



VELQUARIA FORGE

GLOBAL COFFEE MARKET

Production trends, pricing volatility, and supply dynamics

An in-depth analysis of the global coffee industry's recent performance. Explore key production figures, market shares of leading nations, and the latest price fluctuations. Essential data for professionals tracking the coffee commodity landscape.

Global Coffee Market

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CHAPTER 01

Global Production Trends

Production is the heartbeat of the market; without it, price is merely noise.

The global coffee industry operates on a delicate balance between supply resilience and demand volatility. **Global Production Trends** serve as the foundational metric for understanding market dynamics, influencing everything from farmer livelihoods to consumer pricing. By examining worldwide production figures over the last four crop years, we can identify structural shifts in agricultural output that precede price movements. This analysis relies on verified data from the USDA Foreign Agricultural Service (FAS) and the International Coffee Organization (ICO), ensuring a robust baseline for strategic decision-making.

Worldwide production has demonstrated a steady upward trajectory over recent seasons, reflecting both recovery efforts and expanded planting cycles. The following table illustrates this growth, highlighting the increasing volume of coffee entering the global supply chain. These figures are critical for assessing whether the market is facing surplus conditions or tightening supplies.

WORLDWIDE COFFEE PRODUCTION (MILLIONS OF 60-KG BAGS)

Crop Year	Production Volume	Source
2025/26	178.7	USDA FAS
2024/25	174.395	USDA FAS
2023/24	169.345	USDA FAS
2022/23	168.2	ICO

Analyzing the comparative yields of these **60-kg bag** units reveals consistent growth, with a notable acceleration in the 2025/26 forecast. The jump from 174.395 million bags in 2024/25 to 178.7 million in 2025/26 suggests strong harvest performance in key regions. However, production volume alone does not dictate market health; the quality and regional distribution of these crops are equally vital. Stakeholders must monitor these volumes against consumption forecasts to anticipate potential gluts or shortages.

Data verification is paramount in commodity trading, where misinformation can lead to significant financial losses. Cross-referencing USDA FAS reports with ICO statistics ensures that discrepancies are identified early. For instance, the 2025/26 production figure of 178.7 million bags ^[1] aligns closely with broader market expectations, though minor variations may occur due to late-season weather events. Rigorous verification protects against relying on outdated or unverified local reports.

The structural shift in production shares between Arabica and Robusta varieties also influences regional dynamics. For the 2025/26 crop year, total estimated world production is projected at **183.6 million** 60-kg bags ^[5]. Within this total, **Arabica** accounts for **104.4 million** bags ^[5], while **Robusta** comprises **79.2 million** bags ^[5]. This split highlights the continued dominance of Arabica in volume, yet Robusta's significant share indicates its growing importance in instant coffee and espresso blends.

Production is the heartbeat of the market; without it, price is merely noise.

Understanding these production trends allows market participants to forecast price volatility more accurately. When production exceeds consumption, as seen in recent forecasts where global consumption is estimated at **180.6 million** 60-kg bags for 2025/26 ^[5], downward pressure on

prices may emerge. Conversely, any disruption in key producing nations can quickly reverse this trend. Strategic inventory management and hedging strategies should be adjusted based on these volumetric shifts.



Ultimately, the **Global Production Trends** chapter underscores the importance of data-driven insights in coffee trading. By focusing on verified figures from authoritative sources like USDA FAS and ICO, traders can navigate the complexities of supply dynamics with greater confidence. The interplay between production volumes, regional yields, and consumption forecasts creates a complex but predictable pattern for those who monitor it closely.

In conclusion, the last four crop years show a resilient global production sector, albeit one subject to climatic and economic variables. The steady increase in output, culminating in the 178.7 million bag forecast for 2025/26 ^[1], provides a buffer against supply shocks. However, market participants must remain vigilant regarding regional performances and consumption changes to capitalize on emerging opportunities.

IN PRACTICE

- Download the latest USDA FAS and ICO reports to verify current production forecasts.
- Compare Arabica and Robusta production shares to assess regional supply risks.
- Monitor consumption forecasts against production volumes to identify potential surpluses or deficits.



CHAPTER 02

Leading Producing Nations

Geography dictates the rhythm of the global supply chain.

The global coffee landscape is defined by a concentrated group of nations that dictate the availability of the commodity. While previous chapters established the broad production trends, understanding the market requires a granular look at the specific origins that drive supply. The concentration of output within a few key players means that localized environmental or economic shifts can have immediate global repercussions.

The 2025/26 crop year showcases a significant reliance on a small number of major exporters. A detailed analysis of the current period reveals that the top five producers are responsible for a substantial portion of the total global volume. This concentration creates a market structure where the stability of a few specific regions is critical for global price equilibrium.

§ The Top Five Producers: Market Concentration

TOP FIVE COFFEE-PRODUCING COUNTRIES 2025/26

Country	Production (Millions of 60-kg bags)	World Share
Brazil	63.00	35.22%
Vietnam	31.70	17.73%
Colombia	12.50	6.99%
Indonesia	12.37	6.92%
Ethiopia	11.56	6.46%

The current production landscape is led by a group of nations that command significant market shares. Brazil remains the dominant force, followed by Vietnam, which maintains its position as a primary supplier. Colombia, Indonesia, and Ethiopia complete the top five, each contributing essential volumes to the global stock. This hierarchy determines the primary direction of global supply dynamics.

Brazil's role in the market is unparalleled, acting as the primary driver of global supply levels. Its production figures are significantly higher than its closest competitors, making its domestic agricultural conditions a central focus for traders. The scale of Brazilian output serves as the benchmark for the entire industry's capacity.

Vietnam represents the second pillar of the global supply, particularly within the specific segments of the market that rely on its output. The gap between the first and second largest producers is substantial, yet the Vietnamese contribution remains a vital component of the global supply chain. Its production levels are essential for maintaining the balance between supply and demand.

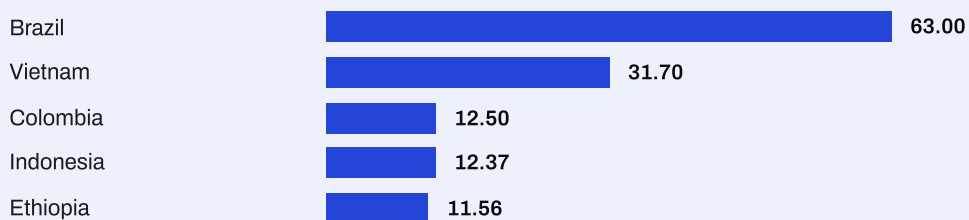
The concentration of output within a few key players means that localized environmental or economic shifts can have immediate global repercussions.

§ Regional Analysis: Brazil, Vietnam, and Colombia

Colombia continues to hold a prestigious position in the market, though its production volume is notably lower than the top two leaders. As a key producer of high-quality varieties, its contribution is vital for the premium segments of the global market. The stability of Colombian yields is a key indicator for specialty coffee availability.

The structural difference between the top three producers is evident in their respective outputs. While Brazil and Vietnam operate at a much larger scale, Colombia's market share remains a significant portion of the global total. This disparity highlights the different roles these nations play in the global ecosystem, from mass-market supply to specialized production.

PRODUCTION BY TOP PRODUCER



source USDA FAS [3]

Monitoring these leading nations is essential for any stakeholder involved in the coffee trade. The following table summarizes the production and market share of the top five producers for the 2025/26 crop year, based on the most recent available data.

For professionals managing portfolios or supply chains, the following actions are recommended: monitor the seasonal reports from the top three producers, track weather patterns in Brazil and Vietnam, and evaluate the impact of regional logistics on Colombian exports.

IN PRACTICE

- Monitor seasonal reports from the top three producers.
- Track weather patterns in Brazil and Vietnam.
- Evaluate the impact of regional logistics on Colombian exports.



CHAPTER 03

Market Price and Consumption

Price is the signal, but consumption is the destination.

The global coffee market is currently navigating a period of intense **price volatility** and shifting demand patterns. While previous chapters detailed the production capacities of leading nations, understanding the market requires a deep dive into the relationship between the ICO Composite Indicator Price and global consumption trends. The interplay between supply availability and consumer appetite remains the primary driver of market equilibrium.

§ Price Volatility and Trends

The ICO Composite Indicator Price (I-CIP) has demonstrated significant upward momentum and instability in recent periods. During 2024, the market experienced a substantial surge, with the monthly average of the I-CIP increasing by nearly 70% ^[6]. This period was marked by extreme peaks, such as the price reaching 312.77 US cents/lb in mid-December 2024 ^[6]. Such fluctuations necessitate robust **risk management** strategies for stakeholders involved in the supply chain.

GLOBAL PRODUCTION SPLIT BY VARIETY (2025/26)

Variety	Production (Millions of 60-kg bags)
Arabica	104.4
Robusta	79.2

Recent data suggests a stabilization of these high levels, albeit at a much higher baseline than previous years. In the summer of 2026, the I-CIP remained relatively steady, with August 2026 averaging 287.29 US cents/lb, closely mirroring the July 2026 average of 287.26 US cents/lb ^[5]. This lack of immediate movement follows the intense volatility observed in the preceding years, indicating a period of high-price consolidation.

§ World Coffee Consumption Forecasts

Analyzing consumption patterns is essential to predict future supply-demand gaps. Following a period of robust demand, the 2024/25 crop year saw consumption reach 182.2 million 60-kg bags ^[5]. However, the outlook for the current cycle suggests a slight contraction in the global appetite for coffee.

The market is navigating a period of intense price volatility and shifting demand patterns.

The forecast for the 2025/26 crop year indicates a projected decline of 0.8% in total consumption, estimated to reach 180.6 million 60-kg bags ^[5]. This downward trend in consumption, paired with the production dynamics discussed in earlier chapters, suggests a tightening of the **market balance**. Importers must closely monitor these shifts to avoid overstocking in a declining demand environment.

<div>70%</div> <div>I-CIP increase in 2024</div> <div>source [6]</div>	<div>287.29</div> <div>US cents/lb · August 2026 I-CIP average</div> <div>source [5]</div>
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§ Production Split: Arabica and Robusta

The composition of the global supply remains divided between the two primary species, each responding differently to market pressures. For the 2025/26 period, the total estimated world production is 183.6 million 60-kg bags ^[5]. Within this total, the distribution reflects a clear dominance of one variety over the other.

Arabica production is estimated at 104.4 million bags, while Robusta accounts for 79.2 million bags ^[5]. This split is critical for roasters and traders, as the **commodity mix** influences both the flavor profile of the final product and the cost structures of the industry. As demand shifts, the relative availability of these two varieties will dictate the long-term pricing architecture of the global market.

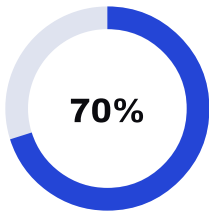
In conclusion, the market is characterized by high-price plateaus and a slight contraction in consumption. Stakeholders should prepare for a landscape where **supply dynamics** are increasingly sensitive to even minor fluctuations in the global consumption forecast.

IN PRACTICE

- Monitor I-CIP monthly averages to identify periods of price stabilization.
- Adjust inventory levels in response to the projected 0.8% decline in consumption.
- Diversify bean sourcing strategies to balance Arabica and Robusta exposure.

The book in numbers

The data cited in the chapters, with sources.



I-CIP increase in 2024
source [6]

178.7 million
2025/26 Production
source [1]

168.2 million
2022/23 Production
source [1]

180.6 million
2025/26 Consumption
source [5]

287.29
US cents/lb · August 2026 I-CIP average
source [5]

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The end.