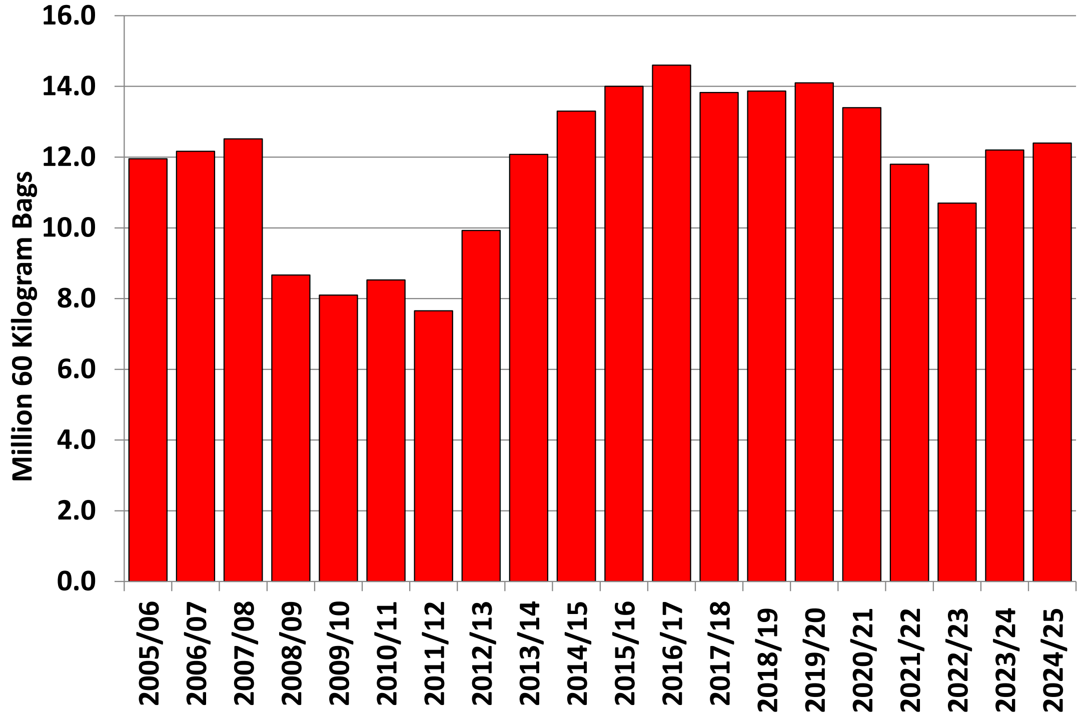
United States Department of Agriculture Foreign Agricultural Service

USDA

June 2024

Coffee: World Markets and Trade

Colombia Production: Two Periods of Sharp Decline



Colombia is the third-largest coffee producer in the world behind Brazil and Vietnam combined Arabica and Robusta output and is the second-largest Arabica producer after Brazil. In the last 2 decades, Colombia coffee growers experienced two sharp annual declines, coinciding with extreme weather events. In 2024/25, Brazil Arabica production is forecast to rise, but is below recent highs as recovery continues. Reduced output from these top suppliers has contributed to world ending stocks trending lower over the last decade on rising consumption.

Colombia's first reduction started during the 2008/09 harvest when heavy rains increased humidity and encouraged coffee rust, which led to a high rate of undeveloped coffee cherries dropping to the ground. This created an ideal environment for the coffee cherry borer insect to proliferate, and the combined impact of rust and insect infestation caused output to drop 3.9 million bags to 8.7 million. This marked the lowest production since 1972/73. In response, the industry embarked on an aggressive tree renovation program to replace trees with rust-resistant varieties. The program had the near-term effect of lowering output until these trees reached maturity; production continued to slip until bottoming at 7.7 million bags in 2011/12. The National Federation of Coffee Growers of Colombia (FEDECAFE) estimates that nearly 85 percent of coffee area is now planted with rust-resistant varieties compared to just 35 percent in 2007/08. The renovation program reduced the average age of coffee trees from about 15 to 7 years and increased yields by nearly 30 percent. By 2013/14, output recovered to 12.1 million bags.

The second output drop occurred during the 2021/22 harvest when excessive rains and cloud cover disrupted the flowering process. This caused production to fall 1.6 million bags to 11.8 million, the lowest level in nearly a decade. Yields continued to decrease in 2022/23 because growers limited fertilizer use due to near record prices for nitrogen, phosphate, and potash following Russia's invasion of

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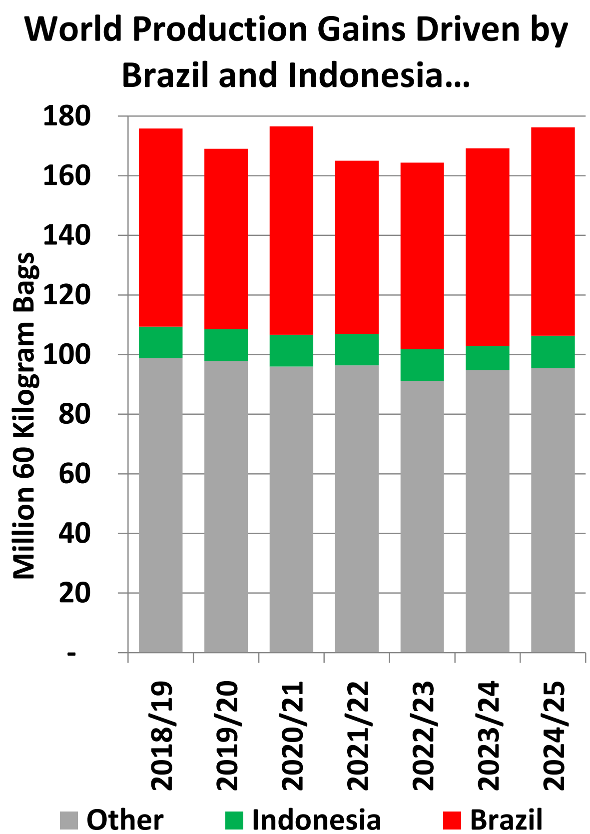
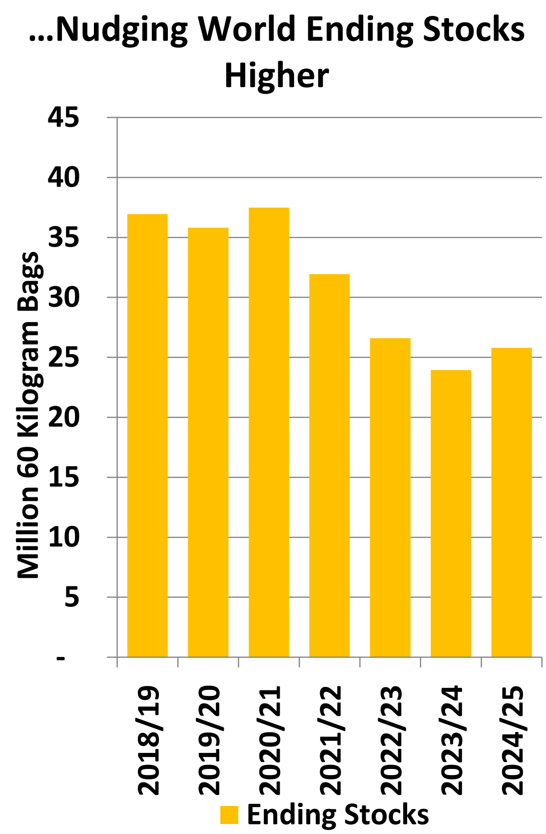
Ukraine. This exacerbated an already limited fertilizer supply situation. Output rebounded to 12.2 million bags in 2023/24 on favorable growing conditions but yields remained nearly 15 percent below normal because elevated fertilizer prices continued to limit utilization. For 2024/25, Arabica production is forecast up 200,000 bags to 12.4 million on slightly higher yields but below previous highs due to increased rates of coffee cherry borer insect infestations.

2024/25 Coffee Overview

World coffee production for 2024/25 is forecast to rebound 7.1 million bags from the previous year to 176.2 million due primarily to continued recovery in Brazil and rebounding output in Indonesia. With additional supplies, global exports are expected up 3.6 million bags to 123.1 million primarily on strong shipments from Indonesia and Brazil. Consumption is seen 3.1 million bags higher to 170.6 million. Ending stocks are expected to rise 1.9 million bags to 25.8 million following 3 years of decline.





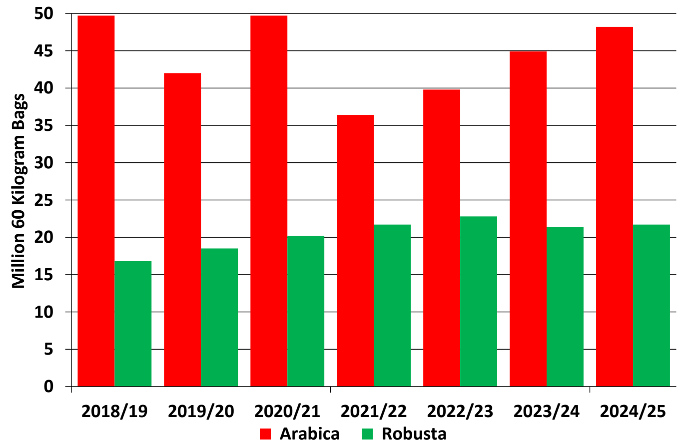
Vietnam production is forecast nearly unchanged at 29.0 million bags, with over 95 percent of total output remaining as Robusta. The rainy season was slightly delayed and above average temperatures were recorded in many areas, adversely affecting yields. Similar conditions lowered yields and output the previous 2 harvests. Bean exports are forecast to drop nearly 500,000 bags to 24.4 million due to reduced total supply and rising domestic consumption.

Reduced groundwater and forest cover pose long term challenges as many coffee growers in Vietnam rely on wells for irrigation and forest cover helps slow evaporation. In response, the provincial

Department of Agriculture and Rural Development and Western Highland Agriculture and Forest Science Institute have implemented strategies to encourage sustainable coffee production. These plans include replacing old coffee trees with new varieties, intercropping to increase shade and water retention, adopting water saving irrigation systems, and helping coffee farmers certify their farms for sustainable practices. According to Ministry of Agriculture and Rural Development statistics, approximately 30 percent of coffee area has been certified to meet sustainability standards. For more information, read the [Coffee Annual Report – 2024] from FAS Post in Hanoi, Vietnam.

Brazil combined Arabica and Robusta harvest is forecast up 3.6 million bags to 69.9 million in 2024/25. Arabica output is forecast to improve 3.3 million bags to 48.2 million and the Robusta harvest is expected to rebound 300,000 bags to 21.7 million. High temperatures at the end of 2023 caused some cherries to drop during the fruit-forming stage, but subsequent adequate precipitation provided ideal conditions for the final stage of fruit development and yields were boosted. With higher supplies, coffee bean exports are forecast up 1.0 million bags to 42.5 million and ending stocks are expected to rise nearly 700,000 bags to 3.5 million.

Brazil's Arabica and Robusta Output Gains Forecast Below Recent Peaks

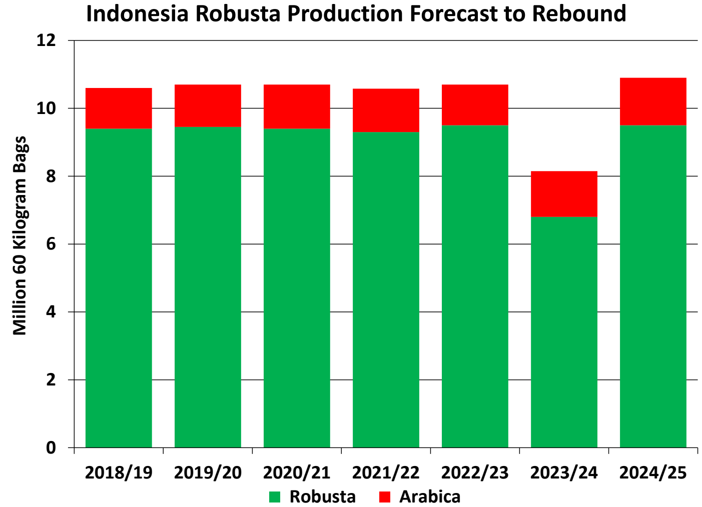


Colombia Arabica production is forecast up 200,000 bags to 12.4 million on slightly higher yields, though yields are expected below recent highs due to increased rates of coffee cherry borer insect infestations. Bean exports, mostly to the United States and European Union, are forecast up 200,000 bags to 10.8 million on higher supplies.

Central America and Mexico production is forecast 300,000 bags higher to 16.6 million, with Arabica accounting for 95 percent of output. Nicaragua is expected nearly 300,000 bags higher to 2.7 million, while Mexico is expected to gain just 30,000 bags to 3.9 million. Production is expected flat in Costa Rica, El Salvador, Guatemala, Honduras, and Panama. Bean exports for the region are forecast up 500,000 bags to 13.4 million, fueled by slightly higher supplies and an expected drawdown of stocks.

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



India combined Arabica and Robusta harvest is forecast down 100,000 bags to 6.0 million as Arabica output slips to 1.4 million due to poor pre-monsoon rains. Robusta production is expected unchanged at 4.6 million on normal growing conditions. Bean exports are forecast down slightly to 4.2 million bags on lower output.

European Union imports are forecast up 2.0 million bags to 47.5 million due to higher shipments from Brazil and Indonesia. Top suppliers in calendar year 2023 included Brazil (36 percent), Vietnam (25 percent), Uganda (8 percent), and Honduras (7 percent). Ending stocks are expected to rise 2.1 million bags to 11.6 million.

The **United States** imports the second-largest amount of coffee beans and is forecast to gain 900,000 bags to 24.5 million on rising consumption. Top suppliers in calendar year 2023 included Brazil (27 percent), Colombia (19 percent), Vietnam (11 percent), and Guatemala (6 percent). Ending stocks are forecast unchanged at 5.7 million bags.

Revisions to 2023/24 Forecasts

World **production** is lowered 2.2 million bags from the December 2023 estimate to 169.2 million.

- Central America and Mexico are reduced 2.5 million bags to 16.4 million due to higher-than-anticipated incidents of coffee cherry borer insect infestations as well as coffee rust.
- Indonesia is revised down 1.6 million bags to 8.2 million as drought conditions in Southern Sumatra lowered Robusta yields.
- Vietnam is raised 1.6 million bags to 29.1 million as farmers improved yields through higher - than-expected irrigation to mitigate the effects of drought and high temperatures.
- Colombia is up 700,000 bags to 12.2 million as coffee cherry borer insect infestations were not as severe as anticipated.

World **bean exports** are lowered 400,000 bags to 119.5 million.

- Central America and Mexico are reduced 2.7 million bags to 12.9 million on reduced exportable supplies.
- Indonesia is down 700,000 bags to 4.3 million on lower output.
- Brazil is raised 2.0 million bags to 41.5 million on higher-than-anticipated stocks drawdown.
- Vietnam is revised 1.9 million bags higher to 24.9 million on higher exportable supplies.

World **ending stocks** are reduced 2.6 million bags to 23.9 million.

- Brazil is lowered 1.7 million bags to 2.9 million on higher shipments.
- Indonesia is reduced 800,000 bags to 500,000 on lower output.

The next release of this publication will be on December 18, 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	July-June	October-September
Angola	Brazil	Cameroon
Bolivia	Cuba	Central African Republic
Burundi	Dominican Republic	China
Ecuador	Haiti	Colombia
Indonesia	Philippines	Congo (Kinshasa)
Madagascar	Tanzania	Costa Rica
Papua New Guinea		Cote d'Ivoire
Peru		El Salvador
Rwanda		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	2023/24	Jun 2024/25
Arabica Production						
Brazil	42,000	49,700	36,400	39,800	44,900	48,200
Colombia	14,100	13,400	11,800	10,700	12,200	12,400
Ethiopia	7,475	7,600	8,150	7,300	8,350	8,360
Honduras	5,200	6,500	4,800	5,700	5,300	5,300
Peru	3,925	3,369	4,200	3,475	4,000	4,250
Mexico	3,150	3,000	3,200	3,000	3,325	3,350
Guatemala	3,515	3,810	3,410	3,150	3,000	3,000
Nicaragua	2,675	2,550	2,718	2,430	2,275	2,525
China	2,000	1,900	1,800	1,800	1,800	1,900
Indonesia	1,250	1,300	1,280	1,200	1,350	1,400
India	1,450	1,650	1,583	1,667	1,500	1,400
Vietnam	1,100	950	1,100	1,000	1,100	1,150
Costa Rica	1,466	1,472	1,215	1,100	1,100	1,100
Uganda	1,025	730	990	990	1,000	1,000
Papua New Guinea	775	650	725	825	850	825
Other	3,815	3,539	3,739	3,629	3,630	3,695
Total	94,921	102,120	87,110	87,766	95,680	99,855
Robusta Production						
Vietnam	30,200	28,050	30,480	27,300	28,000	27,850
Brazil	18,500	20,200	21,700	22,800	21,400	21,700
Indonesia	9,450	9,400	9,300	9,500	6,800	9,500
Uganda	4,450	5,900	5,060	5,575	5,400	5,400
India	3,517	3,917	4,117	4,200	4,600	4,600
Malaysia	1,900	2,000	2,000	2,000	1,500	1,500
Cote d'Ivoire	1,775	910	1,110	1,020	1,350	1,400
Thailand	700	600	650	700	750	700
Tanzania	575	525	550	550	600	625
Mexico	550	530	540	545	545	550
Other	2,492	2,407	2,420	2,456	2,555	2,555
Total	74,109	74,439	77,927	76,646	73,500	76,380
Production						
Brazil	60,500	69,900	58,100	62,600	66,300	69,900
Vietnam	31,300	29,000	31,580	28,300	29,100	29,000
Colombia	14,100	13,400	11,800	10,700	12,200	12,400
Indonesia	10,700	10,700	10,580	10,700	8,150	10,900
Ethiopia	7,475	7,600	8,150	7,300	8,350	8,360
Uganda	5,475	6,630	6,050	6,565	6,400	6,400
India	4,967	5,567	5,700	5,867	6,100	6,000
Honduras	5,200	6,500	4,800	5,700	5,300	5,300
Peru	3,925	3,369	4,200	3,475	4,000	4,250
Mexico	3,700	3,530	3,740	3,545	3,870	3,900
Guatemala	3,645	3,930	3,540	3,270	3,120	3,120
Nicaragua	2,755	2,650	2,838	2,590	2,435	2,685
China	2,000	1,900	1,800	1,800	1,800	1,900
Malaysia	1,900	2,000	2,000	2,000	1,500	1,500
Cote d'Ivoire	1,775	910	1,110	1,020	1,350	1,400
Tanzania	1,200	1,125	1,200	1,200	1,350	1,400
Costa Rica	1,466	1,472	1,215	1,100	1,100	1,100
Papua New Guinea	825	700	775	875	900	875
Kenya	750	693	860	750	725	750
Thailand	700	600	650	700	750	700
Venezuela	550	480	500	500	500	500
El Salvador	510	540	600	550	450	450
Laos	440	485	385	435	450	450
Philippines	450	425	450	475	450	450
Ecuador	275	255	260	354	370	355
Other	2,447	2,198	2,154	2,041	2,160	2,190
Total	169,030	176,559	165,037	164,412	169,180	176,235

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	2023/24	Jun 2024/25
Bean Exports						
Brazil	36,190	41,689	35,576	32,200	41,500	42,500
Vietnam	24,526	22,450	26,110	26,000	24,850	24,400
Colombia	11,770	11,500	11,000	9,450	10,600	10,800
Indonesia	6,096	6,466	6,335	6,735	4,285	6,500
Uganda	5,350	6,514	5,850	6,250	6,300	6,300
Honduras	4,900	6,010	4,650	5,310	4,900	5,000
Ethiopia	4,135	4,675	4,831	3,910	4,820	4,800
India	3,399	3,818	4,937	3,924	4,250	4,200
Peru	3,720	3,326	4,065	3,325	3,920	4,100
Guatemala	3,211	3,675	3,335	3,000	2,850	2,840
Other	13,018	11,014	12,258	10,846	11,245	11,676
Total	116,315	121,137	118,947	110,950	119,520	123,116
Roast and Ground Exports						
European Union	2,275	2,415	2,680	2,975	2,200	2,100
Switzerland	1,560	1,870	1,850	1,765	1,850	1,850
Vietnam	550	550	550	450	350	400
Colombia	210	245	265	210	180	200
Mexico	206	252	148	120	160	150
Brazil	26	32	54	45	50	51
Indonesia	56	56	43	57	70	50
Panama	40	30	32	32	35	35
China	15	25	60	5	25	20
Costa Rica	10	10	10	10	10	10
Other	19	17	21	17	16	21
Total	4,967	5,502	5,713	5,686	4,946	4,887
Soluble Exports						
Brazil	4,040	3,954	4,055	3,900	4,000	4,100
Malaysia	3,000	2,780	2,975	2,500	2,300	2,400
India	1,782	1,970	2,310	2,490	2,080	2,130
Vietnam	2,250	2,300	2,350	1,890	1,650	1,700
European Union	1,215	1,460	1,820	1,720	1,500	1,500
Colombia	1,025	1,010	1,100	950	1,000	1,000
Indonesia	1,000	1,350	1,050	1,040	1,000	1,000
Thailand	905	885	990	900	1,095	1,000
Mexico	945	865	695	880	900	950
Ecuador	370	475	413	465	400	400
Other	1,102	1,093	1,103	1,085	1,085	1,060
Total	17,634	18,142	18,861	17,820	17,010	17,240
Exports						
Brazil	40,256	45,675	39,685	36,145	45,550	46,651
Vietnam	27,326	25,300	29,010	28,340	26,850	26,500
Colombia	13,005	12,755	12,365	10,610	11,780	12,000
Indonesia	7,152	7,872	7,428	7,832	5,355	7,550
India	5,185	5,794	7,258	6,420	6,336	6,340
Uganda	5,350	6,514	5,850	6,250	6,300	6,300
Honduras	4,900	6,010	4,650	5,310	4,900	5,000
Ethiopia	4,135	4,675	4,831	3,910	4,820	4,800
Peru	3,720	3,326	4,065	3,325	3,920	4,100
European Union	3,490	3,875	4,500	4,695	3,700	3,600
Other	24,397	22,985	23,879	21,619	21,965	22,402
Total	138,916	144,781	143,521	134,456	141,476	145,243

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	2023/24	Jun 2024/25
Bean Imports						
European Union	44,460	43,875	46,600	44,490	45,500	47,500
United States	23,900	24,320	25,225	22,540	23,600	24,500
Japan	6,550	6,520	6,800	5,860	6,160	6,500
Russia	3,180	3,390	3,400	3,500	3,500	3,500
Switzerland	3,030	3,450	3,400	3,290	3,220	3,300
China	900	1,675	1,665	1,965	3,200	3,000
Canada	2,835	2,860	2,940	2,700	2,700	2,900
Korea, South	2,660	2,635	3,015	2,820	2,800	2,900
United Kingdom	2,640	2,270	2,725	2,285	2,375	2,450
Algeria	2,000	2,200	2,050	2,000	1,900	1,900
Other	18,448	18,907	20,658	20,340	20,691	20,932
Total	110,603	112,102	118,478	111,790	115,646	119,382
Roast and Ground Imports						
United Kingdom	585	580	580	775	700	700
United States	360	605	580	640	625	600
Canada	480	475	550	450	360	400
Ukraine	450	460	450	400	375	400
Korea, South	320	360	390	355	360	375
Russia	430	460	305	350	350	350
Vietnam	300	200	200	8	200	300
China	260	310	350	290	225	250
Australia	200	205	200	200	200	200
Saudi Arabia	190	200	210	200	200	200
Other	744	781	885	800	826	821
Total	4,319	4,636	4,700	4,468	4,421	4,596
Soluble Imports						
Philippines	5,000	5,500	5,700	5,800	5,500	5,500
Canada	1,515	1,660	1,840	1,960	1,860	1,900
China	1,785	1,840	2,170	1,975	1,800	1,800
Indonesia	766	751	725	983	1,000	1,000
United Kingdom	580	105	680	920	900	900
United States	800	585	1,235	725	850	900
Japan	630	530	500	535	625	650
Kazakhstan	225	210	325	500	500	500
Russia	1,015	315	350	400	400	400
Australia	345	210	365	290	350	350
Other	3,615	3,698	3,799	3,568	3,329	3,615
Total	16,276	15,404	17,689	17,656	17,114	17,515
Imports						
European Union	44,460	43,875	46,600	44,490	45,500	47,500
United States	25,060	25,510	27,040	23,905	25,075	26,000
Japan	7,290	7,150	7,415	6,505	6,895	7,260
Philippines	5,670	6,160	6,540	6,500	6,300	6,300
Canada	4,830	4,995	5,330	5,110	4,920	5,200
China	2,945	3,825	4,185	4,230	5,225	5,050
Russia	4,625	4,165	4,055	4,250	4,250	4,250
United Kingdom	3,805	2,955	3,985	3,980	3,975	4,050
Switzerland	3,030	3,450	3,400	3,290	3,220	3,300
Korea, South	2,980	2,995	3,405	3,175	3,160	3,275
Other	26,503	27,062	28,912	28,479	28,661	29,308
Total	131,198	132,142	140,867	133,914	137,181	141,493

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	2023/24	Jun 2024/25
Domestic Consumption						
European Union	40,264	41,271	41,867	44,482	41,613	41,800
United States	26,049	25,922	26,723	24,623	25,125	26,050
Brazil	22,994	22,280	22,340	22,450	22,560	22,670
Japan	7,610	7,354	7,210	6,886	7,300	7,300
Philippines	6,120	6,585	7,190	7,075	6,950	7,050
China	3,800	4,600	5,000	5,400	5,800	6,200
Canada	4,830	4,995	5,330	5,110	4,920	5,200
Indonesia	4,900	4,450	4,750	4,771	4,785	4,800
Russia	4,625	4,165	4,055	4,250	4,250	4,250
United Kingdom	3,805	2,955	3,985	3,980	3,975	4,050
Vietnam	3,100	2,720	3,200	3,200	3,450	3,600
Ethiopia	3,140	3,000	3,364	3,430	3,500	3,550
Korea, South	2,980	2,995	3,405	3,175	3,160	3,275
Mexico	2,620	2,589	2,850	3,050	3,100	3,100
Colombia	1,775	2,080	2,145	2,150	2,220	2,275
Australia	1,960	2,055	2,305	2,135	2,150	2,200
Algeria	2,040	2,240	2,090	2,050	1,950	1,950
Turkey	1,215	1,165	1,285	1,590	1,605	1,625
Saudi Arabia	1,040	1,200	1,140	1,380	1,300	1,350
India	1,170	1,180	875	1,236	1,300	1,320
Ukraine	1,270	1,235	1,300	1,080	1,060	1,120
Switzerland	1,055	1,180	1,185	1,160	1,020	1,100
Iran	305	425	635	770	895	1,000
Thailand	800	650	725	730	850	925
Argentina	859	789	906	1,019	810	840
Other	12,124	12,154	12,077	12,040	11,892	12,034
Total	162,450	162,234	167,937	169,222	167,540	170,634
Ending Stocks						
European Union	15,038	13,767	14,000	9,313	9,500	11,600
United States	6,402	6,023	6,378	5,700	5,700	5,700
Brazil	2,373	4,390	540	4,620	2,885	3,539
Japan	2,897	2,693	2,898	2,517	2,112	2,072
Colombia	852	1,235	760	885	705	590
Indonesia	2,298	1,669	1,056	500	480	550
China	48	488	358	303	553	458
Vietnam	2,130	3,660	3,580	839	439	439
India	973	911	168	139	253	253
Ecuador	210	166	158	98	100	90
Other	2,587	2,492	2,044	1,674	1,206	493
Total	35,808	37,494	31,940	26,588	23,933	25,784

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.