

Required Report: Required - Public Distribution

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Report Name: Coffee Annual

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Post: Mexico City

Report Category: Coffee

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Report Highlights:

Mexico's coffee production in marketing year (MY) 2026/2027 is forecast to increase 1 percent to 4.1 million green bean equivalent (GBE) due to expanded robusta production and improved management practices. Domestic coffee consumption is also projected to rise 1 percent, supported by increases in retail shops offering ready-to-drink coffee and consumer trends in specialty coffees. The United States remains the primary market for Mexican coffee exports.

Table 1. Mexico Coffee Production, Supply and Distribution

Coffee, Green Market Year Begins Mexico	2024/2025		2025/2026		2026/2027	
	Oct 2024		Oct 2025		Oct 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (1000 HA)	0	680	0	670	0	0
Area Harvested (1000 HA)	0	650	0	660	0	0
Bearing Trees (MILLION TREES)	0	0	0	0	0	0
Non-Bearing Trees (MILLION TREES)	0	0	0	0	0	0
Total Tree Population (MILLION TREES)	0	0	0	0	0	0
Beginning Stocks (1000 60 KG BAGS)	17	17	158	20	0	20
Arabica Production (1000 60 KG BAGS)	3530	3588	3540	3580	0	3575
Robusta Production (1000 60 KG BAGS)	340	340	363	500	0	560
Other Production (1000 60 KG BAGS)	0	0	0	0	0	0
Total Production (1000 60 KG BAGS)	3870	3928	3903	4080	0	4135
Bean Imports (1000 60 KG BAGS)	2331	2040	2000	2030	0	2030
Roast & Ground Imports (1000 60 KG BAGS)	97	98	100	100	0	100
Soluble Imports (1000 60 KG BAGS)	438	502	400	400	0	300
Total Imports (1000 60 KG BAGS)	2866	2640	2500	2530	0	2430
Total Supply (1000 60 KG BAGS)	6753	6585	6561	6630	0	6585
Bean Exports (1000 60 KG BAGS)	1870	1835	1800	1800	0	1750
Rst-Grnd Exp. (1000 60 KG BAGS)	10	15	50	30	0	30
Soluble Exports (1000 60 KG BAGS)	1615	1615	1500	1620	0	1630
Total Exports (1000 60 KG BAGS)	3495	3465	3350	3450	0	3410
Rst,Ground Dom. Consum (1000 60 KG BAGS)	1300	1300	1300	1340	0	1350
Soluble Dom. Cons. (1000 60 KG BAGS)	1800	1800	1800	1820	0	1820
Domestic Consumption (1000 60 KG BAGS)	3100	3100	3100	3160	0	3170
Ending Stocks (1000 60 KG BAGS)	158	20	111	20	0	5
Total Distribution (1000 60 KG BAGS)	6753	6585	6561	6630	0	6585
(1000 HA) ,(MILLION TREES) ,(1000 60 KG BAGS)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Production

MY 2026/27

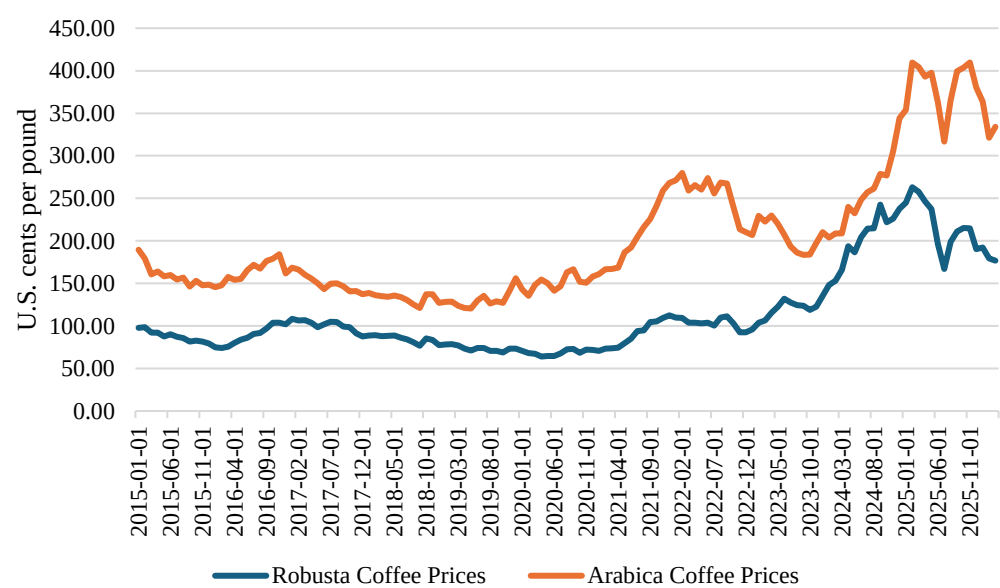
Mexico's coffee production for marketing year (MY) 2026/27 (October to September) is forecast at 4.1 million green bean equivalent (GBE), a 1 percent increase from the previous MY. This marginal growth is driven by sustained investment following two years of favorable market prices, regional initiatives to improve phytosanitary standards, and the continued growth of robusta production.

The three main coffee producing states in Mexico include Chiapas, Veracruz and Puebla, which together constitute more than 80 percent of national production. Mexican coffee production is constituted of 85 percent arabica and 15 percent robusta. Chiapas is forecasted to remain the top coffee producing state by volume in MY 2026/27. Puebla is forecast to have the highest yields (13 GBE/Ha), exceeding double the national average, due to favorable soil conditions, investments in resistant to leaf rust plants, and favorable infrastructure near major cities. Veracruz is forecast as the second highest yielding state with

an increase in harvested area, recovering from heavy rains that adversely affected robusta production in 2025.

Despite a decline from 2025 peaks, coffee prices in early 2026 continue to trend well above historical averages. According to the International Coffee Organization (ICO), as of March 2026, arabica prices averaged US\$3.31/lb, 40 percent above the 10-year average. This extended period of profitability has enabled producers in Chiapas, Veracruz, and Puebla to reinvest in farm management and increase plant density, input application, and quality control measures. The adoption of new varieties resistant to coffee leaf rust are forecast to continue to grow the sector, without expanding planted area. Following years of widespread coffee leaf rust (*Hemileia vastatrix*), producers have gradually transitioned towards the replanting of arabica rust resistant varieties. While these plants, currently in their early growth stages and have yet to fruit, these plants are expected to eventually lay the foundation for a more resilient and productive sector.

Figure 1. Monthly Global Coffee Prices, 2015-2026 (U.S. cents per pound)



Data source: [International Monetary Fund](#)

Figure 2: Arabica Coffee Farm in Huizilan, Puebla



Photo Source: FAS Mexico

Mexico is expanding robusta production due to its resilience against disease, ability to thrive in lower-altitude climates, and demand from large soluble coffee processors. According to industry contacts, large-scale processors have prioritized local sourcing, providing robusta farmers with contract agreements and price stability. The main producer of robusta is Chiapas, followed by Veracruz, Puebla and Oaxaca.

MY 2025/26

Production is estimated at 4 million GBE, a 4 percent increase over the previous MY. This growth is driven by the recovery from heat waves affecting robusta fields in MY 2024/25, increased investment in both robusta and arabica management, enhanced pre- and post-harvest practices, and selective harvesting to secure higher quality and market premiums.

Consumption

MY 2026/27

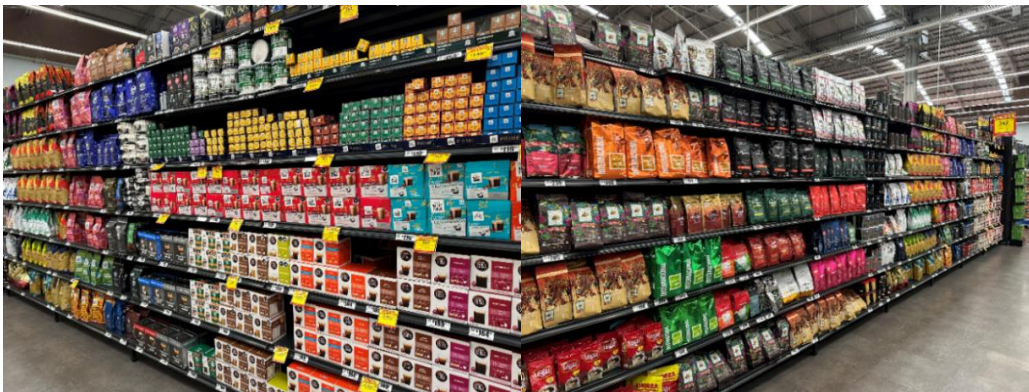
Coffee consumption is forecast at 3.2 million GBE, an increase of 1 percent from the previous MY. This slight increase is attributed to growth in retail coffee shops and chains and expanding consumption habits of premium coffee.

Convenience stores are increasing the availability of ready-to-drink (RTD) coffee. Caffenio, a coffee company in northern Mexico, has entered a partnership with OXXO, the largest chain of convenience stores in Mexico. Caffenio produces, roasts, and supplies coffee for nearly all OXXO stores in Mexico and Colombia, ensuring high quality, fast coffee service across the chain's network. Mexico is also Starbucks' largest market in Latin America and the Caribbean and its seventh largest globally. With an expansion of approximately 70 new stores annually, it plans to reach 1,000 stores in the country during 2026.

Mexico's major urban areas are also showing higher demand for high-quality, single-origin coffee. This has created new markets for premium coffee products in Mexico like capsules, cold brew, and specialty offerings (i.e., innovative processes, responsible sourcing practices, and unique varieties). Microlots are growing in popularity in Mexico in order to meet the demand for unique sensory profiles and limited editions. The presence of Mexican specialty coffees at international events is increasingly led by young entrepreneurs who represent the third or fourth generation of coffee-growing families. Online platforms in Mexico are increasing access to specialty coffee brands, single-origin beans, and subscription programs. This online channel enables small roasters to reach customers throughout the country, giving customers the ability to discover artisanal and responsibly sourced coffee products.

Roasted coffee has also been gaining popularity for its convenience without the loss of flavor. It includes traditional medium-roast blends to a growing number of specialty ground selections, and presentations. Its availability in supermarkets, online channels, and coffee shops has made ground coffee present as a pantry item in Mexican houses.

Figure 3: Coffee in Mexican Supermarkets



Capsules (left) and roasted variety coffee (right): Source FAS Mexico



Street vending coffee: Source FAS Mexico

While there is an increase in premium coffee offerings in Mexico, instant coffee remains the preferred choice in homes and on the go in Mexico. Coffee tricycles, common in Mexico City and other cities, are a street vending for a quick breakfast, offering café de olla (roasted coffee prepared with cinnamon and sweetened), soluble coffee, hot chocolate, and bread or sandwiches. They operate mainly in the mornings in busy areas and office districts, becoming an affordable and traditional alternative to coffee shops.

Despite growth in the premium sector, soluble coffee remains more practical and economical, covering approximately 60 percent of the consumption.

MY 2025/26

Coffee consumption is estimated at 3.2 million GBE, a 2 percent increase from the prior year driven by the growth in both roasted (3 percent) and soluble coffee (1 percent).

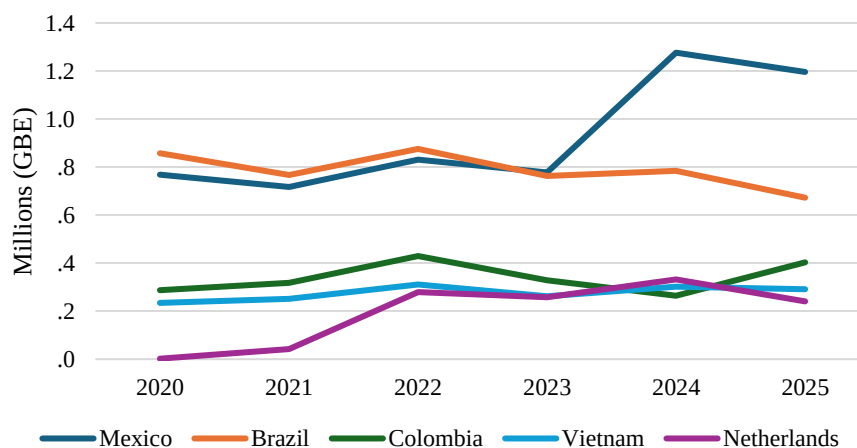
Trade

Exports

MY 2026/27

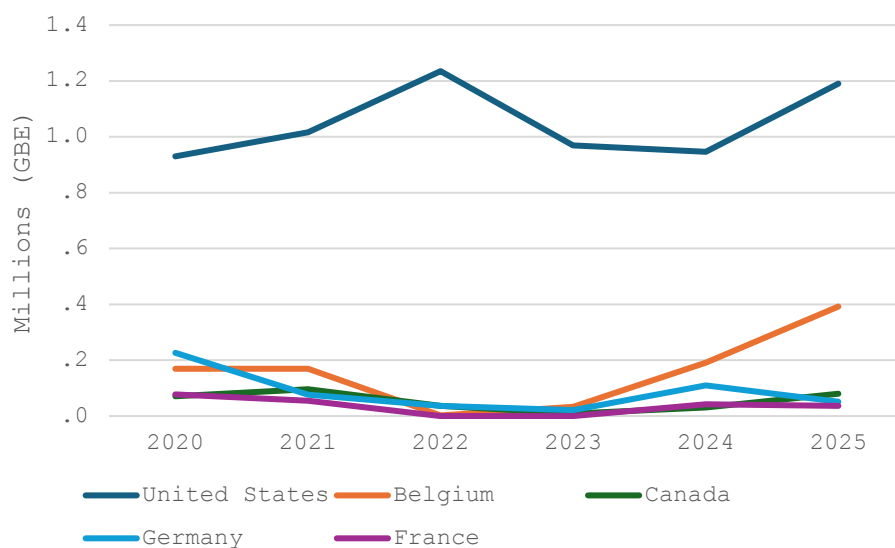
Coffee exports are forecast at 3.4 million GBE for MY 2026/27, a decrease of 1 percent from the previous MY as gains in production are expected to satisfy domestic consumption. The United States remains the primary destination market for Mexican coffee in all forms, with exports in 2025 reaching 2.6 million GBE. Mexico primarily exports green bean and soluble coffee to the United States.

Figure 4. U.S. Soluble Coffee Imports



Source: Trade Data Monitor, LLC

Figure 5. Mexican Green Bean Exports



Source: Trade Data Monitor, LLC

MY 2025/26

Exports for MY 2025/26 are estimated to remain stable at 3.4 million GBE due to comparable market drivers from the prior year and consistent demand from the United States.

Imports

MY 2026/27

Coffee imports are forecast at 2.4 million GBE, a decrease of 4 percent. This trend is driven by a forecasted rise in local robusta production, reducing the need for imported green beans. In 2025, the private sector announced various investment programs aimed at increasing coffee production capacity, as a result Mexico is substituting soluble coffee imports with domestic manufactured products.

MY 2025/26

Imports are estimated at 2.5 million GBE, a 4 percent decrease from the prior MY. Mexico's rise in production is expected to reduce the need for imports.

Policy

There are several coffee-specific producer support programs run by Mexico's Secretariat of Agriculture and Rural Development (SADER). Production for Wellbeing, managed by SADER, provides USD \$388 per producer per year as direct financial support. In 2026, a total of 181,364 producers participated, covering an area of 216,306 hectares. Fertilizers for Wellbeing, managed by SADER, delivered 53,542 tons of fertilizer to 151,253 producers in 2026, benefiting an area of 165,984 ha. This initiative seeks to enhance soil fertility and boost productivity among coffee growers and is expected to expand in scope for 2026. Café Bienestar, managed by the Secretariat of Wellbeing, aims to distribute affordable coffee through the country's network of Bienestar stores, which also offer staple goods such as maize and beans. The program buys coffee from producers in Chiapas, Oaxaca, Puebla, Veracruz, and Guerrero and processes it. This program is estimated to represent 3 to 4 percent of the total soluble coffee market.

Attachments:

No Attachments