



FOREST POLICY TRADE AND FINANCE INITIATIVE
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VIETNAM'S COFFEE IMPORTS AND EXPORTS 2015–2025: KEY HIGHLIGHTS

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Summary

During 2015-2025, Vietnam maintained its position as the world's second-largest coffee exporter, with total exports of 15.8 million tonnes of coffee products valued at USD 41.6 billion, making coffee one of the country's three leading agricultural and forestry export commodities. Coffee prices declined during 2015-2021 before rising sharply from 2022, particularly in 2023-2025. Green robusta coffee beans remained the main export product, accounting for an average of 85-90% of total export volume. Green arabica coffee beans and black instant coffee extract were also two important products. Together, these three products accounted for more than 95% of annual export volume and over 90% of annual export value. For decades, the EU has consistently been Vietnam's largest coffee export market, accounting for around 40% of annual export volume, followed by the United States, Japan, China and Russia.

Vietnam also imports coffee from many countries for domestic consumption and export processing. Coffee import volumes rose sharply from 2022 to meet industry demand. Laos, Indonesia and Brazil were the three largest suppliers in 2025, accounting for 27.1%, 17.4% and 27.7% of Vietnam's total coffee imports by volume, respectively. Imports from Laos have accounted for the largest share for many years, reflecting Vietnamese companies' investment in coffee production and trade in that country. With the EU Deforestation Regulation (EUDR) adopted and scheduled to apply from 30 December 2026, businesses are strengthening transparent, traceable supply chains. The Government and businesses need to establish the legal framework and information infrastructure required to meet these regulations and support the sector's sustainable development in the future.



1. Vietnam's coffee exports, 2015-2025

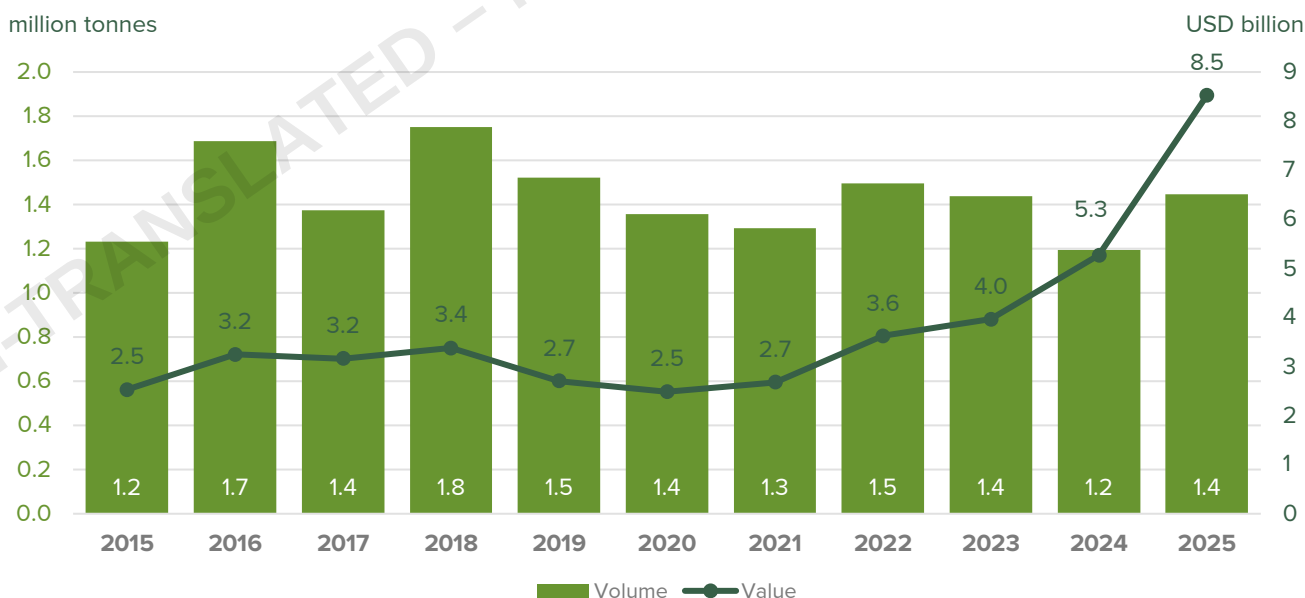
1.1. Export volume and value

Vietnam has been the world's second-largest coffee exporter, after Brazil, since 1999¹. In 2025, coffee export earnings exceeded USD 8.5 billion, maintaining coffee's position among Vietnam's three leading agricultural and forestry export sectors, behind only wood products and seafood.

During 2015-2025, Vietnam exported 15.8 million tonnes² of coffee worth nearly USD 41.6 billion. Export volume peaked at almost 1.8 million tonnes in 2018 (Figure 1). From 2019 to 2021, falling global coffee prices led to a sharp decline in export volume. In 2019, exports fell by 228.4 thousand tonnes from 2018, and the downward trend continued through 2021.

In 2022, coffee exports recovered to 1.5 million tonnes, more than 200 thousand tonnes above 2021. With global coffee prices rising, export value increased sharply to over USD 3.6 billion, up 35.1% from 2021. In 2024, El Niño reduced coffee output in the Central Highlands, and Vietnam's exports fell by 242.3 thousand tonnes from 2023, from more than 1.4 million to 1.2 million tonnes, a decline of 16.8%. Export volume recovered to above 1.4 million tonnes in 2025. However, as global coffee prices surged amid declining global production, Vietnam's coffee export value jumped 120%, from USD 4.0 billion to USD 8.5 billion, during 2023-2025.

Figure 1. Vietnam's annual coffee export volume and value



Source: Forest Trends research team, based on customs data

¹ <https://nguoiquansat.vn/chi-dung-sau-brazil-viet-nam-nam-quyen-luc-so-2-the-gioi-voi-mat-hang-ty-usd-chiem-20-xuat-khau-toan-cau-308534.html>

² Coffee volume in this report is calculated as the cumulative, unconverted volume of coffee bean products (unroasted or roasted, caffeinated or decaffeinated), roasted and ground coffee, pure black coffee extracts or extracts mixed with other ingredients (instant coffee), and other coffee preparations such as cascara tea made from coffee husks. It excludes coffee-derived products not intended for human consumption, such as pellets made from coffee husks. The report also excludes on-the-spot import and export transactions. Because the calculations depend on the accuracy of the original dataset, the import and export volume and value figures calculated by the research team may not capture all actual coffee trade and are for reference only.

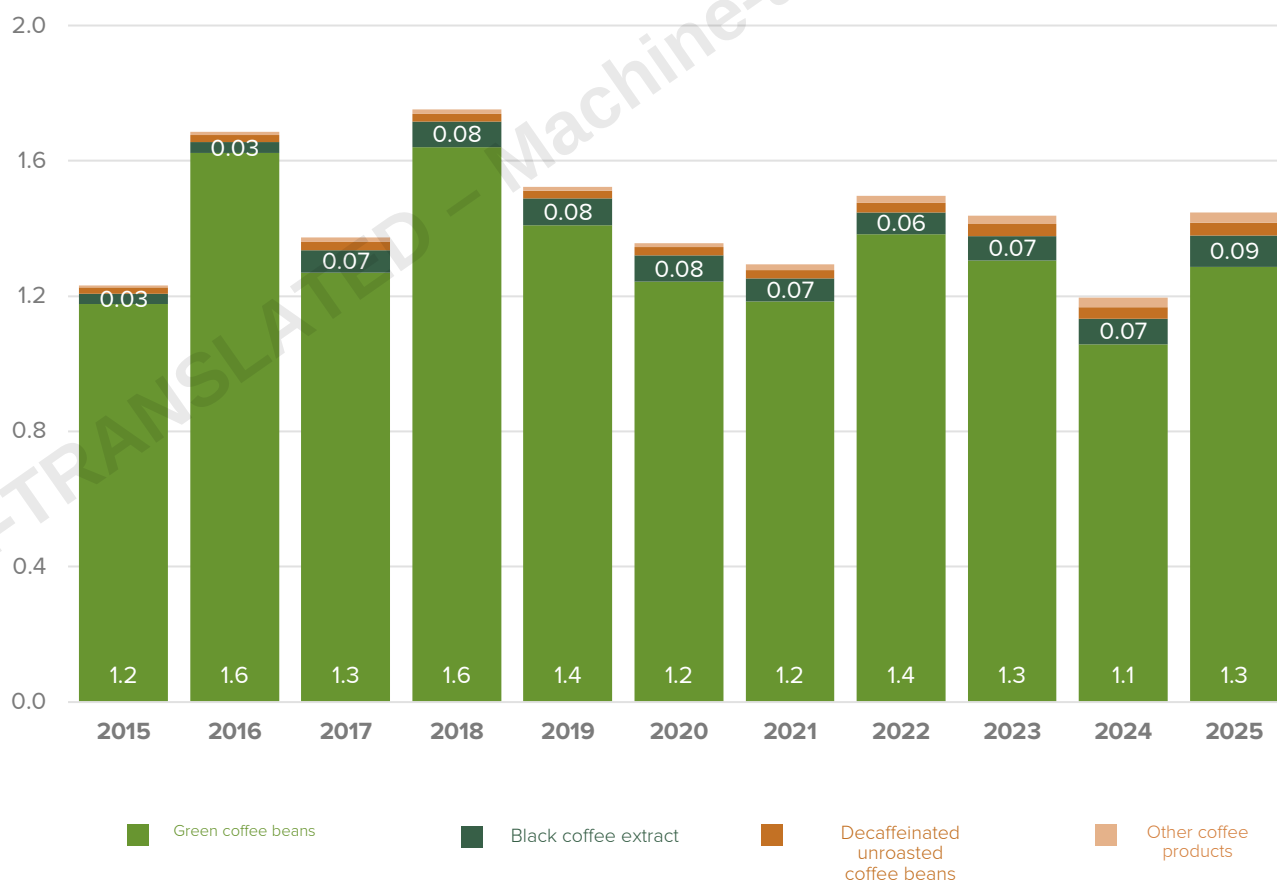


1.2. Main coffee export products³

Vietnam mainly exports green coffee beans (unroasted, non-decaffeinated coffee beans, HS 090111), decaffeinated unroasted coffee beans (HS 090112), and black instant coffee (coffee extract without other ingredients, HS 210111). During 2015-2025, although the shares of export volume by product group changed little, export value grew strongly (Figures 2 and 3). Green coffee beans remained the largest export item, although their share of export value changed considerably. From 2015 to 2025, green coffee bean exports rose from about 1.18 million tonnes (about USD 2.2 billion) to nearly 1.29 million tonnes (about USD 6.65 billion), an increase of 9.4% in volume and more than threefold in value (Figure 4). However, green coffee beans' share of total export value fell from 86.8% to 78% (Figure 5). By contrast, black instant coffee (HS 210111) increased from 8.4% to 14.5% of export value, while export volume rose from 29.9 thousand tonnes to more than 92.6 thousand tonnes, more than tripling over the period. Although the sector's third most important product, decaffeinated unroasted coffee beans (HS 090112) accounted for only about 2% of total export volume; exports rose from 20.3 thousand tonnes to 38.1 thousand tonnes and export value from USD 61 million to USD 259.7 million between 2015 and 2025.

Figure 2. Vietnam's annual coffee export volume by product

million tonnes

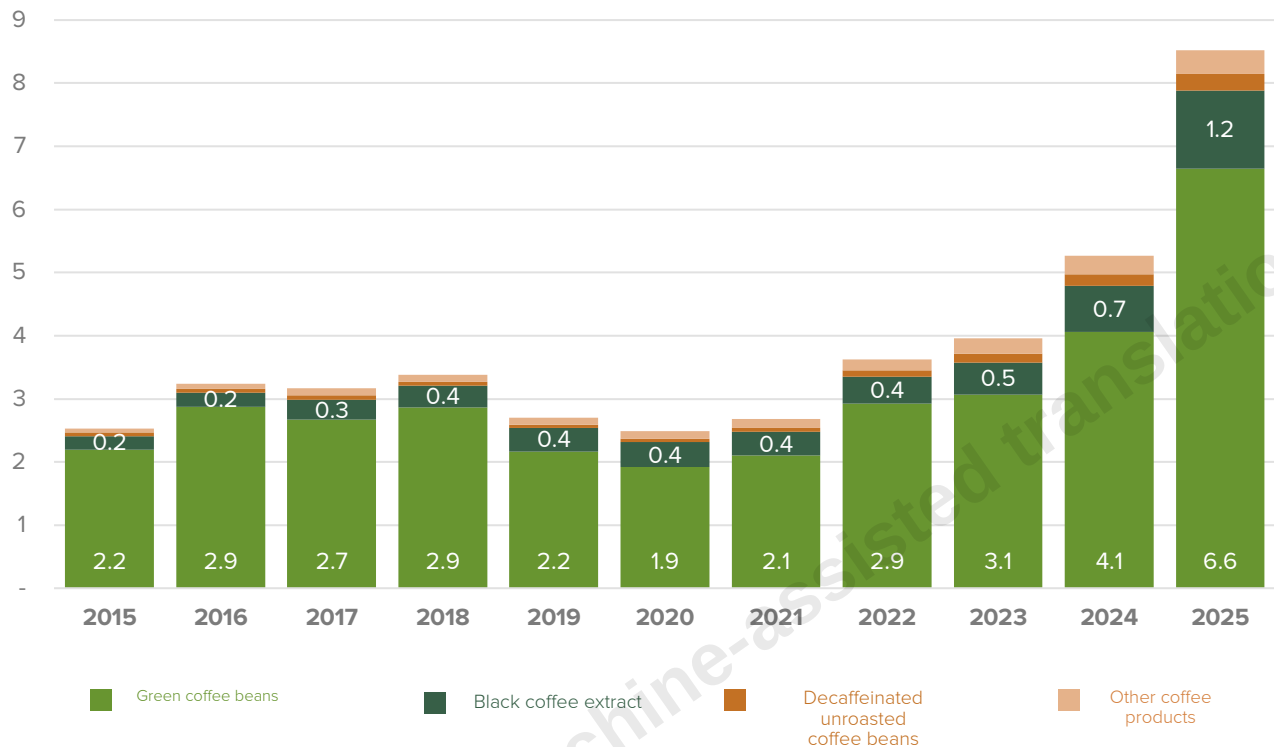


Source: Forest Trends research team, based on customs data

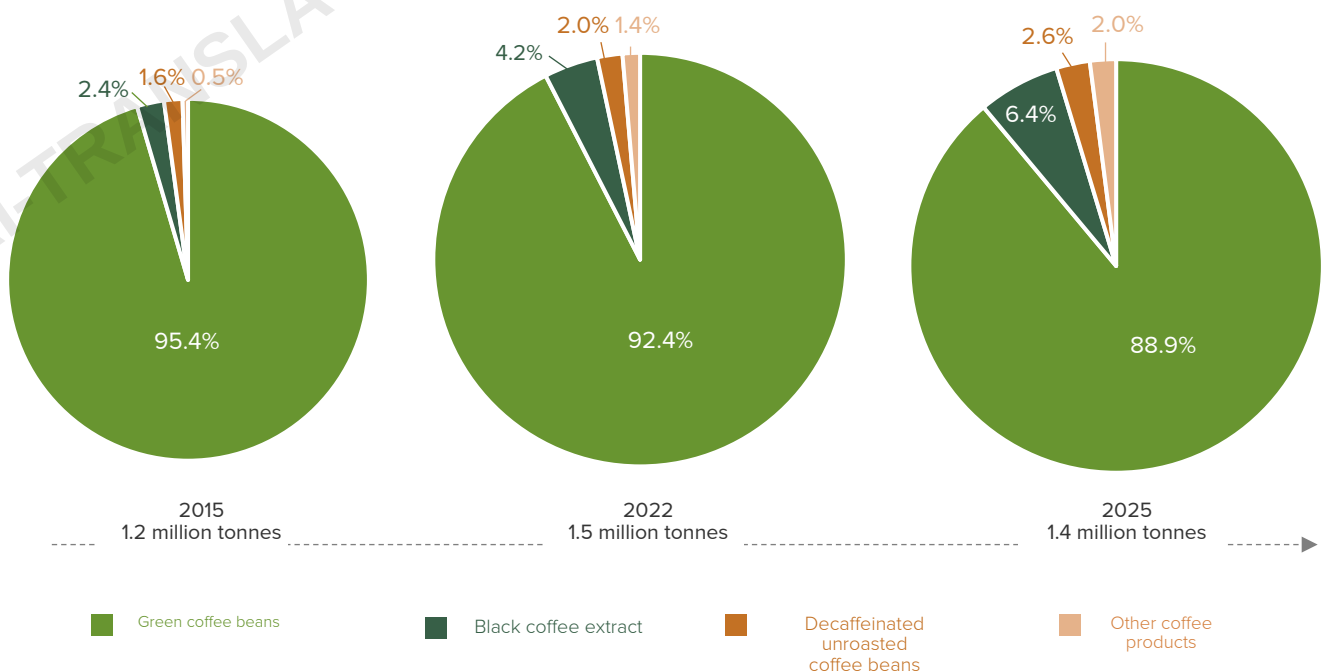
³ Other products in this section include roasted decaffeinated coffee beans (HS 090121), roasted non-decaffeinated coffee beans (HS 090122), soluble coffee extracts mixed with other ingredients (HS 210112), and other products that are not coffee beans (HS 090190).

**Figure 3. Vietnam's annual coffee export value by product**

USD billion



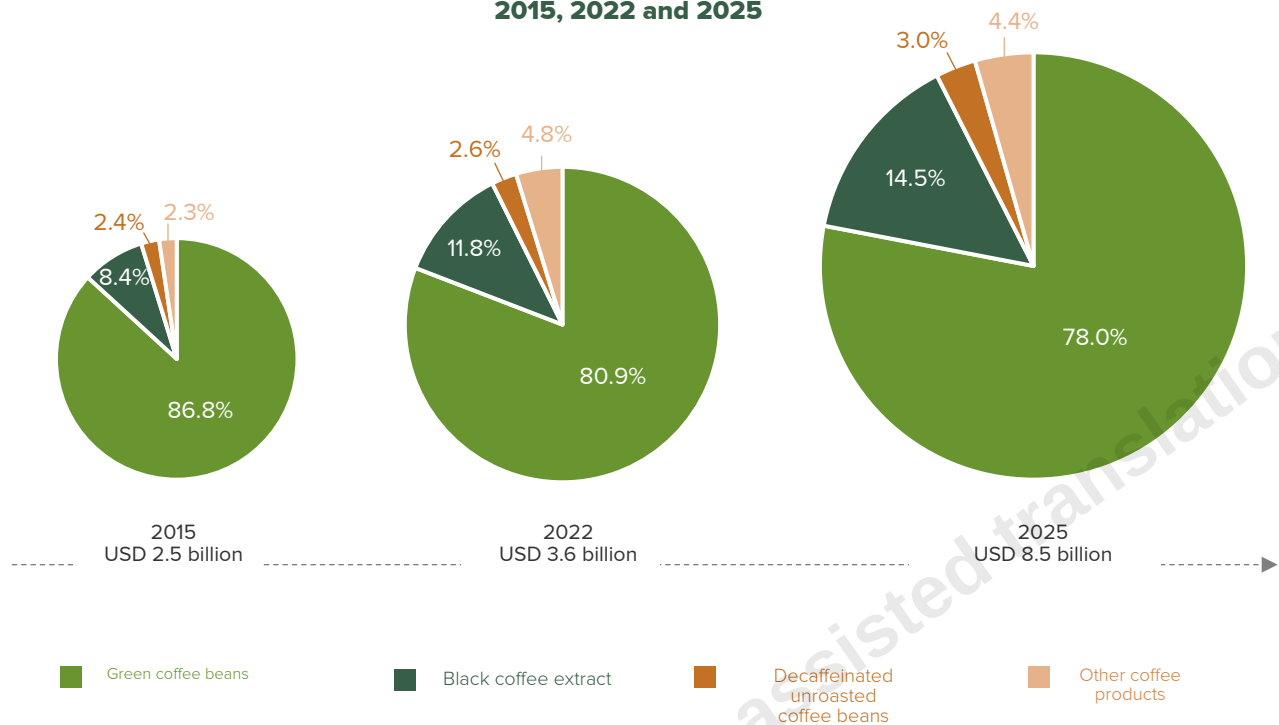
Source: Forest Trends research team, based on customs data

Figure 4. Shares and scale of coffee export volume by main product, 2015, 2022 and 2025

Source: Forest Trends research team, based on customs data



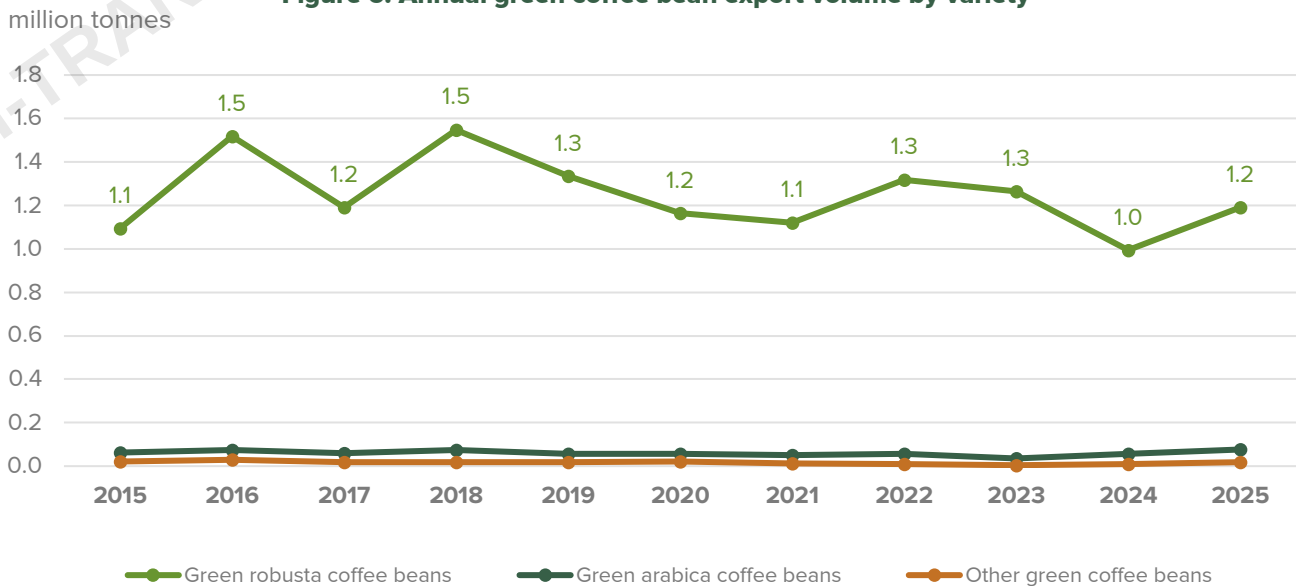
Figure 5. Shares and scale of coffee export value by main product, 2015, 2022 and 2025



Source: Forest Trends research team, based on customs data

Green robusta coffee beans are Vietnam's main coffee export product. During 2015-2025, export volume increased from nearly 1.1 million tonnes to more than 1.2 million tonnes (up 10.1%), while export value rose from USD 2 billion to over USD 6.1 billion (up 206.7%) (Figures 6 and 7). Green arabica coffee bean exports increased from 62.3 thousand tonnes to 79.6 thousand tonnes (up 27.7%), while export value more than tripled, from USD 163.8 million to USD 539.3 million.

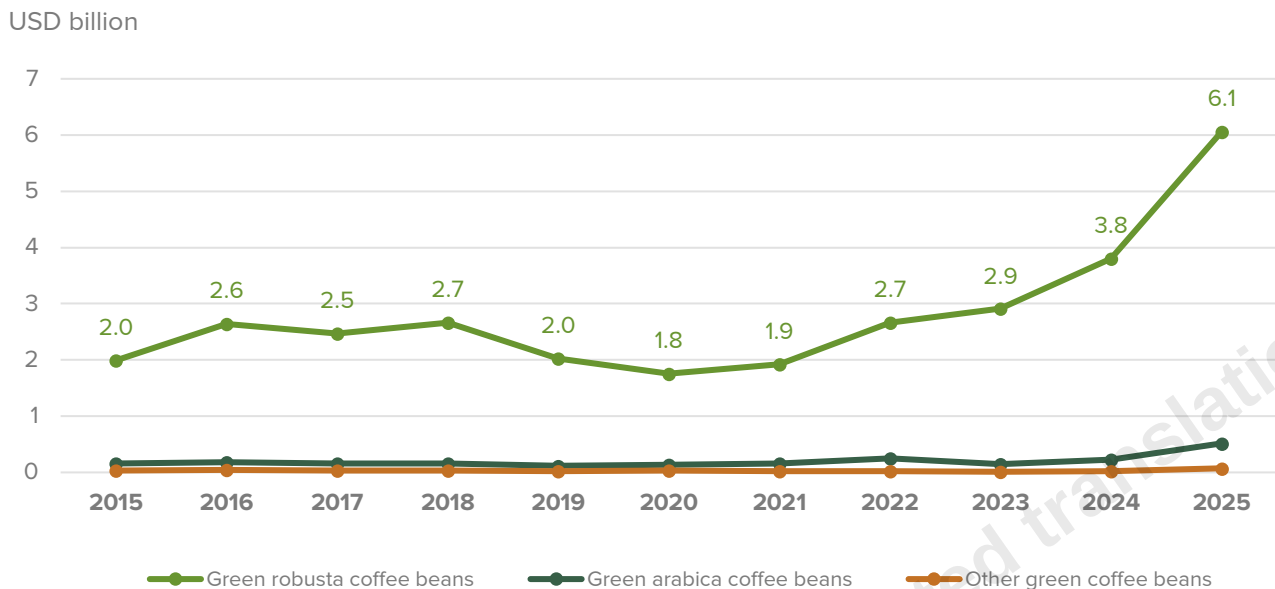
Figure 6. Annual green coffee bean export volume by variety⁴



⁴ The 'other green coffee beans' group includes products containing mixtures of robusta, arabica and/or other coffee varieties, or products for which the composition of raw materials cannot be determined.



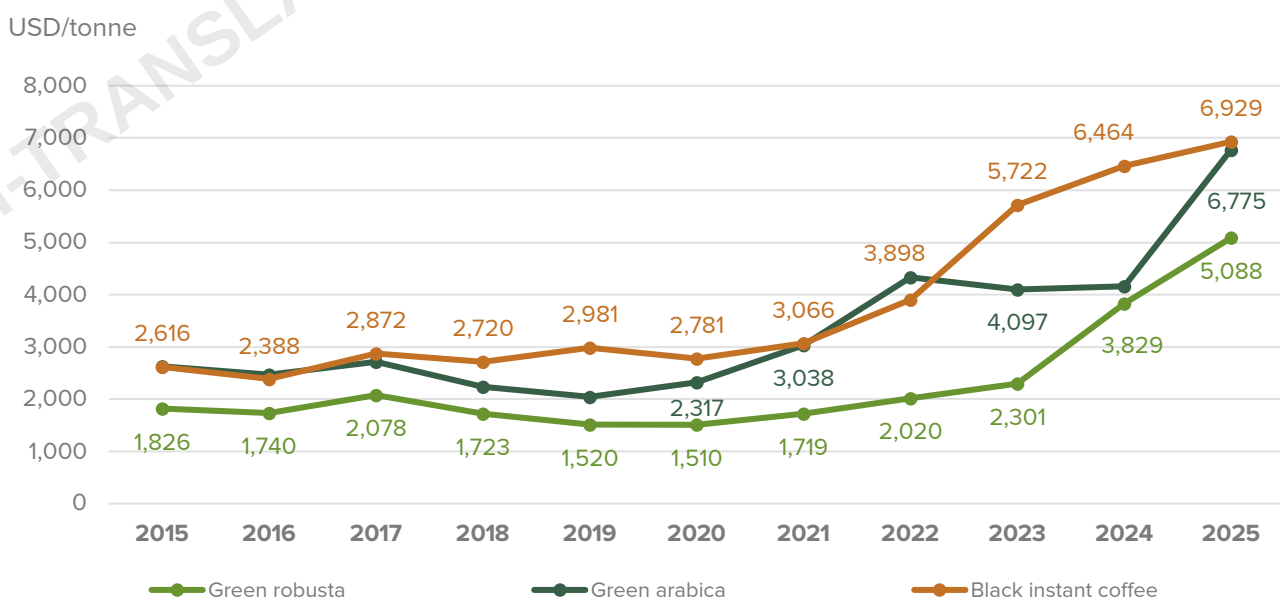
Figure 7. Annual green coffee bean export value by variety⁵



Source: Forest Trends research team, based on customs data

Coffee export prices declined during 2015-2021 and began rising again in 2022 (Figure 8). The price of green robusta coffee beans fell from USD 1,826/tonne to a low of USD 1,510/tonne in 2020, then rose sharply in 2024-2025 to USD 5,088/tonne in 2025. Over 2015-2025, the price of green robusta coffee beans increased by 178.7%. The price of green arabica coffee beans fell 22.2%, from USD 2,628/tonne in 2015 to USD 2,045/tonne in 2019, before rising sharply again from 2022 to USD 6,775/tonne in 2025. Over the full 2015-2025 period, the price of green arabica coffee beans increased by 157.8%. Over the same period, the price of black instant coffee rose 164.8%, from USD 2,616/tonne to USD 6,929/tonne.

Figure 8. Average annual export prices of selected major coffee products



Source: Forest Trends research team, based on customs data

⁵ The 'other green coffee beans' group includes products containing mixtures of robusta, arabica and/or other coffee varieties, or products for which the composition of raw materials cannot be determined.



1.3. Main export markets

During 2015-2025, Vietnam exported coffee to nearly 180 countries worldwide. The EU was the largest market, followed by the United States, Japan, Russia, Algeria and China (Figures 9, 10, 11 and 12).

Specifically, export volume to the EU increased by 15.1%, from 586.3 thousand tonnes to 674.6 thousand tonnes, while export value more than tripled, from USD 1.13 billion to nearly USD 3.7 billion. The EU's share of Vietnam's total coffee export value changed little, edging down from 44.8% in 2015 to 43.3% in 2025. Within the EU, Germany, Italy, Spain, the Netherlands and Belgium were the largest importers of Vietnamese coffee. Green coffee beans, decaffeinated coffee beans, and black instant coffee extract were the three largest products exported to the EU, accounting for about 88.8%, 4% and 7.1% of export value in 2025, respectively.

The United States and Japan were the two largest markets after the EU. Key information on Vietnamese coffee exports to these markets during 2015-2025 is as follows:

- United States: export volume fell from 156.9 thousand tonnes in 2015 to 91.7 thousand tonnes in 2025 (down 41.6%), while export value rose from USD 317.5 million to USD 506.8 million (up 59.7%) because export prices increased. However, the United States' share of Vietnam's total coffee export value fell from 12.5% to 5.9% over the period. Green coffee beans were the largest export product, accounting for nearly 95% of annual volume and more than 80% of annual value to this market. They were followed by black instant coffee (3.1% of volume and 7.1% of value in 2025) and decaffeinated coffee beans (4.7% of volume and 6% of value in 2025).

- Japan: export volume increased from 84.4 thousand tonnes in 2015 to 91.7 thousand tonnes in 2025 (up 8.8%), while export value rose from USD 171 million to USD 608.5 million (nearly 3.5 times). Japan's share of the sector's total export value edged up from 6.8% to 7.1% over the period. Green coffee beans were the most important export product, accounting for nearly 90% of total volume shipped to Japan. Black instant coffee came next and increased gradually over the years, accounting for about 14.2% of volume and 25.5% of total value in 2025.

Russia, Algeria and China are also becoming important export markets for Vietnamese coffee. Key information on these markets during 2015-2025 is as follows:

- Russia: export volume increased 72.4%, from 46.1 thousand tonnes in 2015 to 79.5 thousand tonnes in 2025; export value rose nearly 4.5 times, from USD 105.3 million to USD 462.2 million. Russia's share of Vietnam's total coffee export value increased from 4.2% to 5.4% over the period. Green coffee beans were the main export product to this market (generally over 90% of total volume and 80% of annual value), followed by black instant coffee (about 8% of total volume and 20% of annual value).

- China: export volume more than doubled, from 23.1 thousand tonnes in 2015 to 49.1 thousand tonnes in 2025; export value increased 3.6 times, from USD 77.9 million to USD 282.3 million. China's share of Vietnam's total coffee export value increased from 3.1% to 3.3% over the period. Green coffee beans generally accounted for about 70-80% of annual export volume to this market, but soluble coffee extracts (including black coffee and various milk-coffee products) accounted for the largest share of value, at around 35-50% or more.



- Algeria: export volume increased 126.5%, from 37.3 thousand tonnes in 2015 to 84.5 thousand tonnes in 2025; export value rose more than sixfold, from USD 69.6 million to USD 430.1 million. Algeria's share of Vietnam's coffee export value increased from 2.8% to 5% over the period. Green coffee beans were by far Algeria's largest import from Vietnam, accounting for nearly 100% of annual coffee import volume and value.

Figure 9. Vietnam's coffee export volume to selected major markets, 2015-2025

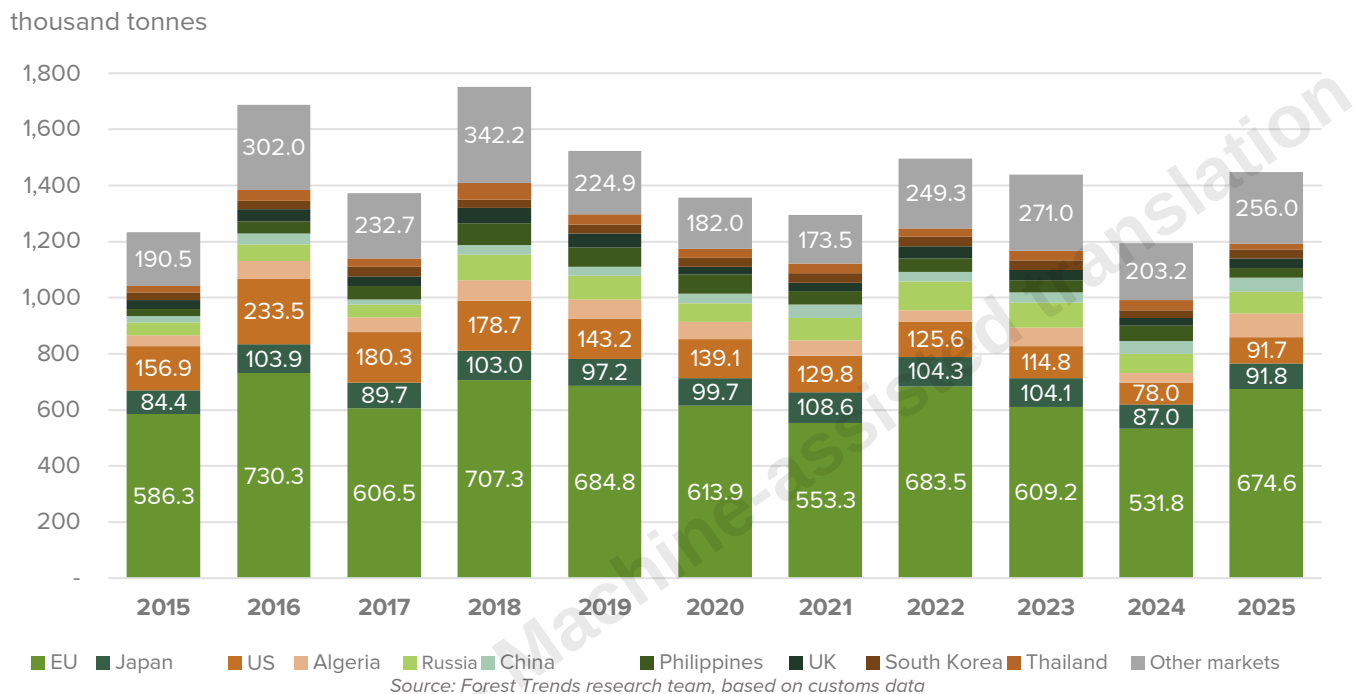


Figure 10. Vietnam's coffee export value to selected major markets, 2015-2025

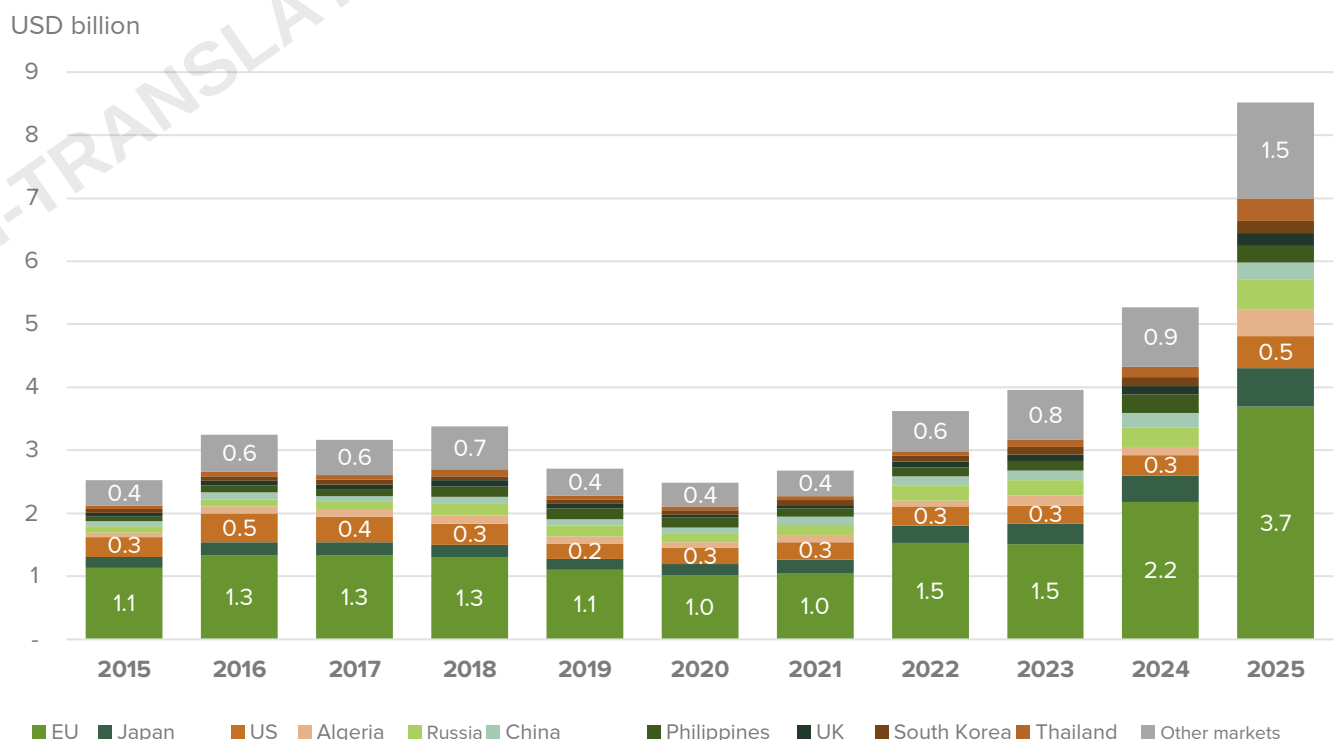
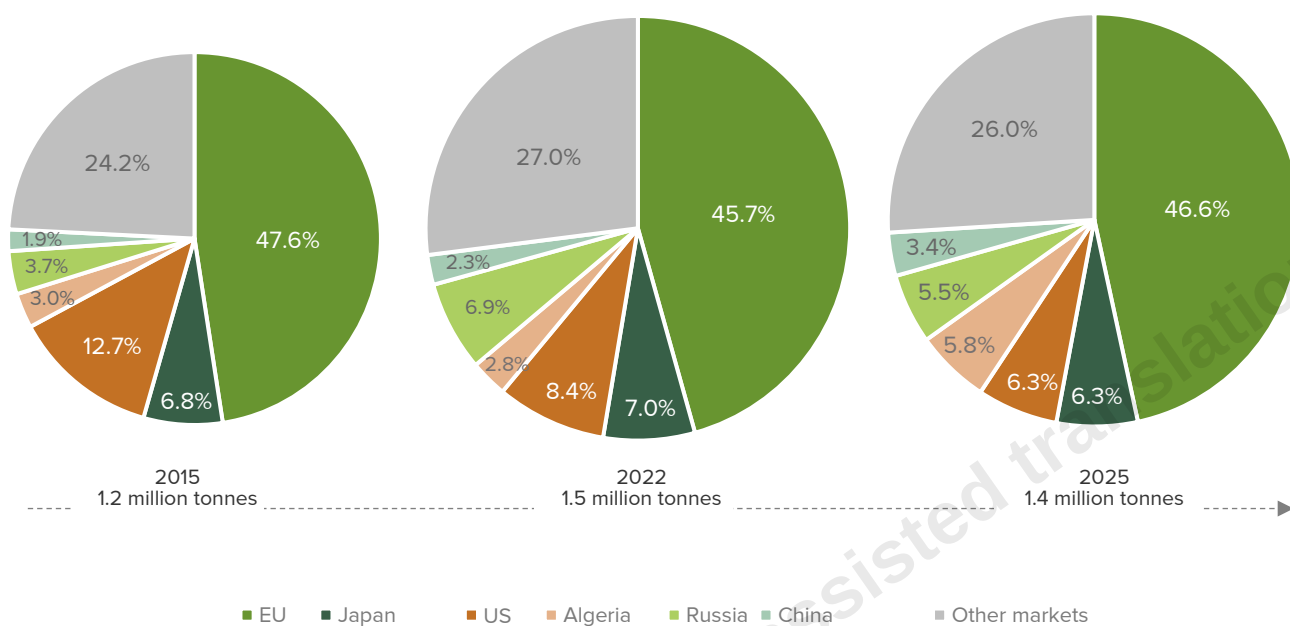


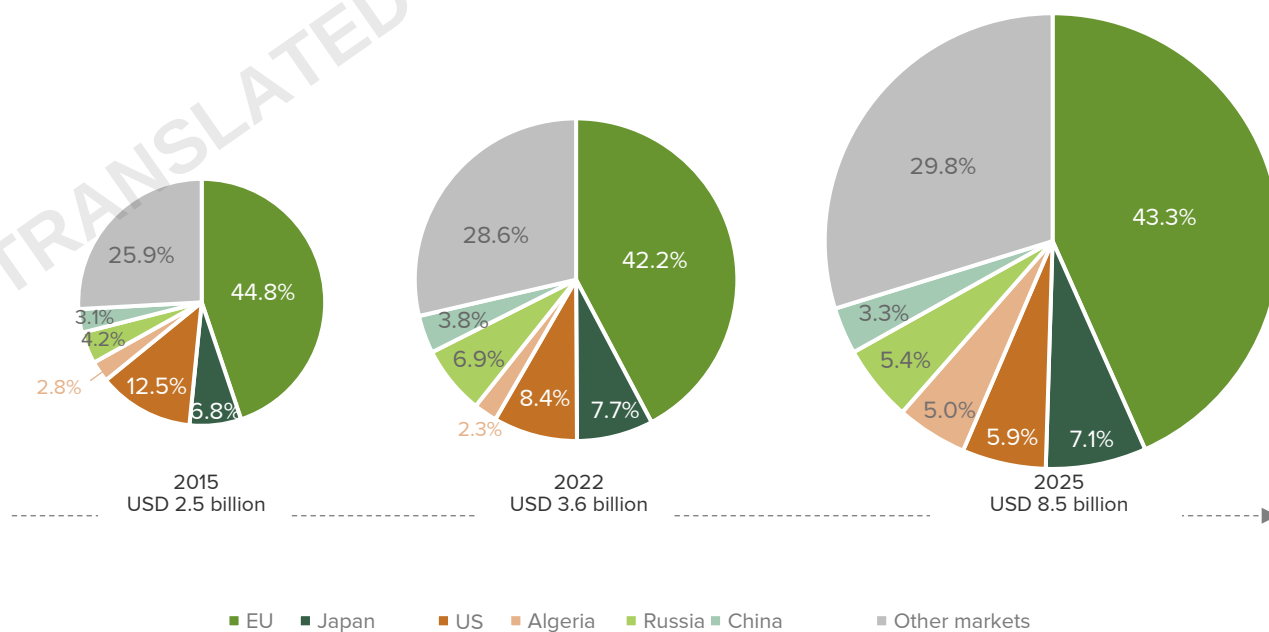


Figure 11. Shares and volume of Vietnam's coffee exports to major markets, 2015-2025



Source: Forest Trends research team, based on customs data

Figure 12. Shares and value of Vietnam's coffee exports to major markets, 2015-2025



Source: Forest Trends research team, based on customs data



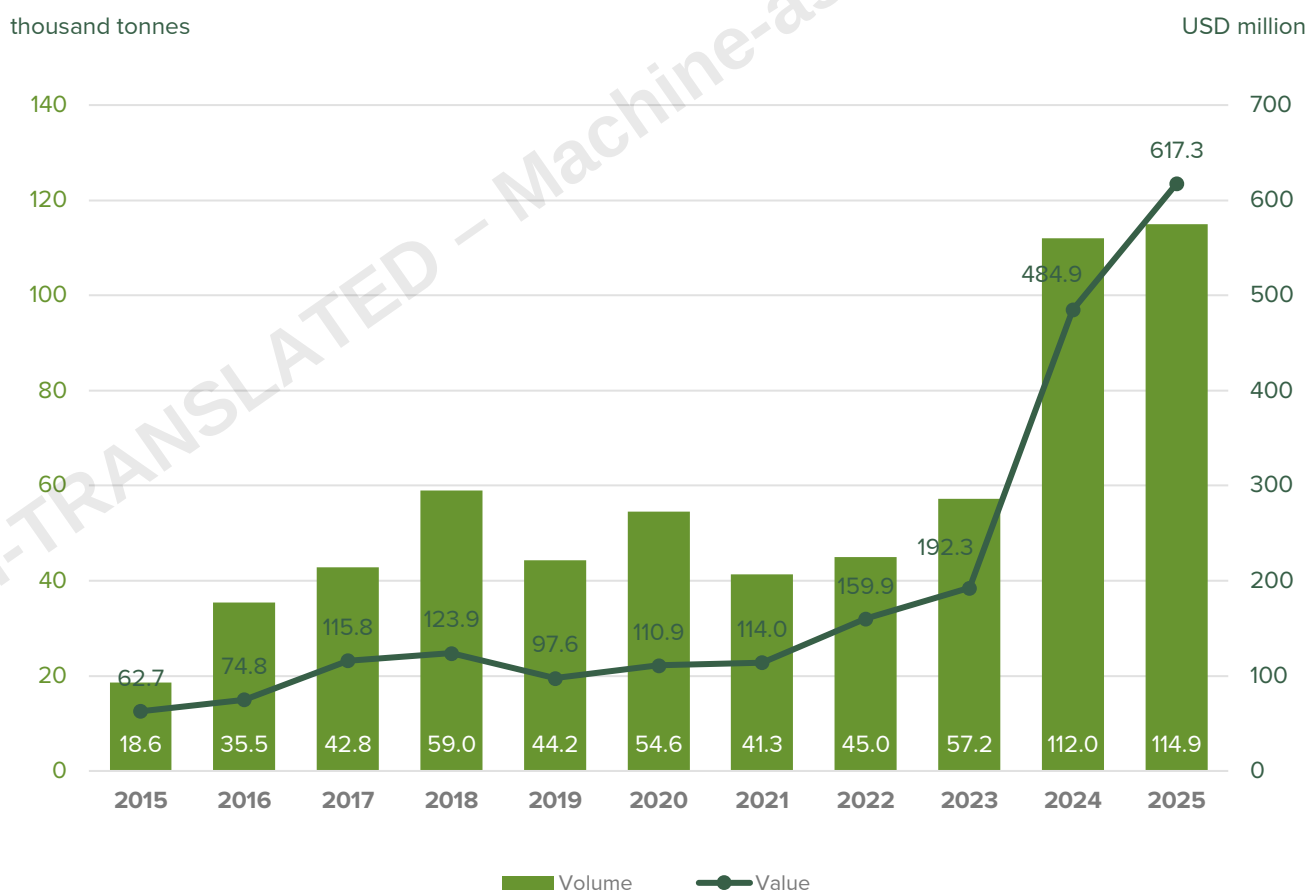
2. Vietnam's coffee imports, 2015-2025

2.1. Import volume and value

Vietnam imports coffee beans and a small volume of instant coffee for domestic consumption, with some imports processed for export. Import volume and value were relatively stable through 2021 and have increased sharply since 2022 as global coffee prices rose (Figure 13).

Before 2022, Vietnam imported around 40-60 thousand tonnes of coffee per year, worth roughly USD 100 million. As coffee prices rose in 2022, both import volume and value increased rapidly. In 2024, Vietnam imported more than 111 thousand tonnes of coffee products worth nearly USD 500 million, twice the 2023 level. Import volume was maintained in 2025; however, import value rose 27.3% as higher import prices pushed the total to more than USD 600 million. By the end of 2025, coffee import volume was about six times the 2015 level, while import value was nearly ten times higher.

Figure 13. Vietnam's annual coffee import volume and value



Source: Forest Trends research team, based on customs data



2.2. Main coffee import products

Vietnam mainly imports green coffee beans and black instant coffee, along with small quantities of roasted or decaffeinated coffee (Figures 14 and 15). Green coffee beans (HS 090111) were the largest import product and recorded the strongest growth. From 2015 to 2025, Vietnam's imports of green coffee beans rose from 14.1 thousand tonnes (about USD 34 million) to more than 100 thousand tonnes (about USD 496 million), increasing more than sixfold in volume and more than fourteenfold in value; their share rose from 75.6% to 87.8% (Figures 16 and 17). By contrast, black instant coffee (HS 210111) fell from 23.3% to 6.9% of import volume, while imports increased only from 4.3 thousand tonnes to 7.9 thousand tonnes, growth of 83.7% over the period.

Figure 14. Vietnam's import volume of major coffee products

thousand tonnes

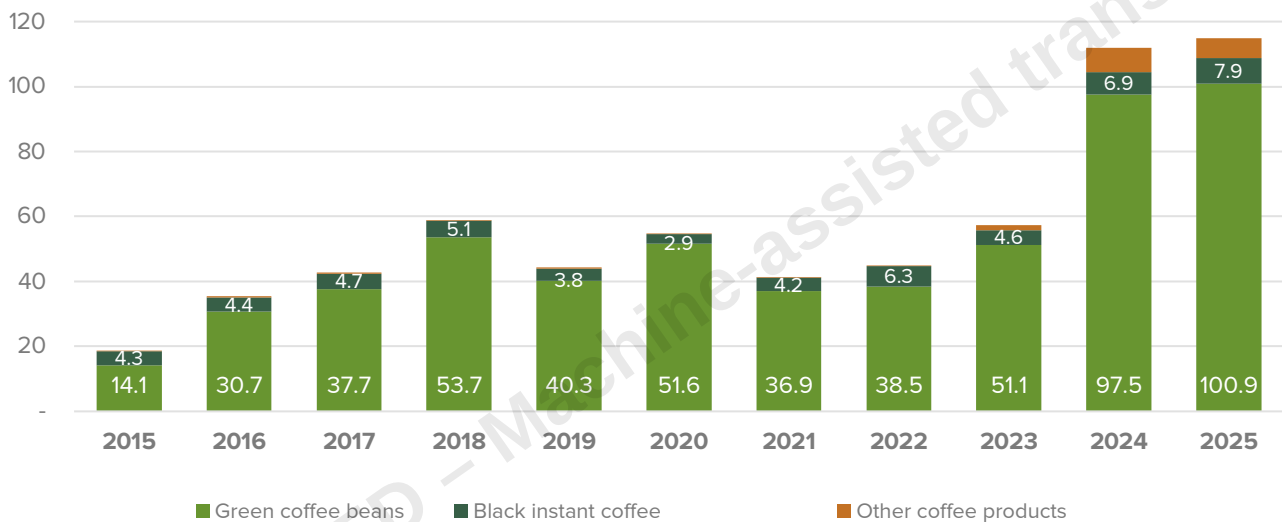
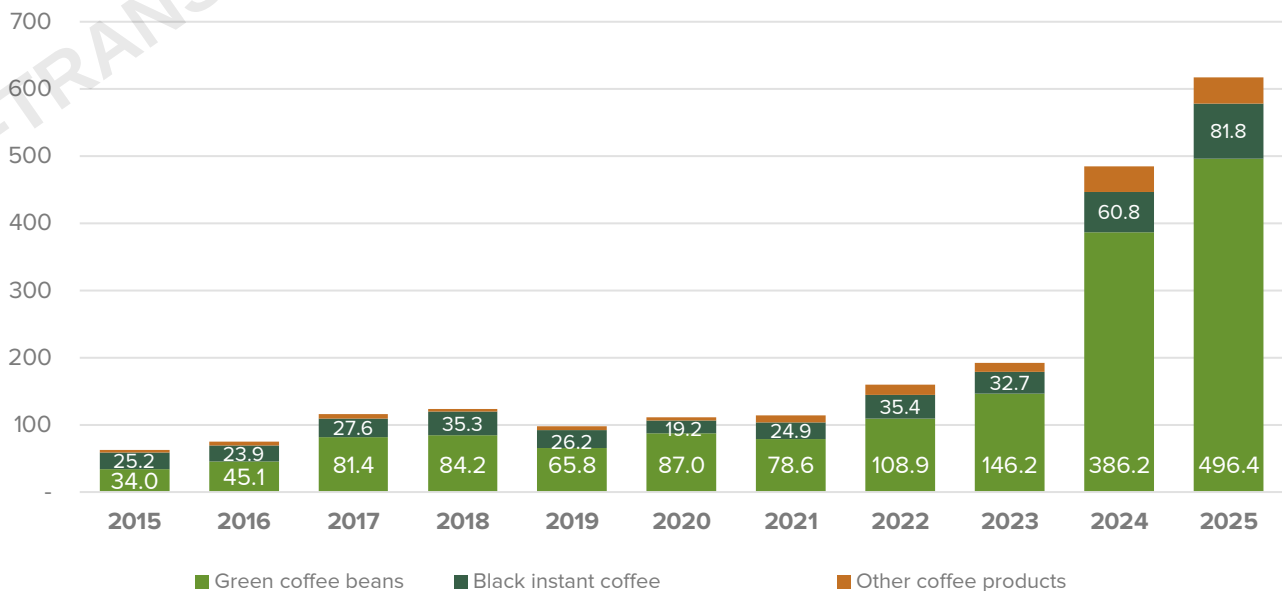


Figure 15. Vietnam's import value of major coffee products

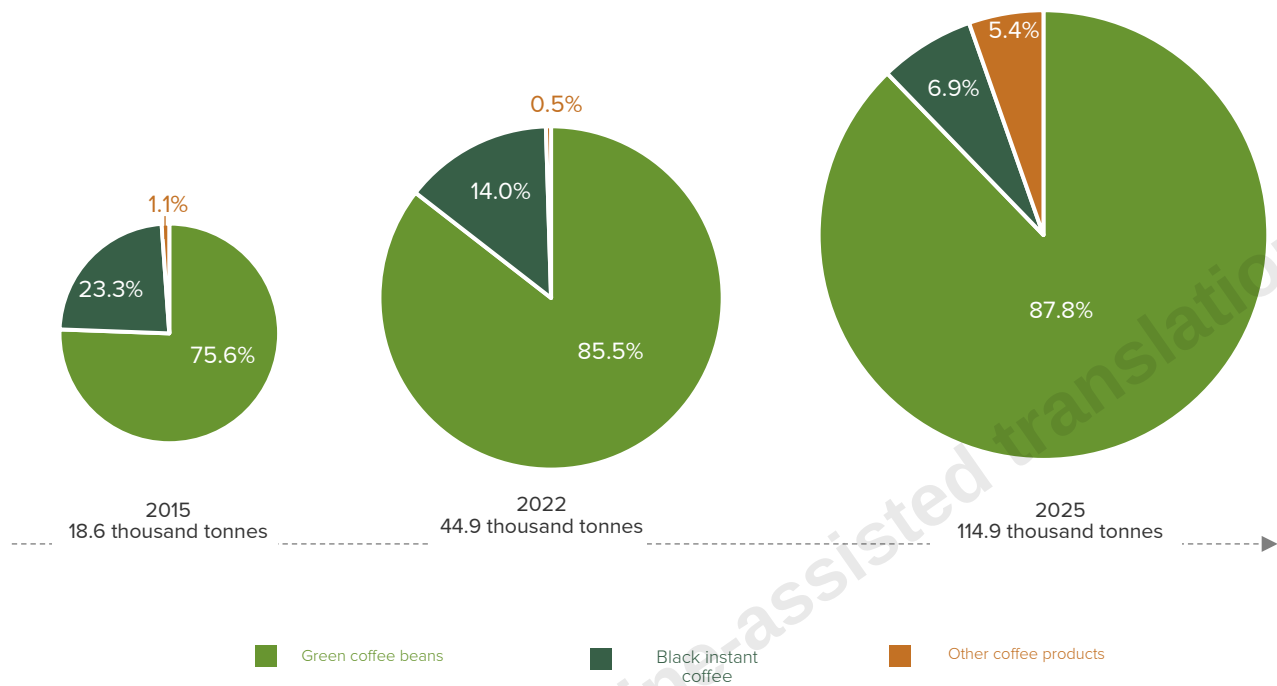
USD million



Source: Forest Trends research team, based on customs data

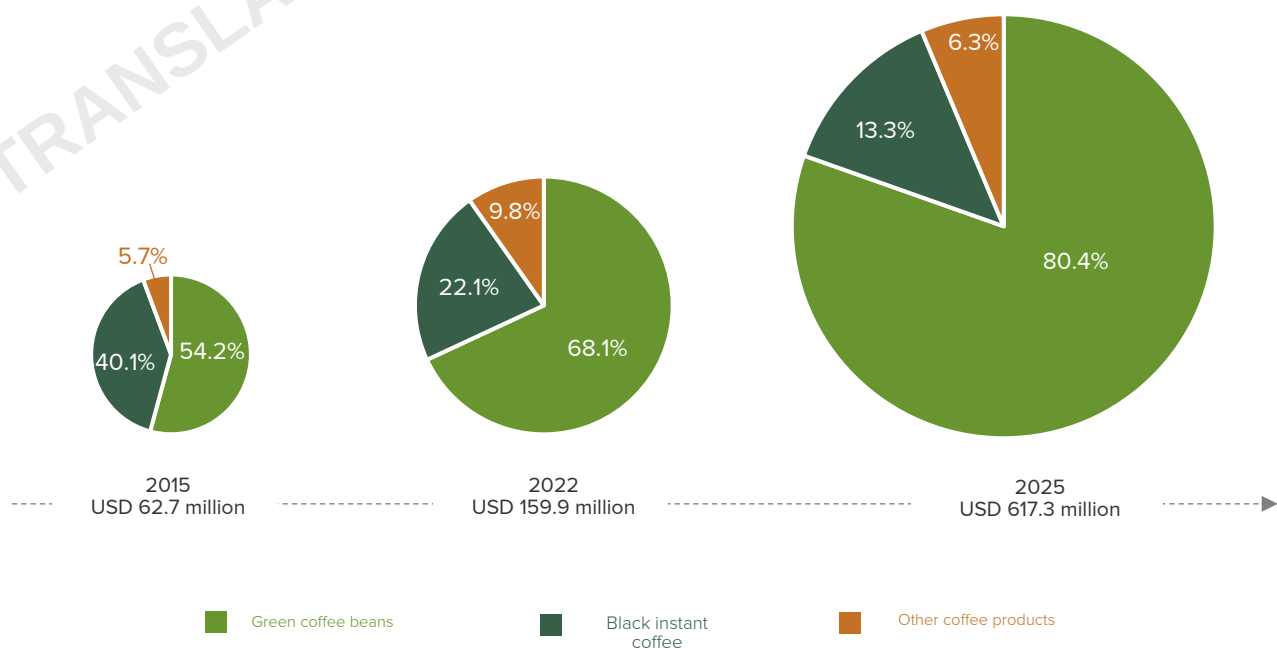


Figure 16. Shares and scale of coffee import volume by product, 2015, 2022 and 2025



Source: Forest Trends research team, based on customs data

Figure 17. Shares and scale of coffee import value by product, 2015, 2022 and 2025



Source: Forest Trends research team, based on customs data



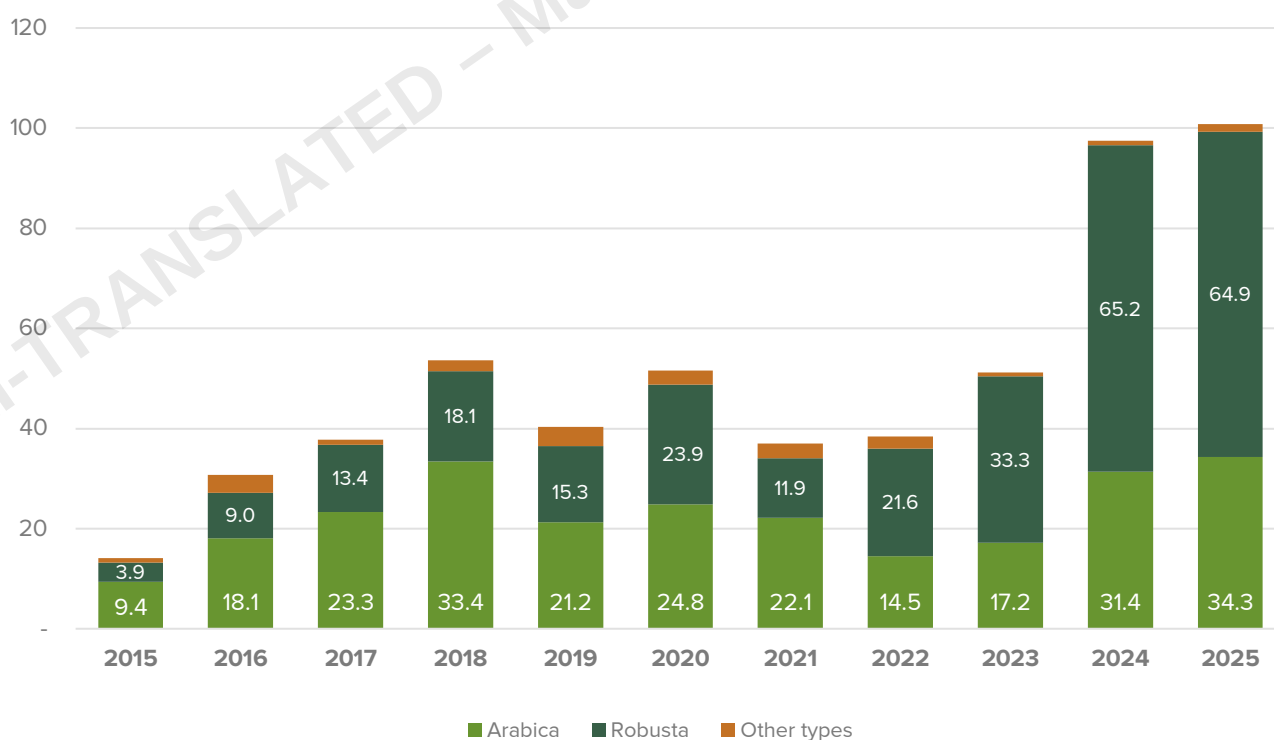
During 2023-2025, Vietnam's imports of green coffee beans (HS 090111) surged from 51 thousand tonnes in 2023 to 100.9 thousand tonnes in 2025 (up 97.2%). Vietnam's robusta supply declined during this period because of extreme weather and a shift from coffee to other crops (Đặng Đức Chiến, Đỗ Xuân Hiền, & Tô Xuân Phúc, 2025).

Green arabica coffee beans were once an important import product, accounting for nearly 60% of import volume before 2022. Green robusta coffee beans subsequently became the largest imported product. In 2025, robusta accounted for 64.4% of Vietnam's total green coffee bean imports (Figure 18). From 2015 to 2025, green robusta imports rose from 3.9 thousand tonnes to 64.9 thousand tonnes (more than fifteenfold). Over the same period, arabica imports increased from 9.4 thousand tonnes to 34.3 thousand tonnes (2.7 times). In 2025, arabica accounted for 34% of total green coffee bean imports.

Arabica coffee is imported mainly from Laos, while Brazil and Indonesia are Vietnam's two suppliers of robusta. Robusta supplies from Laos also increased sharply, although arabica remained the main coffee type imported from this market. In 2025, Vietnam imported green arabica coffee from Laos. Figure 19 shows that the average import price of green coffee beans into Vietnam remained low throughout 2015-2021 and rose very sharply during 2023-2025. Compared with the lowest prices in 2018-2020, the price of green robusta coffee beans was about three times higher in 2025, while the price of green arabica was about four times higher.

Figure 18. Vietnam's green coffee bean import volume by variety, 2015-2025

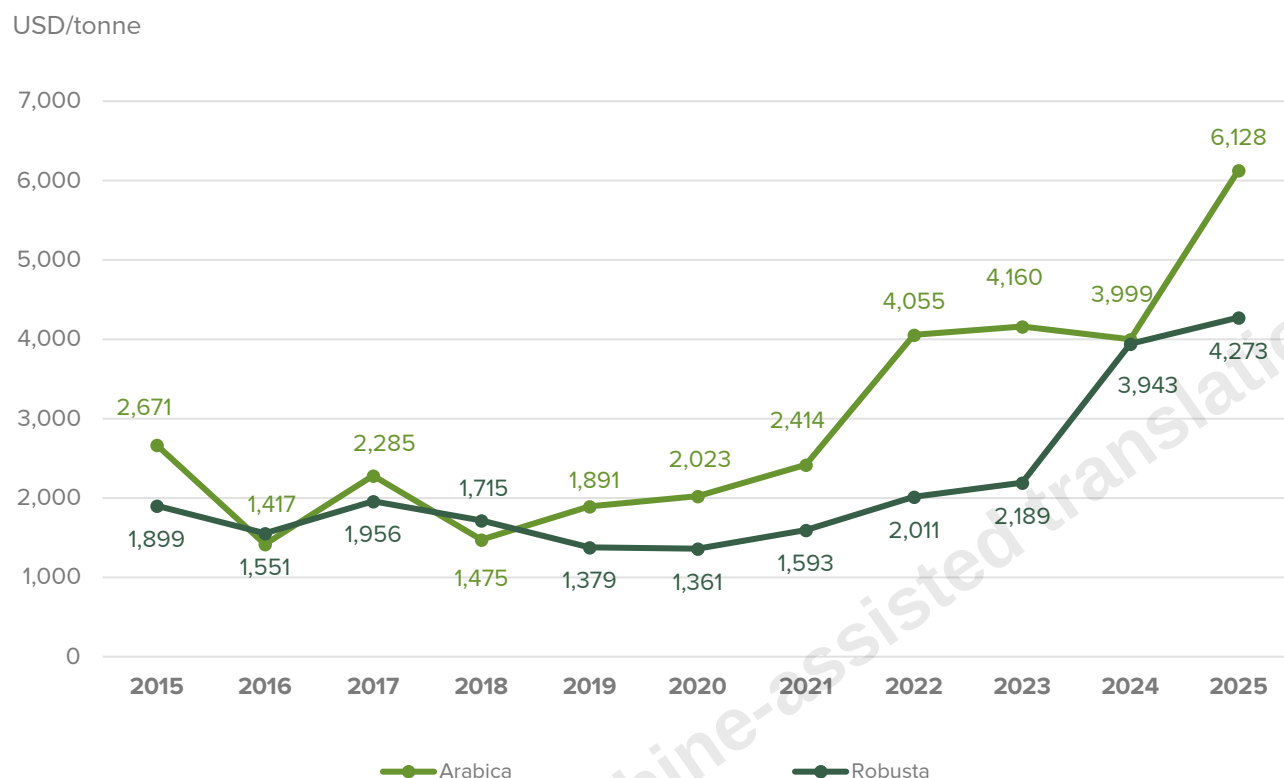
thousand tonnes



Source: Forest Trends research team, based on customs data



Figure 19. Vietnam's average green coffee bean import price by variety, 2015-2025



Source: Forest Trends research team, based on customs data

2.3. Main import markets

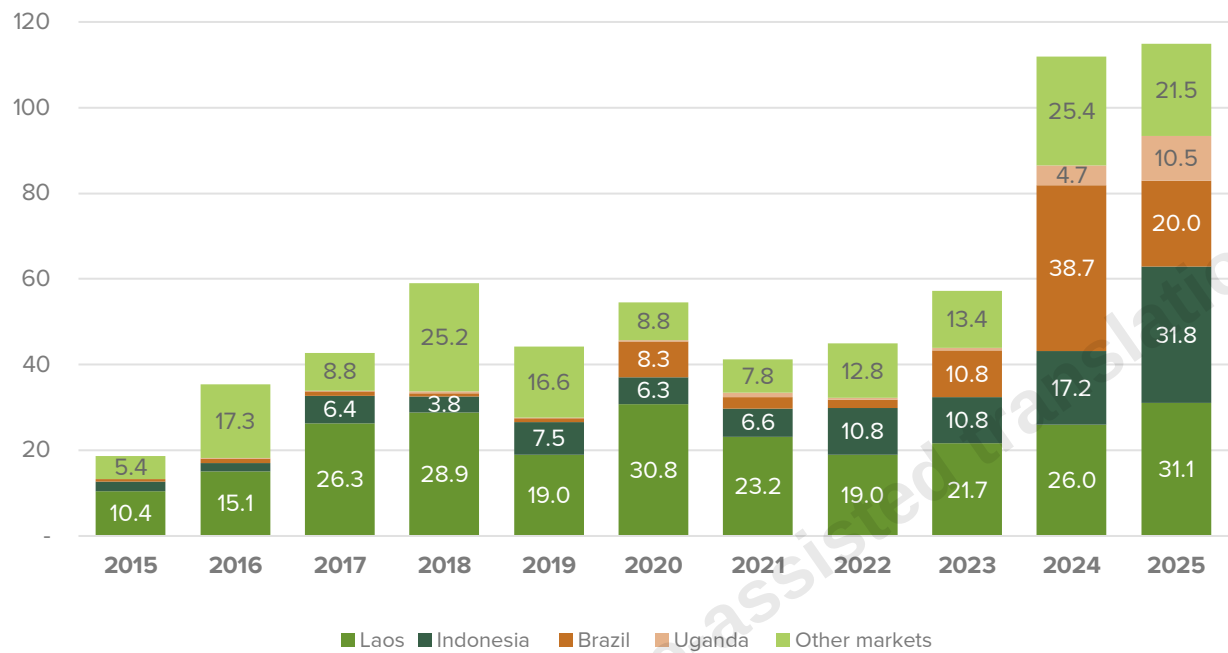
Laos, Indonesia and Brazil were Vietnam's three largest coffee suppliers in 2025, accounting for 27.1%, 17.4% and 27.7% of total coffee import volume, respectively (Figures 20 and 21). Most coffee imported from these markets was green coffee beans, serving Vietnam's domestic consumption and export needs.

During 2015-2025:

- Imports from Brazil increased more than thirtyfold, from 644.7 tonnes to more than 20 thousand tonnes, while import value rose more than fiftyfold, from USD 2.4 million to USD 123.2 million. In 2025, 87% of coffee imported from Brazil was green coffee beans (17.4 thousand tonnes, USD 94.2 million), and 12% was black instant coffee (2.4 thousand tonnes, USD 27.8 million).
- Imports from Indonesia increased more than thirteenfold, from 2,236.3 tonnes to 31.8 thousand tonnes, while import value rose more than twenty-fivefold, from USD 5 million to USD 129.6 million. In 2025, 96.5% of coffee imported from Indonesia was green coffee beans (30.7 thousand tonnes, USD 123.2 million).
- Imports from Laos tripled, from more than 10 thousand tonnes to 31 thousand tonnes, while import value rose more than sixfold, from USD 25.4 million to USD 158.3 million. In 2025, 99.8% of coffee imported from Laos was green coffee beans.

**Figure 20. Vietnam's annual coffee import volume by market, 2015-2025**

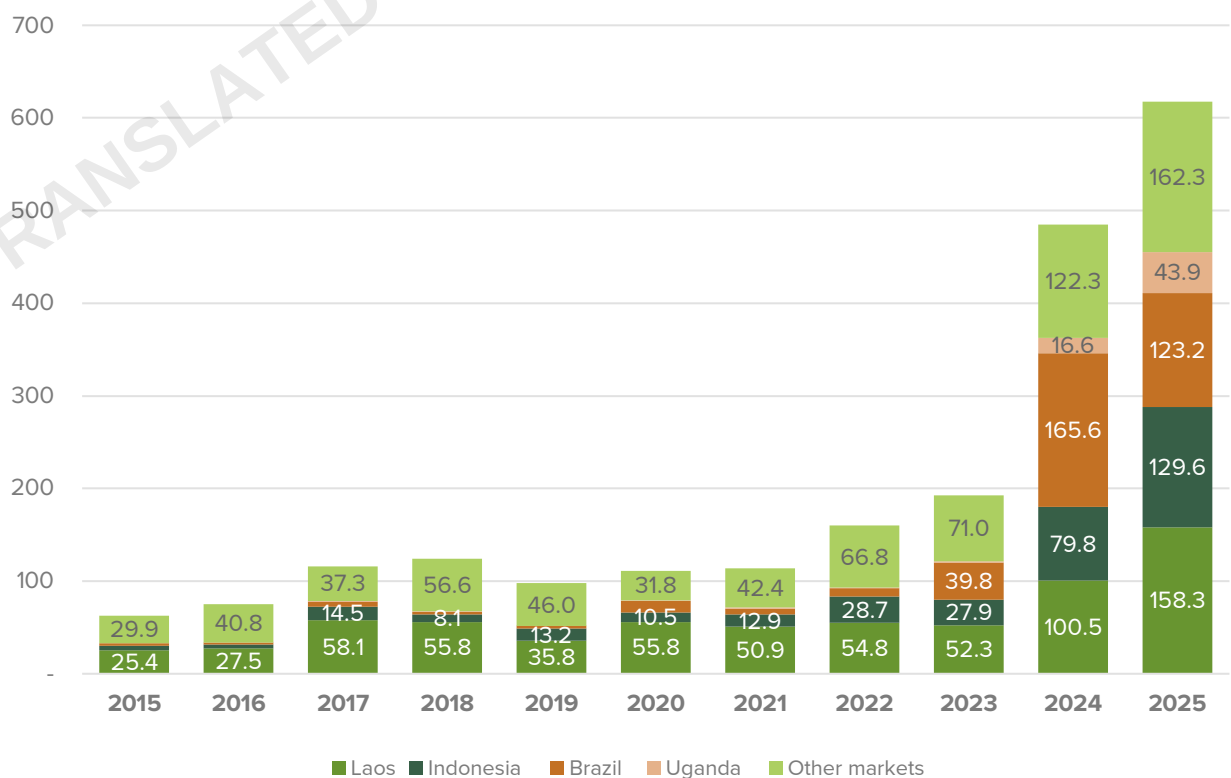
thousand tonnes



Source: Forest Trends research team, based on customs data

Figure 21. Vietnam's annual coffee import value by market, 2015-2025

USD million



Source: Forest Trends research team, based on customs data



3. Key issues in Vietnam's coffee sector

With more than 40 years of large-scale coffee cultivation since the early 1980s, Vietnam has gradually established itself as one of the world's largest coffee producers and exporters. While green coffee beans once accounted for more than 95% of total export volume, the sector has seen strong growth in instant coffee in recent years, with volume nearly tripling from 2015 to 2025. However, more than 80% of exported instant coffee still comes from foreign-invested (FDI) or joint-venture companies such as Nestlé, Sucafina, Louis Dreyfus, Outspan, Ngon Coffee, Tata, Iguacu, Instanta, etc. Relatively few Vietnamese companies produce instant coffee, with notable examples including Trung Nguyen, An Thai, Lua Chon Dinh (Top Choice), Vinacafe and Simexco. Other processed products, such as decaffeinated coffee, roasted and ground coffee, canned coffee and cascara tea, still account for only small shares. This highlights the need for investment in modern technology and deeper processing in the coffee sector. At present, high global coffee prices are bringing substantial benefits to farmers, and new coffee planting and/or conversion from other crops to coffee is increasingly common, especially in northern mountainous provinces - home to ethnic minority communities⁶ and with considerable room for area expansion. Coffee has become a high-value crop, creating opportunities to reduce poverty and improve household and local economies. A future increase in raw coffee supply, together with growing demand for instant coffee imports in key markets such as the EU, Japan, Russia and China, offers a strong opportunity for domestic companies to invest in deeper processing and create greater value added. By participating more deeply in global supply chains through these products and leveraging existing advantages in production areas, Vietnamese companies can strengthen their international position and play a more proactive role in shaping the market and emerging trends.

On the other hand, on 29 June 2023, the European Union formally adopted the EU Deforestation Regulation (EUDR), which will apply from 30 December 2026. Coffee is one of the seven commodities covered by the EUDR, requiring companies importing coffee into the EU to ensure that products comply with the laws of the country of production, are deforestation-free after 31 December 2020, and are accompanied by geolocation coordinates for production plots. The EUDR poses a major challenge for Vietnam's coffee sector in tracing products to production plots and ensuring that coffee is not grown on land converted from forest after the cutoff date. In recent years, Vietnam has increased coffee imports from many markets, especially Laos, Brazil and Indonesia, to meet domestic consumption and export-processing needs. Coffee from these flows, if re-exported to the EU, will also be subject to the EUDR. The United Kingdom has also announced plans for deforestation legislation similar to the EUDR⁷, expected to be adopted in 2027. In Japan, the Government is considering amendments to the Clean Wood Act, enacted in 2017, to exclude wood products linked to natural forest destruction, although this is currently expected to apply only to wood pellets. Traceability requirements aimed at preventing deforestation-linked products from being placed on markets are therefore becoming important legal barriers in major markets. For imported coffee, traceability and assurance of deforestation-free production require companies to establish a transparent, effective and end-to-end supply-chain information system covering the stages from import to export.

⁶ <https://www.vietnam.vn/chuyen-doi-cay-trong-mo-loi-thoat-ngheo>

⁷ [The UK's approach to deforestation regulations - GOV.UK](#)



In addition to traceability requirements, coffee, as a food product, must comply with a range of strict requirements on food hygiene and safety, pesticide residues, etc. In the past, some businesses assumed that consignments unable to enter demanding markets such as the EU, the United States or Japan could be redirected to less demanding markets such as Russia or China. However, China is now also tightening traceability requirements. On 14 October 2025, the General Administration of Customs of China adopted the Regulation on Registration and Administration of Overseas Manufacturers of Imported Food (Regulation 280), effective from 1 June 2026⁸. Coffee is one of the products subject to Regulation 280. Under the Regulation, exporters of covered goods must provide information on the company and production address and ensure that such information can be verified. China's recent tightening of customs controls and rejection of numerous durian consignments that failed to meet these requirements is an important warning for other agricultural products exported to this market, including coffee.

In summary, establishing transparent and legal supply chains, supported by effective traceability systems, is becoming increasingly important for businesses seeking to participate in export supply chains. Beyond businesses' own efforts, this also requires Government support in providing foundational databases that enable companies to provide buyers with evidence of traceability and deforestation-free production at minimum cost. As Vietnam works to improve its legal framework and information infrastructure from central to local levels to meet international laws and agreements, particularly the EUDR, the Government has actively developed and piloted a production-area coding system for plantation forests in five northern provinces⁹, as well as pilot crop-data collection for coffee in Dien Bien and Son La. The Department of Forestry and Forest Protection is also developing a 2020 forest-boundary map to support EUDR traceability. Once implemented in practice, these initiatives can substantially reduce resource requirements for businesses, particularly small and medium-sized enterprises, cooperatives, household businesses, smallholders, etc. - actors with limited resources that may be unable to build independent traceability systems and risk being excluded from export supply chains. This requires stakeholders to build and maintain an active, flexible public-private cooperation mechanism that responds effectively to new policy and market developments, not only during preparations for EUDR implementation but also over the longer term, to support the sustainable development of Vietnam's coffee sector.

⁸ <https://cceeccc.org/1423517437.html>

⁹ <https://baochinhphu.vn/ma-so-vung-trong-nen-tang-cho-lam-nghiep-hien-dai-va-minh-bach-102251106164530464.htm>



4. Conclusion

Vietnam is one of the world's leading coffee-producing countries. In addition to intensifying cultivation, the sector is gradually shifting from volume-based growth toward value creation through deeper processing. However, deeply processed coffee products still account for a relatively small share of Vietnam's export value, with the market largely held by foreign companies. This underscores the need for investment in technology and market expansion so that domestic companies can participate more deeply in the supply chain and play a more proactive role in shaping the rules and the market.

In recent years, to meet domestic consumption, processing and export demand, Vietnam has increasingly imported raw coffee, particularly from Laos, Indonesia and Brazil, while also expanding domestic coffee-growing areas. Vietnam is therefore gradually taking on a dual role: one of the world's leading coffee producers and exporters and a regional hub for coffee imports and processing. As the EUDR and similar regulations in the United Kingdom, Japan and China are introduced and applied in major export markets, establishing a supply-chain due diligence system to trace products from production plots through to export is becoming increasingly important for companies participating in export supply chains. This requires close coordination between the Government and businesses to build cooperation mechanisms and the information infrastructure needed both to comply with these requirements and to safeguard the livelihoods of vulnerable groups participating in supply chains, thereby creating a fair, legal and sustainable environment for the coffee sector in the future.



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