	900
<b>Total Imports</b>	1,960	1,960	1,527	1,614	1,420	1,265
<b>Total Supply</b>	10,610	10,610	12,707	12,794	13,327	14,428
<b>Bean Exports</b>	4,285	4,285	6,100	6,135	6,500	7,800
<b>Rst-Grnd Exp.</b>	70	70	70	66	70	70
<b>Soluble Exports</b>	1,000	1,000	1,080	1,080	1,000	1,000
<b>Total Exports</b>	5,355	5,355	7,250	7,281	7,570	8,870
<b>Rst,Ground Dom. Consum</b>	3,260	3,260	3,270	3,270	3,270	3,270
<b>Soluble Dom. Cons.</b>	1,515	1,515	1,530	1,530	1,540	1,540
<b>Domestic Consumption</b>	4,775	4,775	4,800	4,800	4,810	4,810
<b>Ending Stocks</b>	480	480	657	713	947	748
<b>Total Distribution</b>	10,610	10,610	12,707	12,794	13,327	14,428
	-	-	-	-	-	-

(1000 HA) ,(MILLION TREES) ,(1000 60 KG BAGS)

**Attachments:**

No Attachments