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Prepared By:

Approved By: Colby Branch

Report Highlights:

In Marketing Year (MY) 2026/2027, Colombian coffee production is forecast to increase 7.2 percent to 13.4 million bags green bean equivalent (GBE), mainly due to favorable dry conditions. This increase follows a transition from La Niña to a strong El Niño. Coffee plants can withstand water stress and elevated temperatures, especially when cultivated in soils with good moisture retention that prevent critical water deficit. Decreasing coffee prices are encouraging replanting and renovations. As a result of higher production, Colombian coffee exports are expected to increase to 13.4 million bags in MY 2026/2027. The United States remains the top export destination for Colombian coffee, followed by the European Union and Japan.

Commodities

Coffee, Green

Table 1. Colombia, Coffee, Green, Production, Supply and Distribution

Coffee, Green	**2024/2025**		**2025/2026**		**2026/2027**	
Market Year Begins	**Oct 2024**		**Oct 2025**		**Oct 2026**	
Colombia	**USDA Official**	**New Post**	**USDA Official**	**New Post**	**USDA Official**	**New Post**
Area Planted (1000 HA)	0	800	0	800	0	800
Area Harvested (1000 HA)	0	640	0	640	0	640
Bearing Trees (MILLION TREES)	0	3500	0	3500	0	3500
Non-Bearing Trees (MILLION TREES)	0	1000	0	1000	0	1000
Total Tree Population (MILLION TREES)	0	4500	0	4500	0	4500
Beginning Stocks (1000 60 KG BAGS)	668	668	918	922	0	866
Arabica Production (1000 60 KG BAGS)	14800	14800	13800	12500	0	13400
Robusta Production (1000 60 KG BAGS)	0	0	0	0	0	0
Other Production (1000 60 KG BAGS)	0	0	0	0	0	0
Total Production (1000 60 KG BAGS)	14800	14800	13800	12500	0	13400
Bean Imports (1000 60 KG BAGS)	785	785	900	2200	0	1800
Roast & Ground Imports (1000 60 KG BAGS)	5	4	5	4	0	4
Soluble Imports (1000 60 KG BAGS)	190	191	160	250	0	200
Total Imports (1000 60 KG BAGS)	980	980	1065	2454	0	2004
Total Supply (1000 60 KG BAGS)	16448	16448	15783	15876	0	16270
Bean Exports (1000 60 KG BAGS)	12200	12200	11500	11700	0	12200
Rst-Grnd Exp. (1000 60 KG BAGS)	220	220	200	160	0	200
Soluble Exports (1000 60 KG BAGS)	960	957	850	950	0	1000
Total Exports (1000 60 KG BAGS)	13380	13377	12550	12810	0	13400
Rst,Ground Dom. Consum (1000 60 KG BAGS)	1600	1600	1650	1600	0	1600
Soluble Dom. Cons. (1000 60 KG BAGS)	550	549	620	600	0	600
Domestic Consumption (1000 60 KG BAGS)	2150	2149	2270	2200	0	2200
Ending Stocks (1000 60 KG BAGS)	918	922	963	866	0	670
Total Distribution (1000 60 KG BAGS)	16448	16448	15783	15876	0	16270

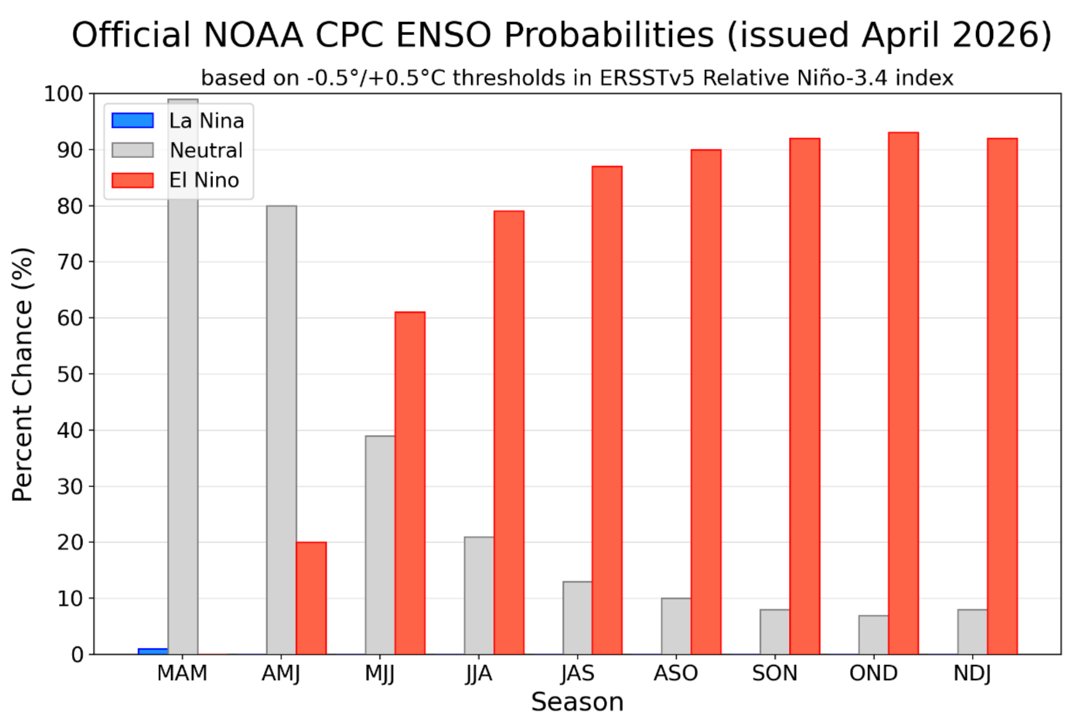
Data source: FAS historical data series: Post estimates for 2026/2027

Production

For marketing year (MY) 2026/2027, which runs from October 2026 to September 2027, post forecasts Colombian coffee production at 13.4 million bags green bean equivalent (GBE), a 7.2 percent increase compared to the revised estimate from the previous marketing year. Although international concerns exist about a strong El Niño (See Figure 1)—a phenomenon that occurs when an extensive swath of the equatorial Pacific Ocean warms above normal levels with temperature anomalies approaching 2.5 degrees Celsius and is more likely to occur after mid-2026—coffee plantations could improve production due to the plant's ability to withstand water stress and elevated temperatures, especially when cultivated in soils with good moisture retention that prevent critical water deficits.

Historically, coffee production performs better during El Niño events, unlike during La Niña. To achieve this production level, the Coffee growers Association (Fedecafe) has recommended several measures to producers, including proper fertilization (well-nourished plants better withstand drought effects), proper weed management to conserve soil moisture, and efficient harvesting that involves collecting all ripe and dried coffee beans to prevent coffee borer outbreaks that seek refuge within healthy beans. Fedecafe also recommends establishing temporary shade cover. The most recommended species for this purpose are *Cajanus cajan* and *Tephrosia*, a genus of flowering plants in the Fabaceae family.

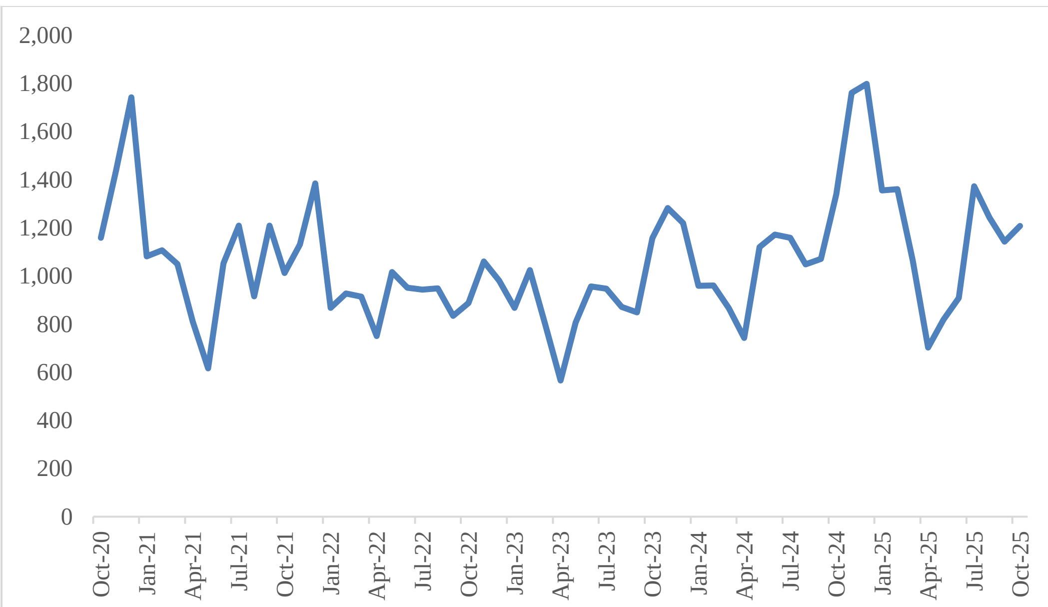
Figure 1: Official National Oceanic and Atmospheric CPC ENSO Probabilities



Source: National Oceanic and Atmospheric Administration (NOOA)

For MY 2025/2026, post estimates coffee production will decline 9.4 percent to 12.5 million bags GBE compared to previous estimate. This production performance is primarily due to excessive rainfall in the country's coffee-growing regions, which has adversely affected the phenological processes of flowering and the physiological development of the bean. Excessive precipitation inhibits coffee flowering because it interrupts the natural reproductive cycle, which requires a period of moderate water stress to induce gibberellin synthesis and flower formation. Continuous rainfall prevents the water deficit necessary for floral induction, causes premature flower abscission, and increases the incidence of coffee leaf rust (*Hemileia vastatrix*) due to high relative humidity conditions.

Figure 2. Monthly Green Coffee Production in Colombia (thousands of 60-kg bags)



Source: Colombian Coffee Producers Federation (Fedecafe)

While coffee leaf rust and coffee berry borer remain challenges in Colombia, overall infestation rates are relatively low due to the high adoption of disease-resistant varieties and good agronomic practices. The phytosanitary survey conducted by Cenicafé in January 2026 revealed that the national average incidence of coffee leaf rust (*Hemileia vastatrix*) reached 4.5%, higher than the 3.9% recorded in October 2025, though it remains within phytosanitary control levels. Coffee berry borer (*Hypothenemus hampei*) infestation reached a national prevalence of 1.6%, below the economic damage threshold of 2%.

To address production challenges and meet the demands of increasingly discerning consumers regarding quality, Cenicafé developed new varieties such as Castalia, Celestra, and Cocoon. These varieties, along with Castillo 2.0 and other options in the varietal portfolio, are oriented toward high sensory quality and phytosanitary resistance, offering distinctive organoleptic profiles for the specialty coffee market. Likewise, the National Federation of Coffee Growers announced the development of "Umbral,"[1] a new variety designed specifically to withstand high temperatures and adverse conditions. The main advantage of this variety is its resilience to heat stress and pest pressure, with the ability to be cultivated from 850 meters above sea level, an altitudinal range that was traditionally not suitable for coffee production.

Figure 3 .Colombia Monthly Average Coffee Prices (Thousand $COP per 125-kg Bag)

Source: Colombian Coffee Producers Federation (Fedecafe)

Colombian domestic coffee prices depend on the New York international price and the Colombian peso (COP) to U.S. dollar exchange rate. Since late 2025, prices have decreased as a result of global optimism regarding coffee production and a lower exchange rate. As of February 2026, coffee prices stood at COP 2,174,143 per 125 kg bag, 30 percent lower compared to the same period in the previous year (see Figure 3).

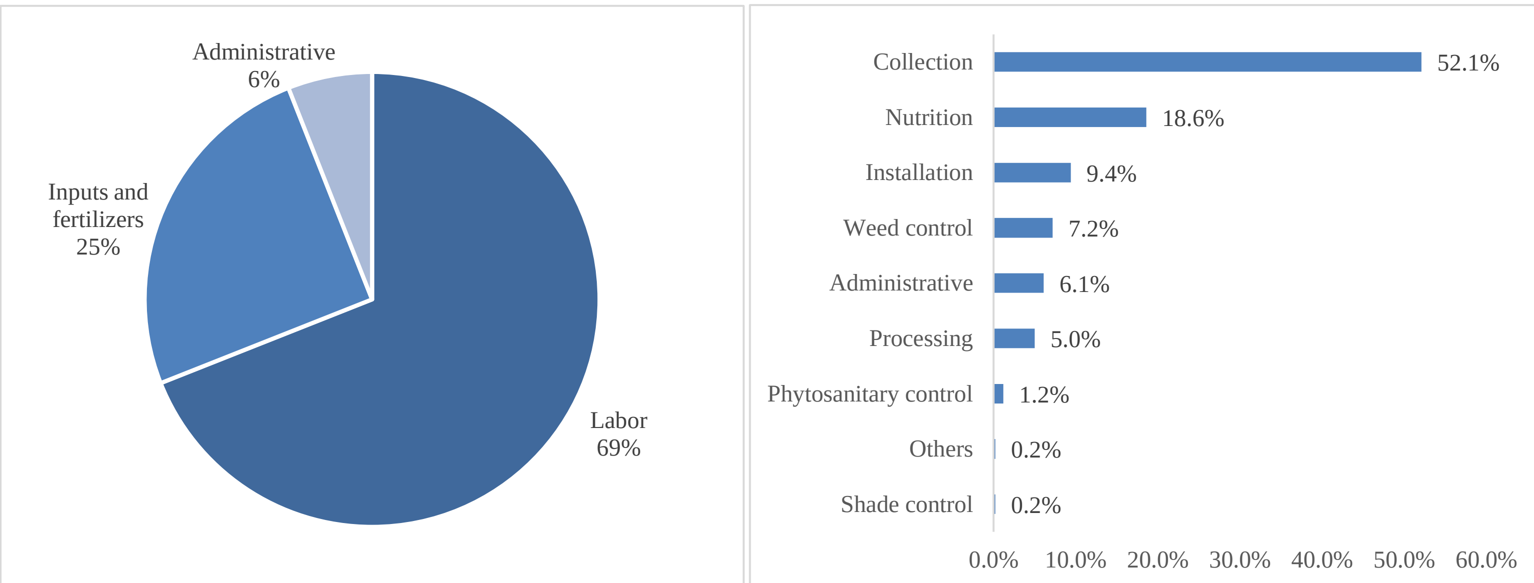
While lower prices reduce near-term revenue for producers, they create a strategic window for farm renovation. When prices are high, producers prioritize maximizing the harvest of existing trees and are reluctant to prune or remove branches that are still bearing fruit. Conversely, when prices are low, the opportunity cost of renovation declines and the longer-term payoff — higher yields from rejuvenated

[1] https://www.eltiempo.com/economia/sectores/tras-30-anos-de-investigaciones-federacion-de-cafeteros-creo-umbral-una-variedad-de-cafe-resistente-al-calor-3507201#:~:text=Tras%2030%20a%C3%B1os%20de%20investigaciones%2C%20Federaci%C3%B3n%20de,una%20variedad%20de%20caf%C3%A9%20resistente%20al%20calor.

stock — becomes more attractive relative to the diminished returns from aging plants. This counter-cyclical dynamic helps explain why Fedecafé is seeing increased replanting activity despite the current price environment and supports the projected recovery in production for MY 2026/2027.

Rising fertilizer costs[2] due to the Middle East conflict and increasing labor costs[3], because of increase of more than 20 percent of minimal wage—which account for nearly 70 percent of coffee production expenses (see Figure 4)—are growing concerns among coffee producers. Furthermore, labor shortages[4] present another challenge as workers abandon the countryside in search of more lucrative employment in urban areas.

Figure 4. Colombian Coffee Cost of Production Structure



Source: Colombian Coffee Producers Federation (Fedecafe)

To differentiate the origin of Colombian coffee and as a pricing strategy, Fedecafe has invested in equipment for the development of the Near-Infrared Spectroscopy (NIRS) technique, an optimal secondary analytical method for determining different quality parameters in agri-food sector products.

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[2] https://www.bbc.com/news/articles/cdj7dydl2lno

[3] https://www.infobae.com/colombia/2026/04/14/salario-minimo-de-2026-en-cuanto-queda-con-la-nueva-decision-del-consejo-de-estado-y-que-viene-para-los-trabajadores/

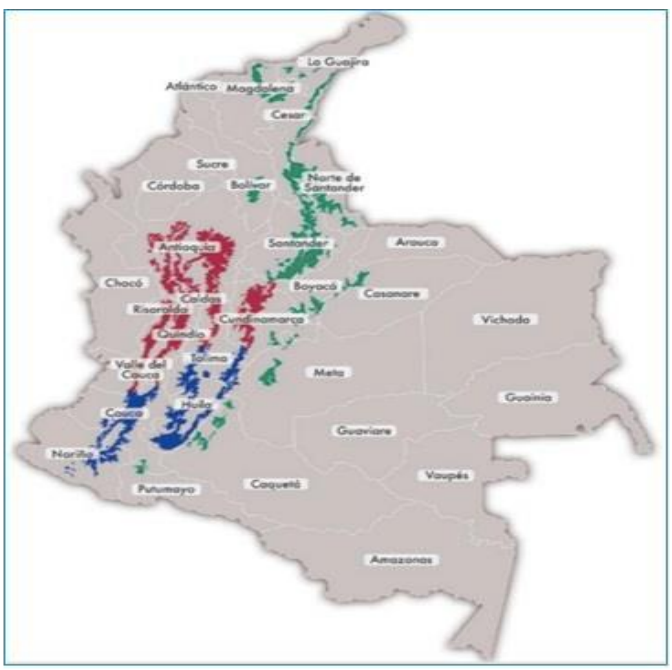
[4] https://www.theguardian.com/global-development/2026/mar/03/historic-harvests-and-sky-high-prices-so-why-cant-colombias-coffee-growers-hire-pickers

This technique allows rapid sample evaluation with minimal processing, while also achieving correlation of sample properties through various statistical tools (Vásquez et al., 2004).[5]

To seek higher farmgate prices, Colombian coffee producers favor the production of specialty grade coffee, utilizing sustainable certification models to receive improved market price differentials. Some of the most popular certification models in Colombia include Rainforest Alliance, Fairtrade, and Bird Friendly. According to Fedecafe, an estimated 40 percent of total Colombian coffee production receives significant price premiums for being specialty coffees.

An estimated 60 percent of coffee production in Colombia is produced on less than 5 hectares of land. In a coffee production calendar year, there are two distinct peak harvest periods: the primary harvest period extends from October to December, delineated by the blue regions in Figure 5 below. The secondary harvest period, referred to as the "mitaca" crop, occurs between April and June, indicated by the green regions. This secondary harvest is predominantly concentrated in the central coffee region of Colombia. The red region in the figure below has a harvest distributed year-round.

Figure 5: Colombian Coffee Producing Regions



Source: Coffee Research Center – CENICAFE, 2025

According to Fedecafe, in calendar year (CY) 2025 there were 684,698 hectares planted with “technified” young coffee crops (between 3 to 9 years old), meaning planted using modern techniques

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[5] https://fundacioncafecert.org/ciencia-tecnologia-e-innovacion-para-la-caficultura-colombiana-cenicafe/

such as the use of improved seeds. Fedecafe estimates that 145,380 hectares are planted with technified old crops (more than 9 years old), and 2,981 hectares are planted with traditional crops. The average age of coffee trees is 6.4 years. Notably, 87 percent of Colombia's coffee area is planted with rust-resistant varieties, a remarkable advancement from the 35 percent reported in 2010. While planting density increased to 5,365 trees per hectare in 2025, a record figure, productivity has been decreasing due to adverse weather conditions but remains above 20 bags GBE per hectare.

Consumption

In MY 2026/2027, coffee consumption is forecast to remain stable at 2.2 million bags GBE. While Colombia's economy is expected to experience moderate improvements, these improvements are offset by continued high coffee prices. The Central Bank of Colombia's January 2026 predictions suggest a more sustainable level of economic activity, with inflation rates expected to increase to 6.3 percent in 2026 and decrease to 3.7 percent in 2027.[6]. Projected economic growth is anticipated to reach 2.6 percent in 2026 and 1.6 percent in 2027.

For the current market year 2025/2026, no major changes are anticipated in Colombia's domestic coffee consumption, which is expected to remain at 2.2 million bags GBE. This lack of growth is attributed to the prevailing economic downturn and persistent high inflation rates, which are likely to impede significant consumption growth in the near term.

Fedecafe continues to promote domestic consumption through its marketing campaign called "Busca el Triángulo de la Calidad Café de Colombia" (translation: "Look for the Colombian Coffee Quality Triangle"). The triangular "Café de Colombia" logo is a seal that guarantees that the content of the package is 100 percent Colombian origin coffee. The use of the 100 percent "Café de Colombia" logo is subject to a brand license agreement and is linked to obtaining the authorization of use of the denomination or origin and the protected geographical indication. There are approximately 850 brands that have this triangular logo.

Colombia's per capita coffee consumption, estimated at 3.08 kg per capita, is relatively low in the region. Most coffee-growing countries consume more than 6 kg per capita. Despite growing interest in specialty coffee, most Colombian households prefer soluble coffee and low-cost coffee mixes.

To increase domestic consumption, the Government issued Law 2504 of 2025, which declares coffee the national beverage, promotes coffee consumption, and enables public entities to purchase national coffee. Additionally, the law allows for the inclusion of coffee in national food programs.

[6] https://www.banrep.gov.co/es/publicaciones-investigaciones/informe-politica-monetaria/enero-2026

Trade

Post forecasts coffee exports to increase by 4.6 percent from the previous year's revised estimate to 13.4 million bags for MY 2026/2027 due to forecasted higher production. In MY 2025/2026, revised Colombian coffee exports are up 2.1 percent to 12.8 million bag GBE.

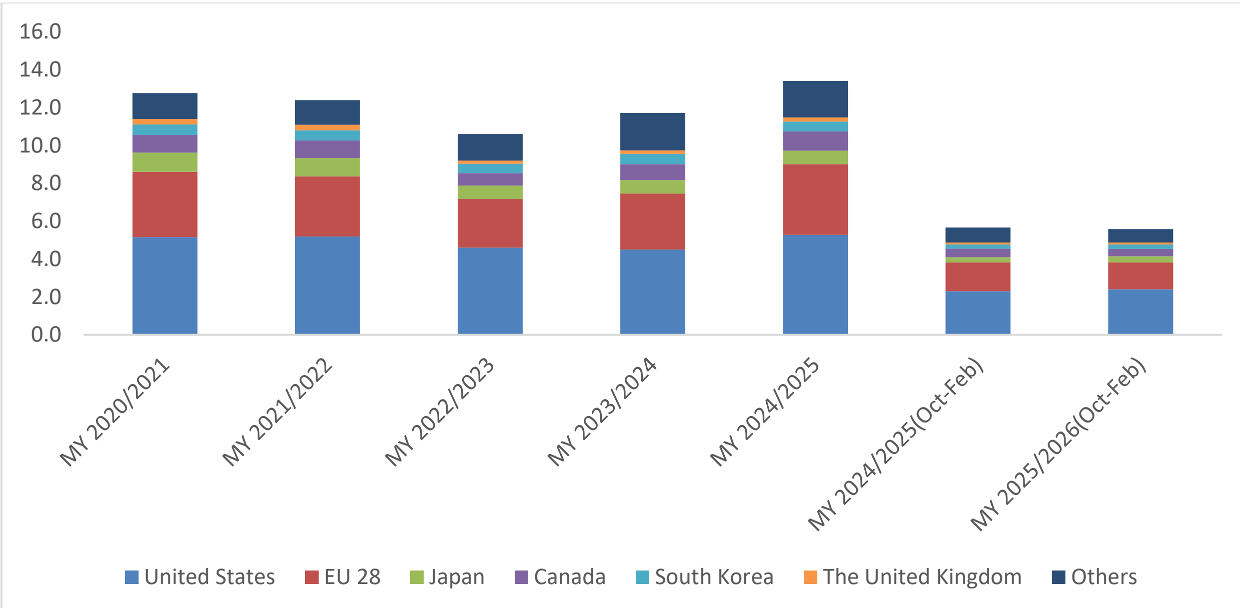
Colombian coffee is exported to more than 40 countries. The United States remains the major export destination, with a more than 40 percent market share, followed by the European Union, Canada, and Japan (see Figure 6). From October 2025 to February 2026, Colombian coffee exports to the United States, Japan, and South Korea have increased more than 6 percent year-on-year accounting for 50 percent of total exports.

In MY 2025/2026, Colombian coffee exports to the United States are expected to decline from the elevated levels recorded in the prior year. The MY 2024/2025 export volume represented a particularly strong year for U.S.-bound shipments, and the current year's lower production constrains the country's available exportable supply. Excessive rainfall has reduced the domestic harvest, leaving less coffee available for export regardless of destination. At the same time, rising production costs, driven by elevated fertilizer prices and a minimum wage increase of more than 20 percent, have compressed the margins that would otherwise support aggressive export contracting. Together, the supply shortfall and cost pressures have reduced Colombia's capacity to sustain prior-year export volumes to all major markets, including the United States.

On average, Fedecafe exports account for more than 20 percent of the total coffee exports, with the remaining 80 percent being handled by private companies. Procafecol, the company overseeing the Juan Valdez brand, recently signed a strategic partnership with Green Coffee Company Holdings to bolster its foothold in the North American market. This strategy aims to distribute Juan Valdez roasted coffee products across supermarkets in the United States and Canada, in addition to institutional retail channels operating within both countries.

Small-quantity "Courier" exports grow 51.4%. In January-September 2025, coffee exports in small quantities, under the modality of express shipments or postal traffic, reached 242,462 kg (including green, roasted, soluble, and extract), 51.4% more than in the same period of 2024 (160,157 kg). There were 12,757 shipments managed by 443 exporters, reflecting growing interest in direct commercialization and the diversification of export channels.

Figure 6. Colombian Coffee Exports by Destination (MY) (Million Bags GBE)

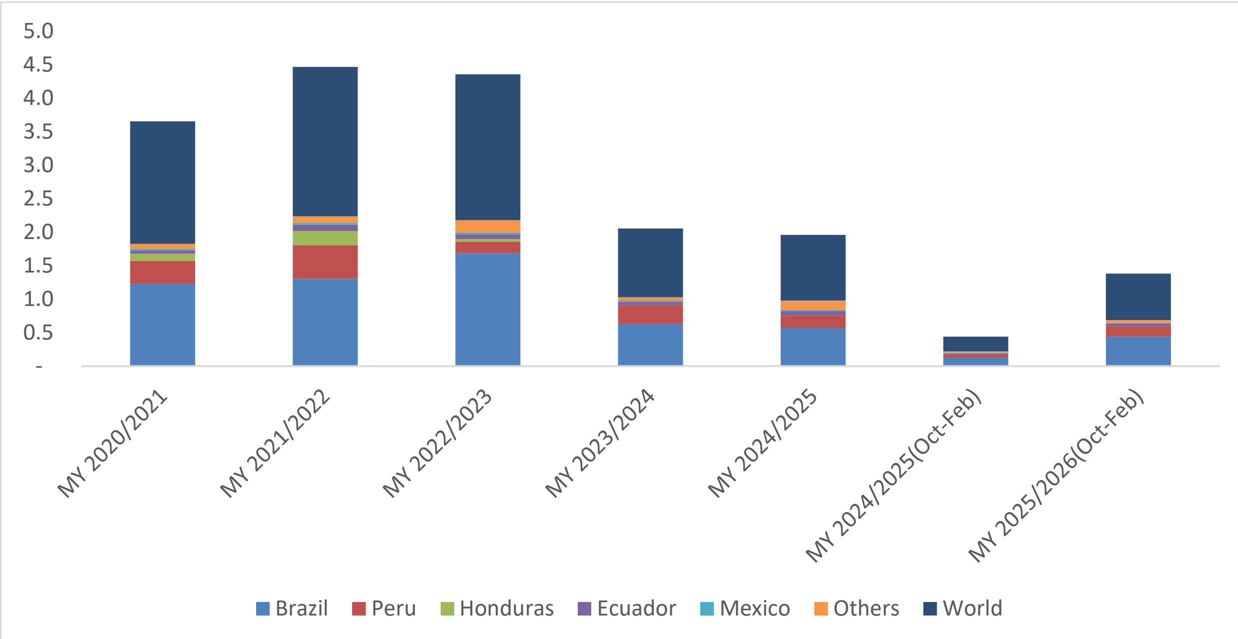


Source: Colombian Customs Authority (DIAN) and Trade Data Monitor

Coffee imports for MY 2026/2027 are forecast to decrease to 2.0 million bags GBE while Colombian coffee production will likely continue to prioritize export markets given persistently strong external demand and producer preference for higher export returns. For MY 2025/2026, revised coffee imports are estimated to increase to approximately 2.4 million bags GBE—roughly 2.5 times the 980,000 bags recorded in MY 2024/2025 and a 63 percent upward revision from last year's forecast. Excessive rainfall has significantly reduced domestic production, increasing the need for imports of lower-quality coffee, primarily from Brazil, Peru, and Ecuador, to compensate for the shortfall and fulfill soluble coffee export commitments. With domestic production forecast to recover to 13.4 million bags GBE in MY 2026/2027, import demand is projected to ease approximately 18 percent to 2.0 million bags GBE.

Brazil continues to be the top coffee supplier for Colombia followed by Peru and Ecuador. Imports are primarily used to meet the demand for soluble and lower quality coffees in the market. Colombia primarily imports green coffee (84.1 percent), followed by soluble coffee (15.7 percent), and roasted coffee (0.2 percent).

Figure 7. Colombia: Coffee Imports by Origin (MY) (Million Bags GBE)



Source: Colombian Customs Authority (DIAN) and Trade Data Monitor

Stocks

Ending stocks for MY 2026/2027 are forecast to decline 22.6 percent to 670,000 bags GBE, down from a revised 866,000 bags in MY 2025/2026. While higher production — up 7.2 percent year-on-year — adds supply to the balance sheet, the increase is more than offset by a projected 4.6 percent rise in exports and a reduction in imports as Colombia's domestic crop partially recovers. The net result is a meaningful drawdown in inventories, even in a year of improved production. There are no government or Fedecafé policies that incentivize large-scale stock carry-over.

Policy

With over 550,000 producers, Colombia's coffee sector has long been a cornerstone of its economy. Coffee is Colombia's third largest export. Fedecafe represents Colombia's coffee sector and manages its programs under a legal agreement with the Government of Colombia. This agreement is renewed by coffee producers every 10 years, and the current one is valid until July 2026.   Most programs are largely funded by the National Coffee Fund, which operates like a checkoff program, levying $0.06 per pound of coffee from producers to finance various activities. The majority of growers are affiliated with Fedecafe and receive access to Fedecafe's educational initiatives, technical training, assistance programs, and sales support services.

On April 5, 2024, Colombia's Coffee Price Stabilization Fund Committee1 established the Coffee Income Compensation Mechanism (MECIC-2024). In theory the MECIC-2024 initiative was created to offer direct financial support to coffee growers to mitigate economic difficulties resulting from either declining domestic coffee prices or rising production costs. Activation triggers when the rolling average of the domestic coffee price falls below the average production cost. In practice, the mechanism has not been activated yet as average coffee prices have remained above the reference production cost. Fedecafe will continue monitoring prices to enable this mechanism. As of December 2023, the Coffee Price Stabilization Fund held a reserve totaling $370 billion COP (approx. $95 million). More current data is not publicly available. More information about MECIC-2024 can be found in Fedecafe's website.

Colombian coffee producers are actively implementing traceability and related measures to comply with the European Union's regulation 2023/1115 on deforestation-free products, which targets coffee, among other products cultivated in-country. Colombia annually exports more than 20 percent of its coffee production to the European Union. Exporting countries have until December 30, 2025 for medium and large companies and June 30, 2026 for micro and small enterprises to meet the regulation. According to Fedecafe, nearly 90 percent of Colombian's coffee lots are already in compliance with the EU regulation but the remaining production remains under review. Fedecafe has been and continues to prepare its producers for the regulation's implementation by training them on the new legal requirements and creating a geospatial platform that allows users to map the coordinates of their farms.

Attachments:

No Attachments