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COFFEE MARKET STUDY AND MOST IN-DEMAND CULTIVARS

COLOMBIA · ARGENTINA · CHILE · UNITED STATES · CANADA · EUROPE

Markets · Cultivars · Quality · Trade · Exporters · Strategy

Prepared for
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1. Executive summary

Coffee combines a mass commodity market with higher-value segments built on origin, processing, cup quality, traceability, and sustainability. For 2026/27, USDA forecasts record world production of 189.7 million 60-kg bags, green-bean exports of 131.4 million, and consumption of 179.7 million. Supply recovery does not eliminate volatility: in July 2026 the ICO Composite Indicator Price averaged 287.26 US cents per pound, 15.4% above June.

Colombia holds a distinctive position. It does not compete as the cheapest origin; it competes through washed Arabica, country-of-origin recognition, strong institutions, and the ability to segment from standard export coffee to micro-lots. USDA forecasts 13.4 million bags of production and 12.2 million bags of green-bean exports in 2026/27.

The United States and European Union offer the greatest volume. Canada is smaller but attractive for premium, responsible, and convenient propositions. Argentina and Chile are fundamentally import, roasting, and distribution markets rather than commercial growing origins. Brazil provides the competitive base, while Colombia supports differentiation and brand value.

Core recommendation: build a three-tier portfolio: (1) stable volume using Brazil/Robusta and blends; (2) traceable premium coffee from Colombia and Central America; and (3) limited micro-lots featuring Gesha, Bourbon, Typica, Ethiopian landraces, or differentiated processes. Buying a “variety” without specifying origin, process, altitude, crop year, moisture, water activity, and cup score is commercially insufficient.

2. Scope, method, and limitations

The study covers Colombia, Argentina, Chile, the United States, Canada, and Europe as target markets, and reviews the leading producing countries that supply them. Figures use 60-kg bags and green-bean equivalent where required. USDA 2026/27 figures are forecasts, not closed results. Eurostat figures refer to 2023, the latest consolidated and comparable cut in the official publication reviewed.

“Most in-demand cultivar” is not directly measured in customs statistics. Trade is classified far more often by product form and species than by cultivar. The assessment therefore combines production relevance, disease resistance, industrial use, specialty positioning, and buyer signals. Demand for Bourbon, Gesha, or Caturra is a niche demand; volume demand centers on commercial Arabica and Robusta.

The exporter list maps relevant participants; it is not an audited ranking. Corporate volumes change, many transactions are private, and some listed entities are

regulators, exchanges, or associations. Buyers must verify current registration, beneficial ownership, sanctions, capacity, bank references, certifications, pre-shipment samples, and contract terms.

3. Global outlook for 2026/27

Forecast production of 189.7 million bags exceeds projected consumption of 179.7 million, allowing ending stocks to rise to 26.3 million. Stocks nevertheless remain below longer-run norms, and the market is highly exposed to Brazil, Vietnam, weather, fertilizer costs, logistics, and currencies.

Brazil would account for roughly 38% of world production and Vietnam about 17%. Colombia is near 7%, but carries greater weight in Colombian Milds and origin storytelling. Green beans represented 86.8% of cumulative world exports in the first nine months of coffee year 2025/26; soluble coffee was 12.7% and roasted coffee only 0.5%. Much roasting and branding value is therefore captured near the consumer.

New York C futures benchmark Arabica and London benchmarks Robusta, but physical contracts add origin and quality differentials, certification, processing, Incoterms, financing, and counterparty risk. Futures hedges do not fix quality failures or supplier risk.

Leading producing and exporting countries

Country	2026/27 output	Green exports	Varietal base	Primary demand
Brasil	71,9	45,0	Arábica natural; Conilon/Robusta	Escala, blends, soluble, especialidad
Vietnam	32,5	25,4	Robusta; Arábica menor	Soluble, espresso, blends costo-eficientes
Colombia	13,4	12,2	Arábica lavado	Suaves premium, trazabilidad, microlotes
Etiopía	12,1	7,1	Arábica landraces	Especialidad floral/frutal, naturales y lavados
Indonesia	11,4	7,0	Robusta; Arábica	Cuerpo, perfil terroso/especiado, specialty
Uganda	7,2	6,8	Robusta; Arábica	Robusta comercial y fino
India	6,1	3,7	Robusta y Arábica	Monsooned, soluble y blends
Honduras	6,0	5,5	Arábica	Lavados, certificados, specialty
Perú	4,8	4,3	Arábica	Orgánico, comercio justo, specialty

Country	2026/27 output	Green exports	Varietal base	Primary demand
Guatemala	3,3	2,9	Arábica	Orígenes diferenciados, alta gama

4. Colombia: supply, farming, and market

Colombia produces almost entirely Arabica and benefits from staggered regional crop calendars. Huila, Antioquia, Tolima, Cauca, Caldas, Santander, Valle, Risaralda, Nariño, and Cundinamarca account for much of the area. Altitude and microclimates support profiles ranging from chocolate and caramel to citrus and floral.

Castillo and its regional selections, Cenicafé 1, and Colombia are central to productivity and coffee-leaf-rust resistance. Caturra retains sensory recognition but needs stronger disease management. Typica, Bourbon, Tabi, Gesha, and other differentiated cultivars earn value in micro-lots only when cup quality confirms the claim.

The United States remains Colombia’s leading destination, followed by the European Union and Canada. USDA reported that these three represented about 75% of trade in 2024/25, with 5.3 million bags shipped to the United States. Growers improve resilience by raising productivity without sacrificing cup quality, tracing lots, and separating grades.

Commercially relevant cultivars

Cultivar	Origin/use	Demand	Commercial reading
Castillo / Castillo zonales	Colombia	High	Resistencia a roya, productividad y calidad; base de oferta confiable
Cenicafé 1	Colombia	High and rising	Resistente, alto rendimiento, grano grande; renovación productiva
Colombia	Colombia	Medium	Variedad compuesta resistente; aún presente en fincas maduras
Caturra	Colombia y América Latina	High in specialty	Taza reconocida; susceptible a roya, requiere manejo intensivo
Typica / Bourbon	América Latina y África	Selective	Calidad y diferenciación; menor productividad y mayor riesgo
Gesha/Geisha	Colombia, Panamá y otros	Very high in micro-lots	Precios premium; manejo exigente y mercado pequeño
Pacamara	Centroamérica	Selective	Grano grande, perfil distintivo; demanda specialty

Cultivar	Origin/use	Demand	Commercial reading
Catuai / Mundo Novo	Brasil y América Latina	High	Productividad, mecanización y consistencia para blends
Conilon	Brasil	Very high industrial	Robusta adaptado; soluble, espresso y blends
Robusta elite	Vietnam, Uganda, India	Very high	Cuerpo, crema, cafeína, costo y soluble; crece el “fine robusta”
Landraces etíopes	Etiopía	High in specialty	Diversidad sensorial floral, cítrica y frutal

5. Argentina: import market and value-add opportunity

Argentina is not a relevant commercial producer because of agroclimatic constraints. The viable business is importing, roasting, blending, packaging, and distribution. Brazil is the natural supplier because of distance, scale, and regional trade conditions; Colombia and other origins can support premium lines.

Demand spans household roast-and-ground coffee, soluble, foodservice, capsules, and urban specialty. Inflation, foreign-exchange access, logistics, and taxation can quickly change prices and inventory. Businesses need inventory coverage, pre-approved alternative specifications, and hard-currency contracts with clear adjustment rules.

Opportunities include Brazil-Colombia blends, private label for hotels and restaurants, specialty subscriptions, compatible capsules, institutional coffee, and premium soluble products. SENASA, Customs, food labeling, and current tariff classification must be confirmed before shipment.

6. Chile: convenience, premiumization, and foodservice

Chile also lacks significant commercial production. Imports serve a market with a historically strong soluble segment and expanding cafés, espresso, capsules, out-of-home consumption, and specialty demand in Santiago and other cities.

Trade agreements and relatively stable logistics support origin diversity. Colombia offers brand affinity; Brazil a competitive base; Peru organic and traceable supply; Central America and Africa specialty rotations.

A prudent launch combines one high-rotation product, one permanent premium line, and temporary micro-lots. Corporate, hotel, and restaurant channels can generate recurring contracts, but require roast consistency, training, and equipment support.

7. United States: scale and segmentation

USDA projects 26.9 million bags of total imports and 26.95 million of consumption in 2026/27. This is a huge, competitive, fragmented market across mass retail, foodservice, chains, specialty roasters, clubs, ready-to-drink/cold brew, and e-commerce.

Colombia works as a recognized, balanced origin; Brazil serves scale and espresso; Vietnam and other Robustas support soluble and blends; Ethiopia, Kenya, Guatemala, and Latin American micro-lots add differentiation. Buyers increasingly expect traceability, consistency, food safety, substantiated environmental claims, and fast logistics.

Market entry must choose among green coffee B2B, branded roasted coffee, private label, or ready-to-drink beverages. Each has different margins, working capital, and regulation. A generic “premium coffee” claim is not enough: specify sensory profile, use case, proof, verifiable story, and target channel economics.

8. Canada: a mature, trust-oriented market

USDA estimates imports and consumption of 5.1 million bags in 2026/27. Canada is smaller than the United States, but coffee is embedded in daily life and buyers respond to quality, certifications, responsible trade, convenience, and at-home formats.

Colombia enjoys strong recognition; Brazil and Central America broaden the range; roasted coffee and re-exports from the United States also matter. Labels must meet Canadian requirements, including bilingual presentation where applicable. Serving a large territory makes distributor and warehouse selection important.

The recommended position is “reliable, traceable quality,” without vague environmental promises. A simple portfolio can work: daily blend, premium single origin, quality decaf, and convenient format.

9. Europe: major importer, roaster, and regulator

The European Union is the largest importing bloc. USDA forecasts 50.0 million bags of green-bean imports and 42.5 million of consumption in 2026/27. Eurostat reported 2.7 million metric tons of extra-EU coffee imports worth €10.6 billion in 2023: Brazil supplied 34%, Vietnam 24%, Uganda 8%, Honduras 6%, and Colombia 4%.

Germany, Italy, Belgium, Spain, and France were the largest entry markets. Italy and Germany also led EU roasted-coffee production. Europe is not one consumer: Italy emphasizes espresso; the Nordics and Germany have high consumption and filter

traditions; France and Benelux are diverse; Eastern Europe retains meaningful soluble and value segments.

The EU deforestation-free products regime changes due diligence. Exporters must prepare geolocation, farm-level traceability, risk assessment, and documentation aligned with the current implementation calendar. Voluntary certification helps but does not replace legal compliance.

Target-market comparison

Market	Imports	Consumption	Suppliers	Segments
Unión Europea	50,0	42,5	Brasil, Vietnam, Uganda, Honduras, Colombia	Tostado molido, espresso, cápsulas, specialty, soluble
Estados Unidos	26,9	27,0	Brasil, Colombia, Vietnam, Honduras, Guatemala	Filtrado, RTD/cold brew, espresso, specialty, descafeinado
Canadá	5,1	5,1	Colombia, Brasil, Guatemala, Honduras, EE.UU. reexportado	Filtrado, premium, ético, conveniencia
Colombia	—	2,2	Oferta nacional; importaciones puntuales	Tinto, soluble, tostado nacional, specialty creciente
Argentina	Importador neto	n/d USDA agregado	Brasil principalmente; Colombia y otros nichos	Tostado molido, soluble, cápsulas, specialty urbano
Chile	Importador neto	n/d USDA agregado	Brasil, Colombia, Perú y otros	Soluble fuerte; espresso, cápsulas y specialty en expansión

10. Cultivars and attributes actually demanded

Volume buyers seek repeatable specifications more than famous cultivar names: washed Arabica, Brazilian naturals, and Robusta with controlled defects, moisture, and screen size. In specialty, cultivar and farm matter, but cup score, process, and freshness drive repeat purchase.

Castillo and Cenicafé 1 should be sold on performance and cup quality, not framed as inferior substitutes. Caturra is useful where rust is controlled. Gesha creates high

value only with exceptional quality and channels able to explain and pay for it. Conilon and improved Robustas gain space through price, crema, intensity, soluble use, and climate resilience.

Agronomic selection begins with site conditions: altitude, temperature, rain, soil, rust pressure, labor, shade system, and target buyer. Planting a fashionable cultivar without contracts or post-harvest capability creates risk. Professional farms balance resilience, productivity, and differentiated lots.

11. Quality, processes, and certifications

Washed, natural, honey, and controlled fermentations alter flavor and risk. Colombian washed coffee offers cleanliness and consistency; well-managed naturals add fruit and body; anaerobic or co-fermented lots attract niches but can be rejected when flavors seem artificial or inconsistent.

Contracts should specify crop year, origin, verifiable cultivar, process, moisture, water activity, defects, screen size, density, cup score/protocol, tolerances, approved sample, and dispute resolution. Organic, Fairtrade, Rainforest Alliance, and other certificates add value only when buyers pay the premium and segregation is preserved.

Food safety covers residues, mycotoxins, cross-contamination, and packaging. Roasted products also require controls for acrylamide, packaging migration, shelf life, and lot consistency.

12. Export entities and due diligence

In Colombia, the FNC administers the National Coffee Exporters Registry. Elsewhere, authorities, associations, exchanges, cooperatives, and traders all play roles. Buyers must distinguish the regulator, certifier, owner of the coffee, and contractual seller.

Minimum due diligence includes legal existence, exporter registration, beneficial ownership, sanctions screening, financial or bank references, shipment history, mill capacity, insurance, verifiable certifications, samples, traceability, payment terms, Incoterms 2020, independent inspection, and arbitration. Large advances should never be sent based only on a pro forma invoice.

For initial purchases, use a pilot lot, letter of credit or documentary collection according to risk, pre-shipment inspection, and arrival quality control. An abnormally low price often signals inferior quality, old crop, incomplete documentation, or fraud risk.

Exporter ecosystem by origin

Origin	Representative entities	Verification note
Brasil	Cooxupé; Expocacer; Minasul; Stockler/Neumann Kaffee Gruppe; ofi; Sucafina Brasil	Cooperativas y traders de escala; verificar campaña, puerto y certificación antes de contratar.
Vietnam	Intimex Group; Simexco Daklak; Tín Nghĩa; Vinh Hiệp; ofi Vietnam	Robusta verde y soluble; fuerte capacidad de acopio y proceso.
Colombia	Federación Nacional de Cafeteros/Almacafé; Expocafé; Racafé; Carcafé; SKN Caribecafé; Sucafina Colombia; ofi Colombia	Todos los exportadores deben figurar en el registro vigente administrado por la FNC.
Etiopía	Ethiopian Coffee and Tea Authority; Ethiopian Commodity Exchange; Kerchanshe; Tracon; Daye Bensa	La autoridad y la bolsa son instituciones del sistema, no equivalen siempre a vendedores contractuales.
Indonesia	ofi Indonesia; Sucafina Indonesia; ECOM/representaciones locales; exportadores miembros de AEKI	Confirmar licencias y trazabilidad por isla y beneficio.
Uganda	Uganda Coffee Development Authority; Kyagalanyi Coffee; ofi Uganda; exporters licensed by UCDA	UCDA regula y publica actores; robusta domina el volumen.
Honduras	IHCAFE; Beneficio de Café Montecristo; COHONDUCAFÉ; cooperativas regionales	IHCAFE es institución sectorial; validar exportador y beneficio para cada lote.
Perú	Junta Nacional del Café; CENFROCAFE; COCLA; Perhusa; Olam/ofi Perú	Fuerte oferta orgánica y cooperativa; rankings varían por campaña.
India	Coffee Board of India; Tata Coffee; ofi India; CCL Products; Allana	Verde y soluble; la Junta es autoridad sectorial, no exportador comercial ordinario.
Guatemala	ANACAFÉ; FEDECOCAGUA;	ANACAFÉ es referente sectorial; la contratación

Origin	Representative entities	Verification note
	exporter mills and members registered locally	corresponde a exportadores habilitados.

13. Logistics, pricing, and economics

Green coffee normally travels in dry containers with liners or GrainPro-type bags depending on quality and route. Principal risks are moisture, condensation, odors, delays, theft, and quality variation. Temperature and humidity records and suitable cargo insurance are especially important for micro-lots.

Landed cost includes FOB price, freight, insurance, duty, fees, customs clearance, financing, shrink, storage, quality control, and cost of capital. For roasted coffee, shelf life and aroma loss make channel speed critical.

A fixed annual price band is not advisable in a volatile market. The sound benchmark is the current futures price plus origin/quality differential and logistics. In July 2026, ICO indicators averaged 383.39 US cents/lb for Colombian Milds, 320.69 for Brazilian Naturals, and 184.78 for Robustas. These are indicators, not purchase quotations.

14. Recommended commercial strategy

Phase 1 - validation: interview 20 buyers per country/channel, cup 12 blind samples, define three profiles, and calculate landed cost. Phase 2 - pilot: import one or two pallets or a consolidated lot, sell for 90 days, and measure turnover, margin, repurchase, and complaints. Phase 3 - scale: annual contract with volume bands, price coverage, and at least two approved origins.

Suggested portfolio: “Daily” using Brazil/fine Robusta as appropriate; traceable washed “Colombia Origin”; rotating “Reserve” micro-lots. Local roasting supports freshness in Argentina and Chile. In the United States, Canada, and Europe, B2B entry through an established importer/roaster usually reduces regulatory and capital risk.

Track gross margin per kg, inventory days, repurchase rate, roast yield, quality loss, OTIF service, producer premium, farm-level traceability, logistics emissions per kg, and supplier concentration.

15. Risks for 2026-2029

Climate: drought, heat, excessive rain, and pests alter yield and quality. Price: stocks remain tight and new plantings respond slowly. Regulation: environmental traceability and labeling. Logistics: ports, containers, and routes. Finance: rates, currencies, and working capital. Reputation: greenwashing and labor conditions.

Mitigation: diversify Brazil-Colombia-Central America/Africa; maintain equivalent approved specifications; buy in windows; stagger contracts; insure cargo; audit traceability; reserve critical inventory; and avoid dependence on one customer or trader.

The main strategic risk is confusing trend with market. Experimental micro-lots create attention but rarely support a plant or distribution network by themselves. Stable cash flow comes from repeatable references and recurring contracts.

16. Conclusions

Opportunity is substantial, but segmentation is essential. Volume and resilience favor Brazil, Vietnam, and improved Robustas; differentiation favors Colombia, Ethiopia, Central America, and micro-lots. Cultivar is only part of value: origin, process, quality, traceability, and commercial execution matter as much or more.

Colombia is the most coherent platform for a premium Latin American line. Argentina and Chile offer industrialization and branding opportunities, not mass cultivation. The United States provides scale; Canada provides trust-led premium niches; Europe combines volume, sophisticated roasting, and the highest regulatory burden.

The recommended decision is to begin with a short portfolio, pilot contracts, and traceability from the first lot. Broader ranges or significant industrial capital should follow only after repeat purchase is demonstrated.

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