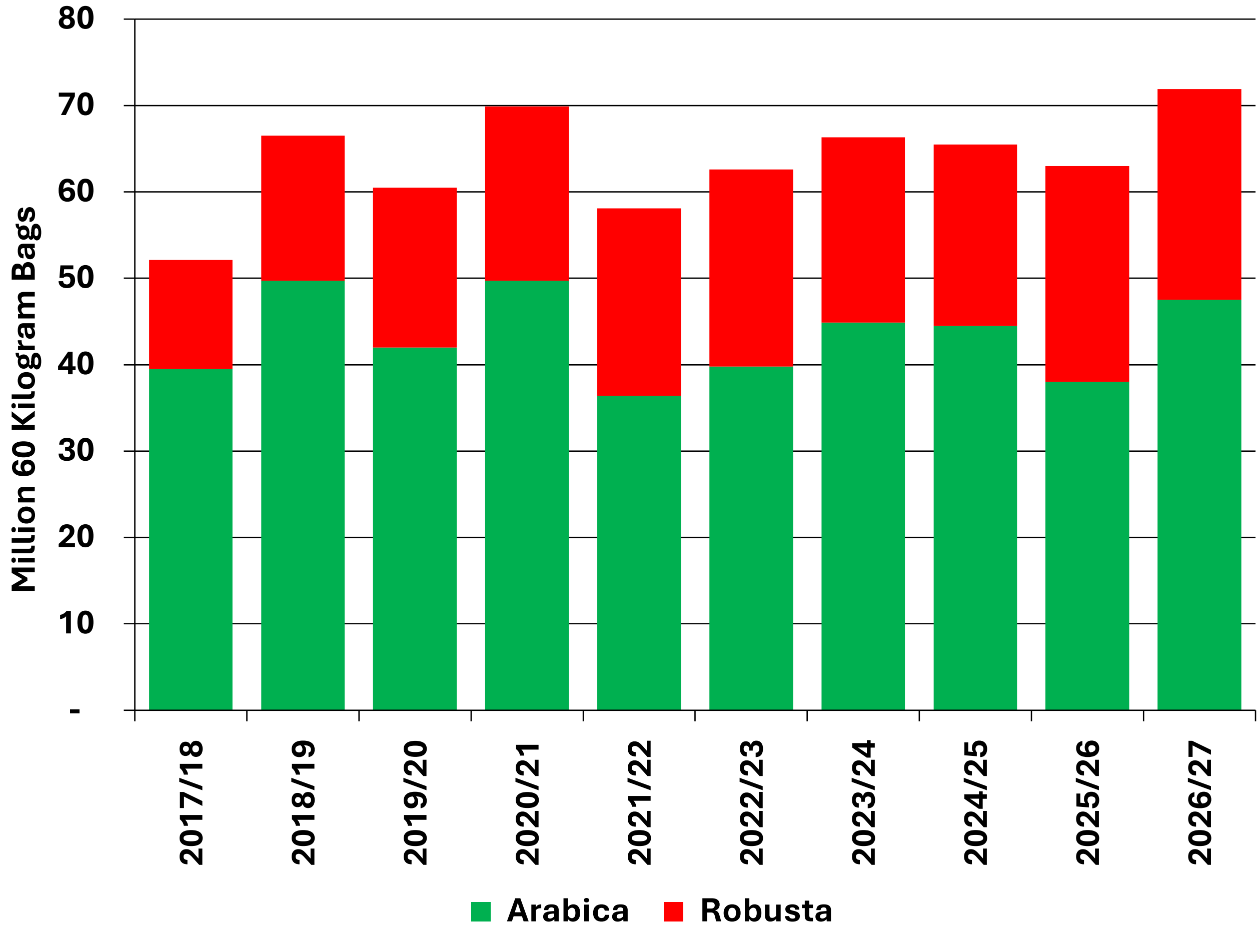
United States Department of Agriculture Foreign Agricultural Service

July 2026

Coffee: World Markets and Trade

Record Brazil Production Driven by Rebounding Arabica Crop



Brazil's combined Arabica and Robusta harvest is forecast to rise 8.9 million bags (60 kilograms) to a record 71.9 million in 2026/27 (July 2026 – June 2027). Arabica output is expected to rebound 9.5 million bags to 47.5 million, ending a 5-year period of underperformance due to adverse weather conditions. Timely rainfall during flowering in September and October ensured favorable fruit development and near-record yields in Minas Gerais, where over 70 percent of Arabica coffee is grown. Robusta production is forecast to retreat 600,000 bags to 24.4 million following last year's record harvest. Cooler temperatures combined with periods of elevated rainfall to lower yields in Espirito Santo, where approximately 70 percent of Robusta coffee is grown. Higher overall supplies are expected to boost coffee bean exports by 11.0 million bags to a record 45.0 million and expand ending stocks by 500,000 bags to 4.4 million.

Brazil accounts for nearly 40 percent of world production and exerts significant influence on global supplies and prices. Brazil's role in Arabica markets is even more pronounced, typically supplying between 40 and 50 percent depending on the biennial crop production cycle. Arabica trees naturally alternate between high-yielding on-years and lower-yielding off-years as energy shifts between fruit and vegetative growth.

Approved by the World Agricultural Outlook Board/USDA

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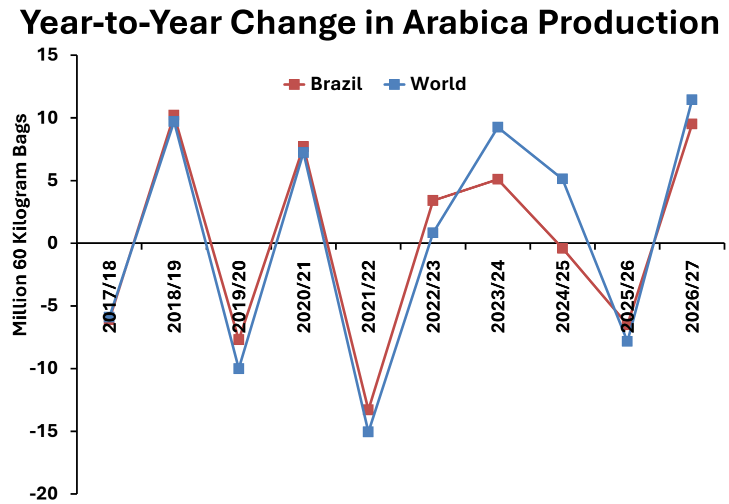
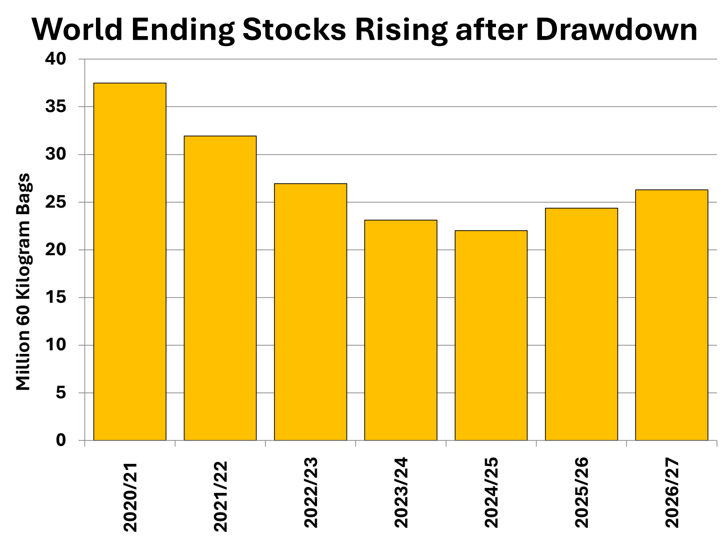
This biennial pattern is especially evident in Brazil due to several unique growing conditions. Arabica trees are cultivated on elevated plateaus and rolling hills with relatively uniform weather patterns, rather than mountainous microclimates that are typical of other producing countries. Extreme weather events such as frost, heat, or drought tend to synchronize yields across large areas by forcing trees into an off-year. Brazil's geography also supports mechanized pruning and harvesting, further harmonizing output.

Brazil's biennial Arabica coffee production cycle significantly affects global supplies. Under normal conditions, the on-year crop can rise 5 to 10 million bags and decline by a similar amount during the following off-year. These swings account for most of the year-to-year variation in global Arabica production. Because these fluctuations shape global supplies, weather developments in Minas Gerais remain the primary indicator for world market conditions.



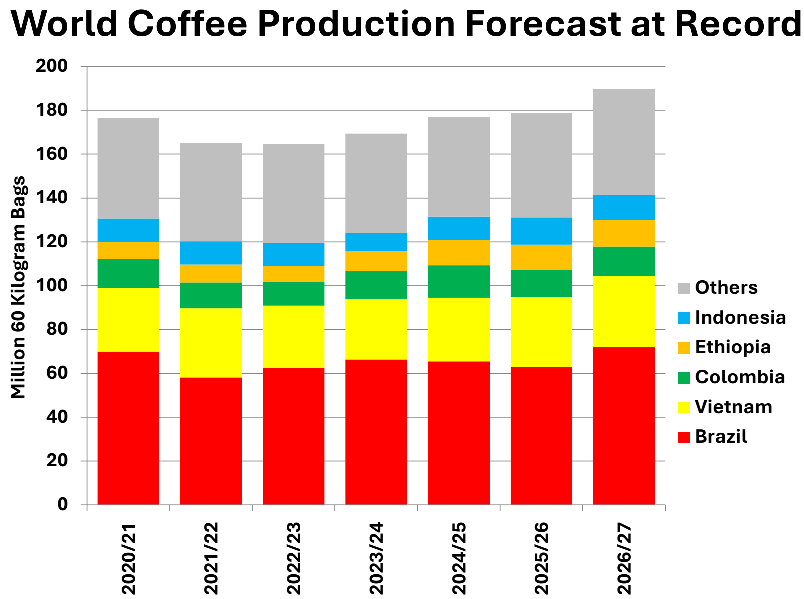
The 2026/27 Arabica crop is forecast to be the second largest on record, but yields have been inconsistent since 2021/22, when drought and high temperatures reduced off-year output by 13.3 million bags. The subsequent on-year witnessed only a modest rebound of 3.4 million bags due to severe frost, high temperatures, and below-average rainfall. Production increased again in 2023/24 but yields lagged expectations because of excessive rainfall during fruit development. These gains were followed by 2 consecutive years of declines as drought and heat again lowered yields.

Following 5 years of lackluster Arabica production in Brazil, output in countries such as Ethiopia, Mexico, and Peru increased to fill the global supply gap. However, these gains did not fully compensate for Brazil's losses. As a result, global ending stocks fell 15.5 million bags between 2020/21 and 2024/25. This year, global stocks are forecast to rise for a second consecutive year to reach 26.3 million in 2026/27. However, they are expected to remain below the long-term average. As global supplies recover, overall market conditions will continue to depend heavily on Brazil's production cycle.



For more information, see the Brazil Coffee Annual report in the FAS Global Agricultural Information Network (GAIN).

2026/27 Coffee Overview



World coffee production for 2026/27 is forecast 10.8 million bags higher than the previous year to a record 189.7 million due to record output in Brazil, Ethiopia, Uganda, and Vietnam. These gains more than compensate for losses in India and Indonesia. World coffee bean exports are forecast 11.9 million bags higher to a record 131.4 million on these output gains. Global consumption is expected to rise to a record 179.7 million bags, with the largest gains occurring in the European Union and the United States. Ending stocks are expected to rise for a second consecutive year to 26.3 million bags. Coffee prices dropped 25 percent in the last 7 months as additional supplies became available (as measured by the International Coffee Organization (ICO) monthly composite price index).

Vietnam production is forecast to increase 800,000 bags to a record 32.5 million due to expanding area and higher yields. Recent high prices allowed coffee growers to increase expenditures on fertilizers and other inputs to boost yields. Bean exports are forecast up 300,000 bags to 25.4 million on higher supplies; domestic consumption is expected to reach a record 5.0 million bags.

Central America and Mexico production is forecast to rise nearly 600,000 bags to 17.7 million on rebounding output in Costa Rica, Guatemala, Honduras, Mexico, and Panama. Honduras is expected to account for nearly all the region’s growth, rebounding 500,000 bags to 6.0 million on expanding area and favorable growing conditions. Higher coffee bean exports from these countries are expected to boost exports from the region by nearly 400,000 bags to 14.0 million.

Colombia output is expected to rise 900,000 bags to 13.4 million on adequate soil moisture from last year’s excessive rains and increased utilization of inputs such as fertilizers and pesticides. Coffee bean exports, mostly to the United States and European Union, are forecast up 500,000 bags to 12.2 million on higher output.

Ethiopia is forecast to increase output by more than 500,000 bags to a record 12.1 million on higher area and yield. Over the last 4 years, growth has been driven by replacement of over half of the cultivated area with higher-yielding coffee varieties. Bean exports are forecast up nearly 200,000 bags to 7.1 million on higher supplies.

Indonesia production is forecast to drop 1.0 million bags to 11.4 million. Robusta output is expected to decrease 1.0 million bags to 10.0 million bags due to lower yields. Excessive rainfall disrupted flowering and cherry formation in the lowland areas of Southern Sumatra and Java, where approximately 75 percent is grown. Arabica production is expected flat at 1.4 million bags on normal growing conditions. Reduced output is expected to cut bean exports by over 800,000 bags to 7.0 million.

Revisions to 2025/26 Estimates

World **production** is unchanged from the December 2025 estimate of 178.8 million bags.
- Vietnam is raised 900,000 bags to 31.7 million on higher yields.
- Peru is up nearly 600,000 bags to 4.8 million on higher yields.
- Colombia is lowered 1.3 million bags to 12.5 million due to excessive rain and cloud cover that lowered yields.
- Guatemala is reduced nearly 400,000 bags to 3.2 million due to lower yields from coffee cherry borer insects and coffee rust.

World **bean exports** are revised down 4.3 million bags to 119.5 million.
- Brazil is lowered 3.0 million bags to 34.0 million due to lower shipments to the EU and United States.
- Ethiopia is reduced over 800,000 bags to 6.9 million on higher-than-anticipated domestic consumption.
- Vietnam is up 500,000 bags to 25.1 million on higher output.

World **bean imports** are revised down 1.3 million bags to 118.6 million.
- Colombia is revised up 1.3 million bags to 2.2 million to maintain domestic consumption levels on reduced domestic output.
- European Union is reduced 500,000 bags to 46.5 million on lower consumption.
- The United States is down 700,000 bags to 23.1 million on lower consumption.

The next release of this publication will be on December 16, 2026.

For additional information, please contact Tony Halstead at *Tony.Halstead@usda.gov*

The *Coffee: World Markets and Trade* circular is based on reports from FAS Overseas Posts and on available secondary information. The individual country reports can be obtained on FAS Online at: https://www.fas.usda.gov/data/gain

Coffee HS Codes and Conversion Factors			
HS Code	**Attribute**	**Description**	**Conversion Rate**
090111	Coffee, Green	Coffee, not roasted, not decaffeinated	1.00
090112	Coffee, Green	Coffee, not roasted, decaffeinated	1.00
090121	Coffee, Roasted	Coffee, roasted, not decaffeinated	1.19
090122	Coffee, Roasted	Coffee, roasted, decaffeinated	1.19
210111	Coffee, Soluble	Coffee extracts, essences and concentrates	2.60
210112	Coffee, Soluble	Coffee preparations with a basis of extracts, essences or concentrates	2.60

Please visit https://www.fas.usda.gov/data/coffee-world-markets-and-trade to view archived reports.

PSD Online
The entire USDA PSD database is available online at: https://www.fas.usda.gov/psdonline.

Additional Resources
Please refer to the USDA-FAS Coffee website at: https://www.fas.usda.gov/commodities/coffee for additional data and analysis.

Marketing Years for Producing Countries

April-March	July-June	October-September
Angola	Brazil	Cameroon
Bolivia	Cuba	China
Burundi	Dominican Republic	Colombia
Ecuador	Philippines	Congo (Kinshasa)
Indonesia	Tanzania	Costa Rica
Madagascar		Cote d'Ivoire
Papua New Guinea		El Salvador
Peru		Ethiopia
Rwanda		Guatemala
		Guinea
		Honduras
		India
		Jamaica
		Kenya
		Laos
		Malawi
		Malaysia
		Mexico
		Nicaragua
		Panama
		Sierra Leone
		Thailand
		Togo
		Uganda
		United States
		Venezuela
		Vietnam

Non-producing countries are on an October-September marketing year.

Coffee Summary

Thousand 60-Kilogram Bags

	2021/22	2022/23	2023/24	2024/25	2025/26	Jul 2026/27
Arabica Production						
Brazil	36,400	39,800	44,900	44,500	38,000	47,500
Colombia	11,800	10,700	12,760	14,800	12,500	13,400
Ethiopia	8,150	7,300	9,130	11,460	11,560	12,100
Honduras	4,800	5,700	5,050	5,200	5,530	6,030
Peru	4,200	3,475	3,912	4,120	4,764	4,780
Mexico	3,200	3,000	3,356	3,588	3,580	3,575
Guatemala	3,410	3,150	3,339	3,140	3,025	3,130
Nicaragua	2,718	2,430	2,187	2,500	2,400	2,300
China	1,800	1,800	1,800	1,900	1,900	1,900
India	1,583	1,667	1,480	1,762	1,730	1,560
Indonesia	1,280	1,200	1,350	1,400	1,370	1,380
Costa Rica	1,215	1,100	1,158	1,315	1,160	1,200
Uganda	990	990	1,000	1,030	1,120	1,135
Vietnam	1,100	1,000	1,000	1,000	1,200	1,100
Kenya	860	750	825	950	850	950
Other	3,583	3,846	3,913	3,611	3,751	3,827
Total	87,089	87,908	97,160	102,276	94,440	105,867
Robusta Production						
Vietnam	30,480	27,300	26,550	28,000	30,500	31,400
Brazil	21,700	22,800	21,400	21,000	25,000	24,400
Indonesia	9,300	9,500	6,800	9,300	11,000	10,000
Uganda	5,060	5,575	5,400	5,670	5,975	6,025
India	4,117	4,200	5,080	4,297	4,700	4,580
Malaysia	2,000	2,000	1,330	1,400	1,500	1,500
Cote d'Ivoire	1,110	1,020	1,325	650	1,300	1,300
Thailand	650	700	750	900	900	900
Tanzania	550	550	600	650	700	750
Mexico	540	545	500	340	500	560
Other	2,448	2,431	2,440	2,333	2,315	2,385
Total	77,955	76,621	72,175	74,540	84,390	83,800
Production						
Brazil	58,100	62,600	66,300	65,500	63,000	71,900
Vietnam	31,580	28,300	27,550	29,000	31,700	32,500
Colombia	11,800	10,700	12,760	14,800	12,500	13,400
Ethiopia	8,150	7,300	9,130	11,460	11,560	12,100
Indonesia	10,580	10,700	8,150	10,700	12,370	11,380
Uganda	6,050	6,565	6,400	6,700	7,095	7,160
India	5,700	5,867	6,560	6,059	6,430	6,140
Honduras	4,800	5,700	5,050	5,200	5,530	6,030
Peru	4,200	3,475	3,912	4,120	4,764	4,780
Mexico	3,740	3,545	3,856	3,928	4,080	4,135
Guatemala	3,540	3,270	3,469	3,270	3,155	3,260
Nicaragua	2,838	2,590	2,347	2,660	2,560	2,440
China	1,800	1,800	1,800	1,900	1,900	1,900
Tanzania	1,200	1,200	1,350	1,350	1,450	1,600
Malaysia	2,000	2,000	1,330	1,400	1,500	1,500
Cote d'Ivoire	1,110	1,020	1,325	650	1,300	1,300
Costa Rica	1,215	1,100	1,158	1,315	1,160	1,200
Kenya	860	750	825	950	850	950
Thailand	650	700	750	900	900	900
Papua New Guinea	775	875	980	790	800	800
El Salvador	600	550	604	581	586	542
Laos	385	410	410	450	475	500
Venezuela	500	500	500	500	500	500
Philippines	450	475	450	450	450	475
Ecuador	260	354	370	355	350	350
Other	2,161	2,183	1,999	1,828	1,865	1,925
Total	165,044	164,529	169,335	176,816	178,830	189,667

Coffee marketing year for producer countries begins either in October (Colombia), April (Indonesia) or July (Brazil), as examples. Coffee marketing year for non-producer countries begins in October. To access a complete dataset for each country, please visit: http://apps.fas.usda.gov/psdonline/psdQuery.aspx

Coffee Summary, Continued

Thousand 60-Kilogram Bags

	2021/22	2022/23	2023/24	2024/25	2025/26	Jul 2026/27
Bean Exports						
Brazil	35,576	32,200	43,100	41,000	34,000	45,000
Vietnam	26,110	26,000	22,000	22,350	25,100	25,400
Colombia	11,000	9,450	10,700	12,200	11,700	12,200
Ethiopia	4,831	3,910	5,605	7,410	6,940	7,100
Indonesia	6,335	6,735	4,285	6,135	7,844	7,000
Uganda	5,850	6,250	6,300	6,350	6,700	6,830
Honduras	4,650	5,310	4,715	4,958	5,028	5,500
Peru	4,065	3,325	3,935	3,620	4,238	4,250
India	4,937	3,924	4,360	3,613	3,600	3,680
Guatemala	3,335	3,000	3,151	2,860	2,800	2,880
Other	12,264	10,976	11,038	11,309	11,588	11,570
Total	118,953	111,080	119,189	121,805	119,538	131,410
Roast and Ground Exports						
European Union	2,687	2,990	3,134	3,070	3,100	3,200
Switzerland	1,850	1,765	1,891	1,925	1,900	2,000
Vietnam	550	450	400	500	700	750
Peru	0	0	63	288	305	300
Colombia	265	210	230	220	160	200
China	65	20	150	30	50	100
Brazil	54	45	50	50	70	70
Indonesia	43	57	70	70	48	50
Guatemala	4	4	9	21	30	40
Ethiopia	0	0	25	20	25	30
Other	206	173	137	60	90	94
Total	5,724	5,714	6,159	6,254	6,478	6,834
Soluble Exports						
Brazil	4,055	3,900	3,600	3,700	3,800	4,000
Vietnam	2,350	1,890	2,000	2,350	2,700	2,800
India	2,310	2,490	2,535	2,545	2,420	2,530
European Union	1,805	1,715	1,930	2,380	2,500	2,500
Malaysia	2,975	2,500	2,300	2,400	2,500	2,500
Mexico	695	880	1,216	1,615	1,620	1,630
Colombia	1,100	950	840	957	950	1,000
Indonesia	1,050	1,040	1,000	1,080	950	1,000
China	375	450	475	790	750	700
Thailand	990	900	1,095	650	500	600
Other	1,201	1,190	1,135	1,220	1,236	1,370
Total	18,906	17,905	18,126	19,687	19,926	20,630
Exports						
Brazil	39,685	36,145	46,750	44,750	37,870	49,070
Vietnam	29,010	28,340	24,400	25,200	28,500	28,950
Colombia	12,365	10,610	11,770	13,377	12,810	13,400
Indonesia	7,428	7,832	5,355	7,285	8,842	8,050
Ethiopia	4,831	3,910	5,630	7,430	6,965	7,130
Uganda	5,850	6,250	6,300	6,350	6,700	6,830
India	7,258	6,420	6,906	6,165	6,026	6,219
European Union	4,492	4,705	5,064	5,450	5,600	5,700
Honduras	4,650	5,310	4,718	4,960	5,030	5,503
Peru	4,065	3,325	4,003	3,908	4,546	4,554
Other	23,949	21,852	22,578	22,871	23,053	23,468
Total	143,583	134,699	143,474	147,746	145,942	158,874

Coffee marketing year for producer countries begins either in October (Colombia), April (Indonesia) or July (Brazil), as examples. Coffee marketing year for non-producer countries begins in October. Roasted coffee was converted to green bean equivalent by multiplying the net weight of roasted coffee by 1.19. Soluble coffee was converted to green bean equivalent by multiplying the net weight of soluble coffee by 2.6. For each non-producing country, the trade balance between imports and exports is used in order to avoid double-counting for these figures.

Coffee Summary, Continued

Thousand 60-Kilogram Bags

	2021/22	2022/23	2023/24	2024/25	2025/26	Jul 2026/27
Bean Imports						
European Union	46,615	44,515	43,990	46,230	46,500	50,000
United States	25,225	22,540	21,475	23,360	23,100	24,500
Japan	6,800	5,860	6,220	5,815	5,800	6,200
China	1,660	1,965	3,405	3,320	3,700	4,000
Russia	3,400	3,500	3,500	3,700	3,800	4,000
Switzerland	3,400	3,290	3,345	3,540	3,500	3,700
Canada	2,940	2,700	2,980	3,190	3,000	3,200
Korea, South	3,015	2,820	2,960	2,985	2,800	3,000
United Kingdom	2,725	2,285	2,450	2,385	2,400	2,600
Mexico	1,811	1,723	1,471	2,040	2,030	2,100
Other	20,897	21,187	20,526	21,605	22,011	23,200
Total	118,488	112,385	112,322	118,170	118,641	126,500
Roast and Ground Imports						
United States	580	640	770	925	900	900
United Kingdom	580	775	740	690	730	750
Ukraine	450	400	440	400	450	450
Korea, South	390	355	390	380	400	400
Russia	305	350	350	350	350	375
Vietnam	200	8	200	200	250	250
Australia	200	200	185	150	175	200
Canada	550	450	185	195	450	200
Saudi Arabia	210	200	200	225	200	200
Norway	135	140	180	175	185	185
Other	1,099	949	898	914	940	955
Total	4,699	4,467	4,538	4,604	5,030	4,865
Soluble Imports						
Philippines	5,700	5,200	5,000	5,000	5,500	5,500
China	2,170	1,975	1,870	1,825	1,900	1,900
Canada	1,840	1,960	1,815	1,700	1,600	1,700
United Kingdom	680	920	1,000	1,420	1,440	1,500
United States	1,220	725	1,250	1,810	1,500	1,500
Indonesia	725	983	1,000	950	1,023	1,000
Guatemala	344	345	433	563	696	836
Japan	500	535	590	465	685	700
Australia	365	290	415	665	660	650
Kazakhstan	325	500	335	520	560	575
Other	3,805	3,633	3,702	3,888	3,696	3,630
Total	17,674	17,066	17,410	18,806	19,260	19,491
Imports						
European Union	46,615	44,515	43,990	46,230	46,500	50,000
United States	27,025	23,905	23,495	26,095	25,500	26,900
Japan	7,415	6,505	6,905	6,370	6,585	7,000
Philippines	6,540	5,890	5,940	5,740	6,075	6,250
China	4,180	4,230	5,485	5,295	5,750	6,050
Canada	5,330	5,110	4,980	5,085	5,050	5,100
United Kingdom	3,985	3,980	4,190	4,495	4,570	4,850
Russia	4,055	4,250	4,250	4,450	4,575	4,800
Switzerland	3,400	3,290	3,345	3,540	3,500	3,700
Korea, South	3,405	3,175	3,350	3,365	3,200	3,400
Other	28,911	29,068	28,340	30,915	31,626	32,806
Total	140,861	133,918	134,270	141,580	142,931	150,856

Coffee marketing year for producer countries begins either in October (Colombia), April (Indonesia) or July (Brazil), as examples. Coffee marketing year for non-producer countries begins in October. Roasted coffee was converted to green bean equivalent by multiplying the net weight of roasted coffee by 1.19. Soluble coffee was converted to green bean equivalent by multiplying the net weight of soluble coffee by 2.6. For each non-producing country, the trade balance between imports and exports is used in order to avoid double-counting for these figures.

Coffee Summary, Continued

Thousand 60-Kilogram Bags

	2021/22	2022/23	2023/24	2024/25	2025/26	Jul 2026/27
Domestic Consumption						
European Union	41,890	44,497	39,613	41,236	41,570	42,500
United States	26,708	24,623	23,545	26,145	25,550	26,950
Brazil	22,340	22,450	22,160	21,970	22,280	22,390
Japan	7,210	6,886	6,996	6,528	6,653	6,900
China	4,920	5,280	5,765	5,893	6,420	6,750
Philippines	7,190	6,465	6,590	6,190	6,525	6,725
Canada	5,330	5,110	4,980	5,085	5,050	5,100
Ethiopia	3,364	3,430	3,500	4,000	4,500	5,000
Vietnam	3,200	3,200	3,900	4,800	4,900	5,000
United Kingdom	3,985	3,980	4,190	4,495	4,570	4,850
Indonesia	4,750	4,771	4,775	4,873	4,810	4,830
Russia	4,055	4,250	4,250	4,450	4,575	4,800
Korea, South	3,405	3,175	3,350	3,365	3,200	3,400
Mexico	2,850	3,035	3,100	3,100	3,160	3,240
Australia	2,305	2,135	2,090	2,740	2,535	2,650
Colombia	2,145	2,150	2,225	2,149	2,200	2,200
Algeria	2,090	2,050	1,950	2,050	2,050	2,050
Turkey	1,285	1,590	1,545	1,820	1,750	1,925
India	875	900	1,250	1,150	1,575	1,580
Saudi Arabia	1,140	1,380	1,375	1,540	1,350	1,450
Switzerland	1,185	1,160	1,094	1,215	1,200	1,300
Egypt	450	900	650	1,175	1,175	1,275
Ukraine	1,300	1,090	1,100	1,070	1,110	1,150
Thailand	725	730	880	930	925	1,125
Morocco	990	805	840	960	910	950
Other	12,189	12,712	12,231	12,832	12,916	13,646
Total	167,876	168,754	163,944	171,761	173,459	179,736
Ending Stocks						
European Union	14,000	9,313	8,626	8,170	7,500	9,300
United States	6,378	5,700	5,700	5,700	5,700	5,700
Brazil	540	4,620	2,085	955	3,895	4,425
Japan	2,898	2,517	2,426	2,268	2,200	2,300
Honduras	67	112	143	178	435	707
Indonesia	1,056	500	480	622	751	671
Colombia	760	885	668	922	866	670
Vietnam	3,580	839	889	1,089	689	489
China	358	303	558	400	400	400
Uganda	454	469	244	269	334	329
Other	1,849	1,676	1,302	1,437	1,600	1,292
Total	31,940	26,934	23,121	22,010	24,370	26,283

Coffee marketing year for producer countries begins either in October (Colombia), April (Indonesia) or July (Brazil), as examples. Coffee marketing year for non-producer countries begins in October.