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Report Highlights:

The 2025/26 coffee harvest in Brazil is expected to see a significant decline in overall production, largely due to a 13 percent drop in arabica coffee production compared to the 2024/25 harvest. However, robusta coffee production is projected to increase by 19 percent, due to favorable weather. Coffee exports for MY 2025/26 are forecasted to decrease by 2.4 percent, to 40.75 million 60 kg bags, but should reach a record value, given the high prices of traded coffee. Meanwhile exports for MY 2024/25 have been slightly revised upward to 44.75 million bags. The decline in 2025 exports is attributed to Brazil's record export volumes in 2024, reduced coffee crop availability, which resulted in lower stocks, and new tariffs.

COFFEE
Production, Supply, and Distribution

Table 1
Production, Supply, and Distribution of Coffee

Coffee, Green	2023/2024		2024/2025		2024/2025	
Market Year Begins	Jul 2023		Jul 2024		Jul 2024	
Brazil	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Beginning Stocks (1000 60 Kg Bags)	4620	4620	2085	2085	640	440
Arabica Production (1000 60 Kg Bags)	44900	44900	43700	44000	40900	38000
Robusta Production (1000 60 Kg Bags)	21400	21400	21000	21000	24100	25000
Other Production (1000 60 Kg Bags)	0	0	0	0	0	0
Total Production (1000 60 Kg Bags)	66300	66300	64700	65000	65000	63000
Bean Imports (1000 60 Kg Bags)	0	0	0	0	0	0
Roast & Ground Imports (1000 60 Kg Bags)	75	75	75	75	75	75
Soluble Imports (1000 60 Kg Bags)	0	0	0	0	0	0
Total Imports (1000 60 Kg Bags)	75	75	75	75	75	75
Total Supply (1000 60 Kg Bags)	70995	70995	66860	67160	65715	63515
Bean Exports (1000 60 Kg Bags)	43100	43100	40500	41000	38000	37000
Rst-Grnd Exports (1000 60 Kg Bags)	50	50	50	50	50	50
Soluble Exports (1000 60 Kg Bags)	3600	3600	3700	3700	3700	3700
Total Exports (1000 60 Kg Bags)	46750	46750	44250	44750	41750	40750
Rst,Ground Dom. Consumption (1000 60 Kg Bags)	21200	21200	21000	21000	21300	21300
Soluble Dom. Cons. (1000 60 Kg Bags)	960	960	970	970	980	980
Domestic Consumption (1000 60 Kg Bags)	22160	22160	21970	21970	22280	22280
Ending Stocks (1000 60 Kg Bags)	2085	2085	640	440	1685	485
Total Distribution (1000 60 Kg Bags)	70995	70995	66860	67160	65715	63515
(1000 HA), (1000 60 KG BAGS)						

Brazil continues to experience erratic and unpredictable weather patterns, characterized by drought, insufficient rainfall, and cold fronts that can lead to frost and hail on coffee farms in the main producing areas. As a result, a significant reduction in arabica coffee production is expected for the 2025/26 Brazilian harvest.

In contrast, robusta/conilon crops in key producing states such as Espírito Santo and Bahia thrived due to favorable weather conditions, with no reported yield losses. Additionally, the increased use of irrigation raised expectations for robusta production in 2025/26.

Coffee Production

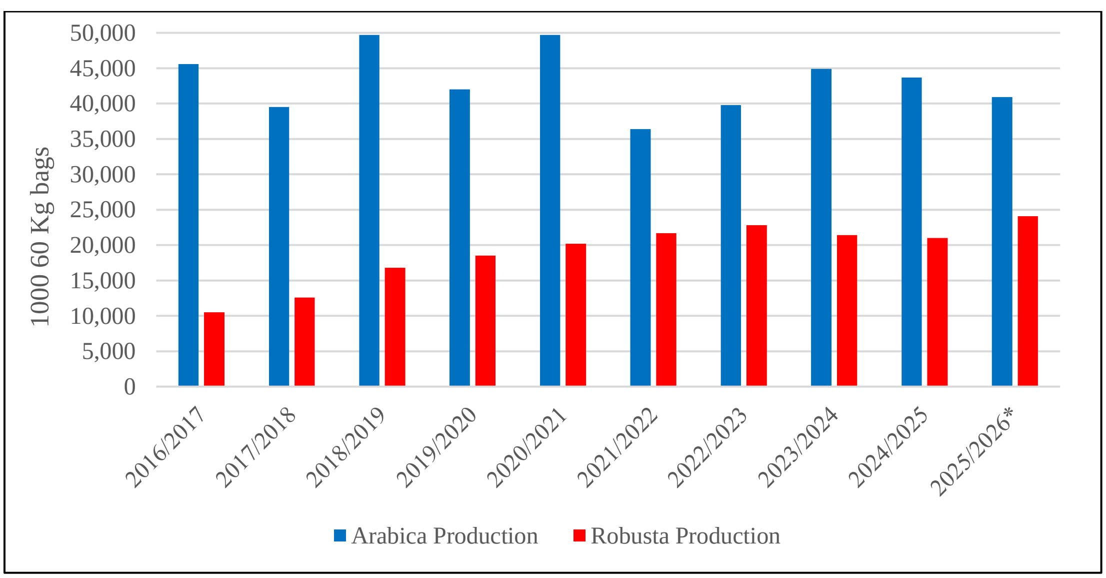
Post revised its forecast for total Brazilian coffee production for marketing year (MY) 2025/26 (July-June) to 63 million bags (60 kilograms per bag), green bean equivalent, 3 percent lower than the estimate for MY 2024/25, set at 65 million bags (60 kilograms per bag). Adverse weather conditions during the early stages of coffee crop development in 2025 are anticipated to impact yields for the 2025/26 harvest.

The overall production for the 2025/26 harvest is expected to decline significantly, primarily due to a more than 13 percent drop in arabica coffee production, which is the predominant variety grown in Brazil. In contrast, robusta/conilon coffee production is projected to increase by 19 percent during the same period, benefiting from favorable weather conditions.

For MY 2025/26 (July-June), Post revised its arabica production to 38 million bags (60 kilograms per bag), down from the original forecast of 40.9 million bags. The decline in arabica coffee production is attributed to below-average rainfall in key producing regions, particularly during the flowering stage, which compromised the potential yield of the harvest. In 2025, despite promising rainfall in January and early February, a prolonged drought in Minas Gerais and São Paulo negatively impacted yields.

Post revised its robusta production for MY 2025/26 to 25 million bags (60 kilograms per bag), 19 percent higher than the 21 million bags projected for the 2024/25 harvest. The increase in robusta production is primarily attributed to favorable weather conditions, which enabled effective crop development, especially in Espírito Santo and Bahia. Post contacts indicate that higher coffee prices over the past few years have allowed farmers to invest more production, suggesting a positive outlook for the 2026/27 harvest. However, the next cycle will heavily depend on rainfall levels in the coming months, as adequate rainfall is crucial for coffee flowering.

Figure 1
Brazilian Coffee Production (Million 60 kg bags)



Data Source: *USDA/Brasilia Office of Agricultural Affairs (OAA); Table Post Brasilia*

Brazil's National Supply Company (CONAB) revised up its estimated total coffee production for the 2025/26 harvest at 55.3 million bags, a 2 percent increase compared to 2024, led by a strong increase in robusta production. However, after a long period of drought and high temperatures, CONAB estimated arabica production at 35.2 million bags, an 11 percent decrease from the previous harvest, while robusta production is estimated at 20.1 million bags, a 37 percent increase from 2024, driven by better weather conditions during crop development.

The Brazilian Institute of Geography and Statistics (IBGE) estimated Brazil's 2025/26 coffee harvest at 56.8 million 60-kg bags, a 0.6 percent decrease compared to 2024. The arabica coffee harvest was projected at 37 million, a 2 percent decrease from the previous harvest. Robusta coffee was estimated at a record volume of 19.8 million bags, 16 percent higher than the previous year. According to IBGE, this growth is attributed to the strong profitability of robusta coffee, encouraging producers to invest more in crop management and fertilization, thereby enhancing productivity, alongside favorable weather conditions.

It is important to note that CONAB and IBGE, though official Brazilian government agencies, use different methodologies to forecast coffee production and have historically provided lower estimates compared to Post.

Harvest Outlook

The 2025/26 Brazilian coffee harvest started slowly, with robusta varieties harvested in April and arabica in May, concluding in October. Minas Gerais remains the leading coffee-producing state in the country, followed by Espírito Santo, São Paulo, Bahia, and Rondônia.

High temperatures and water shortages from February to May impacted coffee plants during the granulation phase, resulting in beans that are of normal size but lighter weight. Consequently, producers will require more beans to fill a 60-kilogram bag. Furthermore, the rains that affected some producing regions in June and July could negatively impact yields in the 2026 harvest, as flower buds developed earlier than usual.

Table 2
Brazilian Coffee Production by State (Million 60 kg bags)

State/Variety	MY 2021/22	MY 2022/23	MY 2023/24	MY 2024/25	MY 2025/26
Minas Gerais	**24.5**	**27.3**	**33.1**	**31.6**	**26.7**
Southwest	13.0	14.4	18.0	17.0	14.3
Central-western	5.0	5.0	7.4	5.8	5.3
Southeast	6.5	7.9	7.7	8.8	7.1
Espirito Santo	**19.4**	**21.0**	**18.0**	**18.5**	**21.2**
Arabica	3.7	4.4	3.0	3.8	3.2
Robusta	15.7	16.6	15.0	14.7	18.0
São Paulo	**4.6**	**4.8**	**5.6**	**5.3**	**4.8**

Paraná	**1.0**	**0.7**	**0.9**	**0.7**	**0.7**
Others	**8.6**	**8.8**	**8.7**	**8.9**	**9.6**
Arabica	2.6	2.6	2.3	2.6	2.6
Robusta	6.0	6.2	6.4	6.3	7.0
Total	**58.1**	**62.6**	**66.3**	**65.0**	**63.0**
Arabica	36.4	39.8	44.9	44.0	38.0
Robusta	21.7	22.8	21.4	21.0	25.0

Data Source: *USDA/Brasilia Office of Agricultural Affairs (OAA); Table Post Brasilia*

ARABICA

High temperatures and low precipitation in the main regions of Minas Gerais have negatively impacted crop yields. Additionally, the decline of older crops has diminished the productive capacity of trees in several areas, resulting in an increased need for pruning and renewal.

Figure 2
Main Producing States of Arabica Coffee in Brazil

Data Source*: USDA/Brasilia Office of Agricultural Affairs (OAA); Figure Post Brasilia*

- **Minas Gerais:** The largest coffee-producing state, which accounts for over 70 percent of the country's arabica production, faced challenges such as heat waves, droughts, and irregular rainfall, particularly in the months leading up to the flowering stage. These adverse weather conditions significantly affected coffee crops, resulting in lower yields. According to the state's Secretariat of

Agriculture, Livestock, and Food Supply, the 2025 harvest is expected to be 11 percent lower than that of the previous cycle. This decline is primarily attributed to the unfavorable weather that impacted arabica coffee production during critical growing periods.

- **São Paulo**: The state, which produces only arabica coffee, has faced challenges due to adverse weather conditions that have impacted production. Arabica coffee does not tolerate temperatures above 89 degrees Fahrenheit (32º Celsius), which disrupts the plant's metabolism and photosynthetic capacity. After rain returns, it takes several days for the plant to reset to its normal metabolic state, which affects the development of leaves and branches as well as the formation of future fruits. Due to the lack of rain during the development phase in the state's coffee crops, the expected yield for the 2026 harvest is likely to be significantly lower than potential.

  The Technical and Economic Department of the Federation of Agriculture and Livestock of São Paulo (FAESP) conducted a survey in October 2025 with rural producers across the state, providing an overview of expectations for the 2025/26 harvest. The survey highlights an environment characterized by economic uncertainty, high production costs, and limited access to expensive rural credit. Seventy-three percent of coffee growers intend to invest this harvest, primarily in infrastructure and equipment. While 64 percent of all participants report having no outstanding debts from the previous harvest, 36 percent are still dealing with debts, with the majority (80%) owed to financial institutions.

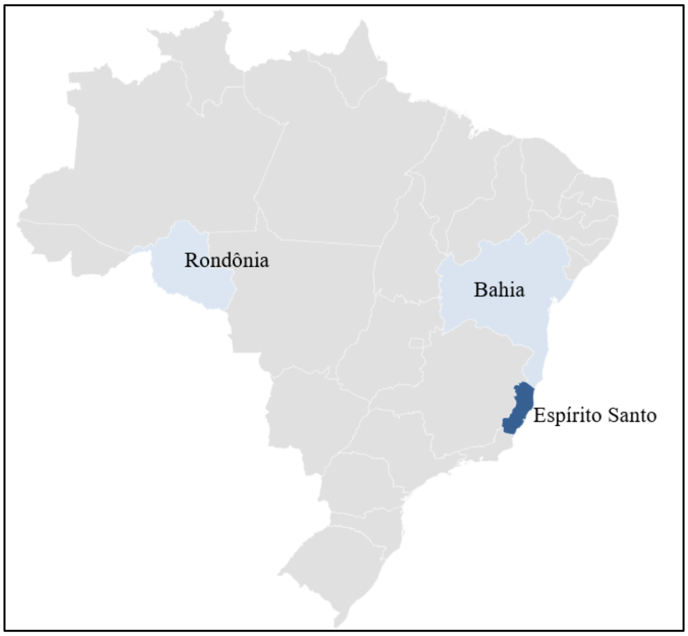
- **Espírito Santo:** The state is Brazil's third-largest producer of arabica coffee, with over 95 percent of crops grown without irrigation in the southern region. For the 2025/26 harvest, the state is anticipated to experience a decline of over 15 percent in arabica production compared to the previous season. This decrease is attributed to a reduction in the area under cultivation, due to high pruning rates and adverse weather, and lower yields.

ROBUSTA/CONILON

Robusta coffee plants are less sensitive to heat and require an environment of around 72°F to 79°F (22°C to 26°C). The plant is also less susceptible to pests and disease, requiring less fertilizer and pesticides, which traditionally makes it cheaper to plant than arabica coffee trees.

With expectations of record-breaking robusta production in 2025/26, Post contacts indicated that many producers in Espírito Santo and Bahia were preparing to undergo natural production adjustments, such as pruning and trimming of crops. This scenario will likely negatively impact the 2026/27 harvest until the plants recover.

Figure 3
Main Producing States of Robusta/Conilon Coffee in Brazil



Data Source*: USDA/Brasilia Office of Agricultural Affairs (OAA); Figure Post Brasilia*

- **Espírito Santo:** The state is the largest producer of robusta coffee in Brazil, accounting for nearly 70 percent of the country's production and 20 percent of the world's robusta coffee supply. According to data from the Espírito Santo Institute of Research, Technical Assistance, and Rural Extension (INCAPER), approximately 70 percent of robusta crops are managed using irrigation. The first half of 2025 offered more favorable conditions for crop vegetative growth, which is essential for determining the productive potential of the upcoming harvest. Post estimates that robusta coffee production for 2025/26 will increase by more than 22 percent compared to the previous year, driven by favorable weather conditions and significant investments by producers in mechanization.

- **Bahia**:. The state is steadily increasing its robusta coffee production, primarily focusing planting efforts on the southern region where irrigation is more prevalent. As a result, CONAB projected that Bahia has become the second-largest robusta-producing state in 2025, surpassing another traditional producer, Rondônia. The robusta harvest for 2025/26 has benefited from favorable rainfall. With investments in crops driven by high coffee prices, yields are expected to be higher than initially forecasted.

- **Rondônia**: Rondônia, renowned for its robusta coffee grown in the center-south region of the state, is anticipated to produce a larger crop in the 2025/26 season. This is despite earlier forecasts suggesting otherwise. Improvements in weather conditions throughout the crop cycle have resulted in a good yield of cherries.

U.S Tariffs on Brazilian Coffee Imports

Increased tariffs have led to a decrease in Brazilian coffee exports to the United States. In August 2025, a 40 percent tariff on Brazilian coffee imports was added on top of the existing 10 percent tariff, enacted in April 2025, resulting in a total tariff of 50 percent.

To assist producers, the Brazilian government launched the Sovereign Brazil Plan (*Plano Brasil Soberano*) in August. This program offers credit lines at lower interest rates, a two-month deferral of federal tax payments, and the reactivation of '*Reintegra*'. This mechanism allows companies affected by the tariffs to receive refunds for taxes paid throughout the production chain in the form of tax credits.

Coffee associations in Brazil have generally welcomed these measures, viewing them as necessary actions to address the immediate impacts on the sector.

Brazilian robusta coffee has been increasing its market share in the U.S., largely due to a crop failure in Vietnam in 2023. This situation has led to a rise in Brazilian exports to Europe, Latin America, and the United States. However, Brazil's competitive advantage in the U.S. could be diminished. The industry's main concern is the potential impact on soluble coffee, a value-added product that constitutes a significant share of exports to the United States.

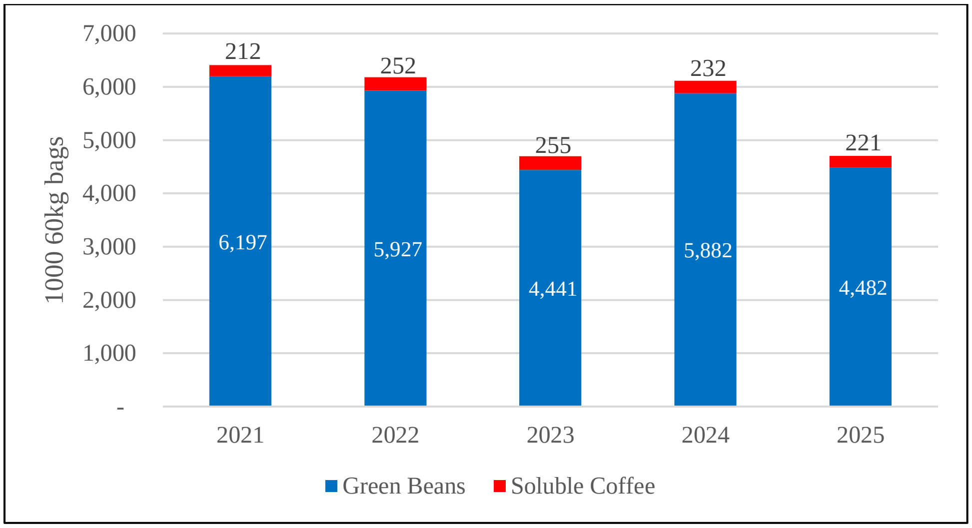
The United States is the largest coffee-consuming market in the world, with Brazil holding over 30 percent of the market share in the U.S. Brazilian coffee imports grew by 34 percent in 2024 alone, translating to foreign exchange revenue of approximately US$ 2.05 billion. Additionally, an NCA study indicates that coffee generates US$ 343 billion annually for the U.S. economy, supporting more than 2.2 million jobs and representing 1.2 percent of the country's GDP.

Brazil has traditionally been the main source of coffee imports for the United States, supplying about 32 percent of green coffee. This is followed by Colombia (20%), Vietnam (8%), and Honduras (7%). The NCA estimates that coffee imports from other countries cannot replace Brazilian coffee, as Brazil's export volume is nearly equal to the combined volumes of the next three largest coffee producers.

Coffee consumption in the United States remains high, with approximately 66 percent of American adults consuming coffee daily, averaging three cups per day. This trend has remained stable for four years, despite inflation and rising prices.

On November 14, 2025, the United States government announced the removal of a 10 percent tariff on coffee exports from Brazil. Shortly after, on November 20, the 40 percent tariff on Brazilian coffee (HS 0901) was also eliminated. However, it should be noted that this removal does not apply to soluble coffee (HS 2101.11.10) imported into the United States.

Figure 4
Brazilian Coffee Exports to the United States 2021 - 2025 (January - October)



***Data Source**: Trade Data Monitor LLC; Graph Post Brasilia*

Coffee Prices

In early 2025, coffee prices reached historic highs, primarily due to supply disruptions caused by adverse weather conditions in major coffee-producing countries, Brazil and Vietnam. However, by mid-year, prices began to decline as the new harvest reached the market.

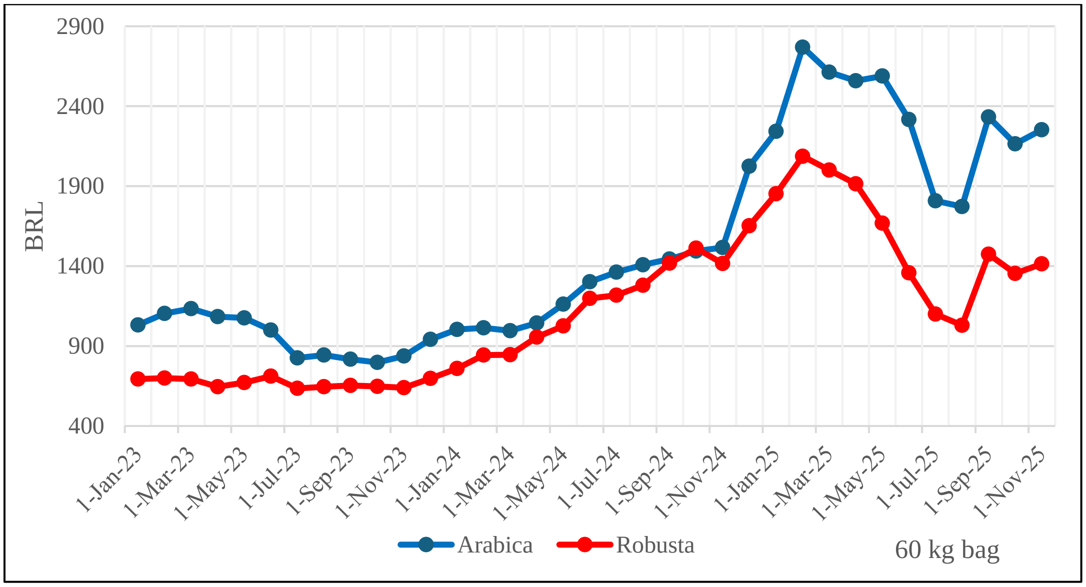
According to the Brazilian Coffee Industry Association (ABIC), coffee prices increased by nearly 15 percent between August and September 2025, continuing the upward trend that began in April and May 2025. From August 2024 to August 2025, soluble coffee saw the largest price increase at 50.5 percent, followed by Traditional/Extra Strong coffee (49%), and Gourmet coffee (46%).

Between January and July 2025, overall prices for arabica and robusta coffee in Brazil fell by 20 percent and 40 percent, respectively. This decline was attributed to the progress of the national harvest and optimistic production expectations in both Brazil and Vietnam. However, the situation changed after the U.S. announced a 50 percent tariff on Brazilian coffee.

Data from the University of São Paulo's Center for Advanced Studies in Applied Economics (CEPEA) reveal that, in September 2025, Arabica coffee prices averaged BRL 2,234.00 (US$ 414.68) per 60 kg bag. This marks a 50 percent increase compared to the same month in 2024, when Arabica prices averaged BRL 1,490.14 (US$ 264.88). On February 12, 2025, Arabica coffee reached CEPEA’s historical high price, quoted at BRL 2,769.45 (US$ 480.81).

Robusta coffee also reached a historic milestone in early 2025, with prices at BRL 2,102.12 (US$ 355.27) on January 23. In September 2025, Robusta prices averaged BRL 1,398.44 (US$ 259.59) per 60 kg bag, reflecting a slight 1 percent decrease from the value recorded in September 2024, which was BRL 1,416.72 (US$ 251.88).

Figure 5
Evolution of Arabica and Robusta/Conilon Coffee Prices in Brazil



***Data Source**: University of São Paulo Center for Advanced Studies in Applied Economics (CEPEA), Arabica coffee delivered to São Paulo; Graph Post Brasilia*

The decline in arabica coffee production has significantly impacted both domestic demand and exports, primarily due to changes in price and availability. The price gap between arabica and robusta coffee may prompt Brazilian industries to use more robusta in blends to reduce costs. Consequently, many robusta producers are shifting sales to the domestic market.

With coffee production issues in Vietnam and logistical challenges in the Red Sea threatening exports throughout 2024 and 2025, demand for Brazilian coffee rose sharply, drastically reducing the country's stocks. The expectation that the European Union Deforestation Regulation (EUDR) would come into effect at the end of 2025, also prompted many European companies to expedite their imports due to uncertainty regarding how the legislation will be implemented. Additionally, futures prices for coffee are currently lower than spot prices, which discourages stock accumulation.

According to data from the Ministry of Agriculture and Livestock from August 2025, the Gross Value of Production (GVP) for coffee, representing the total estimated gross revenue for the coffee sector in 2025, is projected to be BRL 115.27 billion. Of this total, arabica coffee is expected to account for BRL 84.04 billion, which is approximately 73 percent of the national coffee sector, while robusta coffee is projected to generate BRL 31.23 billion, roughly 27 percent.

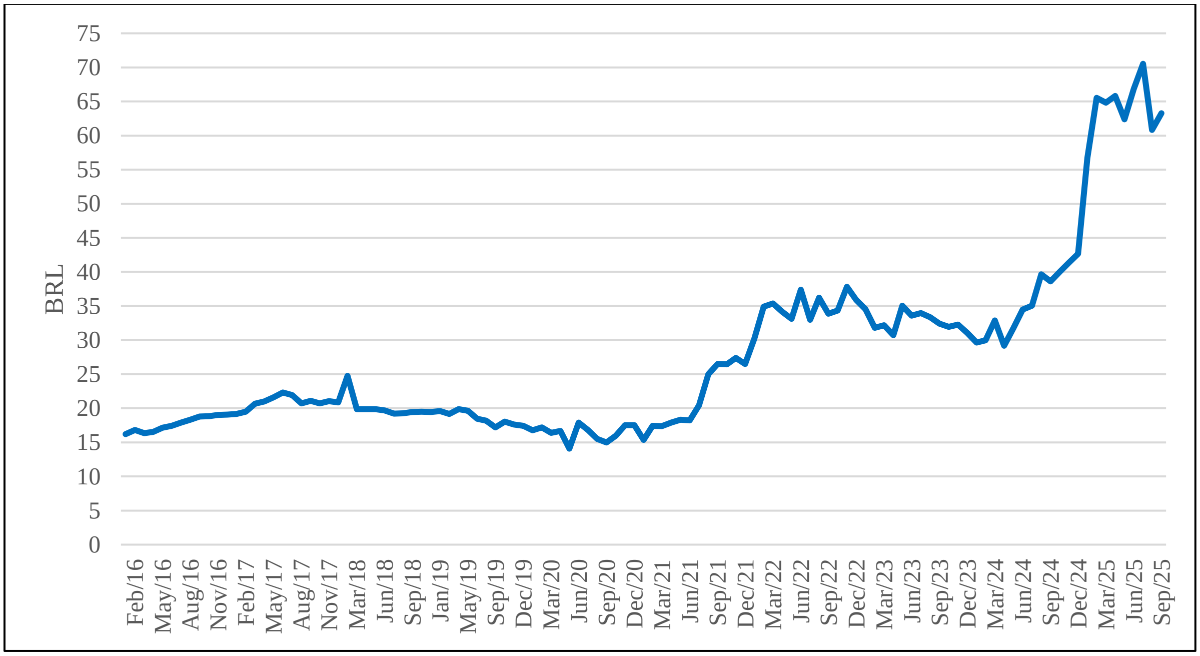
Minas Gerais leads Brazilian states in coffee production revenue, with an estimated revenue of BRL 59.08 billion, representing about 51 percent of the total GVP for coffee in Brazil. Espírito Santo follows in second place with an estimated revenue of BRL 28.47 billion (24.7%), while São Paulo ranks third with an estimated revenue of BRL 11.14 billion (9.6%). Bahia's gross revenue from coffee production is estimated at BRL 8.65 billion (7.5%), and Rondônia has an estimated revenue of BRL 4.23 billion (3.6%).

Coffee Consumption

Post maintained its forecast for Brazil's total domestic coffee consumption for MY 2025/26 (July-June) at 22.28 million coffee bags (21.3 million bags of roast/ground and 980,000 bags of soluble coffee). This represents a 1.4 percent increase relative to the total consumption estimated for MY 2024/25, below the average annual growth stipulated by the coffee industry, which ranges from 2 to 3 percent.

Figure 6

Average Price of Roasted and Ground Coffee in Brazilian Retail (BRL/kg)



***Data Source**: Brazilian Coffee Industry Association (ABIC), with estimates referring to Minas Gerais, Rio de Janeiro, and São Paulo since January 2020; Graph Post Brasilia*

The significant rise in coffee prices continues to be a major factor contributing to food inflation in Brazil. According to the Brazilian Coffee Industry Association (ABIC), the percentage of the population that has reduced their coffee consumption has reached its highest level since 2019, likely due to the recent price increase. Over the past two years, coffee has experienced one of the most substantial price hikes in the Brazilian inflation index, with increases exceeding 70 percent.

In August 2025, coffee consumption declined by 4 percent compared to August 2024. Additionally, accumulated sales in the first eight months of this year decreased by 5.5 percent compared to the same period last year, primarily driven by rising coffee prices.

A survey commissioned by ABIC in September revealed that 24 percent of respondents reported reducing their coffee consumption in Brazil, markedly up from just 3 percent in the 2023 survey, 5 percent in 2021, and 7 percent in 2019.

This decline in consumption aligns with ABIC's retail sales data, which indicated a 5.4 percent drop year-to-date due to higher prices. Besides decreasing purchase volumes, consumer buying patterns have shifted, with 39 percent opting for cheaper coffee alternatives. Furthermore, attendance at coffee shops fell from 51 percent in 2023 to 39 percent in 2025. The survey also indicated that only 2 percent of respondents increased their coffee intake in 2025, compared to 16 percent in 2023, 49 percent in 2021, and 36 percent in 2019.

Despite the rising prices, Brazilians remain enthusiastic coffee drinkers, with 26 percent of respondents reporting that they consume more than six cups of coffee per day. Though this is a decline from 29 percent recorded two years earlier, it still indicates substantial coffee consumption.

The Brazilian Association of the Soluble Coffee Industry (ABICS) estimates that the consumption of soluble coffee in Brazil has grown at an average rate of 3 percent per year since 2016. According to ABICS, soluble coffee consumption reached 763,600 bags from January to August – an increase of nearly 5 percent compared to the same period last year. This growth has been largely driven by freeze-dried coffee, which rose by 11 percent, while spray-dried coffee consumption increased by 4 percent.

Table 3
Domestic Consumption of Coffee in Brazil

	Million bags		***Per Capita Consumption (kg/inhabitant year)***	
Year	**Roast/Ground**	**Soluble/Instant (million bags)**	**Green**	**Roasted**
2004	14.1	0.8	5.0	4.0
2005	14.6	0.9	5.1	4.1
2006	15.4	0.9	5.3	4.3
2007	16.1	1.0	5.5	4.4
2008	16.7	1.0	5.6	4.5
2009	17.4	1.0	5.8	4.7
2010	18.1	1.0	6.0	4.8
2011	18.6	1.1	6.1	4.9
2012	19.2	1.1	6.2	5.0
2013	19.0	1.1	6.1	4.9
2014	19.2	1.1	6.1	4.9
2015	19.4	1.1	6.1	4.9

2016	20.1	1.1	6.3	5.0
2017	20.9	1.1	6.4	5.1
2018	19.9	1.1	6.0	4.8
2019	20.0	0.9	6.0	4.8
2020	20.3	0.9	6.0	4.8
2021	20.5	1.0	6.1	4.8
2022	20.3	1.0	6.0	4.8
2023	20.6	1.1	6.4	5.1
2024	20.9	1.0	6.3	5.0

***Data Source**: Brazilian Coffee Industry Association (ABIC); Note: Estimates refer to the November-October period. As of 2018, roast/ground consumption figures exclude consumption from on-farm consumption, coffee shops, and other informal sources; Graph Post Brasilia*

Coffee Trade

Exports

Post reduced its forecast for total coffee exports for MY 2025/26 (July-June) to 40.75 million 60 kg bags, down 2.4 percent from the previous forecast. The estimate for coffee exports for MY 2024/25 has been slightly adjusted upward from 44.25 million to 44.75 million 60-kg bags.
The decline in exports for 2025 is attributed to Brazil's record export volumes in 2024, reduced coffee crop availability, and increased tariffs.

According to the Brazilian Coffee Exporters Council (CECAFE), Brazil exported 3.750 million 60-kg bags of coffee in September 2025, marking an 18 percent decrease from the same month in 2024, when exports totaled 4.598 million bags. Despite the decrease in volume, foreign exchange revenue rose by 11 percent during the same period, totaling US$ 1.369 billion.

In August 2025, Brazil experienced a 17.5 percent decrease in coffee exports compared to August 2024, with a total of 3.144 million 60-kg bags exported. Revenue during this month reached US$ 1.101 billion, an increase of 13 percent over August 2024. The United States fell to second place as the largest buyer of Brazilian coffee in August 2025, importing 301,000 bags, while Germany took the lead with 414,000 bags. Year-on-year, U.S. coffee imports fell 46 percent from August 2025 to August 2024.

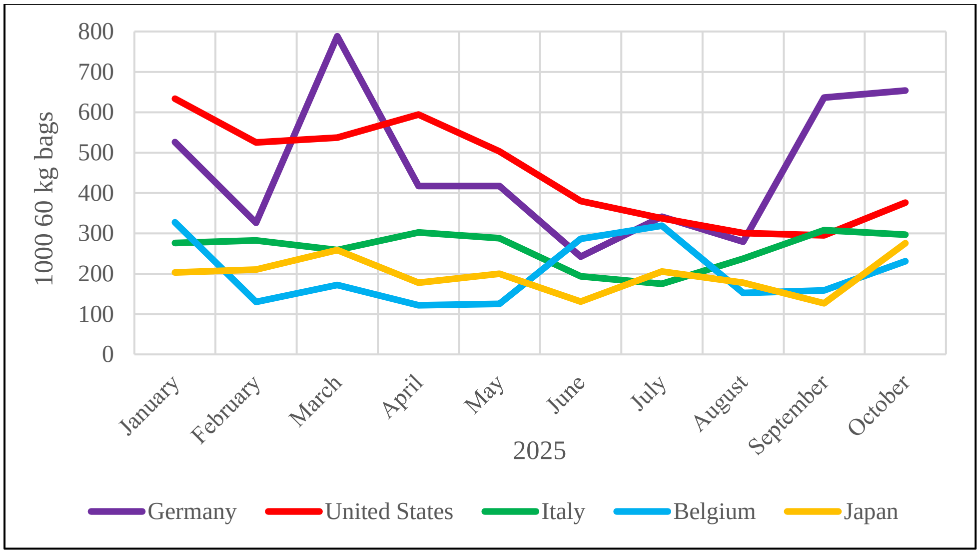
From January to September 2025, Brazil exported 29.105 million bags, a 20.5 percent decline compared to the 36.593 million bags exported during the same period in 2024. However, rising coffee prices contributed to a 30 percent increase in revenue, climbing from US$ 8.499 billion to US$ 11.049 billion during that time.

In September 2025, the United States dropped to third place in the ranking of Brazilian coffee importers, with imports down nearly 53 percent from September 2024. The largest buyer that month was Germany (654,638 bags), followed by Italy (334,654 bags).

Despite the declining exports to the United States, it remains the primary importer of Brazilian coffee year-to-date, with imports totaling 4.361 million bags, a decrease of nearly 25 percent compared to the same period in 2024. This figure represents 15 percent of total shipments for the year.

Figure 7

Main Destination of Brazilian Coffee (Green Bean), 2025 (January - October)



***Data Source**: Trade Data Monitor LLC; Graph Post Brasilia*

Rounding out the list of the top five destinations for Brazilian coffee, between January and September 2025, are Germany (3.727 million bags, down 30.5 percent), Italy (2.324 million bags, down 23.3 percent), Japan (1.891 million bags, up 15 percent), and Belgium (1.703 million bags, down 48.8 percent).

Eighty percent of Brazil's coffee exports between January and September 2025 consisted of arabica, totaling 23.200 million bags. Robusta was the second most exported type, with shipments of 3.062 million bags (10.5% of the total), followed by soluble coffee with 2.799 million bags (9.6%), and roasted and ground coffee, with just 43,644 bags (0.1%).

CECAFE reports that from July 2024 to June 2025, Brazil exported 45.589 million 60-kg bags of coffee to 115 countries, which is a 4 percent decrease compared to the 2023/24 cycle, when 47.455 million bags were shipped. This volume represents the third-highest in the country's history, behind only the 2023/24 and 2020/21 seasons.

Despite the decrease in export volume, shipments generated US$ 14,728 billion in revenue, a 50 percent increase over the previous record of US$ 9.849 billion set in the last cycle. The revenue for the 2024/25 season marks Brazil's highest coffee export value in history.

According to CECAFE, the exports of specialty coffees, including those certified for sustainable practices and superior quality, accounted for 20 percent of all Brazilian coffee shipped abroad between January and September 2025, totaling 5.913 million bags. This volume represents an 11 percent decrease from the same period the previous year. However, due to an average price of US$ 425.00 per bag, revenue from these specialty shipments rose by 49 percent compared to 2024, reaching US$ 2.513 billion, which constitutes 23 percent of total revenues from January to September 2025.

The United States remained the leading market for specialty coffees, purchasing 987,499 bags between January and September 2025, equating to almost 17 percent of total purchases of this product type. Germany was the second-largest destination (825,657 bags, or 14 percent), followed by Belgium (667,883 bags, or 11.3 percent), the Netherlands (508,722 bags, or 8.6 percent), and Italy (387,065 bags, or 6.5 percent).

Nonetheless, Brazilian exports of specialty coffee to the United States plunged in August 2025, with the country shipping only 21,679 bags—a staggering 80 percent drop from August 2024 and a 70 percent drop from July. This decline was due to contract cancellations and postponements in August, coinciding with the first month of a 50 percent U.S. tariff.

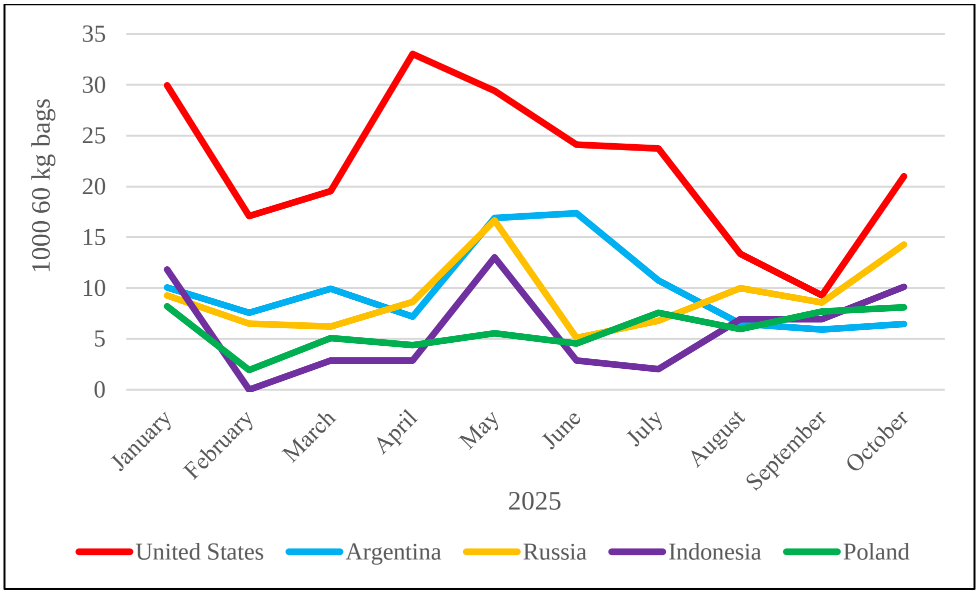
Among the main coffee-producing countries, Brazil primarily exports coffee to Mexico, Colombia, Vietnam, and Indonesia. Notably, Brazilian coffee exports to Colombia surged by 578 percent in August 2025 compared to the same period the previous year. This increase can be attributed to higher tariffs, which prompted Brazilian producers to seek alternative markets for their coffee, including major producers such as Canada and Uruguay.

From January to August, Brazil exported 2.508 million bags of soluble coffee to 88 countries, marking a 4 percent decrease compared to the same period in 2024. However, this decline in volume was offset by rising prices, which increased revenue for Brazilian exporters. Foreign exchange revenue reached US$ 760.8 million, representing a 33 percent increase compared to the previous year. The United States remained the primary destination for this product during the period, importing 443,100 bags (a decrease of 3.7%). It was followed by Argentina, which saw a significant increase in imports to 236,400 bags (+88.3%), and Russia, with 188,000 bags (+16.8%). Other notable producing countries that entered the top 15 soluble coffee importers included Colombia (82,700 bags), Vietnam (72,400 bags), and Malaysia (68,800 bags).

ABICS projects that exports will exceed US$ 1 billion in 2025, surpassing the record set in 2024, which was US$ 950 million in soluble coffee.

However, Brazilian soluble coffee exports to the United States experienced a significant drop in August. Shipments totaled 26,460 bags, reflecting a 60 percent decrease compared to August 2024 and a 50 percent drop from July, according to ABICS.

Figure 8
Main Destination of Brazilian Coffee (Soluble), 2025 (January - October)



***Data Source**: Trade Data Monitor LLC; Graph Post Brasilia*

Table 4
Brazilian Coffee Exports by Classification/Type (January to September 2025)

Type/Classification	60-Kg bag	US$ FOB	Average price US$/bag
Arabica – Total	**23,200,402**	**9,335,636,058.61**	**402.39**
Special or Gourmet	338,280	154,881,944.01	457.85
Robusta/Conilon - Total	**3,061,581**	**839,076,085.78**	**274.07**
Special or Gourmet	500	227,648.40	455.3
Soluble – Total	**2,799,463**	**847,522,693.06**	**302.74**
Spray Dried	1,936,983	577,333,770.33	298.06
Freeze Dried	658,860	210,601,963.94	319.65
Coffee Preparation	164,931	40,671,605.98	246.60
Extract	38,688	18,911,402.81	488.82
Special or Gourmet	1	3,950.00	3,950.00
Roasted - Total	**43,644**	**26,727,863.33**	**612.41**
Special or Gourmet	997	1,512,958.14	1,517.51

***Data Source**: Council of Brazilian Coffee Exporters (CECAFE); Table Post Brasilia*

Coffee exporters in Brazil continue to incur losses due to logistical bottlenecks stemming from the country’s outdated port infrastructure. Data from CECAFE indicates that in September 2025, companies lost an additional BRL 9 million in storage, pre-stacking, and detention costs because they were unable to ship 2,848 containers, equivalent to 939,400 bags of coffee. According to the DTZ Bulletin, this was the third-largest financial impact on record, surpassed only by the losses observed in November and December 2024.

Of the ships scheduled to transport coffee at Brazil's main ports in September, 57 percent experienced delays or altered port calls. The Port of Santos, which managed 79 percent of coffee shipments from January to September of this year, recorded a 75 percent rate of delays or changes in port calls. Some vessels faced waiting times of up to 35 days at the Santos dock.

Imports

Brazil traditionally does not import coffee from other countries. When it does, it is usually to suppress specific demands or because prices are attractive. For MY 2025/26 (July-June), 49 percent of all roasted coffee imports into Brazil came from Switzerland, followed by France (19%), Portugal (8%), Italy (7%), the United States (6%), and Uruguay (5%).

Coffee Stocks

Post estimates total ending stocks for marketing year 2025/26 will reach 485,000 bags, indicating the 2025/26 harvest will not be enough to replenish stocks that were already low since the last harvest. In 2024, there was a crop shortfall accompanied by strong price increases. Consequently, producers increased exports, nearly depleting stocks nationwide. The sharp drop in the arabica coffee harvest has led to a revision of stock figures, which are expected to remain low.

Coffee Policy

In May 2025, the Government of Brazil approved Ordinance CMN nº 5.213, allocating the Coffee Economy Defense Fund (FUNCAFE) for the 2025/26 harvest. The coffee sector is the only Brazilian agribusiness sector with its own fund, comprised of resources originating from the producers. The purpose of the funding is to:

1. Develop the coffee production chain in Brazil through financing and incentives for the modernization of coffee farming. It also supports coffee research aimed at developing plants resistant to pests, diseases, and adverse climatic conditions.
2. Support industry and exports, with the goal of increasing consumption and seeking new markets, securing buyers for coffee produced on rural properties.
3. Promote the orderly operation of supply, including financing storage to prevent coffee growers and their cooperatives from having to sell coffee during periods when prices are at their lowest.

Table 5
Coffee Economy Defense Fund (FUNCAFE) 2024/25

	2022/23	2023/24	2024/25	2025/26
Crop Management	BRL 1.57 billion	BRL 1.62 billion	BRL 1.73 billion	BRL 1.81 billion
Marketing Financing	BRL 2.17 billion	BRL 2.35 billion	BRL 2.49 billion	BRL 2.60 billion
Financing for the Acquisition of Coffee (FAC)	BRL 1.38 billion	BRL 1.48 billion	BRL 1.61 billion	BRL 1.69 billion
Recovery of Damaged Coffee Plantations	BRL 160 million	BRL 30.0 million	BRL 30.0 million	BRL 31.3 million
Working Capital (industry and cooperatives)	BRL 775 million	BRL 883.75 million	BRL 1.01 billion	BRL 1.06 billion
TOTAL	BRL 6.06 billion	BRL 6.37 billion	BRL 6.88 billion	BRL 7.18 billion

Data Source*: Coffee Policy Deliberative Council (CDPC); Table Post Brasilia*

The Government of Brazil, through CONAB, sets policies and programs to guarantee that producers are paid the minimum prices for coffee in case market prices are below the minimum guaranteed price. Measures include purchasing coffee directly from producers (Federal Government Acquisitions) or paying a premium to buyers to move the product from growers to the destination (Product Flow Premium Program), among others.

For arabica coffee, the minimum price for the 2025/26 harvest was set at BRL 662.04 per 60-kilo bag, a 4 percent increase compared to the previous season. For robusta, the price was set at BRL 498.79 per 60-kilo bag, an 18 percent year-on-year increase. The increases are credited to the sharp rise in coffee prices in the domestic market. The new minimum prices for coffee are effective from April 2025 through March 2026.

Table 6
Coffee Minimum Guaranteed Prices (BRL/60kg bag)

	2021/22	2022/23	2023/24	2024/25 (a)	2025/26* (b)	Variation (a/b)
Arabica type 6	369.40	606.66	684.16	637.91	662.04	3.78 %
Robusta/Conilon type 7	263.93	434.82	460.02	423.08	498.79	17.89 %

Data Source*: Ministry of Agriculture and Livestock; Table Post Brasilia, with *2025/26 Prices valid from April 2025 to March 2026*

Attachments:

No Attachments