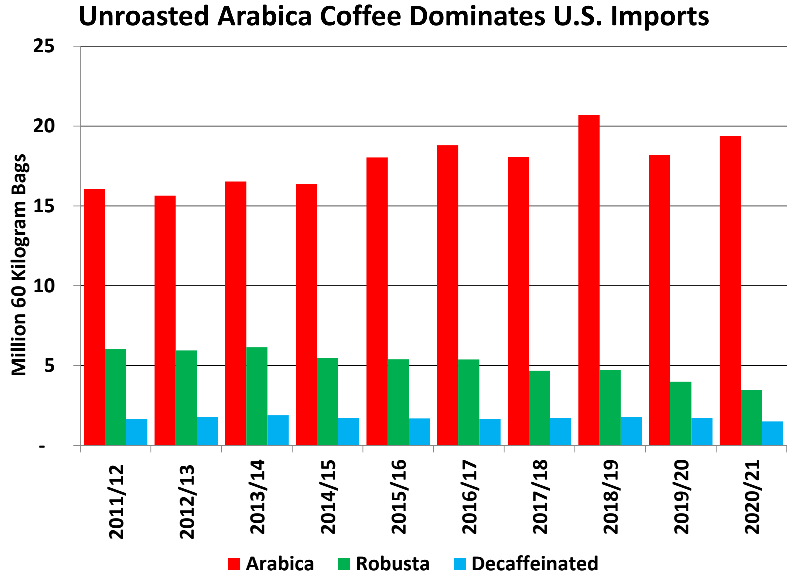
United States Department of Agriculture Foreign Agricultural Service

June 2022

Coffee: World Markets and Trade

U.S. Unroasted Coffee Imports

U.S. imports are dominated by unroasted Arabica coffee which expanded from 68 percent of unroasted coffee trade in 2011/12 to 80 percent in 2020/21. In terms of volume, unroasted Arabica coffee imports gained 3.3 million bags to 19.4 million during this period, while unroasted Robusta coffee imports lost 2.6 million bags to 3.5 million. Unroasted decaffeinated coffee imports, which are not designated as either Arabica or Robusta, slipped 100,000 bags to 1.5 million.

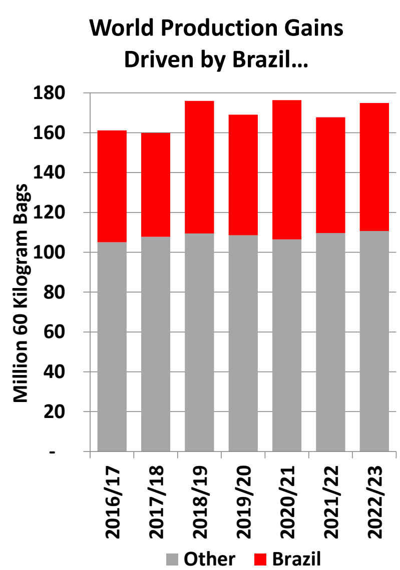


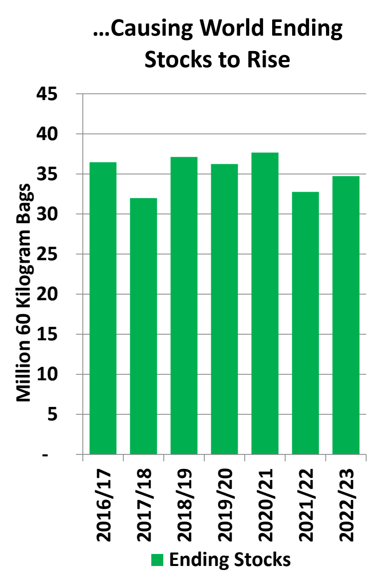
In the last decade, the United States has become increasingly reliant on unroasted Arabica coffee from Brazil and Colombia. Brazil's market share increased from 29 to 36 percent and Colombia's market share has risen from 17 to 23 percent. These gains largely came at the expense of Mexico, whose market share was cut in half to 4 percent, as well as Central American suppliers' collective footprint which slipped from 25 to 23 percent. These changes were primarily a function of output, as Brazil and Colombia Arabica production growth outpaced other suppliers.

However, this market dynamic could come under pressure because Arabica price gains outpaced Robusta over the last year. This widening differential could tempt some roasters to blend in additional lower-priced Robusta to reduce costs. If realized, this could reverse the near-decade long trend of falling Robusta coffee imports.

2022/23 Coffee Overview

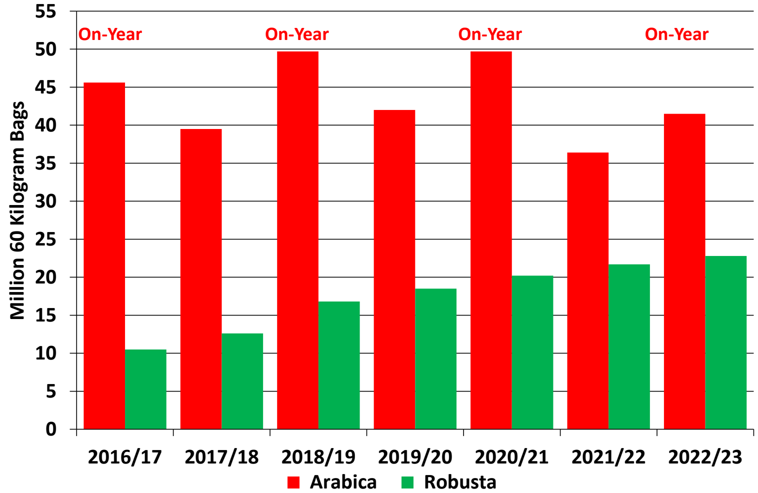
World coffee production for 2022/23 is forecast to rebound 7.8 million bags from the previous year to 175.0 million due primarily to Brazil's Arabica crop entering the on-year of the biennial production cycle. Global consumption is expected to rise 1.8 million bags to 167.0 million, with the largest gains in the European Union, the United States, Japan, and Brazil. World exports are forecast modestly higher on gains in Brazil and Indonesia. Ending stocks are expected 2.1 million bags higher to 34.7 million following last year's sharp drawdown.





Brazil Arabica output is forecast to recover 5.1 million bags to 41.5 million. The majority of producing areas are in the on-year of the biennial production cycle, resulting in higher production potential for the upcoming crop; however, this quantity is well below recent on-year crops that peaked at nearly 50 million bags. Arabica trees in many growing regions continue to recover from severe frosts in June and July 2021 as well as high temperatures and below-average rainfall that prevailed until September 2021. Although light frosts were also observed last month in limited areas in the states of Sao Paulo, Minas Gerais, and Parana, minimal damage was reported. The Robusta harvest is forecast to continue expanding to reach a record 22.8 million bags, up 1.1 million, as favorable weather conditions and good crop management aided fruit settings and development in the main growing region of Espirito Santo. A marginal increase in harvested area also supports the expected gains. The combined Arabica and Robusta harvest is forecast up 6.2 million bags to 64.3 million. Output gains are expected to be nearly evenly distributed between exports and stocks.

Brazil's On-Year Arabica Output Gains Forecast Below Recent Peaks, Robusta to Reach Record



Vietnam production is forecast at 30.9 million bags, down 700,000 from last year's record harvest. Cultivated area is forecast unchanged from last year, with over 95 percent of total output remaining as Robusta. The rainy season started earlier than previous years which supported good flowering and cherry development. Wetter-than-normal conditions reduced irrigation needs and costs. However, fertilizer prices skyrocketed as much as 70 percent in the last 6 months while local coffee prices remained flat. Farmers responded by reducing fertilizer use which is expected to lower yields and output from the previous year. Bean exports are forecast to decline 1.0 million bags to 25.0 million, and ending stocks are nearly flat at 3.5 million bags.

Colombia Arabica coffee production is forecast flat at 13.0 million bags on normal growing conditions. Yields are not expected to rise because farmers have limited fertilizer use due to the recent price spike. Colombia is highly dependent on imported fertilizer ingredients such as nitrogen, phosphorous, and potassium. The National Federation of Coffee Growers (FEDECAFE) has delivered limited quantities of fertilizer through its replanting program, but it is unlikely to meet the total fertilizer needs of its members. Bean exports, mostly to the United States and European Union, are forecast flat at 11.8 million bags.

Indonesia production is forecast to rise nearly 800,000 bags to 11.4 million. Robusta output is expected to reach 10.0 million bags on favorable growing conditions in the lowland areas of Southern Sumatra and Java where approximately 75 percent is grown. The main harvest season in southern Sumatra began on time in March and is expected to continue through July 2022. Arabica production is also seen rising slightly to 1.4 million bags. Bean exports are forecast to gain 200,000 bags to 6.5 million.

India production is forecast to gain 200,000 bags to 5.7 million as favorable weather during the flowering and fruit set period is expected to improve Arabica and Robusta yields. Bean exports are forecast up 100,000 bags to 3.9 million, while inventories remain stable.

European Union imports are forecast up 1.0 million bags to 46.0 million and account for 40 percent of the world's coffee bean imports. Top suppliers include Brazil (40 percent), Vietnam (20 percent), Uganda (8 percent), and Honduras (7 percent). Ending stocks are expected to drop 400,000 bags to 12.4 million in order to sustain a modest increase in consumption.

The **United States** imports the second-largest amount of coffee beans and is forecast up 500,000 bags to 25.5 million. Top suppliers include Brazil (30 percent), Colombia (19 percent), Vietnam (10 percent), and Honduras (7 percent). Ending stocks are forecast to grow 300,000 bags to 6.5 million.

Revised 2021/22

World **production** is lowered 300,000 bags from the December 2021 estimate to 167.1 million.

- Brazil is up 1.8 million bags to 58.1 million due largely to higher Arabica yields.
- Honduras is revised 1.4 million bags lower to 5.4 million as leaf rust lowered yields more than expected.
- Colombia is 800,000 bags lower to 13.0 million due to excessive rain and cloud cover that lowered yields.
- Cote d'Ivoire is reduced 670,000 bags to 800,000 due to lower yields.

World **bean exports** are revised up 200,000 bags to 117.3 million.

- Brazil is up 4.0 million bags to 34.0 million as logistical bottlenecks slowed trade less than expected.
- Honduras is reduced 1.3 million bags to 5.2 million on reduced exportable supplies.
- Colombia is down 1.0 million bags to 11.8 million on reduced exportable supplies.
- Cote d'Ivoire is down 650,000 bags to 550,000 on updated trade data.

World **bean imports** are revised up 2.4 million bags to 112.7 million.

- European Union is raised 2.5 million bags to 45.0 million on higher consumption and build-up of stocks.

World **ending stocks** are revised up 2.7 million bags to 32.7 million.

- European Union is revised up 1.5 million bags to 12.8 million.
- Vietnam is raised 500,000 bags to 3.4 million.
- The United States is up 400,000 bags to 6.2 million.

The next release of this publication will be on December 20, 2022.

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.

European Union definition: includes 27 countries in the customs union (Austria, Belgium/Luxembourg, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, and Sweden).

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	Colombia
Ecuador	Haiti	Congo (Kinshasa)
Indonesia	Philippines	Costa Rica
Madagascar	Tanzania	Cote d'Ivoire
Papua New Guinea		El Salvador
Peru		Ethiopia
Rwanda		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

	2017/18	2018/19	2019/20	2020/21	2021/22	Jun 2022/23
Arabica Production						
Brazil	39,500	49,700	42,000	49,700	36,400	41,500
Colombia	13,825	13,870	14,100	13,400	13,000	13,000
Ethiopia	7,055	7,350	7,475	7,600	8,150	8,250
Honduras	7,600	7,100	5,200	6,500	5,400	6,000
Peru	4,375	4,390	3,925	3,369	4,200	4,200
Guatemala	3,600	3,520	3,515	3,810	3,700	3,600
Mexico	3,800	3,100	3,150	3,095	3,300	3,300
Nicaragua	2,700	2,900	2,675	2,485	2,680	2,680
China	1,950	1,925	2,000	1,800	2,000	2,000
Costa Rica	1,525	1,250	1,466	1,472	1,275	1,365
Indonesia	1,000	1,200	1,250	1,300	1,280	1,350
India	1,583	1,583	1,450	1,320	1,280	1,320
Vietnam	1,026	1,064	1,100	950	1,100	1,100
Uganda	1,200	1,050	1,025	730	950	900
Papua New Guinea	760	915	775	650	700	750
Other	3,750	4,059	3,840	3,596	3,734	3,689
Total	95,249	104,976	94,946	101,777	89,149	95,004
Robusta Production						
Vietnam	28,274	29,336	30,200	28,050	30,500	29,800
Brazil	12,600	16,800	18,500	20,200	21,700	22,800
Indonesia	9,400	9,400	9,450	9,400	9,300	10,000
Uganda	3,400	3,600	4,450	5,900	5,300	5,750
India	3,683	3,742	3,517	3,917	4,250	4,420
Malaysia	2,100	2,100	1,900	2,000	2,000	2,000
Cote d'Ivoire	1,250	2,000	1,725	910	800	800
Thailand	700	650	700	600	650	700
Mexico	200	450	550	530	540	545
Tanzania	550	600	600	650	550	525
Other	2,433	2,302	2,492	2,427	2,395	2,606
Total	64,590	70,980	74,084	74,584	77,985	79,946
Production						
Brazil	52,100	66,500	60,500	69,900	58,100	64,300
Vietnam	29,300	30,400	31,300	29,000	31,600	30,900
Colombia	13,825	13,870	14,100	13,400	13,000	13,000
Indonesia	10,400	10,600	10,700	10,700	10,580	11,350
Ethiopia	7,055	7,350	7,475	7,600	8,150	8,250
Uganda	4,600	4,650	5,475	6,630	6,250	6,650
Honduras	7,600	7,100	5,200	6,500	5,400	6,000
India	5,266	5,325	4,967	5,237	5,530	5,740
Peru	4,375	4,390	3,925	3,369	4,200	4,200
Mexico	4,000	3,550	3,700	3,625	3,840	3,845
Guatemala	3,780	3,770	3,645	3,930	3,830	3,730
Nicaragua	2,730	2,950	2,755	2,605	2,800	2,800
China	1,950	1,925	2,000	1,800	2,000	2,000
Malaysia	2,100	2,100	1,900	2,000	2,000	2,000
Costa Rica	1,525	1,250	1,466	1,472	1,275	1,365
Tanzania	1,150	1,300	1,250	1,350	1,200	1,150
Cote d'Ivoire	1,250	2,000	1,725	910	800	800
Papua New Guinea	810	965	825	700	750	800
Kenya	720	850	750	650	750	700
Thailand	700	650	700	600	650	700
El Salvador	660	654	510	540	590	575
Venezuela	575	585	550	480	500	500
Laos	450	375	440	485	465	485
Philippines	450	425	450	425	450	475
Cameroon	425	450	475	400	375	450
Other	2,043	1,972	2,247	2,053	2,049	2,185
Total	159,839	175,956	169,030	176,361	167,134	174,950

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

	2017/18	2018/19	2019/20	2020/21	2021/22	Jun 2022/23
Bean Exports						
Brazil	26,938	37,379	36,190	41,689	34,000	35,000
Vietnam	27,257	25,618	24,526	22,450	26,000	25,000
Colombia	11,700	12,400	11,770	11,500	11,800	11,800
Uganda	4,300	4,450	5,350	6,514	6,120	6,520
Indonesia	6,940	4,907	6,096	6,466	6,300	6,500
Honduras	7,225	6,910	4,900	6,010	5,200	5,600
Ethiopia	3,893	4,174	4,135	4,675	4,700	4,725
Peru	4,185	4,293	3,720	3,326	4,100	4,100
India	4,127	3,936	3,399	3,818	3,830	3,920
Guatemala	3,460	3,600	3,211	3,675	3,500	3,400
Other	12,894	13,606	13,083	11,037	11,795	11,645
Total	112,919	121,273	116,380	121,160	117,345	118,210
Roast and Ground Exports						
European Union	1,875	1,806	2,275	2,365	2,100	2,000
Switzerland	1,225	1,350	1,560	1,870	1,750	1,800
Vietnam	550	550	550	550	550	600
Mexico	180	222	206	252	230	230
Colombia	175	315	210	245	200	200
Indonesia	70	43	56	56	50	50
Brazil	20	24	26	32	42	45
Panama	30	40	40	30	30	30
China	15	25	15	25	25	25
Costa Rica	5	5	10	10	10	10
Other	10	10	19	22	20	22
Total	4,155	4,390	4,967	5,457	5,007	5,012
Soluble Exports						
Brazil	3,496	4,023	4,040	3,954	3,950	4,000
Malaysia	3,075	3,125	3,000	2,780	2,900	3,000
Vietnam	2,100	2,150	2,250	2,300	2,350	2,500
India	2,017	1,838	1,782	1,970	2,000	2,050
European Union	970	1,160	1,215	1,475	1,700	1,500
Indonesia	1,000	1,200	1,000	1,350	1,050	1,100
Mexico	1,000	943	945	865	1,050	1,100
Colombia	850	900	1,000	990	1,100	1,000
Thailand	650	730	905	885	900	1,000
Ecuador	572	410	370	475	413	465
Other	775	723	637	728	728	627
Total	16,505	17,202	17,144	17,772	18,141	18,342
Exports						
Brazil	30,454	41,426	40,256	45,675	37,992	39,045
Vietnam	29,907	28,318	27,326	25,300	28,900	28,100
Colombia	12,725	13,615	12,980	12,735	13,100	13,000
Indonesia	8,010	6,150	7,152	7,872	7,400	7,650
Uganda	4,300	4,450	5,350	6,514	6,120	6,520
India	6,148	5,778	5,185	5,794	5,835	5,975
Honduras	7,225	6,910	4,900	6,010	5,200	5,600
Ethiopia	3,893	4,174	4,135	4,675	4,700	4,725
Peru	4,185	4,293	3,720	3,326	4,100	4,100
European Union	2,845	2,966	3,490	3,840	3,800	3,500
Other	23,887	24,785	23,997	22,648	23,346	23,349
Total	133,579	142,865	138,491	144,389	140,493	141,564

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

	2017/18	2018/19	2019/20	2020/21	2021/22	Jun 2022/23
Bean Imports						
European Union	44,510	45,890	44,460	43,875	45,000	46,000
United States	24,450	27,150	23,900	24,335	25,000	25,500
Japan	6,500	7,370	6,550	6,520	6,800	6,900
Switzerland	2,750	2,810	3,030	3,450	3,350	3,400
Canada	3,035	3,135	2,835	2,860	2,850	2,900
Russia	2,860	3,070	3,180	3,390	3,300	2,800
Korea, South	2,400	2,480	2,660	2,635	2,700	2,750
United Kingdom	2,890	3,175	2,640	2,270	2,500	2,600
Algeria	2,270	2,300	2,000	2,200	2,050	2,000
Colombia	670	975	845	1,670	1,650	1,700
Other	17,593	18,721	17,483	17,902	17,506	18,005
Total	109,928	117,076	109,583	111,107	112,706	114,555
Roast and Ground Imports						
United Kingdom	620	700	630	525	650	600
United States	115	370	360	605	550	600
Canada	285	350	480	475	475	500
Korea, South	245	290	320	360	350	350
Russia	390	475	430	460	400	350
China	280	250	260	309	300	300
Ukraine	280	360	450	460	325	300
Australia	160	165	200	205	200	200
Saudi Arabia	75	150	190	200	210	200
Vietnam	400	500	300	200	200	200
Other	735	720	745	782	736	787
Total	3,585	4,330	4,365	4,581	4,396	4,387
Soluble Imports						
Philippines	5,500	5,500	5,000	5,500	5,700	5,500
China	1,520	1,525	1,775	1,820	1,800	1,800
Canada	1,430	1,400	1,515	1,660	1,700	1,700
United States	210	500	800	585	1,000	1,000
Indonesia	828	983	766	751	675	800
Japan	1,140	860	630	530	600	700
South Africa	315	360	310	405	450	475
Russia	1,215	1,400	1,015	315	350	400
Argentina	300	260	310	350	350	375
Australia	200	265	345	210	325	350
Other	3,487	3,112	4,031	3,519	3,533	3,666
Total	16,145	16,165	16,497	15,645	16,483	16,766
Imports						
European Union	44,510	45,890	44,460	43,875	45,000	46,000
United States	24,775	28,020	25,060	25,525	26,550	27,100
Japan	7,720	8,320	7,290	7,150	7,490	7,700
Philippines	6,100	6,100	5,670	6,180	6,375	6,200
Canada	4,750	4,885	4,830	4,995	5,025	5,100
Russia	4,465	4,945	4,625	4,165	4,050	3,550
United Kingdom	3,785	3,995	3,880	2,900	3,410	3,450
Switzerland	2,750	2,810	3,030	3,450	3,350	3,400
China	2,615	2,625	2,935	3,804	3,350	3,100
Korea, South	2,645	2,770	2,980	2,995	3,050	3,100
Other	25,543	27,211	25,685	26,294	25,935	27,008
Total	129,658	137,571	130,445	131,333	133,585	135,708

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

	2017/18	2018/19	2019/20	2020/21	2021/22	Jun 2022/23
Domestic Consumption						
European Union	42,065	42,092	40,264	41,306	42,200	42,900
United States	25,557	27,162	26,049	25,937	26,411	26,800
Brazil	22,420	23,200	22,994	22,280	22,340	22,450
Japan	8,231	7,897	7,610	7,354	7,750	7,933
Philippines	6,550	6,125	6,120	6,605	7,025	6,775
Canada	4,750	4,885	4,830	4,995	5,025	5,100
Indonesia	3,560	4,300	4,900	4,450	4,750	4,800
China	2,900	3,000	3,600	4,200	4,200	4,200
Russia	4,465	4,945	4,625	4,165	4,050	3,550
Ethiopia	3,150	3,193	3,140	3,000	3,475	3,500
United Kingdom	3,785	3,995	3,880	2,900	3,410	3,450
Vietnam	2,880	2,940	3,100	3,100	3,140	3,300
Korea, South	2,645	2,770	2,980	2,995	3,050	3,100
Mexico	2,295	2,580	2,620	2,600	2,650	2,700
Australia	1,900	2,040	1,960	2,055	2,125	2,200
Colombia	1,650	1,925	1,800	2,100	2,160	2,150
Algeria	2,300	2,340	2,040	2,240	2,090	2,050
Switzerland	1,525	1,460	1,470	1,580	1,600	1,600
Saudi Arabia	935	980	1,040	1,200	1,210	1,300
Turkey	865	1,205	1,215	1,165	1,250	1,300
India	1,215	1,250	1,170	1,180	1,210	1,235
Morocco	825	845	710	880	915	950
Argentina	775	735	859	789	810	850
Jordan	775	835	770	845	745	850
Serbia	725	800	805	835	820	850
Other	11,637	12,031	11,325	11,116	10,829	11,147
Total	160,380	165,530	161,876	161,872	165,240	167,040
Ending Stocks						
European Union	13,500	14,332	15,038	13,767	12,767	12,367
United States	6,440	7,352	6,402	6,023	6,200	6,540
Brazil	3,115	5,056	2,373	4,390	2,231	5,111
Vietnam	254	556	2,130	3,280	3,440	3,515
Japan	2,794	3,217	2,897	2,693	2,433	2,200
Indonesia	593	2,419	2,298	1,669	1,009	1,024
China	143	93	298	1,017	842	717
Tanzania	290	310	280	504	480	506
Philippines	400	800	800	800	600	500
Colombia	1,111	552	852	1,235	780	485
Other	3,351	2,436	2,863	2,286	1,868	1,739
Total	31,991	37,123	36,231	37,664	32,650	34,704

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