

Required Report: Required - Public Distribution

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Report Name: Coffee Semi-annual

Country: Colombia

Post: Bogota

Report Category: Coffee

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Report Highlights:

FAS Bogota estimates marketing year (MY) 2024/2025 Colombian coffee production at 12.9 million bags green bean equivalent (GBE), 1.1 percent higher from the previous year revised figure, reflecting continued recovery from favorable weather conditions and producers adopting improved agronomic practices to mitigate climate change shocks. Exports are projected to reach 12 million bags GBE, while total coffee imports are estimated at 1.4 million bags GBE to reflect stable consumer demand. While the United States remains as Colombia's top coffee export market, China is rapidly becoming a significant importer of Colombian coffee.

Commodities

Coffee, Green

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

Coffee, Green Market Year Begins Colombia	2022/2023		2023/2024		2024/2025	
	Oct 2022		Oct 2023		Oct 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (1000 HA)	800	800	800	800	0	800
Area Harvested (1000 HA)	640	600	640	640	0	640
Bearing Trees (MILLION TREES)	3500	3500	3500	3500	0	3500
Non-Bearing Trees (MILLION TREES)	1000	1000	1000	1000	0	1000
Total Tree Population (MILLION TREES)	4500	4500	4500	4500	0	4500
Beginning Stocks (1000 60 KG BAGS)	760	760	885	885	705	678
Arabica Production (1000 60 KG BAGS)	10700	10700	12200	12760	12400	12900
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)	10700	10700	12200	12760	12400	12900
Bean Imports (1000 60 KG BAGS)	2000	2000	1445	900	1575	1200
Roast & Ground Imports (1000 60 KG BAGS)	5	5	5	3	5	5
Soluble Imports (1000 60 KG BAGS)	180	180	170	130	180	150
Total Imports (1000 60 KG BAGS)	2185	2185	1620	1033	1760	1355
Total Supply (1000 60 KG BAGS)	13645	13645	14705	14678	14865	14933
Bean Exports (1000 60 KG BAGS)	9450	9450	10600	10700	10800	10900
Rst-Grnd Exp. (1000 60 KG BAGS)	210	210	180	230	200	200
Soluble Exports (1000 60 KG BAGS)	950	950	1000	850	1000	900
Total Exports (1000 60 KG BAGS)	10610	10610	11780	11780	12000	12000
Rst, Ground Dom. Consum. (1000 60 KG BAGS)	1550	1550	1620	1620	1650	1650
Soluble Dom. Cons. (1000 60 KG BAGS)	600	600	600	610	625	620
Domestic Consumption (1000 60 KG BAGS)	2150	2150	2220	2220	2275	2250
Ending Stocks (1000 60 KG BAGS)	885	885	705	678	590	683
Total Distribution (1000 60 KG BAGS)	13645	13645	14705	14678	14865	14933

Data source: FAS historical data series. Post estimates for MY 2024/2025.

Production

FAS Bogota (Post) revises its MY 2024/2025 (October-September) Colombian coffee production estimate 4 percent higher to 12.9 million bags green bean equivalent (GBE), owing to continued production recovery from the previous marketing year. Coffee production has grown in the current MY on account of favorable weather conditions and the widescale adaptation of improved cultivation practices¹ that have had a positive impact on yields. In addition, recent gains in local prices have also had a positive impact for producer incomes, who are highly dependent on global coffee prices and favorable exchange rates.

¹ These practices include establishing agroforestry systems, weed and pest management, irrigation, soil management and conservation and complementary crops.

For MY 2023/2024, Post revises coffee production to 12.8 million bags GBE, 4.6 percent higher than the previous estimate. This increase is attributed to improved weather conditions near the end of La Niña phenomenon (Southern Oscillation), and the emergence of drier conditions and increased direct sunlight from El Niño, which boosted coffee flowering in key production areas. The addition of timely rainfall supported the bean filling stage, which has led to good coffee quality (improved average weight) and adequate yields (Figure 1). Although coffee production is expected to continue recovering, production growth remains modest as producers continue facing unpredictable rainfall and temperature shifts.

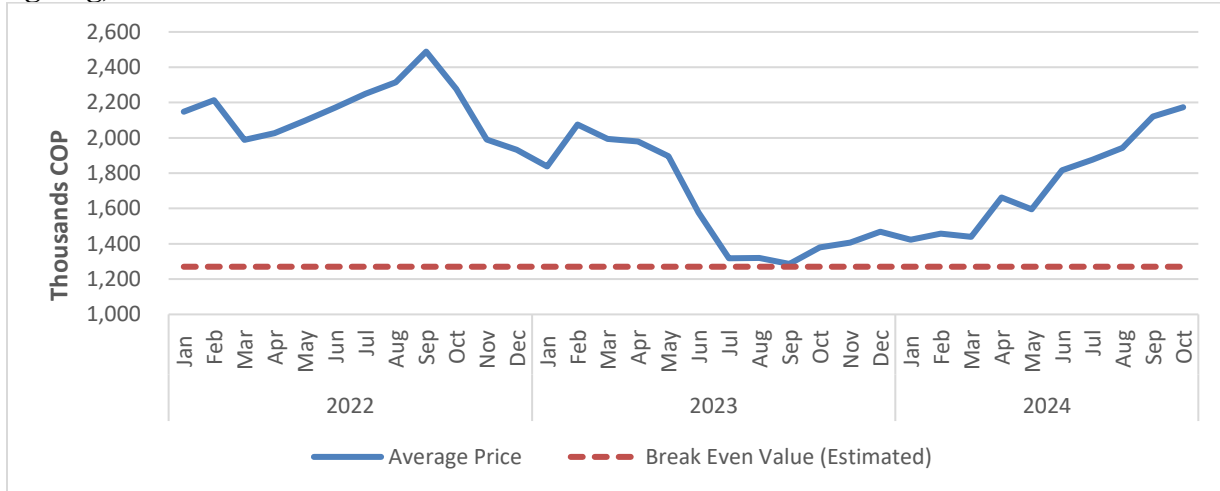
Figure 1. Coffee Trees During Flowering and Harvest, Timaná Municipality, Huila Department October 2024



Source: Coffee Committee of Huila Department, October 2024.

Colombian domestic prices depend on the New York international price (C Futures) and the Colombian peso (COP) exchange rate to the U.S. dollar. Since the second half of 2024, increasing international prices and depreciation of the Colombian peso have placed upward pressure on domestic Colombian coffee prices (Figure 2). Despite this short-term market trend, Colombian farmers continue to focus on high-quality, sustainably certified coffee to secure better producer prices via premiums and favorable market differentials. According to the Colombian Coffee Producers Federation (Fedecafe), more than 40 percent of Colombia’s coffee production earns a premium price due to its specialty grade.

Figure 2. Colombia Monthly Average Coffee Prices CY 2022-2024 (Thousands \$COP/125-kg Bag)

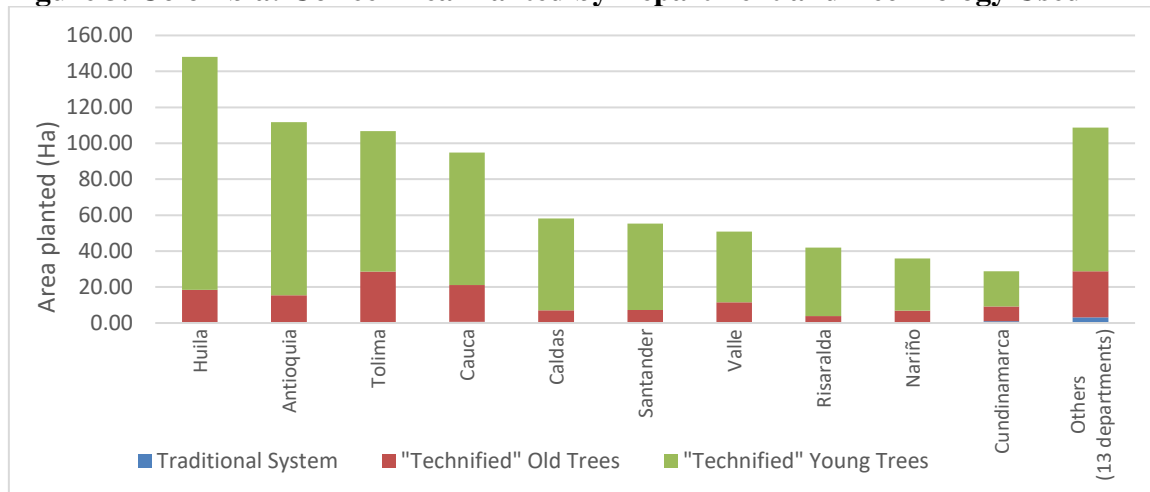


Data Source: Fedecafe.

Note: USD \$1 equals COP 4,482 as on November 13, 2024.

Fedecafe estimates there are approximately 840,000 hectares (ha) of coffee cultivated in Colombia by nearly 550,000 families, of which 95 percent produce on less than 5 ha of land yet are responsible for more than 60 percent of total coffee production. In calendar year (CY) 2023, there were approximately 682,972 ha of young trees (3-9 years old), where farmers apply modern growing practices known as “technified crops”.² In addition, approximately 152,950 ha included coffee varieties that are 9 years or older, and 5,430 ha deemed “traditional” coffee varieties. The average age of a Colombian coffee tree is 6.81 years. Notably, 87 percent of Colombia’s coffee area includes rust-resistant varieties, a significant advancement from the 35 percent rate reported in 2010.

Figure 3. Colombia: Coffee Area Planted by Department and Technology Used



Data Source: Fedecafe.

² Such production systems include the cultivation of improved coffee varieties, including trees resistant to coffee leaf rust.

Consumption

In MY 2024/2025, Post revises coffee consumption slightly lower from the official estimate to 2.3 million bags green bean equivalent. Nevertheless, this figure is 4 percent higher from the 2023/2024 estimate, supported by modest improvements in Colombia's economic projections. For MY 2023/2024, domestic consumption is expected to remain stable at 2.2 million bags GBE, based on limited economic growth and persistent inflation. Colombia's per capita coffee consumption stands at 2.8 kilograms (kg), a rate significantly lower than other coffee producing countries globally.³ Interest in consuming specialty coffee is on the rise, mostly due to young professionals with increased disposable incomes who will pay for premium coffee. Still, most Colombian households still prefer soluble coffee and other affordable coffee blends, which are often mixed with other origins.⁴

Trade

In MY 2024/2025, the Colombian coffee export forecast remains unchanged at 12 million bags GBE following a continued trend of local production recovery. The MY 2023/2024 coffee export figure also remains at 11.8 million bags GBE, aligning with current market realities. However, Post has adjusted the MY 2023/2024 coffee product export categories due to improved quality and higher than expected production volumes. Coffee bean exports for MY 2023/2024 are revised upward by 1 percent, while roasted coffee exports are 28 percent up compared to the previous estimate. Conversely, soluble coffee exports for MY 2023/2024 are adjusted 15 percent lower from the official estimate.

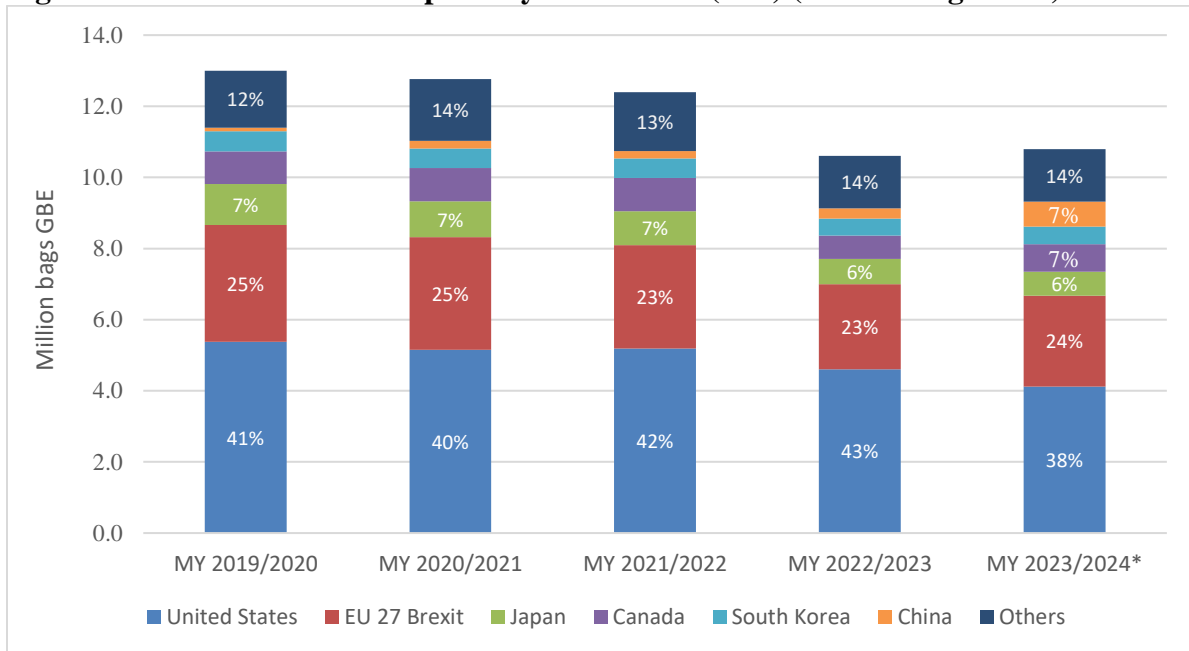
Fedecafe developed a new [logistics model](#) to permit freshly roasted, specialty coffee to be exported from Colombia direct to the United States within a 72 hour period. This system leverages the major air cargo route between Bogotá and Miami, and the model is utilized by major e-commerce platforms including Amazon and Walmart, allowing Colombian coffee to reach U.S. consumers while avoiding inventory storage. This initiative aims to increase profitability for Colombian coffee producers connecting them directly with international markets. Fedecafe expects this model will be expanded to Europe, Asia, and other regions in the first half of 2025.

Colombian coffee is exported to more than 40 countries. In MY 2023/2024, the United States remained the primary export destination, with nearly 40 percent market share, followed by the European Union (EU) (24 percent), Canada (7 percent), and China (7 percent) (Figure 4). Between October 2023 to August 2024, exports to China increased 246 percent year-on-year accounting for 7 percent of Colombia's total coffee exports, reaching more than 700,000 bags green bean equivalent.

³ Most coffee producing countries consume more than 6 kg per capita. See: "Per capita coffee consumption in Colombia reached 2.8 kilograms, an increase of 4%," [La Republica](#), published July 2, 2024.

⁴ Includes robusta and arabica coffees imported from Brazil and other origins.

Figure 4. Colombia: Coffee Exports by Destination (MY) (Million Bags GBE)



Data Source: Colombian Customs Authority (DIAN); Trade Data Monitor.

Note: MY 2023/2024 includes data from October 2023 to August 2024. Percentage indicates approximate market share.

Due to the EU’s new traceability and anti-deforestation standards for imports (starting January 2025), Colombia is increasingly focusing on consolidating alternative markets, including China. While Colombia has prepared for coffee exports to meet these requirements,⁵ the coffee sector will likely look for new markets to ensure stable export channels should EU market access face delays.

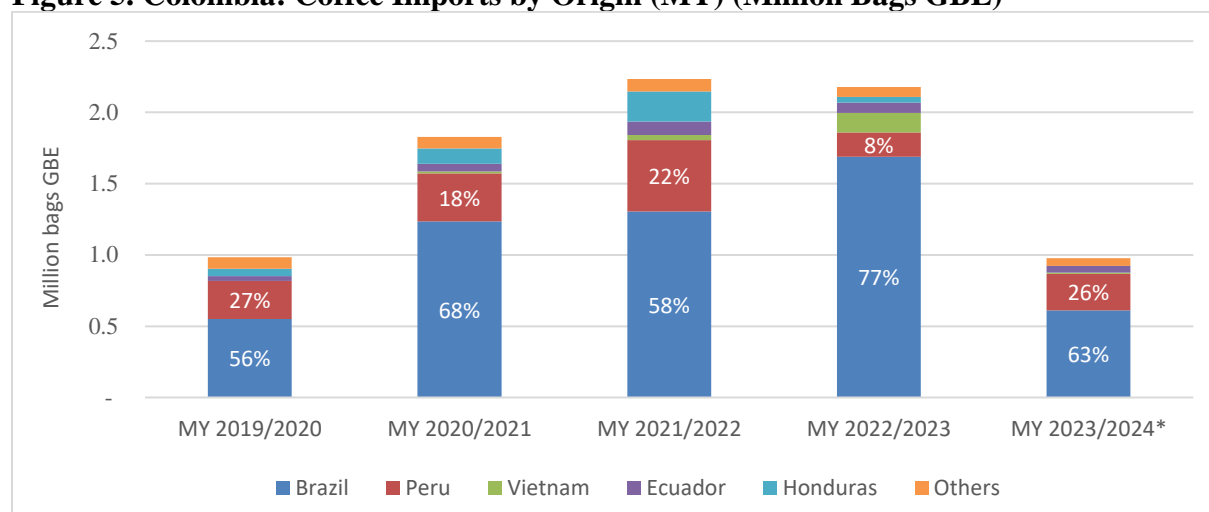
According to the National Coffee Exporters Association of Colombia, Colombia exports approximately 93 percent of its domestic coffee production, meaning that the country not only consumes locally produced coffee but also imports coffee products to meet domestic demand at affordable prices.

In MY 2024/2025, Post’s coffee import estimate is revised 23 percent lower from the official figure, totaling 1.4 million bags green bean equivalent. The estimate still reflects a 31 percent increase compared to the previous MY estimate (also revised). For MY 2023/2024, Colombia’s coffee imports are lowered to 1 million bags GBE to better align with market realities. This import figure is also attributed to recovering local production, rising international prices, and mostly stagnant consumption.

Brazil continues to be the top coffee supplier for Colombia. From October 2023 to August 2024, Brazil accounted for 63 percent of total Colombian imports, while Peru increased its market share from previous year to 25 percent (Figure 5). Colombia primarily imports green coffee (91 percent), followed by soluble coffee (8 percent), and roasted coffee products (1 percent).

⁵ See: “Fedecafé will launch a platform that will allow coffee exporters to access the georeferencing of coffee lots;” [Redagráfica](#), published September 3, 2024.

Figure 5. Colombia: Coffee Imports by Origin (MY) (Million Bags GBE)



Data Source: Colombian Customs Authority (DIAN), Trade Data Monitor.

Note: MY 2023/2024 includes data from October 2023 to August 2024. Percentage indicates market share.

Stocks

Marketing year 2024/2025 ending stocks are estimated at 683,000 bags GBE, with no major changes from the previous year estimate. There are no government or Fedecafe policies that support large scale carry-over stocks of coffee.

Policy

Fedecafe represents Colombia's coffee sector which operates under a legal agreement with the Colombian government. This agreement is adjusted and resigned every 10 years, with the current accord valid through 2026. Most policy and programs are largely funded by the National Coffee Fund, a checkoff program that levies a USD \$0.06/pound of coffee taxed from producers to finance various activities. Most coffee growers participate in Fedecafe's initiatives, benefiting from education, technical training, and sales support. Fedecafe offers extension services, providing technical assistance and processing technologies to enhance crop quality.

The Coffee Income Compensation Mechanism ([MECIC-2024](#)) was launched on April 5, 2024, as part of Colombia's Coffee Price Stabilization Fund (via the National Coffee Fund). This mechanism is designed to provide direct financial assistance to coffee growers struggling with either low domestic coffee prices or rising production costs. While the program was scheduled to operate between May 2-August 31, 2024, coffee prices rose in mid-2024, so the MECIC-2024 was not used.⁶

In response to dry conditions caused by El Niño, Colombia's Ministry of Agriculture launched the [Agricultural Inputs Access Fund \(FAIA\)](#) for coffee to target smallholder producers, with an estimated budget of COP \$54 billion (USD \$12 million). The initiative provided resources to help select growers (coffee farms 5 ha or less) secure agricultural inputs to mitigate the drought impacts. The program concluded at the end of August 2024 and allowed smallholders access to fertilizers and equipment that helped stabilize yields.

⁶ Further details on MECIC-2024 are available [at this link](#).

Attachments:

No Attachments