

Global Robusta Coffee Market

Market size, segmentation, competitive landscape and outlook

2021-2031

Moving forward, together



Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

ANDREY SHEVCHENKO, Managing Partner

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Market at a glance

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Indicator	Value
Market size (2025)	USD 22.9 bn
Forecast (2031)	USD 35.5 bn
CAGR (2021-2031)	7.6%
Study period	2021-2031
Largest region	Asia-Pacific · 44.2%
Fastest-growing region	Middle East and Africa · 8.8%
Market concentration	Moderate
Licence	Individual / Company

The global robusta coffee market reached USD XXX billion in 2025 and is forecast to attain USD XXX billion by 2031, advancing at a XX% CAGR. Asia-Pacific accounted for XX% of market value, supported by concentrated production in Vietnam and Indonesia, large soluble-coffee industries and expanding domestic consumption. Tight inventories, elevated green-coffee prices, investment in extraction capacity and broader use of robusta in espresso, ready-to-drink beverages and value-engineered blends are reshaping industry economics. The report evaluates market value, physical supply, pricing, product formats, applications, quality tiers, distribution channels, producing origins, consuming regions and company strategies.

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Executive summary

The global robusta coffee market reached USD XXX billion in 2025 and is forecast to attain USD XXX billion by 2031, advancing at a XX% CAGR. Asia-Pacific accounted for XX% of market value, supported by concentrated production in Vietnam and Indonesia, large soluble-coffee industries and expanding domestic consumption. Tight inventories, elevated green-coffee prices, investment in extraction capacity and broader use of robusta in espresso, ready-to-drink beverages and value-engineered blends are reshaping industry economics. The report evaluates market value, physical supply, pricing, product formats, applications, quality tiers, distribution channels, producing origins, consuming regions and company strategies.

Indicator	Value
Market size 2025	XXX
Forecast 2031	XXX
CAGR	XXX
Largest region	XXX
Fastest region	XXX

Key findings

- The global robusta coffee market generated USD XXX billion in 2025 and will reach USD XXX billion by 2031.
- Global robusta production totaled XXX 60-kilogram bags in coffee year 2024/25, according to the International Coffee Organization.
- Robusta green-bean exports reached XXX bags in coffee year 2024/25, representing XX% of global green-coffee exports.
- The ICO Robusta Group Indicator averaged 225.7 US cents per pound in coffee year 2024/25, an increase of XX%.
- Vietnam is forecast to produce XXX bags of robusta in 2025/26, retaining its position as the largest origin.
- Brazilian robusta and conilon production is forecast at XXX bags in 2025/26, supported by irrigation and favorable conditions in Espírito Santo and Bahia.
- Asia-Pacific represented XX% of 2025 market value and will expand at an XX% CAGR through 2031.
- Soluble coffee represented XX% of market value by product form, reflecting robusta's extraction yield, body and cost efficiency.

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Market size and forecast

Market value by year, USD bn

Indicator	2026	2027	2028	2029	2030	2031	CAGR
Market value, USD bn	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Market volume	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Production	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Imports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Exports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Apparent consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Year-over-year value change

Indicator	2027	2028	2029	2030	2031	CAGR
Market value	X%	X%	X%	X%	X%	X%
Production	X%	X%	X%	X%	X%	X%
Imports	X%	X%	X%	X%	X%	X%
Exports	X%	X%	X%	X%	X%	X%

Source: XXX

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Global Robusta Coffee Market Trends and Growth Drivers

Robusta has entered a higher-value phase in which scarcity, processing investment and broader application demand matter as much as its traditional price relationship with arabica. The market remains anchored in soluble coffee and mainstream blends, but espresso, cold coffee, extracts and premium fine robusta are widening the addressable opportunity.

Supply economics are shaped by a concentrated origin structure. Vietnam determines the marginal availability of export robusta, Brazil provides a rapidly expanding conilon counterweight, and Indonesia contributes a more variable harvest alongside substantial domestic processing. Uganda, India and smaller Asian origins provide diversification but cannot yet fully offset simultaneous disruption among the three leaders.

Procurement capability is becoming a competitive differentiator. Elevated prices require stronger working capital and hedging discipline, while deforestation due diligence requires farm polygons, legality records and chain-of-custody controls. These pressures favor integrated processors and well-capitalized traders while creating premium opportunities for exporters that provide quality consistency and verified traceability.

Growth drivers

Soluble coffee demand in emerging markets

Population growth, urbanization and the convenience of sachets are expanding soluble-coffee consumption across Southeast Asia, South Asia, the Middle East and Africa. Robusta's extraction efficiency, strong cup profile and competitive formulation economics make it the principal beneficiary of new spray-dried, freeze-dried and coffee-mix capacity.

Robusta penetration in espresso and blends

Roasters are increasing robusta content to deliver crema, body and intensity while managing elevated arabica costs. The effect is strongest in Southern Europe, Brazil, India and value-focused retail portfolios, where controlled blend reformulation can preserve familiar sensory profiles.

Ready-to-drink coffee and concentrate expansion

Cold coffee, canned beverages and liquid concentrates require consistent extraction performance and scalable flavor systems. Robusta provides caffeine intensity and formulation stability, allowing beverage manufacturers to balance dairy, plant-based milk, sweeteners and flavor additions.

Fine robusta premiumization

Selective harvesting, improved fermentation, wet processing and stronger origin differentiation are moving a portion of robusta into specialty and premium channels. Higher producer remuneration and better lot separation support growth in single-origin espresso, specialty blends and direct-trade programmes.

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Processing investment in producing countries

New extraction, spray-drying, aroma-recovery and ready-to-drink facilities are retaining more value in origin markets. Investments in Vietnam, Thailand, India and Brazil shorten supply chains and improve manufacturers' ability to serve fast-growing Asian consumer markets.

Yield and climate-resilience advantage

Robusta generally offers higher yield potential and stronger heat and disease tolerance than arabica under suitable agronomic conditions. Breeding, irrigation and rejuvenation programmes increase its strategic importance as the coffee industry adapts sourcing portfolios to warmer and more variable climates.

Restraints

Concentrated supply and weather exposure

Vietnam, Brazil and Indonesia account for most internationally available robusta supply, leaving the market exposed to drought, excessive rainfall and synchronized crop disruptions. Supply shocks rapidly transmit into London futures, export differentials and inventory costs.

Price and working-capital pressure

The sharp rise in robusta prices increases financing needs throughout the exporter, trader and roaster chain. Smaller processors face tighter credit limits, while consumer brands must manage price increases, pack-size changes and promotional reductions without losing volume.

Traceability compliance burden

Geolocation, legality evidence, segregation and due-diligence requirements raise procurement costs for fragmented smallholder supply chains. Exporters lacking farm-level data risk losing access to regulated markets or accepting discounts from intermediaries able to complete compliance workflows.

Quality perception gap

Historical use in low-cost blends and commodity soluble coffee continues to shape consumer and specialty-roaster perceptions. Premium robusta suppliers must invest in processing discipline, sensory evaluation and buyer education before improved quality consistently converts into higher prices.

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Robusta Coffee Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Soluble coffee demand in emerging markets	XXX	XXX	XXX
Robusta penetration in espresso and blends	XXX	XXX	XXX
Ready-to-drink coffee and concentrate expansion	XXX	XXX	XXX
Fine robusta premiumization	XXX	XXX	XXX
Processing investment in producing countries	XXX	XXX	XXX
Yield and climate-resilience advantage	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Concentrated supply and weather exposure	XXX	XXX	XXX
Price and working-capital pressure	XXX	XXX	XXX
Traceability compliance burden	XXX	XXX	XXX
Quality perception gap	XXX	XXX	XXX

Source: XXX

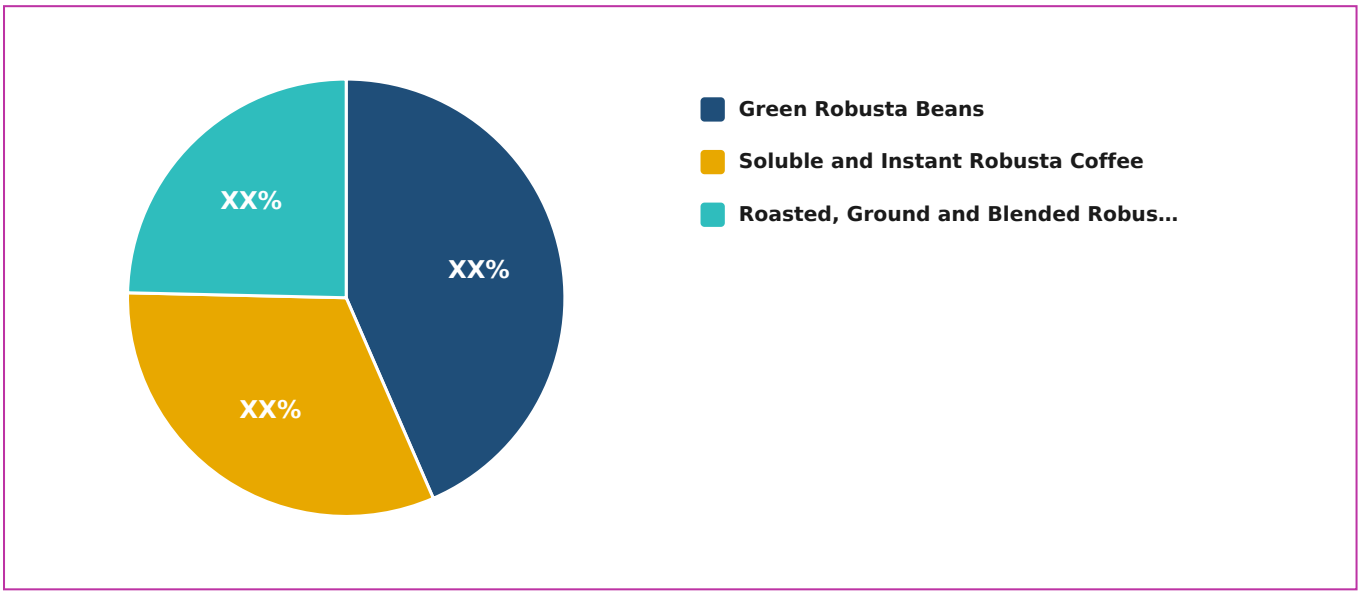
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Robusta Coffee Market Segmentation Analysis

By Product Form

Green beans remain the largest form because global roasters and extract manufacturers procure substantial volumes through traders and origin exporters. Soluble coffee benefits from robusta's high extraction yield and strength in sachets, coffee mixes and institutional products. Roasted and ground robusta blends are gaining value as espresso and retail brands increase robusta inclusion.

Value share by product Form, 2025



Source: XXX

Value by product Form, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Green Robusta Beans	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Soluble and Instant Robusta Coffee	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Roasted, Ground and Blended Robusta Coffee	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

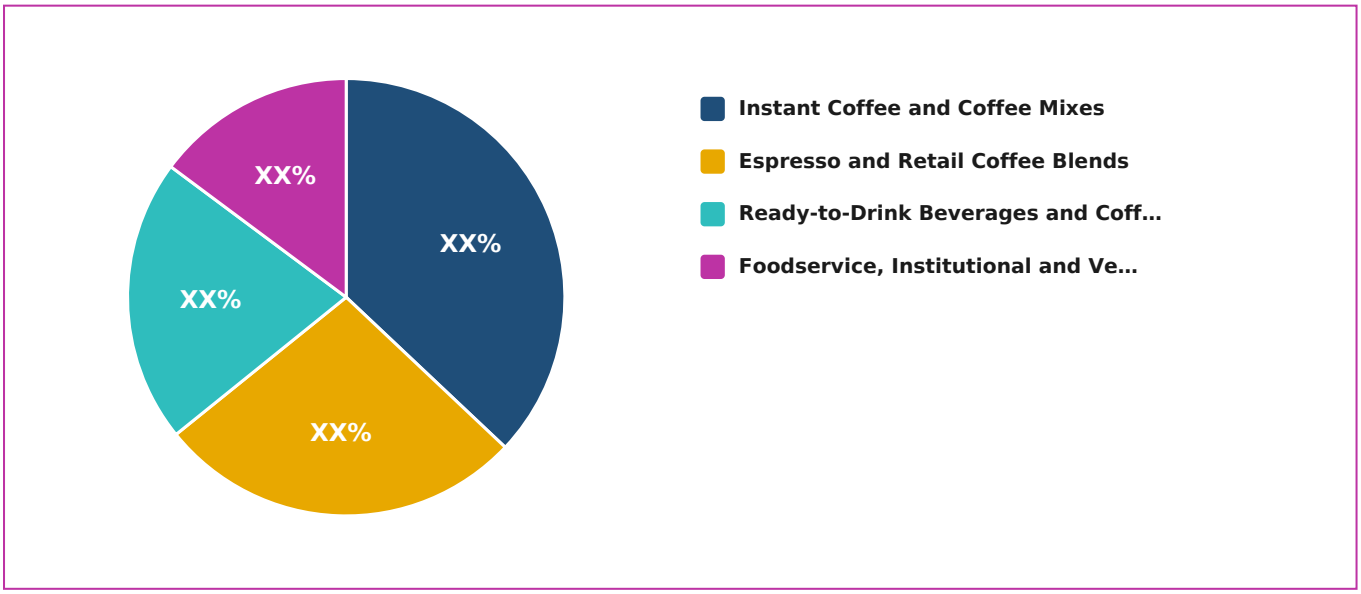
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By Application

Instant coffee is the principal application because robusta delivers soluble solids, caffeine and flavor intensity efficiently at scale. Espresso and retail blends remain a major outlet, particularly in Europe, Brazil and India. Ready-to-drink beverages, concentrates and cold-coffee systems are the fastest-growing application as manufacturers expand convenient consumption occasions.

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Value share by application, 2025



Source: XXX

Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Instant Coffee and Coffee Mixes	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Espresso and Retail Coffee Blends	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Ready-to-Drink Beverages and Coffee Extracts	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Foodservice, Institutional and Vending	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Quality Tier

Commercial grades dominate high-volume soluble coffee and standardized blends where consistency, screen size and defect control determine procurement. Premium and fine robusta are gaining traction through washed processing, controlled fermentation and origin-specific sensory profiles. Verified sustainability and traceability grades command increasing commercial importance as multinational buyers formalize responsible-sourcing requirements.

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Value by quality Tier, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Mainstream Commercial Grade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Premium and Fine Robusta	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Certified and Fully Traceable Grade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Distribution Channel

Large roasters and extract manufacturers dominate procurement through direct contracts, international traders and origin-based exporters. Foodservice and vending provide a stable outlet for robusta-led blends and soluble systems. Modern retail remains important for jars, sachets and packaged blends, while online and specialty retail lead growth through traceable lots, subscriptions and premium robusta products.

Value by distribution Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
B2B Roasters and Beverage Manufacturers	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Foodservice, Office Coffee and Vending	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Supermarkets, Hypermarkets and Convenience Retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Online and Specialty Retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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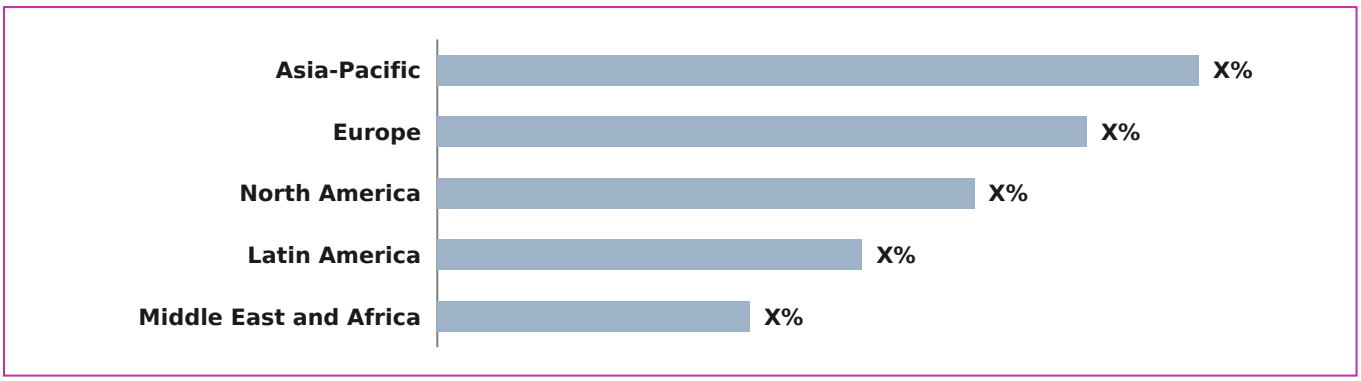
Robusta Coffee Market Regional Analysis and Country Outlook

Asia-Pacific held XX% of global market value in 2025, combining the world's largest robusta production base with substantial soluble-coffee, coffee-mix and ready-to-drink manufacturing. Vietnam anchors exportable supply, while Indonesia contributes both green beans and a large domestic consumer market. India provides plantation production, instant-coffee processing and export-oriented extraction capacity; China, Thailand, the Philippines and South Korea broaden regional demand through convenience retail and cold-coffee formats.

Europe accounted for XX% of value, led by Germany, Italy, France, Spain and the United Kingdom. The region remains a major importer and blending center, with robusta demand supported by espresso, private-label retail, soluble coffee and vending. European procurement is shifting toward geolocated, segregated and legality-verified supply as roasters prepare their supplier networks for EU deforestation requirements.

Middle East and Africa will post the fastest regional CAGR of XX% through 2031. Uganda's growing output, West African instant-coffee demand, Gulf café expansion and affordable single-serve formats strengthen the regional outlook. Latin America benefits from Brazil's record conilon capacity and growing domestic use, while North American growth centers on ready-to-drink coffee, concentrates, value blends and premium robusta experimentation.

Growth rate by region, 2025-2031



Source: XXX

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Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Latin America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Market value by leading country, USD bn

Country	2025	2031	Share 2025	CAGR
United States	XXX	XXX	XXX	XXX
Germany	XXX	XXX	XXX	XXX
United Kingdom	XXX	XXX	XXX	XXX
Belgium	XXX	XXX	XXX	XXX
Netherlands	XXX	XXX	XXX	XXX
Japan	XXX	XXX	XXX	XXX
China	XXX	XXX	XXX	XXX
Mexico	XXX	XXX	XXX	XXX

Source: XXX

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Robusta Coffee Market Competitive Landscape and Company Share

The market has moderate concentration. Nestlé and JDE Peet's command significant downstream purchasing and processing scale, while Louis Dreyfus Company, ofi, Sucafina, ECOM and Neumann Kaffee Gruppe connect producing origins with roasters through trading, warehousing, risk management and sustainability programmes. Regional processors and exporters remain influential because robusta quality, differentials and physical availability are determined close to origin.

Competitive advantage increasingly depends on access to diversified origins, balance-sheet capacity for elevated inventories and the ability to provide traceable segregated lots. Integrated groups are investing in soluble coffee, concentrates, ready-to-drink production, aroma recovery and automated distribution. Traders are expanding farm mapping, agronomy services and verified supply programmes to protect access to European and multinational buyers.

Consolidation is reshaping branded coffee and vending. Keurig Dr Pepper's acquisition of JDE Peet's creates a global coffee platform with broader procurement reach, while Lavazza's investment in IVS Group increases its exposure to vending and office coffee. Capacity additions by Nestlé in Vietnam and Thailand reinforce Southeast Asia's role as both a sourcing base and a finished-coffee manufacturing hub.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Nestlé S.A.	XXX	XXX	XXX	XXX
JDE Peet's N.V.	XXX	XXX	XXX	XXX
Keurig Dr Pepper Inc.	XXX	XXX	XXX	XXX
Louis Dreyfus Company B.V.	XXX	XXX	XXX	XXX
ofi	XXX	XXX	XXX	XXX
Sucafina SA	XXX	XXX	XXX	XXX
ECOM Agroindustrial Corp. Ltd.	XXX	XXX	XXX	XXX
Neumann Kaffee Gruppe	XXX	XXX	XXX	XXX
Tata Consumer Products Limited	XXX	XXX	XXX	XXX
Luigi Lavazza S.p.A.	XXX	XXX	XXX	XXX

Source: XXX

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Robusta Coffee Market Forecast and Commercial Opportunities

The market will expand from USD XXX billion in 2025 to USD XXX billion in 2031. Value growth will remain ahead of physical volume as origin differentials, compliance expenditure, processing investment and premium product mix sustain a higher price structure. Supply recovery will moderate extreme price spikes, but structurally low inventories and weather risk will preserve volatility.

The strongest volume opportunities will occur in soluble coffee, ready-to-drink beverages and concentrates sold in Asia-Pacific, the Middle East and Africa. Premium growth will come from fine robusta, differentiated fermentation, single-origin positioning and espresso applications that communicate body, crema and provenance rather than treating robusta solely as a low-cost component.

The winning operating model will combine multi-origin procurement, direct farmer relationships, digital traceability and flexible processing assets. Roasters that reformulate transparently, secure verified supply before compliance deadlines and maintain consumer-relevant price points will gain share; exporters that cannot provide farm-level evidence and consistent cup quality will face narrower market access.

Opportunities

- Fine robusta and single-origin premium products
- Regenerative and deforestation-free supply programmes
- Soluble-coffee capacity expansion in producing countries
- Ready-to-drink coffee and liquid concentrate applications
- Ugandan, Indian and Indonesian origin diversification
- Digital traceability, farm mapping and segregated supply chains

> This preview shows the form and depth of the report. The full report contains every figure, segment- and country-level detail and full company profiles. On purchase all figures are finalised and verified, and the report is delivered within 24–72 hours.

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