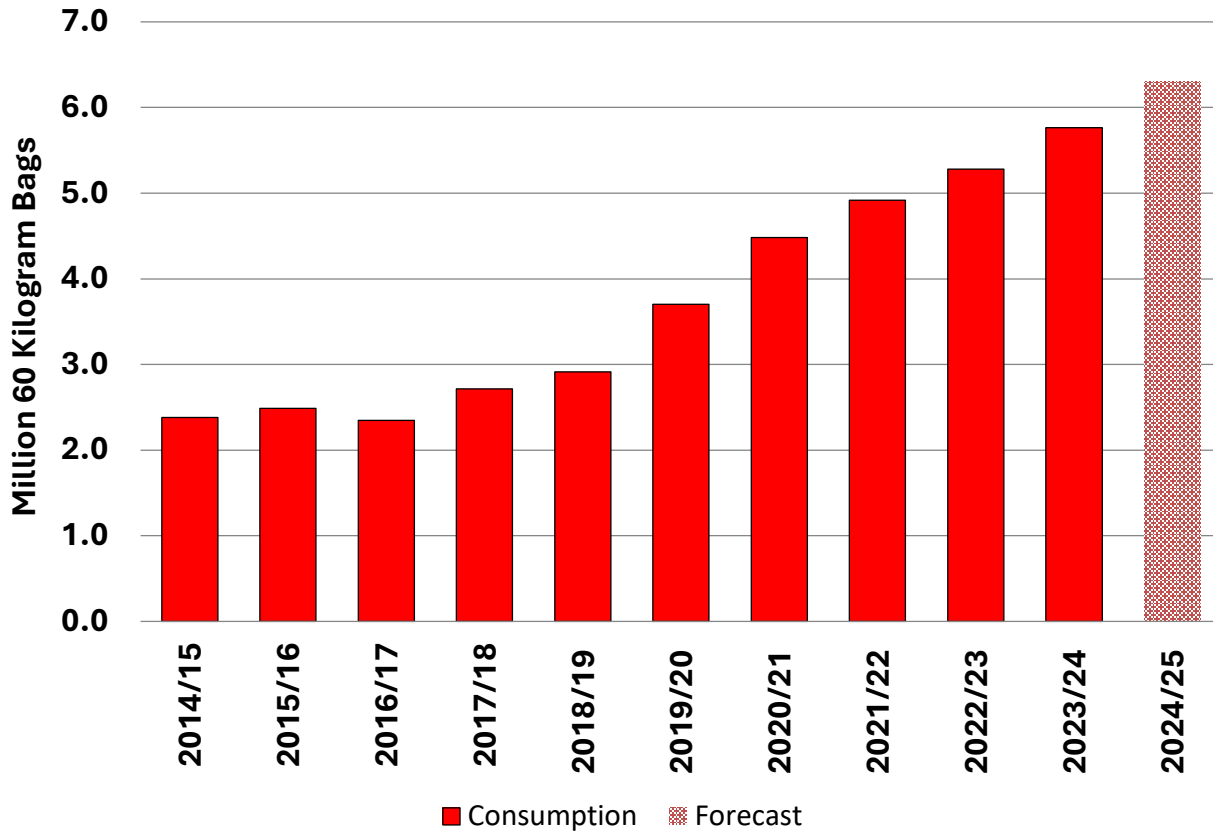


Coffee: World Markets and Trade

China's Expanding Coffee Consumption



China's coffee consumption surged almost 150 percent in the last 10 years and is forecast to reach 6.3 million bags (60 kilograms) in 2024/25. With domestic production hovering around 2.0 million bags during this period, imports satisfied rising demand. Whereas lower-quality soluble coffee dominated trade at the beginning of this period, higher-quality green coffee now accounts for over 60 percent of total imports.

While tea remains China's primary beverage, coffee consumption is becoming more popular, especially with younger professionals in urban areas who increasingly purchase coffee away from home. Retailers are concentrated in Beijing, Shanghai, Guangzhou, and Shenzhen but have been on the rise in lesser populated cities such as Chengdu, Hangzhou, Suzhou, and Chongqing. These markets were initially dominated by international companies that arrived after trade liberalization in the early 2000s, but domestic retail chains have expanded in recent years. This trend has been facilitated by companies offering on-line purchase for either in-store pickup or delivery, which has raised volumes and lowered costs. This further stimulated consumption as coffee became more affordable. As the market grows, consumers are transitioning from imported soluble coffee to locally roasted coffee identified by origin (domestic or imported).

China grows almost exclusively Arabica coffee in the prefectures of Baoshan, Dehong, Pu'er, and Lincang in the Yunnan Province where the altitude ranges between 1,000 and 2,000 meters above sea level. Output is forecast at 1.9 million bags in 2024/25. While Catimor is the most common variety grown due to its higher resistance to diseases such as leaf rust, it sometimes produces an

inferior flavor. In response to demand for higher quality coffee, growers have begun planting other Arabica varieties such as Bourbon and Typica which offer better flavor and more favorably compete with imports.

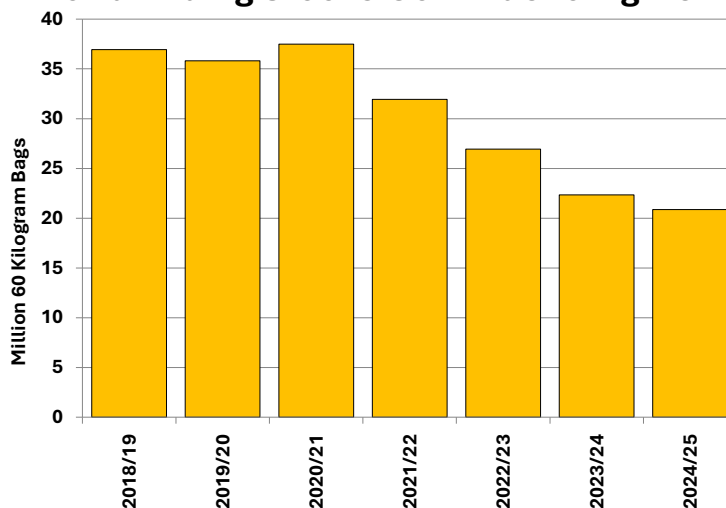
In the last decade, China’s total coffee imports nearly tripled to 5.5 million bags and are forecast to reach 5.6 million in 2024/25. This explosive growth was driven by green coffee jumping from just 900,000 bags in 2014/15 to a forecast 3.6 million. Vietnam and Indonesia were initially top suppliers but have since been overtaken by Brazil and Colombia. Import demand for soluble coffee has remained relatively flat during this period and is forecast at 1.8 million bags in 2024/25, with top suppliers including Vietnam and Malaysia. China typically imports less than 400,000 bags of roasted coffee, primarily from the European Union and United States. Roasted coffee is less desirable for imports because it begins to lose flavor and aroma shortly after being roasted unless shipped quickly in specially designed packaging.

China’s consumption growth is expected to continue as this largely tea drinking culture embraces a higher caffeinated beverage and be a major factor in growing global coffee demand.

2024/25 Coffee Overview

World coffee production for 2024/25 is forecast 6.9 million bags higher than the previous year to 174.9 million due primarily to rebounding output in Vietnam and Indonesia. World exports are forecast modestly higher as gains in Vietnam and Indonesia more than offset reduced shipments from Brazil. Global consumption is expected to rise 5.1 million bags to 168.1 million, with the largest gains in the European Union, the United States, and China. Ending stocks are expected to drop 1.5 million bags to 20.9 million.

World Ending Stocks Continue to Tighten



Brazil combined Arabica and Robusta harvest is forecast at 66.4 million bags, up just 100,000 bags from the previous year. Arabica output is forecast 500,000 bags higher to 45.4 million while the Robusta harvest is expected to slip 400,000 bags to 21.0 million. Drought and high temperatures during the fruit development and filling period caused Arabica and Robusta yields to fall below initial projections. With nearly flat output, coffee bean exports are forecast to drop 2.6 million bags to 40.5 million due primarily to last year’s inventory drawdown, which lowered total supplies.

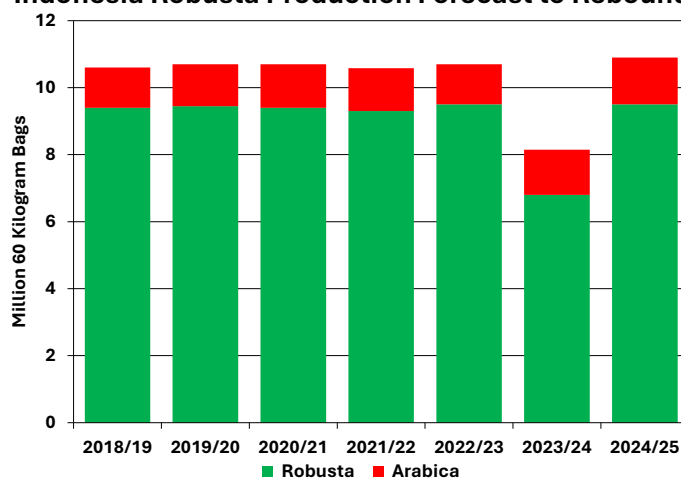
Vietnam production is forecast to recover 2.6 million bags to 30.1 million but remain below the 2021/22 record crop. The beginning of the rainy season got off to a dry start and was followed by below-average precipitation and temperatures in many of the major growing areas. Whereas similar conditions lowered yields and output the previous 2 harvests, growers this year responded to higher coffee prices by picking as much as possible rather than omitting smaller, less profitable cherries. Bean exports are forecast to rebound 1.8 million bags to 24.4 million on higher available supplies.

Colombia Arabica production is forecast up 100,000 bags to 12.9 million on favorable growing conditions and improving yields. Bean exports, mostly to the United States and European Union, are forecast up 200,000 bags to 10.9 million on slightly higher supplies and sustained demand.

Central America and Mexico production is forecast 600,000 bags higher to 17.0 million, with Arabica accounting for 95 percent of output. Honduras is expected 300,000 bags higher to 5.3 million and Nicaragua is expected to gain 300,000 bags to 2.7 million on improved yields. Production is expected flat in Costa Rica, El Salvador, Guatemala, Mexico, and Panama. Bean exports for the region are forecast up 800,000 bags to 13.7 million, fueled by higher supplies in Honduras and Nicaragua.

Indonesia combined Arabica and Robusta harvest is forecast to rebound nearly 2.8 million bags to 10.9 million. Robusta output is expected to recover 2.7 million bags to 9.5 million on favorable growing conditions in the lowland areas of Southern Sumatra and Java where approximately 75 percent is grown. Last year's crop suffered from excessive rain during cherry development and caused sub-optimal conditions for pollination. Arabica production is seen rising slightly to 1.4 million bags. Elevated output is expected to translate to exports gaining 2.2 million bags to 6.5 million.

Indonesia Robusta Production Forecast to Rebound



European Union imports are forecast up 1.0 million bags to 45.0 million due to higher shipments from Vietnam and Indonesia. Top suppliers in 2023/24 included Brazil (43 percent), Vietnam (22 percent), Uganda (7 percent), and Honduras (6 percent). Ending stocks are expected to continue sliding to 8.0 million bags.

The **United States** imports the second-largest amount of coffee beans and is forecast to gain 800,000 bags to 22.3 million on rising consumption. Top suppliers in 2023/24 included Brazil (32 percent), Colombia (20 percent), Vietnam (8 percent), and Honduras (7 percent). Ending stocks are forecast unchanged at 5.7 million bags.

Revisions to 2023/24 Forecasts

World **production** is lowered 1.2 million bags from the June 2024 estimate to 168.0 million.

- Vietnam is reduced 1.6 million bags to 27.5 million as drought and high temperatures lowered yields.
- Colombia is up 600,000 bags to 12.8 million as coffee cherry borer insect infestations were not as severe as anticipated.

World **bean exports** are raised 200,000 bags to 119.8 million.

- Brazil is up 1.6 million bags to 43.1 million on higher-than-anticipated stocks drawdown.
- Vietnam is reduced 2.3 million bags to 22.6 million on lower exportable supplies.

World **ending stocks** are reduced 1.6 million bags to 22.3 million.

- Brazil is lowered 1.2 million bags to 1.7 million on higher shipments.
- European Union is reduced 900,000 bags to 8.0 million on lower imports.

The next release of this publication will be on June 25, 2025.

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

For additional information, please contact Tony Halstead (202-720-4620), (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://gain.fas.usda.gov/Pages/Default.aspx>.

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

Angola
Bolivia
Burundi
Ecuador
Indonesia
Madagascar
Papua New Guinea
Peru
Rwanda

July-June

Brazil
Cuba
Dominican Republic
Haiti
Philippines
Tanzania

October-September

Cameroon
Central African Republic
China
Colombia
Congo (Kinshasa)
Costa Rica
Cote d'Ivoire
El Salvador
Ethiopia
Ghana
Guatemala
Guinea
Honduras
India
Jamaica
Kenya
Laos
Liberia
Malawi
Malaysia
Mexico
Nicaragua
Nigeria
Panama
Sierra Leone
Thailand
Togo
Uganda
United States
Venezuela
Vietnam
Yemen

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

Coffee Summary
Thousand 60-Kilogram Bags

	2020/21	2021/22	2022/23	2023/24	Jun 2024/25	Dec 2024/25
Arabica Production						
Brazil	49,700	36,400	39,800	44,900	48,200	45,400
Colombia	13,400	11,800	10,700	12,760	12,400	12,900
Ethiopia	7,600	8,150	7,300	8,600	8,360	8,360
Honduras	6,500	4,800	5,700	5,000	5,300	5,300
Peru	3,369	4,200	3,475	4,000	4,250	4,350
Mexico	3,000	3,200	3,000	3,325	3,350	3,325
Guatemala	3,810	3,410	3,150	3,300	3,000	3,300
Nicaragua	2,550	2,718	2,430	2,200	2,525	2,525
China	1,900	1,800	1,800	1,800	1,900	1,800
Indonesia	1,300	1,280	1,200	1,350	1,400	1,400
India	1,650	1,583	1,667	1,480	1,400	1,400
Costa Rica	1,472	1,215	1,100	1,100	1,100	1,100
Vietnam	950	1,100	1,000	1,000	1,150	1,100
Uganda	730	990	990	1,000	1,000	1,000
Papua New Guinea	650	725	825	930	825	915
Other	3,539	3,729	3,642	3,634	3,695	3,670
Total	102,120	87,100	87,779	96,379	99,855	97,845
Robusta Production						
Vietnam	28,050	30,480	27,300	26,500	27,850	29,000
Brazil	20,200	21,700	22,800	21,400	21,700	21,000
Indonesia	9,400	9,300	9,500	6,800	9,500	9,500
Uganda	5,900	5,060	5,575	5,400	5,400	5,400
India	3,917	4,117	4,200	4,580	4,600	4,800
Malaysia	2,000	2,000	2,000	1,330	1,500	1,500
Cote d'Ivoire	910	1,110	1,020	1,325	1,400	1,400
Thailand	600	650	700	750	700	700
Tanzania	525	550	550	600	625	625
Mexico	530	540	545	545	550	545
Other	2,407	2,448	2,416	2,395	2,555	2,540
Total	74,439	77,955	76,606	71,625	76,380	77,010
Production						
Brazil	69,900	58,100	62,600	66,300	69,900	66,400
Vietnam	29,000	31,580	28,300	27,500	29,000	30,100
Colombia	13,400	11,800	10,700	12,760	12,400	12,900
Indonesia	10,700	10,580	10,700	8,150	10,900	10,900
Ethiopia	7,600	8,150	7,300	8,600	8,360	8,360
Uganda	6,630	6,050	6,565	6,400	6,400	6,400
India	5,567	5,700	5,867	6,060	6,000	6,200
Honduras	6,500	4,800	5,700	5,000	5,300	5,300
Peru	3,369	4,200	3,475	4,000	4,250	4,350
Mexico	3,530	3,740	3,545	3,870	3,900	3,870
Guatemala	3,930	3,540	3,270	3,420	3,120	3,420
Nicaragua	2,650	2,838	2,590	2,360	2,685	2,685
China	1,900	1,800	1,800	1,800	1,900	1,800
Malaysia	2,000	2,000	2,000	1,330	1,500	1,500
Cote d'Ivoire	910	1,110	1,020	1,325	1,400	1,400
Tanzania	1,125	1,200	1,200	1,350	1,400	1,400
Costa Rica	1,472	1,215	1,100	1,100	1,100	1,100
Papua New Guinea	700	775	875	980	875	965
Kenya	693	860	750	775	750	750
Thailand	600	650	700	750	700	700
El Salvador	540	600	550	500	450	500
Venezuela	480	500	500	500	500	500
Laos	485	385	410	430	450	450
Philippines	425	450	475	450	450	450
Ecuador	255	260	354	370	355	355
Other	2,198	2,172	2,039	1,924	2,190	2,100
Total	176,559	165,055	164,385	168,004	176,235	174,855

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

	2020/21	2021/22	2022/23	2023/24	Jun 2024/25	Dec 2024/25
Bean Exports						
Brazil	41,689	35,576	32,200	43,100	42,500	40,500
Vietnam	22,450	26,110	26,000	22,600	24,400	24,400
Colombia	11,500	11,000	9,450	10,700	10,800	10,900
Indonesia	6,466	6,335	6,735	4,285	6,500	6,500
Uganda	6,514	5,850	6,250	6,300	6,300	6,300
Ethiopia	4,675	4,831	3,910	5,610	4,800	5,200
Honduras	6,010	4,650	5,310	4,700	5,000	4,900
India	3,818	4,937	3,924	4,360	4,200	4,400
Peru	3,326	4,065	3,325	3,920	4,100	4,200
Guatemala	3,675	3,335	3,000	3,150	2,840	3,200
Other	11,024	12,288	10,841	11,028	11,676	11,831
Total	121,147	118,977	110,945	119,753	123,116	122,331
Roast and Ground Exports						
European Union	2,415	2,680	2,990	3,110	2,100	2,100
Switzerland	1,870	1,850	1,765	1,800	1,850	1,850
Vietnam	550	550	450	400	400	400
Colombia	245	265	210	230	200	200
China	40	65	20	150	20	100
Mexico	252	148	120	70	150	100
Brazil	32	54	45	50	51	50
Indonesia	56	43	57	70	50	50
Panama	30	32	32	28	35	30
Costa Rica	10	10	10	10	10	10
Other	17	21	17	21	21	21
Total	5,517	5,718	5,716	5,939	4,887	4,911
Soluble Exports						
Brazil	3,954	4,055	3,900	3,600	4,100	3,700
Vietnam	2,300	2,350	1,890	2,000	1,700	2,500
Malaysia	2,780	2,975	2,500	2,300	2,400	2,400
India	1,970	2,310	2,490	2,535	2,130	2,130
European Union	1,460	1,805	1,715	1,925	1,500	1,500
Indonesia	1,350	1,050	1,040	1,000	1,000	1,000
Thailand	885	990	900	1,095	1,000	1,000
Mexico	865	695	880	900	950	950
Colombia	1,010	1,100	950	830	1,000	900
China	380	375	450	475	325	400
Other	1,268	1,201	1,190	1,130	1,135	1,135
Total	18,222	18,906	17,905	17,790	17,240	17,615
Exports						
Brazil	45,675	39,685	36,145	46,750	46,651	44,250
Vietnam	25,300	29,010	28,340	25,000	26,500	27,300
Colombia	12,755	12,365	10,610	11,760	12,000	12,000
Indonesia	7,872	7,428	7,832	5,355	7,550	7,550
India	5,794	7,258	6,420	6,906	6,340	6,540
Uganda	6,514	5,850	6,250	6,300	6,300	6,300
Ethiopia	4,675	4,831	3,910	5,610	4,800	5,200
Honduras	6,010	4,650	5,310	4,700	5,000	4,900
Peru	3,326	4,065	3,325	3,920	4,100	4,200
European Union	3,875	4,485	4,705	5,035	3,600	3,600
Other	23,090	23,974	21,719	22,146	22,402	23,017
Total	144,886	143,601	134,566	143,482	145,243	144,857

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

	2020/21	2021/22	2022/23	2023/24	Jun 2024/25	Dec 2024/25
Bean Imports						
European Union	43,875	46,600	44,540	43,975	47,500	45,000
United States	24,320	25,225	22,540	21,480	24,500	22,300
Japan	6,520	6,800	5,860	6,220	6,500	6,500
China	1,675	1,660	1,965	3,405	3,000	3,600
Russia	3,390	3,400	3,500	3,500	3,500	3,500
Switzerland	3,450	3,400	3,290	3,345	3,300	3,300
Canada	2,860	2,940	2,700	2,980	2,900	3,100
Korea, South	2,635	3,015	2,820	2,960	2,900	3,100
United Kingdom	2,270	2,725	2,285	2,450	2,450	2,600
Algeria	2,200	2,050	2,000	1,900	1,900	2,000
Other	18,907	20,658	20,890	20,011	20,932	19,977
Total	112,102	118,473	112,390	112,226	119,382	114,977
Roast and Ground Imports						
United Kingdom	580	580	775	740	700	700
United States	605	580	640	770	600	700
Canada	475	550	450	185	400	400
Korea, South	360	390	355	390	375	400
Ukraine	460	450	400	440	400	400
Russia	460	305	350	350	350	350
Australia	205	200	200	185	200	200
China	310	350	290	210	250	200
Saudi Arabia	200	210	200	200	200	200
Vietnam	200	200	8	200	300	200
Other	781	885	800	830	821	836
Total	4,636	4,700	4,468	4,500	4,596	4,586
Soluble Imports						
Philippines	5,500	5,700	5,200	5,000	5,500	5,000
Canada	1,660	1,840	1,960	1,815	1,900	1,900
China	1,825	2,170	1,975	1,870	1,800	1,800
Indonesia	751	725	983	1,000	1,000	1,000
United Kingdom	105	680	920	950	900	1,000
United States	585	1,220	725	1,250	900	900
Japan	530	500	535	590	650	650
Kazakhstan	210	325	500	500	500	500
Russia	315	350	400	400	400	400
Guatemala	350	344	345	355	350	370
Other	3,558	3,820	3,523	3,456	3,615	3,510
Total	15,389	17,674	17,066	17,186	17,515	17,030
Imports						
European Union	43,875	46,600	44,540	43,975	47,500	45,000
United States	25,510	27,025	23,905	23,500	26,000	23,900
Japan	7,150	7,415	6,505	6,905	7,260	7,250
Philippines	6,160	6,540	5,900	5,850	6,300	5,800
China	3,810	4,180	4,230	5,485	5,050	5,600
Canada	4,995	5,330	5,110	4,980	5,200	5,400
United Kingdom	2,955	3,985	3,980	4,140	4,050	4,300
Russia	4,165	4,055	4,250	4,250	4,250	4,250
Korea, South	2,995	3,405	3,175	3,350	3,275	3,500
Switzerland	3,450	3,400	3,290	3,345	3,300	3,300
Other	27,062	28,912	29,039	28,132	29,308	28,293
Total	132,127	140,847	133,924	133,912	141,493	136,593

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

	2020/21	2021/22	2022/23	2023/24	Jun 2024/25	Dec 2024/25
Domestic Consumption						
European Union	41,271	41,882	44,522	39,607	41,800	42,046
United States	25,922	26,708	24,623	23,550	26,050	23,950
Brazil	22,280	22,340	22,450	22,560	22,670	22,670
Japan	7,354	7,210	6,886	6,996	7,300	7,176
Philippines	6,585	7,190	6,475	6,500	7,050	6,550
China	4,480	4,920	5,280	5,765	6,200	6,300
Canada	4,995	5,330	5,110	4,980	5,200	5,400
Indonesia	4,450	4,750	4,771	4,775	4,800	4,800
United Kingdom	2,955	3,985	3,980	4,140	4,050	4,300
Russia	4,165	4,055	4,250	4,250	4,250	4,250
Vietnam	2,720	3,200	3,200	3,300	3,600	3,600
Korea, South	2,995	3,405	3,175	3,350	3,275	3,500
Mexico	2,589	2,850	3,035	3,190	3,100	3,150
Ethiopia	3,000	3,364	3,430	3,000	3,550	3,100
Colombia	2,080	2,145	2,150	2,278	2,275	2,280
Australia	2,055	2,305	2,135	2,090	2,200	2,200
Algeria	2,240	2,090	2,050	1,950	1,950	2,050
Turkey	1,165	1,285	1,590	1,545	1,625	1,575
Saudi Arabia	1,200	1,140	1,380	1,440	1,350	1,350
Iran	425	635	770	1,040	1,000	1,100
Switzerland	1,180	1,185	1,160	1,185	1,100	1,100
Ukraine	1,235	1,300	1,090	1,120	1,120	1,070
India	1,180	875	900	950	1,320	1,025
Thailand	650	725	730	880	925	925
Jordan	845	730	725	805	810	825
Other	12,098	12,251	12,882	11,775	12,064	11,779
Total	162,114	167,855	168,749	163,021	170,634	168,071
Ending Stocks						
European Union	13,767	14,000	9,313	8,646	11,600	8,000
United States	6,023	6,378	5,700	5,700	5,700	5,700
Japan	2,693	2,898	2,517	2,426	2,072	2,500
Brazil	4,390	540	4,620	1,685	3,539	1,240
Vietnam	3,660	3,580	839	839	439	939
Colombia	1,235	760	885	680	590	685
China	488	358	303	558	458	558
Indonesia	1,669	1,056	500	480	550	550
Mexico	17	99	79	213	48	173
Ethiopia	135	90	50	40	90	100
Other	3,417	2,181	2,128	1,080	698	422
Total	37,494	31,940	26,934	22,347	25,784	20,867

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.