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Report Highlights:

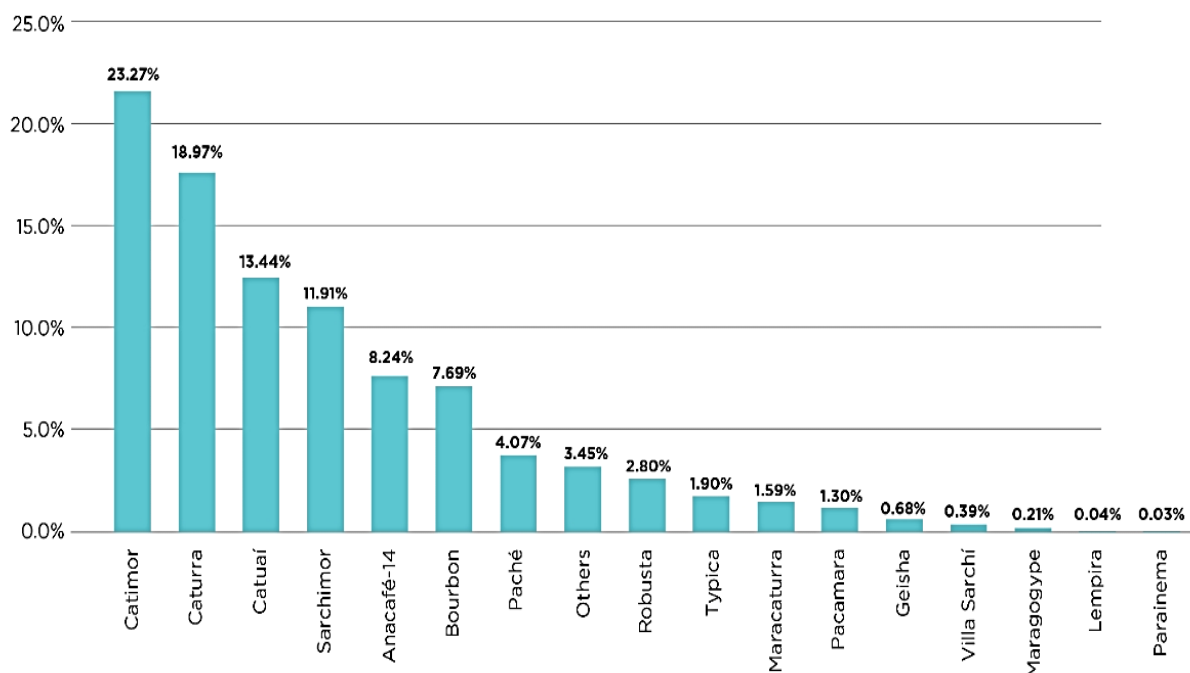
Guatemala's coffee production areas remain stable, with gradual increases in output as ongoing renovation efforts begin to show results. Full production is anticipated within the next two years, as recently planted trees complete their fruiting cycle. Roughly 30 percent of cultivated Arabica hybrids are rust-tolerant and have proven capable of producing high-quality coffee, as evidenced by the 83 percent of exports classified as strictly hard beans. The United States continues to be Guatemala's leading export market, while soluble coffee, largely imported, represents 60 percent of domestic consumption.

CROP AREA

In marketing year (MY) 2025/26 (October to September), Guatemala's coffee planted area is forecast to remain stable at 376,000 hectares, unchanged from MY 2023/24. Similarly, the harvest area is expected to hold steady at 338,000 hectares, according to a 2024 coffee map produced by ANACAFÉ, a Guatemalan national coffee association. The number of bearing coffee trees remains constant at 1.63 billion, complemented by an estimated 183 million non-bearing trees. Arabica continues to dominate production, accounting for approximately 98 percent of the total planted area, while Robusta represents the remaining 2 percent (see Figure 1). Within the Arabica category, an estimated 30 percent of the trees are rust-tolerant hybrid varieties.

Renovation efforts continue across the sector, bolstered by improved access to certified coffee plants. ANACAFÉ plays a critical role in this process, offering certified seeds for both Arabica and Robusta varieties. For MY 2024/25, Arabica seeds, including cultivars such as Anacafé 14, Anacafé 90, Cuscatleco, Catuai, Catucaí, Caturra, Marsellesa, Obatá, Parainema, and Sarchimor, were priced at \$4.55 per pound. Certified Robusta varieties, including Criollo and Nemaya, were available at \$5.20 per pound.

Figure 1
Guatemalan Coffee Varieties Planted Until MY 2024/25
(representation as a percentage of the total coffee area)



Source: ANACAFE, 2025

PRODUCTION

Guatemala's coffee production is projected to remain relatively stable between MY 2024/25 and 2025/26, with a marginal increase of less than one percent. Output for MY 2025/26 is forecast at 3.54 million 60-kilogram bags, continuing a gradual upward trend from 3.53 million bags in MY 2024/25 and surpassing the 3.47 million bags produced in MY 2023/24.

These modest gains are primarily attributed to Arabica coffee plantations, which have undergone extensive renovation following the coffee rust outbreak of the 2010s. Positive market signals, especially strong prices under the global benchmark Arabica coffee futures contract (C Contract) during MY 2024/25, have boosted grower confidence and encouraged continued investment in the sector. As a result, crop renovation efforts are beginning to show returns, with gradual but consistent recovery in production. The increasing adoption of hybrid varieties has played a pivotal role in this rebound, offering both improved disease resistance and strong cup quality.

Renovation practices closely follow the guidelines established by the National Coffee Association (ANACAFÉ), which prioritizes sustainable profitability and effective tissue management. ANACAFÉ's sustainable profitability program is structured around three core pillars, designed to support the transition of traditional coffee growers into entrepreneurial farm managers operating within a formal business model:

- **Technical Agronomics:** The adoption of integrated production systems that promote the consistent regeneration of new tissue annually, ensuring healthy plantations capable of sustained profitability.
- **Administrative Management:** Strategic resource allocation to guarantee timely access to input and labor, minimizing losses and avoiding inefficiencies that could erode profitability.
- **Financial Planning:** The application of sound business analysis to inform agronomic and administrative decisions, thereby maximizing returns in a sustainable and data-driven manner.

In July 2024, ANACAFE released the second edition of its [Sustainable Profits Guide](#) (in Spanish), outlining a comprehensive technical agronomic approach structured around five foundational pillars: (1) tissue management systems (TMS), (2) plant nutrition, (3) weed control, (4) preventive pest and disease management, and (5) shade regulation. Each pillar is supported by a detailed implementation manual and bolstered by ANACAFE's field-based technical assistance network. This support is delivered through a dedicated team of 210 coffee extension agents, who currently serve 663 producer organizations and 27,476 individual coffee growers. Of these, 1,937 producers have already adopted the sustainable profitability model promoted by the guide. The initiative reflects a long-term vision, recognizing that Guatemala's coffee industry remains rooted in the work of approximately 125,000 smallholder farmers (see Figure 2).

Figure 2
Segmentation of Coffee Producers by Number and by Production Volume

SEGMENTATION OF COFFEE PRODUCERS			
Farmer Size	Quantity produced (qq parchment)	Number of producers	Average productivity (qq parchment)
Large	More than 2001	354	16
Medium	201 a 2000	3,636	14
Small	Up to 200	121,192	13
TOTAL		125,182	

Source: ANACAFE, 2025

Smallholder farmers form the backbone of Guatemala’s coffee sector, accounting for 97 percent of all coffee producers and contributing 44 percent of the nation’s total coffee output. In contrast, medium-sized producers, just 3 percent of the farming population, are responsible for 31 percent of production, while large-scale producers, representing less than 1 percent of growers, generate 25 percent of the country’s total coffee volume. To facilitate technology transfer and capacity-building across the entire value chain, ANACAFE supported the [PROCAMPO](#) project (link in Spanish), which concluded in July 2024. One of its key outcomes was the establishment of [CERCAFE](#) (in Spanish), a regional training center aimed at advancing skills and knowledge throughout the coffee sector.

Favorable weather conditions during MY 2023/24 and MY 2024/25 significantly benefited crop performance. ANACAFE capitalized on this by organizing 1,297 training events that reached 29,099 coffee farmers, 95 percent of whom were smallholders. Meanwhile, weather monitoring systems continue to improve, with new meteorological stations added to the [122 stations](#) in operation (link in Spanish). These stations provide real-time data, readily accessible to producers for download and decision-making. Additionally, regular bulletins issued by Guatemala’s National Institute of Vulcanology and Meteorology (INSIVUMEH) equip farmers with timely forecasts, helping them anticipate and mitigate the impacts of adverse climate events.

INPUTS

To further support producers, ANACAFE operates an agricultural input program that leverages collective purchasing power to secure inputs at reduced prices. This initiative makes essential resources more accessible and affordable for farmers, particularly smallholders. The details of the 2025 inputs program are outlined in Table 1.

Table 1
ANACAFE's 2025 Inputs Program for Coffee Production in Guatemala

Input	Source	Product	Value
Amino acids	Egs company	Haf Brio	\$28.57/liter
		Viusid Agro	\$185.06/liter
Bio stimulants	Egs company	Culbac Plant Pinta	\$71.37/liter
Fertilizers	Cadelga Group company	Plus and Fastrac lines	\$0.80 - \$1.20 discount per 100 pounds
Foliar fertilizers	DISAGRO company	FertiCAFE initiation + Btec	\$0.80 discount per 100 pounds
		FertiCAFE reinforcement	\$0.80 discount per 100 pounds
		NITROXTEND + S	\$0.80 discount per 100 pounds
		FertiCAFE foliar	\$0.80 discount per 100 pounds
		Maxiboost	\$0.80 discount per 100 pounds
		Ultra KP	\$0.80 discount per 100 pounds
	La corneta, S.A.	Wuxall Ascofol	\$2.33/kilogram \$24.09/liter
		Calbosol	\$25.32/liter
	Egs company	Haf vita Mg	\$13.32/liter
		Haf Fullbox	\$17.15/liter
		Nitromyel 30	\$28.23/liter
		Myelfos	\$31.44/liter
		Molek	\$24.00/liter
		Myel Complex	\$33.66/liter
		Caixa	\$26.25/liter
		Solbor	\$25.25/liter
Pesticides	Syngenta	Alto 10 SL	\$59.74/liter
		Amistar Xtra	\$74.03/liter
		Dartañan	\$23.12/liter
Fungicides	BASF	Opera 18.3 SE	\$56.02
		Opus 12.5 SC	\$35.13
	BAYER	Esfera Max 53.5C	\$117.66/liter
Organic	Handelsa	Bio Regen Compost	5% discount
		Bio Regen OWS	5% discount
		Bio Fegen Huma Balance	5% discount
		Bio Regen sludge pellets	5% discount
		Fertum Booster Dry	5% discount
		Fertum Growth Dry	5% discount
Crop protection	La Corneta, S.A.	Extra copper 50 WP	\$15.58/kg
		Hidrostar 50 WP	\$1.56/kg
		Cupertine M 41 WP	\$1.49/kg

Source: ANACAFE, 2025

YIELDS

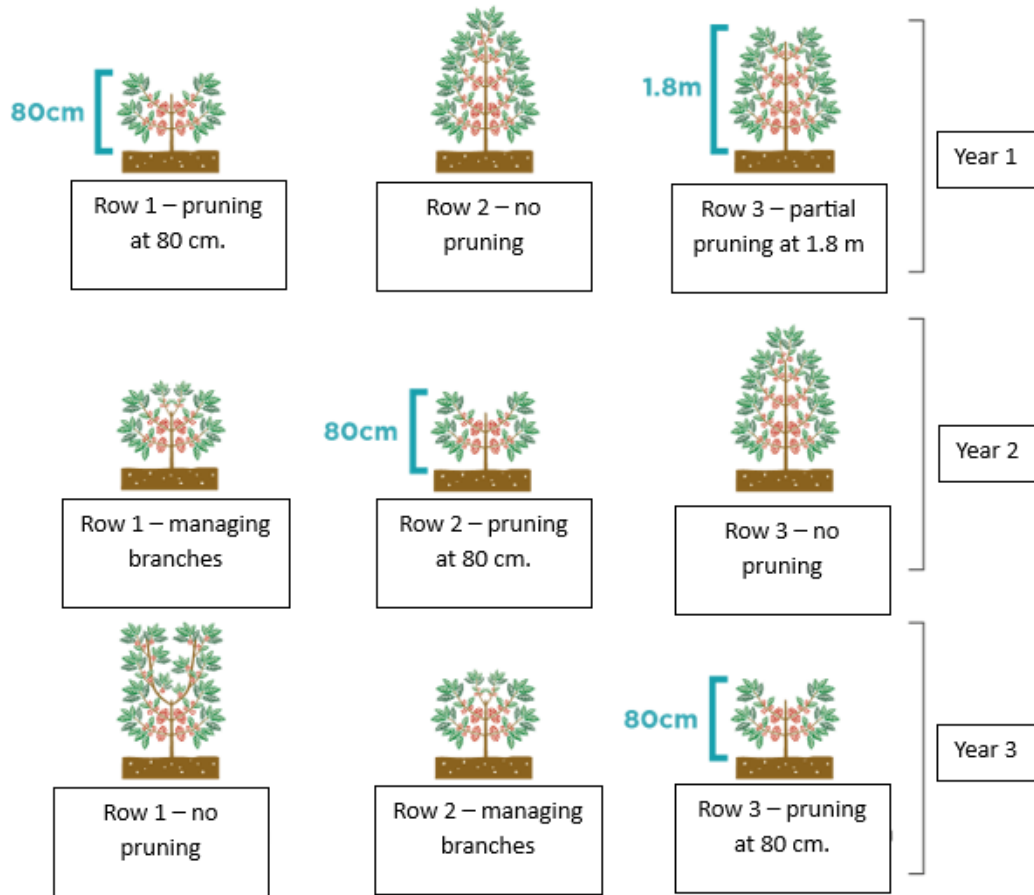
Yields for MY 2025/26 are projected to rise modestly to 10.47 60-kilogram bags per hectare, up from an estimated 10.43 bags per hectare in MY 2024/25. This upward trend follows a productive MY 2023/24, which closed at 10.26 bags per hectare, thanks in large part to favorable weather conditions, including adequate rainfall and low humidity during the dry season, which kept coffee leaf rust incidence below 10 percent. To support sustained yield improvements, ANACAFE continues to promote the implementation of its Tissue Management System (TMS), a cornerstone of long-term productivity and plantation profitability. TMS is vital to preserving the productive lifespan of coffee plants and ensuring their financial viability. It can be applied using one of two planting designs: groove or block. The following describes guidelines for maximizing yields through the pruning process.

Essential Pruning Guidelines for Optimal Coffee Plant Productivity:

- Tall varieties should be pruned at 50 cm, regardless of whether they are on a short (three-year) or long (five-year) cycle.
- Smaller varieties should be trimmed at 80 cm during the short cycle and at 50 cm during longer cycles.
- Pruning is non-negotiable; it is essential for stimulating branching, flowering, and fruiting, while also maintaining practical plant heights for harvesting.
- Pruning must be carried out immediately following harvest, and the designated pruning height should remain consistent.
- All trimmed plant tissue must be completely removed from the plant to avoid interference with regrowth.

The tissue management system, shown in Figure 3, outlines a structured pruning approach that promotes branching at an optimal height, typically around 80 cm. This facilitates more efficient tissue management, improves pest and disease monitoring, and simplifies harvesting. For farms able to adopt a five-year pruning cycle, the system allows for gradual, row-by-row pruning rotation. Alternatively, a three-year cycle can be implemented with similar height constraints. In both models, the consistent pruning pattern fosters healthy branching and fruit development. Regardless of the cycle chosen, careful post-pruning management of the branch axis is essential to sustain vigorous plant growth.

Figure 3
Tissue Management System for Coffee Profitability in Guatemala



Source: [ANACAFE, 2025](#) (in Spanish)

POLICY

Coffee stands as Guatemala's second most vital agricultural crop, contributing 6.3 percent to the nation's gross domestic product (GDP), following bananas and preceded by sugar and fats and oils. As the primary source of income for many, coffee cultivation spans nearly the entire country. In recognition of its importance, the Guatemalan government offers robust support to the coffee sector through ANACAFE, an entity established by public law under Legislative Decree 19-69. ANACAFE's role is to enhance coffee production, marketing, and exportation. In addition to its support, Guatemala has established a coffee trust fund, created by Legislative Decree 31-2001 and later amended by Decree 12-2013. This fund provides credit opportunities to coffee farmers, with a board composed of representatives from the Ministry of Agriculture,

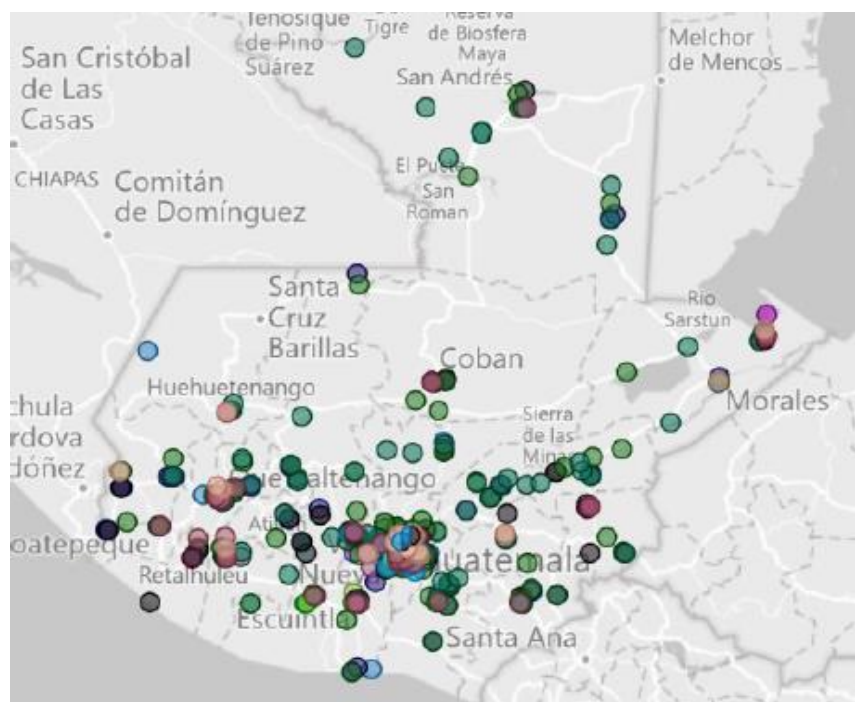
Ministry of Finance, Ministry of Economy, Ministry of Foreign Affairs, the Monetary Board, and ANACAFE.

ANACAFE offers financial guidance to coffee farmers seeking credit from the trust fund, which is administered by BANRURAL Bank. The trust fund currently manages approximately \$65 million, with an additional \$40 million expected to complete a total of \$100 million. At any given time, \$7 million is available for disbursement, revolving as farmers repay their loans. On average, the credits are distributed as follows: 84 percent to small-scale farmers, 15 percent to medium-scale farmers, and roughly 1 percent to large-scale farmers. Small and medium-scale farmers benefit from an annual interest rate of 2 percent, while large farmers face a 3 percent rate. Legislative Decree 4-2019 extended the trust fund's duration until October 23, 2051, further enhancing banking services for the coffee sector, including digital payment options. These measures serve to streamline the coffee value chain. Additionally, ANACAFE is responsible for issuing export licenses for Guatemalan coffee.

CONSUMPTION

Coffee consumption in Guatemala is projected to increase to 720,000 60-kilogram bags in MY 2025/26. This follows a forecast of 717,000 bags for MY 2024/25 and a total of 713,000 bags in MY 2023/24. The steady growth in domestic consumption is attributed to the continued expansion of coffee shops in urban areas (see Figure 4) and the availability of high-quality coffee in approximately 700 supermarkets nationwide. Urbanization is a contributing factor, as the urban population now exceeds the rural population, supporting greater demand for coffee-related products and services.

Figure 4
Restaurants and Coffee Shops in Guatemala



Source: CABI, 2025

High-end roasted and ground coffee currently accounts for approximately 40 percent of total coffee consumption in Guatemala, as a significant portion of the population continues to consume soluble coffee, most of which is imported. Soluble coffee remains popular due to its convenience and affordability. Notably, some well-known coffee chains, such as Barista, have introduced premium soluble coffee offerings (see Figure 5). Nonetheless, Nespresso machines remain the preferred choice in corporate settings, favored by both employees and clients.

Figure 5
High-end soluble/instant coffee in Guatemala



Source: Barista, 2025

STOCKS

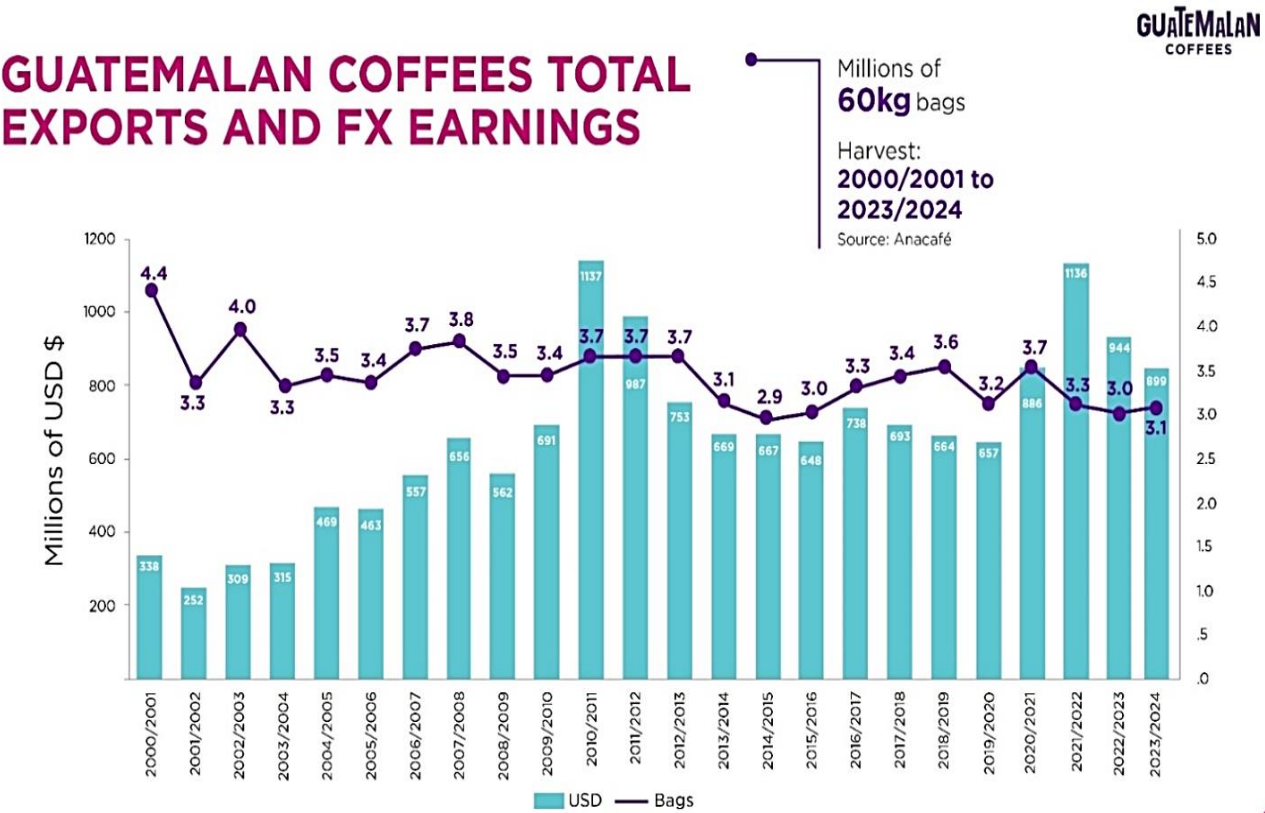
Coffee stocks in Guatemala are forecast at 10,000 60-kilogram bags for MY 2025/26, a 17 percent decrease from the estimated 12,000 bags in MY 2024/25. In MY 2023/24, ending stocks were recorded at 15,000 bags. These stocks are stored at coffee mills and warehouses and are allocated to meet both export and domestic market requirements.

TRADE

Figure 6 presents Guatemala's historical coffee export volumes and values from MY 2000/01 to MY 2023/24. While export volumes have remained relatively stable over the past decade, export

values have shown considerable fluctuations, reflecting changes in global coffee prices and market dynamics.

Figure 6
Guatemalan Historical Exports MY 2000/01 – MY 2023/24



Source: ANACAFE, 2025

Table 2 details Guatemala’s coffee exports for MY 2023/24. The United States remains the leading export destination, accounting for 41 percent of total exports, primarily green coffee, with a volume of 1.29 million 60-kilogram bags out of a total 3.2 million bags exported globally. Green coffee exports totaled 3.15 million 60-kg bags, 83 percent of which were classified as strictly hard beans. In addition, Guatemala exported 43,465 bags of soluble coffee and approximately 9,120 bags of roasted coffee. After the United States, the main export markets included Canada, Japan, Belgium, Italy, South Korea, and Germany. El Salvador was the top destination for both roasted and soluble coffee exports.

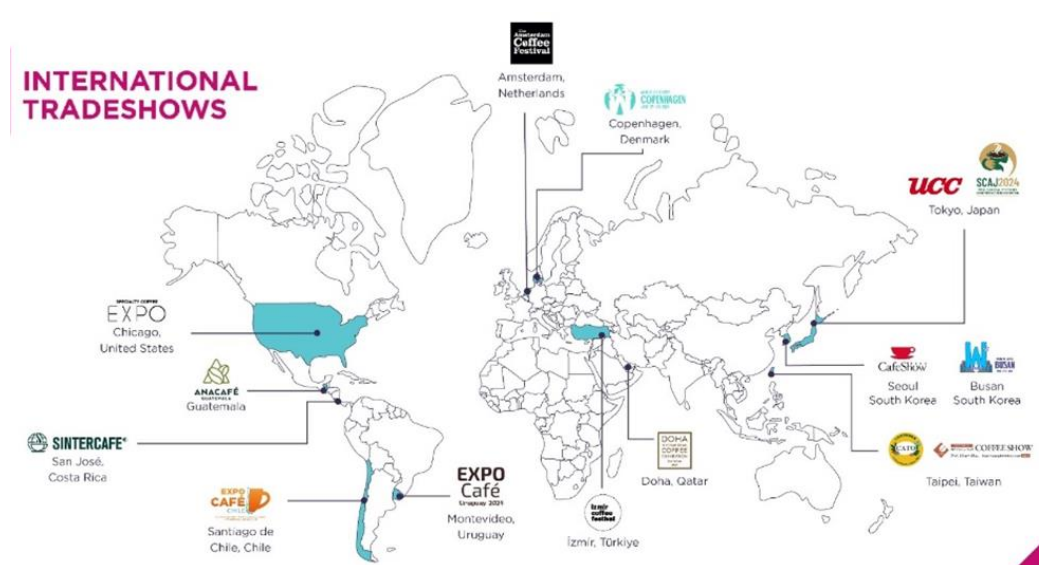
Table 2
Guatemalan Coffee Exports in MY 2023/24

	Green Bean (MT)		Roasted (GBE MT)		Soluble (GBE MT)
United States	1,294,133	El Salvador	3,710	El Salvador	37,368
Canada	359,787	United States	2,777	Honduras	2,833
Japan	308,377	Belgium	788	United States	1,850
Belgium	263,411	South Korea	380	Nicaragua	745
Italy	164,891	Costa Rica	322	Costa Rica	307
South Korea	146,983	Honduras	290	Panama	228
Germany	130,773	Belize	288	Italy	133
Taiwan	57,076	Panama	170		
Netherlands	48,396	Dominican Republic	156		
China	43,120	Japan	120		
Other	2,816,946	Other	119	Other	0
TOTAL	3,151,101	TOTAL	9,120	TOTAL	43,465
GRAND TOTAL	3,203,686				

Source: FAS Guatemala with TDM data. 2025

ANACAFE continues to play an active role in international coffee trade shows (see Figure 7) to showcase Guatemalan coffee. Coffees that qualify for these prestigious events go through a stringent local evaluation process. This begins with regional coffee classifications, where winners are selected, including those who will compete in the Cup of Excellence 2025.

Figure 7
Guatemala's participation in international coffee tradeshow



Source: ANACAFE, 2025

PRICE TABLE

Table 3 presents the local reference prices for washed Arabica coffee, including hard and strictly hard beans, that Guatemala exports.

Table 3
Reference Prices for Guatemala Coffee Exports
(Second Quarter of Calendar Year 2025, Closing on April 15)

DESCRIPTION	WASHED ARABICA		HARD		STRICTLY HARD	
Green Bean Price	Q2,508.77	/ \$325.81	Q2,554.96	/ \$331.81	Q2,578.06	/ \$334.81
Parchment Coffee Price	Q1,929.82 \$250.63	+75: Q2,004.82 -75: Q1,854.82	Q1,965.36/ \$255.24	+75: Q2,040.36 -75: Q1,890.36	Q1,983.13 \$257.55	+75: Q2,058.13 -75: Q1,908.13
Fruit Coffee Price	Q336.33 \$43.67	+25: Q361.33 -25: Q311.33	Q377.07 \$48.97	+25: Q402.07 -25: Q352.07	Q396.48 \$48.24	+25: Q421.48 -25: Q371.48

Source: [ANACAFE, Local Prices Reference, 2025](#) (in Spanish)

Production, Supply & Demand

Coffee, Green Market Year Begins Guatemala	2023/2024		2024/2025		2025/2026	
	Oct 2023		Oct 2024		Oct 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (1000 HA)	305	376	0	376	0	376
Area Harvested (1000 HA)	250	338	0	338	0	338
Bearing Trees (MILLION TREES)	1225	1628	0	1628	0	1628
Non-Bearing Trees (MILLION TREES)	125	183	0	183	0	183
Total Tree Population (MILLION TREES)	1350	1811	0	1811	0	1811
Beginning Stocks (1000 60 KG BAGS)	22	22	33	15	0	12
Arabica Production (1000 60 KG BAGS)	3300	3339	3300	3396	0	3410
Robusta Production (1000 60 KG BAGS)	120	130	120	130	0	130
Other Production (1000 60 KG BAGS)	0	0	0	0	0	0
Total Production (1000 60 KG BAGS)	3420	3469	3420	3526	0	3540
Bean Imports (1000 60 KG BAGS)	2	2	2	2	0	2
Roast & Ground Imports (1000 60 KG BAGS)	5	5	5	5	0	5
Soluble Imports (1000 60 KG BAGS)	355	433	370	435	0	437
Total Imports (1000 60 KG BAGS)	362	440	377	442	0	444
Total Supply (1000 60 KG BAGS)	3804	3931	3830	3983	0	3996
Bean Exports (1000 60 KG BAGS)	3150	3151	3200	3200	0	3210
Rst-Grnd Exp. (1000 60 KG BAGS)	4	9	5	9	0	9
Soluble Exports (1000 60 KG BAGS)	15	43	15	45	0	47
Total Exports (1000 60 KG BAGS)	3169	3203	3220	3254	0	3266
Rst,Ground Dom. Consum (1000 60 KG BAGS)	277	280	275	282	0	283
Soluble Dom. Cons. (1000 60 KG BAGS)	325	433	325	435	0	437
Domestic Consumption (1000 60 KG BAGS)	602	713	600	717	0	720
Ending Stocks (1000 60 KG BAGS)	33	15	10	12	0	10
Total Distribution (1000 60 KG BAGS)	3804	3931	3830	3983	0	3996
(1000 HA) ,(MILLION TREES) ,(1000 60 KG BAGS)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Attachments:

No Attachments