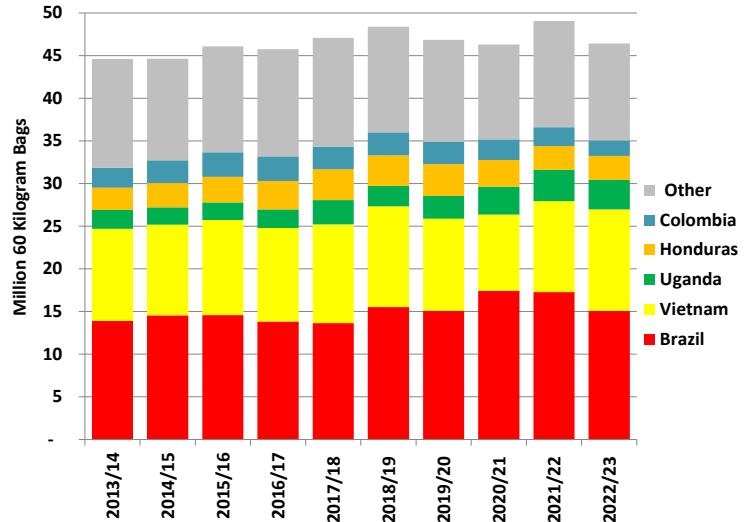


Coffee: World Markets and Trade

European Union: World's Top Coffee Importer

European Union (EU) imports are dominated by unroasted green coffee beans, which accounts for about 90 percent of trade. Top suppliers in 2022/23 (October through September) included Brazil (32 percent), Vietnam (26 percent), Uganda (7 percent), and Honduras (6 percent). Imports reached a record 49.1 million bags the previous year but slipped 2.6 million bags this year as lower imports from Brazil more than offset gains from Vietnam. These two countries accounted for 54 to 58 percent of EU green coffee imports over the last 10 years, leaving limited market share for other suppliers. During this same period, Uganda gained 1.2 million bags to total 3.4 million on rising production while Colombia lost 500,000 bags to total 1.8 million on falling output.

Brazil and Vietnam Drive EU Green Coffee Imports



EU imports of roasted coffee totaled just 1.4 million bags in 2022/23, down from a record 2.1 million bags 4 years earlier on reduced imports from Switzerland. Top suppliers included Switzerland (77 percent) and the United Kingdom (13 percent). Because coffee beans begin to lose flavor and aroma shortly after being roasted, these imports are mostly limited to neighboring non-producing countries.

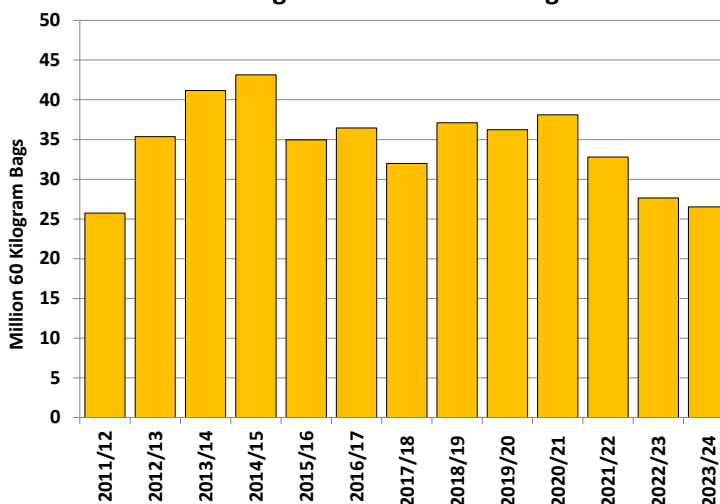
Imports of soluble coffee rebounded 300,000 bags to 3.7 million in 2022/23. Top suppliers included the United Kingdom (34 percent), Vietnam (12 percent), India (12 percent), and Ecuador (10 percent). While imports from the United Kingdom have been nearly flat at 1.3 million bags for a decade, imports from India and Vietnam gained about 300,000 bags to each total over 400,000.

EU green coffee imports are forecast to rebound slightly in 2023/24 to 47.0 million bags primarily due to stronger shipments from Brazil, while roasted and soluble coffee imports remain flat at 1.4 million bags and 3.7 million bags, respectively.

2023/24 Coffee Overview

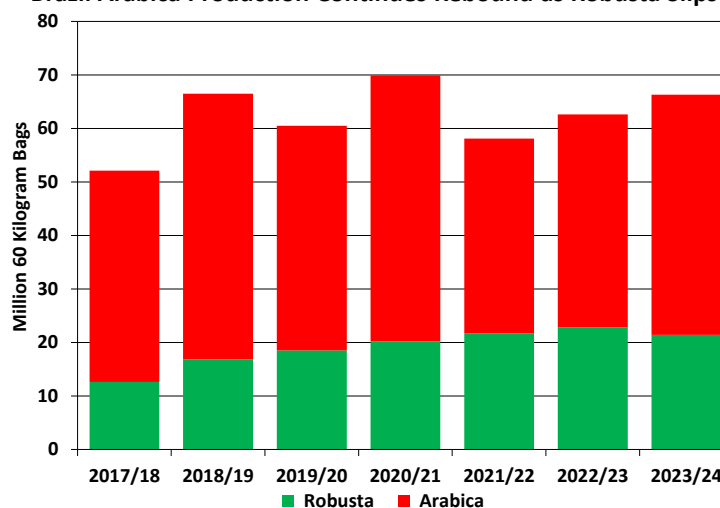
World coffee production for 2023/24 is forecast to reach 171.4 million bags (60 kilograms), 6.9 million bags higher than the previous year. Higher output in Brazil, Colombia, and Ethiopia is expected to more than offset reduced production in Indonesia. Global coffee bean exports are expected up 8.4 million bags to 119.9 million, primarily on strong shipments from Brazil. With global consumption forecast at a record 169.5 million bags, ending inventories are expected to continue to tighten to a 12-year low of 26.5 million bags.

World Ending Stocks Continue to Tighten



Brazil combined Arabica and Robusta harvest is forecast up 3.7 million bags to 66.3 million in 2023/24. Arabica output is forecast to improve 5.1 million bags to 44.9 million. In January 2023, coffee trees in top growing region Minas Gerais experienced higher than average rains during the fruit development stage, causing difficulties for some growers in controlling plant diseases and pests. However, increased precipitation resulted in coarser and heavier beans compared to the last crop, which contributed to production gains. Although output is expected to expand, this quantity is below previous

Brazil Arabica Production Continues Rebound as Robusta Slips



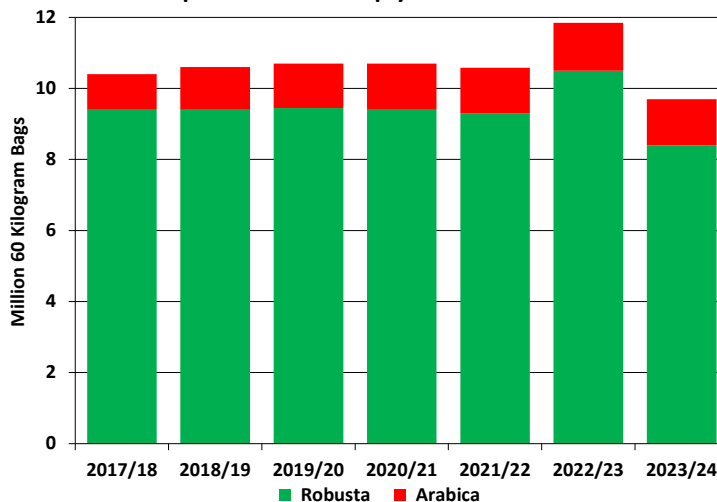
crops that peaked at nearly 50.0 million bags. Arabica trees in many growing regions continue to recover from severe weather that occurred in 2021 including severe frosts, high temperatures, and below-average rainfall that lowered production in 2021/22 and 2022/23. Following 6 years of expansion, the Robusta harvest is forecast to decline 1.4 million bags to 21.4 million as reduced precipitation and cooler temperatures leading up to the flowering stage lowered yields in Espirito Santo, where the vast majority is grown. Coffee bean exports are forecast to rebound 7.3 million bags to 39.5 million, fueled by higher supplies and stronger EU and U.S. import demand.

Vietnam production is forecast to add 300,000 bags to reach 27.5 million. Cultivated area is forecast unchanged, with nearly 95 percent of total output remaining as Robusta. However, with lower total supplies due to last year's stocks drawdown, bean exports are forecast to decline 2.4 million bags to 23.0 million.

Colombia Arabica production is forecast up 800,000 bags to 11.5 million on slightly higher yields. However, yields remain nearly 15 percent below normal because growers limited fertilizer use due to high prices. Bean exports, mostly to the United States and EU, are forecast up 1.2 million bags to 10.8 million on strong demand.

Indonesia combined Arabica and Robusta harvest is forecast down 2.2 million bags to 9.7 million. Robusta production is expected to drop 2.1 million bags to 8.4 million. Excessive rain during cherry development lowered yields and caused sub-optimal conditions for pollination in the lowland areas of Southern Sumatra and Java, where approximately 75 percent of coffee is grown. Arabica production is seen dipping slightly to 1.3 million bags. Bean exports are forecast to plummet 2.7 million bags to 5.0 million on sharply reduced supplies.

Indonesia Output Forecast Sharply Lower on Reduced Robusta



India combined Arabica and Robusta harvest is forecast nearly unchanged at 6.0 million bags. Arabica production is forecast to drop 200,000 bags to 1.4 million due primarily to a prolonged dry spell from December 2022 to March 2023 which was followed by poor pre-monsoon rains. Robusta production is expected to rise 300,000 bags to 4.5 million on slightly higher yields. Bean exports are forecast up 300,000 bags to 4.3 million on a slight inventory drawdown.

Revisions to 2022/23 Forecasts

World **production** is lowered 5.5 million bags from the June 2023 estimate to 164.5 million.

- Vietnam is 2.6 million bags lower to 27.2 million due to dry conditions that dropped yields.
- Ethiopia is reduced 1.0 million bags to 7.3 million as dry conditions lowered yields.
- Colombia is down 600,000 bags to 10.7 million as damaging rains fell in some areas during the flowering period.

World **bean exports** are lowered 4.9 million bags to 111.6 million.

- Colombia is down 1.2 million bags to 9.6 million on lower output and higher ending stocks.
- Ethiopia is lowered 900,000 bags to 3.9 million on reduced output.
- Vietnam is reduced 600,000 bags to 25.4 million on lower output.

World **ending stocks** are revised down 4.0 million bags to 27.6 million.

- EU is down 3.3 million bags to 9.3 million on stronger-than-anticipated consumption.
- Vietnam is lowered 1.4 million bags to 300,000 on reduced production.

The next release of this publication will be on June 20, 2024.

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

	2019/20	2020/21	2021/22	2022/23	Jun 2023/24	Dec 2023/24
Arabica Production						
Brazil	42,000	49,700	36,400	39,800	44,700	44,900
Colombia	14,100	13,400	11,800	10,700	11,600	11,500
Ethiopia	7,475	7,600	8,150	7,300	8,350	8,350
Honduras	5,200	6,500	4,800	5,700	5,500	6,500
Peru	3,925	3,369	4,200	3,400	4,200	4,200
Mexico	3,150	3,000	3,200	3,000	3,545	3,545
Guatemala	3,515	3,810	3,410	3,150	3,305	3,305
Nicaragua	2,675	2,550	2,780	2,500	2,500	2,500
China	2,000	1,700	1,700	1,600	1,800	1,700
Costa Rica	1,466	1,472	1,215	1,425	1,440	1,440
India	1,450	1,650	1,583	1,667	1,230	1,420
Indonesia	1,250	1,300	1,280	1,350	1,300	1,300
Uganda	1,025	730	990	990	1,000	1,000
Vietnam	1,100	950	1,100	900	1,070	880
Papua New Guinea	775	650	725	825	850	850
Other	3,840	3,639	3,829	3,579	3,935	3,925
Total	94,946	102,020	87,162	87,886	96,325	97,315
Robusta Production						
Vietnam	30,200	28,050	30,480	26,300	30,230	26,620
Brazil	18,500	20,200	21,700	22,800	21,700	21,400
Indonesia	9,450	9,400	9,300	10,500	8,400	8,400
Uganda	4,450	5,900	5,060	5,575	5,850	5,850
India	3,517	3,917	4,117	4,200	4,580	4,530
Malaysia	1,900	2,000	2,000	2,000	1,500	1,500
Cote d'Ivoire	1,775	910	1,110	1,050	1,350	1,350
Thailand	700	600	650	700	750	750
Tanzania	600	650	550	520	600	600
Mexico	550	530	540	545	545	545
Other	2,492	2,407	2,420	2,456	2,510	2,565
Total	74,134	74,564	77,927	76,646	78,015	74,110
Production						
Brazil	60,500	69,900	58,100	62,600	66,400	66,300
Vietnam	31,300	29,000	31,580	27,200	31,300	27,500
Colombia	14,100	13,400	11,800	10,700	11,600	11,500
Indonesia	10,700	10,700	10,580	11,850	9,700	9,700
Ethiopia	7,475	7,600	8,150	7,300	8,350	8,350
Uganda	5,475	6,630	6,050	6,565	6,850	6,850
Honduras	5,200	6,500	4,800	5,700	5,500	6,500
India	4,967	5,567	5,700	5,867	5,810	5,950
Peru	3,925	3,369	4,200	3,400	4,200	4,200
Mexico	3,700	3,530	3,740	3,545	4,090	4,090
Guatemala	3,645	3,930	3,540	3,270	3,435	3,435
Nicaragua	2,755	2,650	2,900	2,660	2,660	2,660
China	2,000	1,700	1,700	1,600	1,800	1,700
Malaysia	1,900	2,000	2,000	2,000	1,500	1,500
Costa Rica	1,466	1,472	1,215	1,425	1,440	1,440
Cote d'Ivoire	1,775	910	1,110	1,050	1,350	1,350
Tanzania	1,250	1,350	1,290	1,120	1,350	1,350
Papua New Guinea	825	700	775	875	900	900
Kenya	750	693	860	750	800	800
Thailand	700	600	650	700	750	750
El Salvador	510	540	600	550	670	670
Venezuela	550	480	500	500	500	500
Laos	440	485	385	435	450	450
Philippines	450	425	450	475	450	450
Ecuador	275	255	260	354	370	370
Other	2,447	2,198	2,154	2,041	2,115	2,160
Total	169,080	176,584	165,089	164,532	174,340	171,425

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

	2019/20	2020/21	2021/22	2022/23	Jun 2023/24	Dec 2023/24
Bean Exports						
Brazil	36,190	41,689	35,576	32,200	41,000	39,500
Vietnam	24,526	22,450	26,110	25,400	24,500	23,000
Colombia	11,770	11,500	11,000	9,600	10,900	10,800
Uganda	5,350	6,514	5,850	6,250	6,515	6,515
Honduras	4,900	6,010	4,650	5,350	5,200	6,200
Indonesia	6,096	6,466	6,335	7,695	5,200	5,000
Ethiopia	4,135	4,675	4,831	3,910	4,820	4,820
India	3,399	3,818	4,937	4,000	4,250	4,250
Peru	3,720	3,326	4,065	3,300	4,060	4,060
Guatemala	3,211	3,675	3,335	2,985	3,150	3,150
Other	13,023	11,019	12,263	10,876	12,584	12,630
Total	116,320	121,142	118,952	111,566	122,179	119,925
Roast and Ground Exports						
European Union	2,275	2,415	2,680	2,975	2,500	2,500
Switzerland	1,560	1,870	1,850	1,765	1,850	1,850
Vietnam	550	550	550	450	500	350
Colombia	210	245	265	200	200	200
Mexico	206	252	148	100	160	125
Brazil	26	32	54	45	50	50
Indonesia	56	56	43	57	40	50
Panama	40	30	32	32	25	35
China	15	25	60	5	25	25
Costa Rica	10	10	10	10	10	10
Other	19	17	21	17	16	16
Total	4,967	5,502	5,713	5,656	5,376	5,211
Soluble Exports						
Brazil	4,040	3,954	4,055	3,900	4,300	4,300
Malaysia	3,000	2,780	2,975	2,500	2,300	2,300
India	1,782	1,970	2,310	2,300	2,080	2,080
Vietnam	2,250	2,300	2,350	1,890	2,500	1,650
European Union	1,215	1,460	1,820	1,720	2,200	1,600
Thailand	905	885	990	900	1,100	1,100
Colombia	1,025	1,010	1,100	900	1,000	1,000
Indonesia	1,000	1,350	1,050	1,040	1,000	1,000
Mexico	945	865	695	880	900	900
Ecuador	370	475	413	465	400	400
Other	687	693	748	770	760	760
Total	17,219	17,742	18,506	17,265	18,540	17,090
Exports						
Brazil	40,256	45,675	39,685	36,145	45,350	43,850
Vietnam	27,326	25,300	29,010	27,740	27,500	25,000
Colombia	13,005	12,755	12,365	10,700	12,100	12,000
Uganda	5,350	6,514	5,850	6,250	6,515	6,515
India	5,185	5,794	7,258	6,306	6,336	6,336
Honduras	4,900	6,010	4,650	5,350	5,200	6,200
Indonesia	7,152	7,872	7,428	8,792	6,240	6,050
Ethiopia	4,135	4,675	4,831	3,910	4,820	4,820
European Union	3,490	3,875	4,500	4,695	4,700	4,100
Peru	3,720	3,326	4,065	3,300	4,060	4,060
Other	23,987	22,590	23,529	21,299	23,274	23,295
Total	138,506	144,386	143,171	134,487	146,095	142,226

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

	2019/20	2020/21	2021/22	2022/23	Jun 2023/24	Dec 2023/24
Bean Imports						
European Union	44,460	43,875	46,600	44,470	47,500	47,000
United States	23,900	24,320	25,225	22,540	26,500	24,000
Japan	6,550	6,520	6,800	5,860	6,200	6,200
Russia	3,180	3,390	3,400	3,500	3,500	3,500
Switzerland	3,030	3,450	3,400	3,290	3,500	3,500
Canada	2,835	2,860	2,940	2,700	3,100	3,100
Korea, South	2,660	2,635	3,015	2,820	2,800	2,800
United Kingdom	2,640	2,270	2,725	2,285	2,600	2,600
Colombia	845	1,670	2,040	2,100	2,350	2,300
China	900	1,675	1,665	1,965	1,800	2,000
Other	19,603	19,442	20,476	20,144	19,995	20,805
Total	110,603	112,107	118,286	111,674	119,845	117,805
Roast and Ground Imports						
United Kingdom	585	580	580	775	700	700
United States	360	605	580	640	625	625
Canada	480	475	550	450	500	500
Korea, South	320	360	390	355	400	400
Ukraine	450	460	450	400	400	400
China	260	309	350	290	350	350
Russia	430	460	305	350	350	350
Australia	200	205	200	200	200	200
Vietnam	300	200	200	8	200	200
Norway	120	135	135	140	140	140
Other	815	847	976	913	667	697
Total	4,320	4,636	4,716	4,521	4,532	4,562
Soluble Imports						
Philippines	5,000	5,500	5,700	5,800	5,500	5,500
Canada	1,515	1,660	1,840	1,960	2,100	1,800
China	1,775	1,820	2,170	1,975	1,800	1,800
Indonesia	766	751	725	983	1,000	1,000
United Kingdom	580	105	680	920	1,000	900
United States	800	585	1,235	725	1,200	800
Japan	630	530	500	535	500	500
Argentina	310	350	360	400	400	400
Russia	1,015	315	350	400	400	400
South Africa	310	405	490	350	400	400
Other	3,566	3,364	3,640	3,540	3,565	3,335
Total	16,267	15,385	17,690	17,588	17,865	16,835
Imports						
European Union	44,460	43,875	46,600	44,470	47,500	47,000
United States	25,060	25,510	27,040	23,905	28,325	25,425
Japan	7,290	7,150	7,415	6,505	6,800	6,800
Philippines	5,670	6,160	6,540	6,500	6,300	6,300
Canada	4,830	4,995	5,330	5,110	5,700	5,400
Russia	4,625	4,165	4,055	4,250	4,250	4,250
United Kingdom	3,805	2,955	3,985	3,980	4,300	4,200
China	2,935	3,804	4,185	4,230	3,950	4,150
Switzerland	3,030	3,450	3,400	3,290	3,500	3,500
Korea, South	2,980	2,995	3,405	3,175	3,200	3,200
Other	26,505	27,069	28,737	28,368	28,417	28,977
Total	131,190	132,128	140,692	133,783	142,242	139,202

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

	2019/20	2020/21	2021/22	2022/23	Jun 2023/24	Dec 2023/24
Domestic Consumption						
European Union	40,264	41,271	41,867	44,462	42,000	43,125
United States	26,049	25,922	26,723	24,623	27,300	25,475
Brazil	22,994	22,280	22,340	22,450	22,560	22,560
Japan	7,610	7,354	7,210	6,886	7,100	7,317
Philippines	6,120	6,585	7,190	7,075	6,950	6,950
Canada	4,830	4,995	5,330	5,110	5,700	5,400
China	3,600	4,400	4,800	5,000	4,900	5,000
Indonesia	4,900	4,450	4,750	4,770	4,789	4,790
Russia	4,625	4,165	4,055	4,250	4,250	4,250
United Kingdom	3,805	2,955	3,985	3,980	4,300	4,200
Ethiopia	3,140	3,000	3,364	3,430	3,500	3,500
Korea, South	2,980	2,995	3,405	3,175	3,200	3,200
Vietnam	3,100	2,720	3,200	3,200	3,400	3,200
Mexico	2,620	2,589	2,850	3,000	2,950	2,985
Australia	1,960	2,055	2,305	2,135	2,250	2,250
Colombia	1,775	2,080	2,145	2,200	2,150	2,230
Algeria	2,040	2,240	2,090	2,050	1,950	1,950
Switzerland	1,470	1,580	1,550	1,525	1,650	1,650
Turkey	1,215	1,165	1,285	1,590	1,400	1,530
India	1,170	1,180	875	1,240	1,285	1,270
Argentina	859	789	906	1,019	1,040	1,040
Saudi Arabia	1,040	1,200	1,140	1,300	1,000	1,000
Ukraine	1,270	1,235	1,300	1,080	1,175	1,000
Morocco	710	880	990	830	930	930
Iran	305	425	635	770	700	800
Other	12,210	11,920	11,631	11,861	11,804	11,898
Total	162,661	162,430	167,921	169,011	170,233	169,500
Ending Stocks						
European Union	15,038	13,767	14,000	9,313	13,375	9,088
United States	6,402	6,023	6,378	5,700	6,775	5,700
Brazil	2,373	4,390	540	4,620	2,685	4,585
Japan	2,897	2,693	2,898	2,517	2,000	2,000
Indonesia	2,298	1,669	1,056	691	800	1,271
Colombia	852	1,235	760	845	420	620
China	298	717	687	832	502	507
Costa Rica	299	281	241	481	346	486
Uganda	363	379	454	469	479	479
Tanzania	280	504	516	407	416	416
Other	5,126	6,464	5,281	1,753	4,038	1,377
Total	36,226	38,122	32,811	27,628	31,836	26,529

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.