COFFEE MARKET BULLETIN

22 - 29.10.2026

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Global coffee market

Market close:
29 October

- London Robusta futures for November 2026 delivery fell **4.5%** on the week to **USD 3,200 a tonne**.
- New York Arabica futures for March 2027 delivery fell **8.3%** on the week to **276.2 US cents/lb**, equivalent to **USD 6,089.16 a tonne**.

Price drivers

- **Robusta prices fell** on prospects of fresh supplies from Viet Nam's new crop and rising exchange inventories. As Viet Nam enters its harvest season, export supplies are expected to increase in the coming months.
- **Arabica prices fell** under selling pressure and expectations of increased Brazilian supplies. A weaker real encouraged growers and exporters to sell more to earn local currency. Favourable weather in Brazil's key growing regions also supported flowering and fruit development.

Stocks

- Robusta stocks on ICE rose to **6,755 lots**, their **highest level in 15 months**.
- ICE-certified Arabica stocks stood at **222,035 bags** on 28 October 2026. Brazilian coffee awaiting grading at ICE warehouses reached **41,961 bags**, a **six-week high**, raising expectations of additions to certified stocks.

Viet Nam's coffee market

Domestic coffee prices fell over the week as trading and buying remained subdued despite the start of the Central Highlands harvest. Declining global Robusta prices and increased Brazilian supplies added to the pressure.

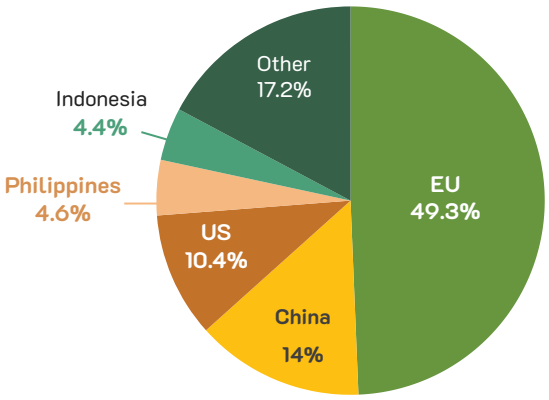
Domestic prices for unsorted Robusta beans:
(Unit: VND/kg)

PROVINCE	29/10/2026	22/10/2026	CHANGE FROM START OF PERIOD
Dak Lak	88,400	91,400	-3,000
Lam Dong	88,000	90,800	-2,800
Gia Lai	88,300	91,400	-3,100
Dak Nong	88,500	91,500	-3,000

Arabica export markets

- The **EU** was Viet Nam's largest Arabica export market in January-September 2026. Export earnings from the bloc fell **6.6%** year on year, driven by a sharp decline in shipments to Germany.

Viet Nam's Arabica exports by destination
Share of value, January-September 2026

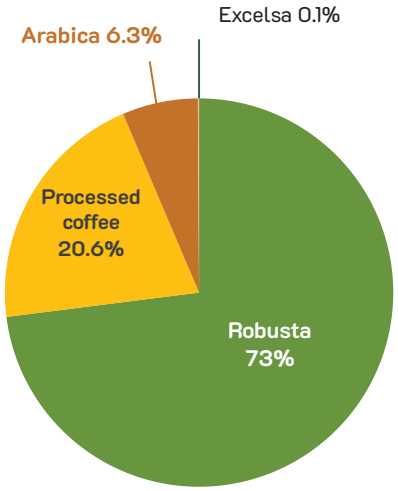


Exports by coffee type

Robusta accounted for the largest share of Viet Nam's coffee export volume in January-September 2026.

- **Robusta** exports reached **1.22 million tonnes**, worth **USD 4.8 billion**, up **17.9% in volume** but down **9.8% in value** year on year.
- **Arabica** exports totalled **62,700 tonnes**, worth **USD 412.6 million**, up **2.2% in volume** and **1.5% in value** year on year.
- **Excelsa** exports reached **1,400 tonnes**, worth **USD 6.1 million**, up **86.1% in volume** and **49.7% in value** year on year.
- **Processed coffee** exports earned **USD 1.35 billion**, up **1.6%** year on year.

Viet Nam's coffee exports by type
Share of volume, January-September 2026



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