

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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Vietnam

Coffee Semi-annual

2010

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Report Highlights:

Post's production estimate for MY 2010/11 is 18.73 million 60 kg-bags, or 1.12 million metric tons (mmt), up 6 percent from 2009/10. By the end of MY 2010/11 Post expects that stock levels will have rebounded to 2 million bags, or 120 thousand metric tons (tmt), despite a program proposed by industry to the Government of Vietnam to build domestic stocks to 5 million bags, or 300 tmt.

Executive Summary:
SITUATION AND OUTLOOK

Post's estimate for MY 2010/11 coffee production is 18.73 million 60 kg-bags or 1.12 mmt, about six percent higher than the previous year, due to favorable weather conditions, better yields and new production from small increases in growing area. Vietnam produced 1.05 million metric tons (mmt) or 17.5 million 60kg-bags of coffee beans in MY 2009/10, a decline of 2.7 percent in production from the previous crop year.

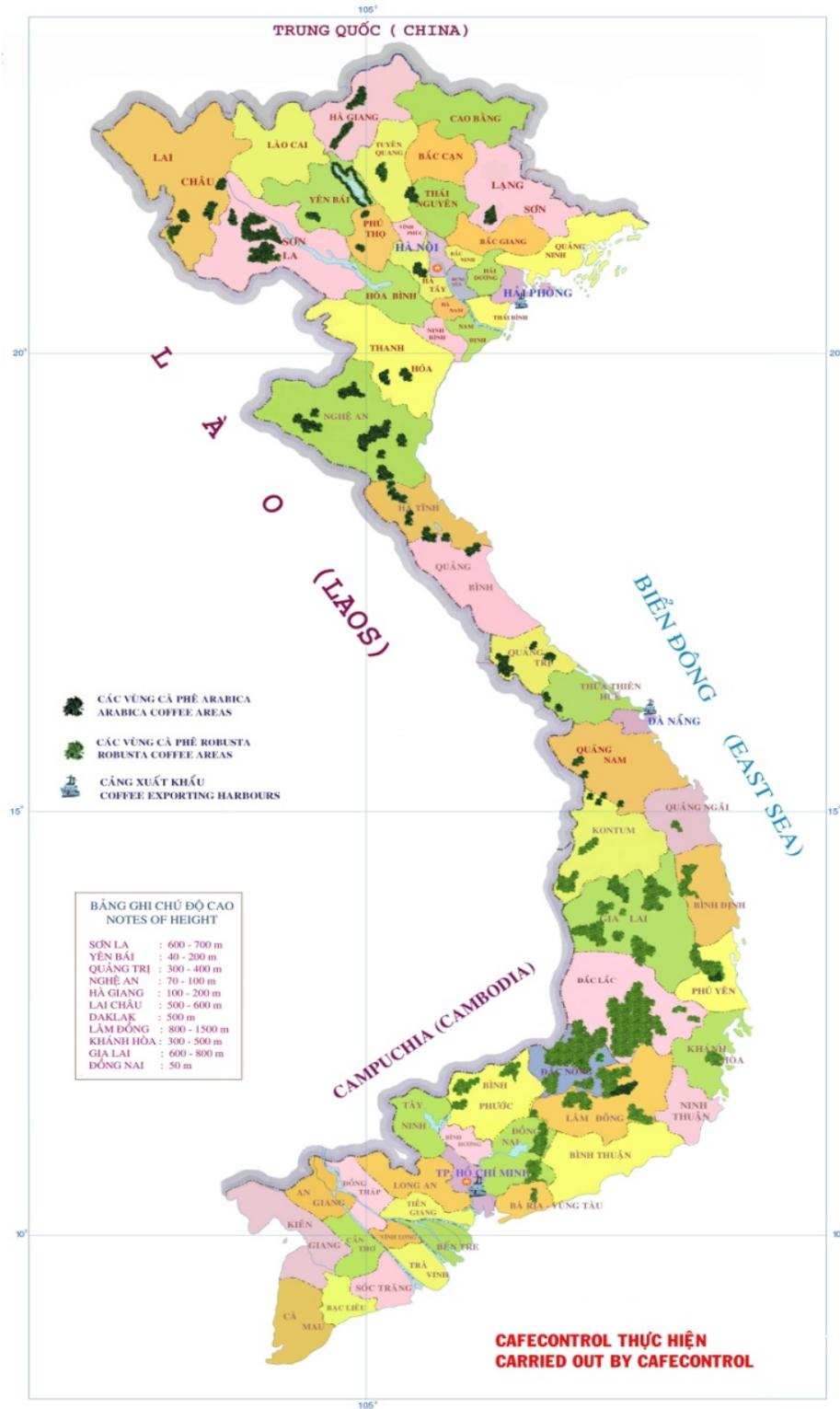
According to the General Customs Office, green coffee bean exports for MY 2009/10 were 16.5 million 60 kg bags or 989 tmt, a 1.2 percent increase over the previous marketing year. However, the export value decreased by 4.2 percent due to lower global market prices. Vietnam remains the world's number one Robusta exporter.

Currently, Vietnam's Cocoa and Coffee Association (VICOFA) has proposed a plan to the Government of Vietnam (GVN) to build domestic stocks to 5 million 60 kg bags, or 300 tmt, to help stabilize coffee domestic prices.

Post will continue to follow this policy as it develops.

CÁC VÙNG CÀ PHÊ VIỆT NAM

COFFEE PRODUCING AREAS IN VIETNAM



Commodities:

Coffee, Green

Production:**PRODUCTION****Marketing Year (MY) 2009/10 (Oct-Sep)**

Post keeps the MY 2009/2010 production estimate at 17.5 million 60 kg-bags or 1.05 mmt, about 3 percent lower than the year ago, as a result of losses from torrential rains during the blossoming and harvesting seasons in the largest coffee growing areas, Dak Lak and Lam Dong provinces (see Table 2). The coffee yield was estimated at 2.09 metric tons, per hectare, about 3.2 percent lower than the previous year (see Table 1).

MY 2010/11 (Oct-Sep)

The rainy season in the main coffee growing area ended the third week of November. This is about a month later than usual and has delayed the harvest. Normally, the harvest peaks in late November but this year it should peak in late December. Post expects that about 80 percent of the crop will be harvested by the end of December. Fortunately, the delay of the harvest will have little to no impact on total coffee production.

Post has not changed its MY 2010/11 production estimate, it remains 18.73 million 60 kg-bags or 1.12 mmt. This is a six percent increase over the previous marketing year. This increase is due to favorable weather in the main coffee growing areas: Adequate rains aided flowering, good fruit setting and cherry development (see table 3). Though production is up, quality compared to last year is lower, according to local traders. In some coffee growing areas in Dak Lak province, beans are small this year because the rains came later than normal and farmers had to delay fertilizer application. In addition, overall quality is diminished because some young coffee trees in new production areas and replanted areas have just started producing beans in this crop year, and the bean quality of young trees is lower than mature ones.

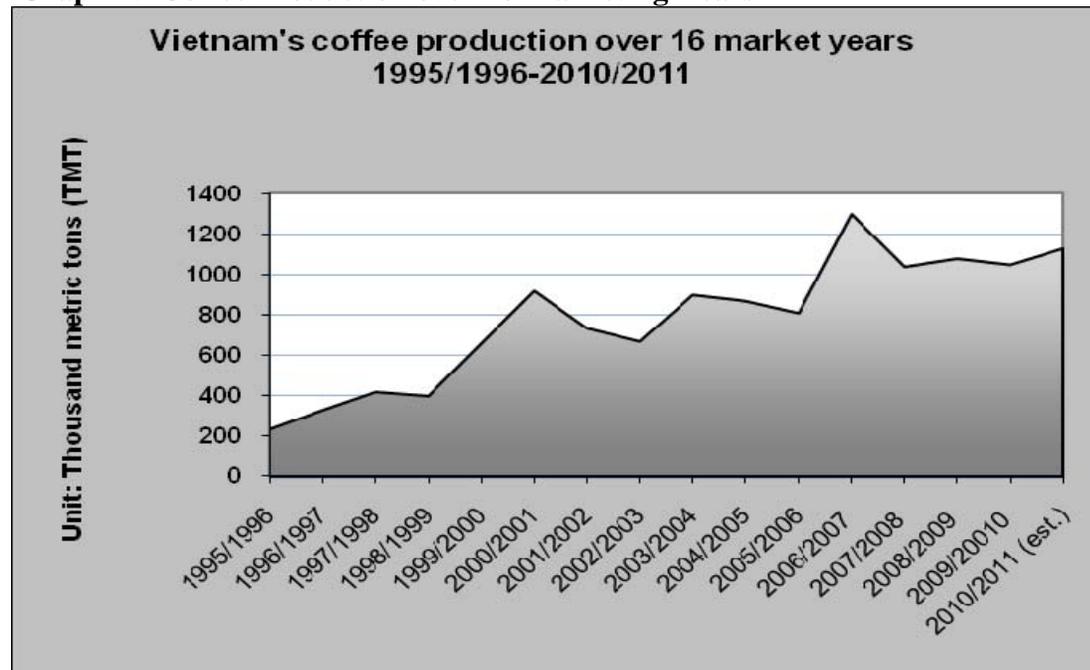
The GVN continues to encourage coffee growers to replace old and low-quality producing coffee trees, especially in the provinces of Dak Lak and Lam Dong. The GVN has published detailed guidance for coffee growers detailing how to replant old or low yielding coffee tree fields. The GVN hopes that the current high level of coffee prices will encourage the planting of new trees. (Refer to the Policy Section of this report for more details)

According to MARD, Arabica coffee accounts for less than 3 percent of the total coffee production in Vietnam. The production area for Arabica is slowly expanding in Northern and Central regions in the provinces of Quang Tri, Son La and Hoa Binh. Post does not expect Arabica production to surpass the 3 percent threshold in the next five years.

Table 1: Coffee Production by Marketing Year (Oct-Sept)

	2008/2009	2009/2010	2010/2011
Marketing year begins	10/2008	10/2009	10/2010
Production (green bean, thousand tons)	1,080	1,050	1,124
Average coffee yield (ton/ha)	2.16	2.09	2.10

Source: Post estimates

Graph 1: Coffee Production over 16 Marketing Years

Source: Post's estimates

Table 2: Total Rainfalls in Select Coffee Growing Areas (Oct. 2008 – Sept. 2009)

Station name	Province	Total rainfall (mm)				Total rainfall (Oct-Sept)	Number of rainy days
		Oct-Dec. 2008	Jan-Mar. 2009	Apr.-Jun. 2009	Jul.-Sept. 2009		
Son La	Son La	315	41	379	560	1295	116
Pleiku	Gia Lai	227	45	539	1399	2210	150
Buon Ma Thuot	Dak Lak	401	24	511	892	1828	136
Da Lat	Lam Dong	433	209	579	699	1920	171

Source: The Vietnam Institute of Meteorology, Hydrology and Environment (IMHEN)

Table 3: Total Rainfalls in Select Coffee Growing Areas (Oct. 2009 – Sept. 2010)

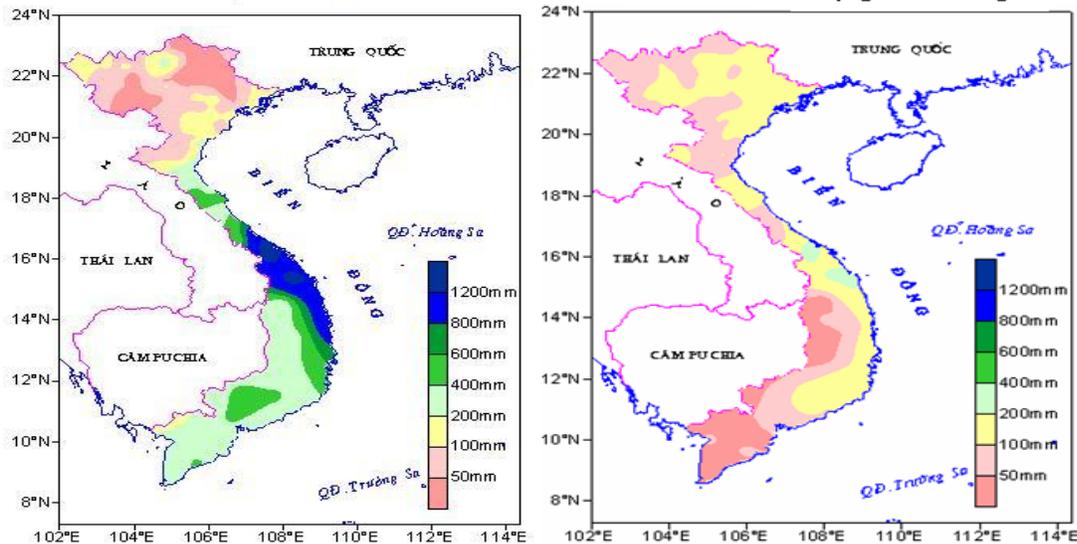
Station name	Province	Total rainfall (mm)				Total rainfall (Oct-Sept)	Number of rainy days
		Oct-Dec. 2009	Jan-Mar. 2010	April-June 2010	July-Sept. 2010		
Son La	Son La	23	166	389	544	1122	107
Pleiku	Gia Lai	307	61	295	733	1396	133
Buon Ma Thuot	Dak Lak	305	25	362	843	1535	139
Da Lat	Lam Dong	344	138	653	565	1700	157

Source: The Vietnam Institute of Meteorology, Hydrology and Environment (IMHEN)

Picture1, 2: Vietnam's rainfall maps

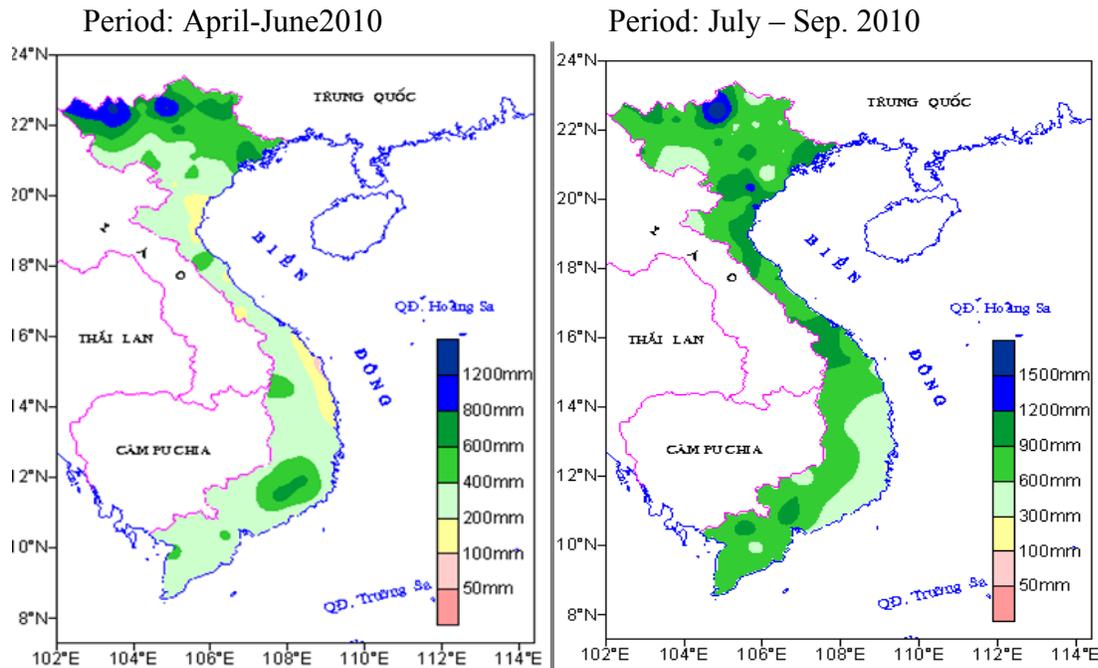
Period: Oct. – Dec. 2009

Period: Jan. - Mar. 2010



Source: The Vietnam Institute of Meteorology, Hydrology and Environment (IMHEN)

Picture3, 4: Rainfall maps



Source: The Vietnam Institute of Meteorology, Hydrology and Environment (IMHEN)

Tables 2 and 3, and pictures 3 and 4, show that the rainfall in Dak lak province and surrounding areas is not considerably different from MY 2009/10 compared to MY 2008/09. This region is the capital of Vietnam’s coffee production area and accounts for more than 60 percent of total production area. In MY 2009/10 the rainfall was adequate for a good level of coffee production.

Consumption:

According to local coffee producers, Vietnam’s domestic consumption has grown in recent years. Post estimates that in MY 2009/10 domestic consumption was at 1.25 million 60 kg-bags, or 75 tmt green bean equivalent, about 17 percent higher than the previous year and accounting for 7.1 percent of total production. Vietnam’s current per capita coffee consumption is only about 0.87 kg, still considerably lower than other producing countries, and much lower than some coffee importing countries.

Table 4: Per Capita Coffee Consumption of Selected Countries

Country	Per capita coffee consumption in 2009 (kg)
Coffee Exporting Countries	
Vietnam	0.83
Brazil	5.69
Honduras	3.77
Venezuela	3.52
Costa Rica	3.17
Nicaragua	2.22

Coffee Importing Countries	Per capita coffee consumption in 2009 (kg)
Norway	8.92
Switzerland	7.65
Canada	5.94
EU	5.40
USA	4.09
Japan	3.36

Source: ICO

Post's estimate for MY 2010/11 coffee consumption is 1.3 million 60kg-bags or 78 tmt green bean equivalent (GBE), a 4 percent increase over the previous year. Domestic consumption has been increasing due to the effective marketing strategies of domestic coffee companies. Domestic marketers started courting the local market by opening more coffee shops all over the country by introducing stylish cafes such as the Trung Nguyen Café chain, as well as several Western-style coffee shops such as Highlands Coffee, Gloria Jean's etc.

Home coffee consumption and young people's coffee drinking habits continue to increase as more middle-class consumers respond to the coffee industry's effective marketing efforts.

Diversified coffee products like roasted and ground coffee, instant coffee, and canned coffee are available in many supermarkets, and are making home consumption more convenient. Some coffee producers and marketers think that domestic consumption could reach 100 tmt green bean equivalent (GBE) in the current marketing year. However, Post is less convinced since there is not any reasonable survey or market research to support this contention.

Trade:

According to trade data from the General Customs Office, Vietnam exported approximately 16.5 million 60kg-bags or 989 thousand metric tons (tmt) of green bean coffee in MY 2009/10, this is a 1 percent increase over MY 2008/09. The export value was reported at \$1.43 billion, a drop of 4 percent from the year before due to a significant coffee price drop in the global market in the first six months of MY 2009/10. Global coffee prices recovered in the second half of the marketing year thereby minimizing the drop in the overall export value for the full year.

Table 5: Vietnam's Green coffee exports, MY 2007/08 – MY 2009/10

Month	2007/2008		2008/2009		2009/2010		% Change 09/10 over 08/09	
	Volume (tmt)	Value (\$ million)	Volume (tmt)	Value (\$ million)	Volume (tmt)	Value (\$ million)	Volume	Value
Oct.	41	73	34	60	52	74	53%	23.3%
Nov.	70	121	63	106	70	100	11%	-6%
Dec.	110	192	159	262	114	160	-28%	-39%
Jan.	171	309	118	182	112	158	-5%	-13%
Feb.	77	156	119	181	64	92	-46%	-49%
Mar.	97	218	110	158	104	142	-6%	-10%
April	78	171	103	149	102	137	-1%	-8%
May	73	162	69	100	78	111	13%	11%

June	96	213	64	93	79	114	23%	23%
July	65	147	44	63	81	124	84%	97%
Aug.	49	110	49	70	69	110	41%	57%
Sept.	50	110	45	65	65	106	44%	63%
Grand Total	977	1,982	977	1,489	989	1,426	1.2%	-4.2%

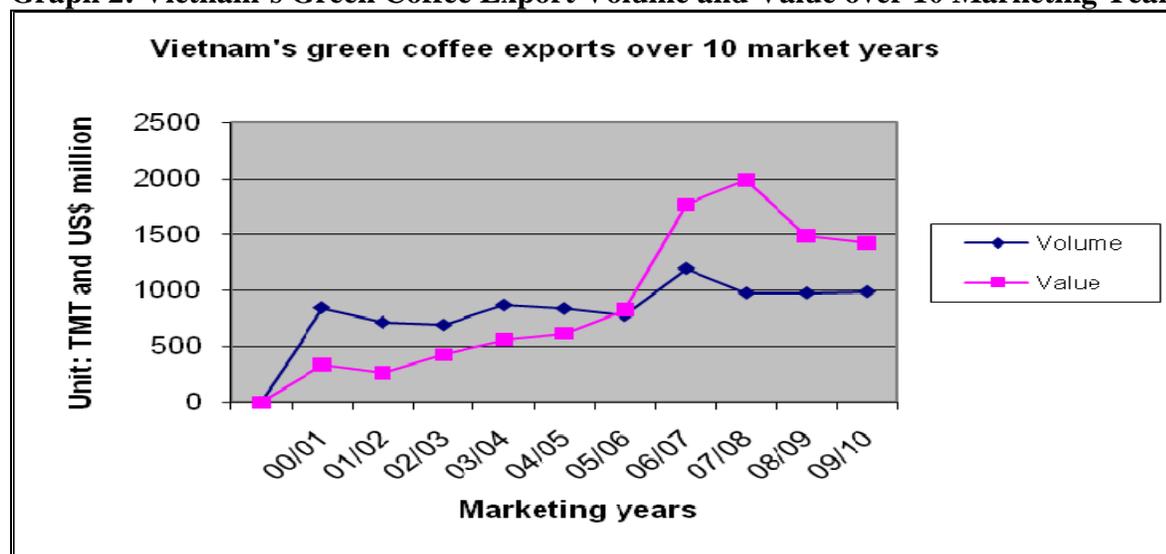
Source: Vicofa, General Customs Office, Global Trade Atlas

Vietnam exports coffee beans to about 90 countries, worldwide. Though it has exported almost the same volume over the past three marketing years, the export value has declined significantly (see Graph 2) during that time due to the sharp drop in global coffee prices.

In MY 2009/10, the top fifteen markets accounted for about 77 percent of total Vietnamese coffee bean exports (see table 6). The United States still remains the second largest importer of Vietnam green bean coffee after Germany. Vietnam's coffee exports to the Philippines grew 115 percent in MY 2009/10 over the previous year. According to GVN trade data, Vietnam's MY2009/10 exports of ground, roasted and soluble coffee was worth over \$389 million.

According to local traders, shipments in the first month of the new marketing year have been slow since the harvest has been delayed. Shipments in December and January will be large if the export prices remain high. If the GVN's 300,000 metric ton stockpiling program is instituted in MY 2010/11, exporters will weigh its potential benefits against current price levels. Post does not expect the stockpiling program to limit exports in MY 2010/11 if it is implemented in its current proposed form.

Graph 2: Vietnam's Green Coffee Export Volume and Value over 10 Marketing Years



Source: Vicofa, General Customs Office, General Statistic Office

**Table 6: Key Markets for Vietnamese Green Coffee Exports
in Period MY 2007/2008 – MY 2009/2010**

Rank	Export Destinations	MY 2007/2008		MY 2008/2009		MY 2009/2010 (Oct.-Sept.)	
		Vol (tmt)	Value (\$000)	Vol (tmt)	Value (\$000)	Vol (tmt)	Value (\$000)
1	Germany	174	373,024	165	292,418	151	219,842
2	USA	158	317,572	157	243,084	143	222,784
3	Spain	100	221,092	88	154,426	75	105,001
4	Italy	80	171,176	83	163,948	69	98,200
5	Japan	44	99,789	50	86,768	51	77,103
6	Belgium	61	144,529	44	87,251	46	64,523
7	South Korea	44	90,875	39	72,551	30	43,484
8	Switzerland	10	23,149	9	18,047	28	38,847
9	Philippines	10	19,996	19	21,635	28	39,706
10	United Kingdom	29	53,587	25	45,698	28	37,662
11	Russia	23	51,237	20	38,221	27	36,261
12	Algeria	28	69,386	29	56,667	21	30,350
13	Ecuador	0	0	3	4,037	21	27,602
14	Malaysia	21	45,778	20	34,754	21	29,283
15	India	4	7,360	18	33,802	20	26,973
	Total	786	1,688,550	769	1,353,307	759	1,097,621

Source: Global Trade Atlas; Vicofa and General Customs Office

Table 7: U.S. Coffee Imports from Vietnam

Product	2007 (Oct.06-Sept. 07)		2008 (Oct.- 07-Sept. 08)		2009 (Oct.- 08-Sept. 09)		2010 (Oct. 09-Aug. 10)	
	Value ('000 \$)	Qty (MT)	Value ('000 \$)	Qty (MT)	Value ('000 \$)	Qty (MT)	Value ('000 \$)	Qty (MT)
Coffee, Not Roasted (HS 090111)	288,709	191,969	315,399	156,595	238,310	153,782	293,719	195,978
Coffee, Not roasted Def (HS 090112)	3,205	1,348	2,172	963	4,774	2,899	6,089	3,512
Coffee, Roasted (HS 090121)	2,055	628	1,031	302	2,283	511	1,853	569
Coffee, Roasted, Def (HS 090122)	292	89	414	111	635	166	1,130	394
Coffee Husks and skins (HS 090190)	4	2	11	8	11	5	5	1.3
Coffee Extracts, Instant coffee (HS 2101)	1,690	829	2,646	1,222	4,093	1,245	293,719	195,978

Source: Department of Commerce, U.S. Census Bureau, Foreign Trade Statistics

Vietnam continues to import small quantities of green coffee, as well as roasted and soluble coffees. According to the trade data for MY 2009/10, total green coffee imports, both Robusta and Arabica, were down 51 thousand 60kg-bags, or over 3 tmt, a 48 percent drop from the previous marketing year, with a total value of \$5 million. Much of this imported green coffee was sourced from Indonesia, Laos and China for further processing and/or re-export (see Table 11). Vietnam also imported roasted and instant coffee products during MY 2009/10 valued at \$62 thousand and \$15 million, respectively.

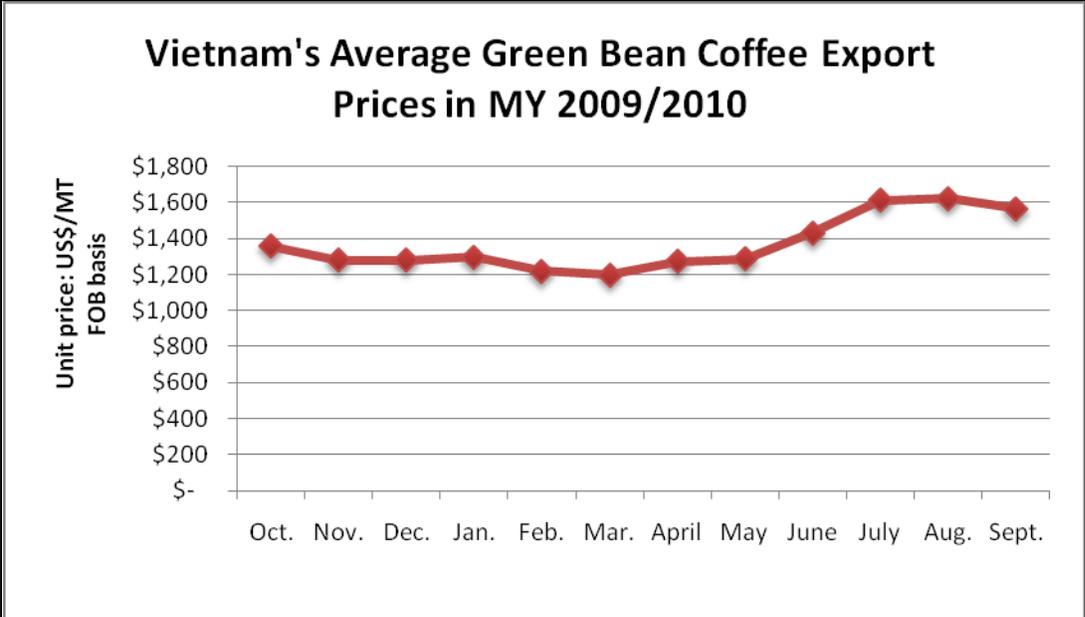
PRICES

Export

The average export price of Vietnam’s Robusta coffee was \$1,368/mt (FOB basis) during MY 2009/10, which is 6 percent lower than the previous marketing year (\$1,460/mt). The decrease in price can be attributed to the effects of large stocks in European consuming countries. Prices were lowest at \$1,200/mt, FOB Ho Chi Minh City in February and March. However, the prices increased about 18 percent in the last three months of MY 2009/10. Local coffee traders are expecting that export prices will go up in the short-run due to increases in global demand, and adverse weather conditions in other exporting countries. However, consuming countries may hold more stocks to avoid being at the mercy of the global market to secure supplies for processing.

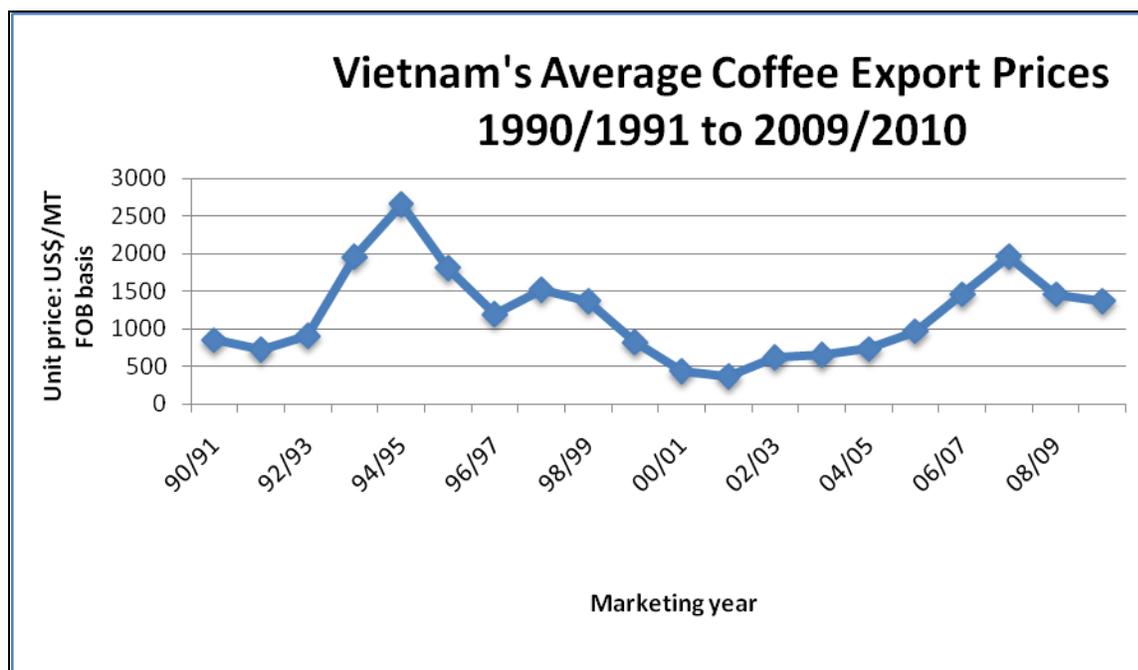
Currently, \$1,832/MT is the export price being quoted for FOB Ho Chi Minh City basis for ungraded Robusta green beans. This is the highest price quoted in the past two years. According to the General Statistics Office, Vietnam had shipped 70,000 mt of coffee beans valued \$118 million in October.

Graph 3: Average Green Bean Coffee Export Prices in MY 2009/2010



Source: Dak Lak Trade, Investment & Tourism Promotion Center (Daktip)

Graph 4: Vietnam's Average Coffee Export Prices Over 20 Marketing Years



Source: Dak Lak Trade, Investment & Tourism Promotion Center (Daktip)

Table 8: Average Export Prices for Vietnamese Green Coffee, 2008-2009

Month	2009	2010	% Change
Jan.	\$1,494	\$1,297	-13%
Feb.	\$1,468	\$1,218	-17%
Mar.	\$1,398	\$1,198	-14%
Apr.	\$1,434	\$1,271	-11%
May	\$1,417	\$1,286	-9%
Jun.	\$1,388	\$1,431	3%
Jul.	\$1,340	\$1,610	20%
Aug.	\$1,344	\$1,622	21%
Sept.	\$1,387	\$1,566	13%
Oct.	\$1,357	\$1,601	18%
Nov.	\$1,278		
Dec.	\$1,277		

Source: Dak Lak Trade, Investment & Tourism Promotion Center (Daktip)

**Note: Prices on FOB Ho Chi Minh City basis

Domestic

Vietnam's average domestic coffee price in MY 2009/10 was VND 25,500/kg (\$1.3), an increase of 3.2 percent over the previous marketing year. The prices in the last three months increased by almost 19 percent when compared with the same period a year ago (see graph 4 and table 10).

The prices in Dak Lak province are currently quoted at VND 35,200/kg (\$1.8) for common ungraded Robusta coffee beans. Coffee growers hope that they will be able to sell their coffee beans at these prices or higher during the first two months of the new marketing year due to the delayed harvest of the new crop.

Graph 4: Average Prices for Robusta Beans in Dak Lak Province in MY 2008/2009 – MY 2009/2010

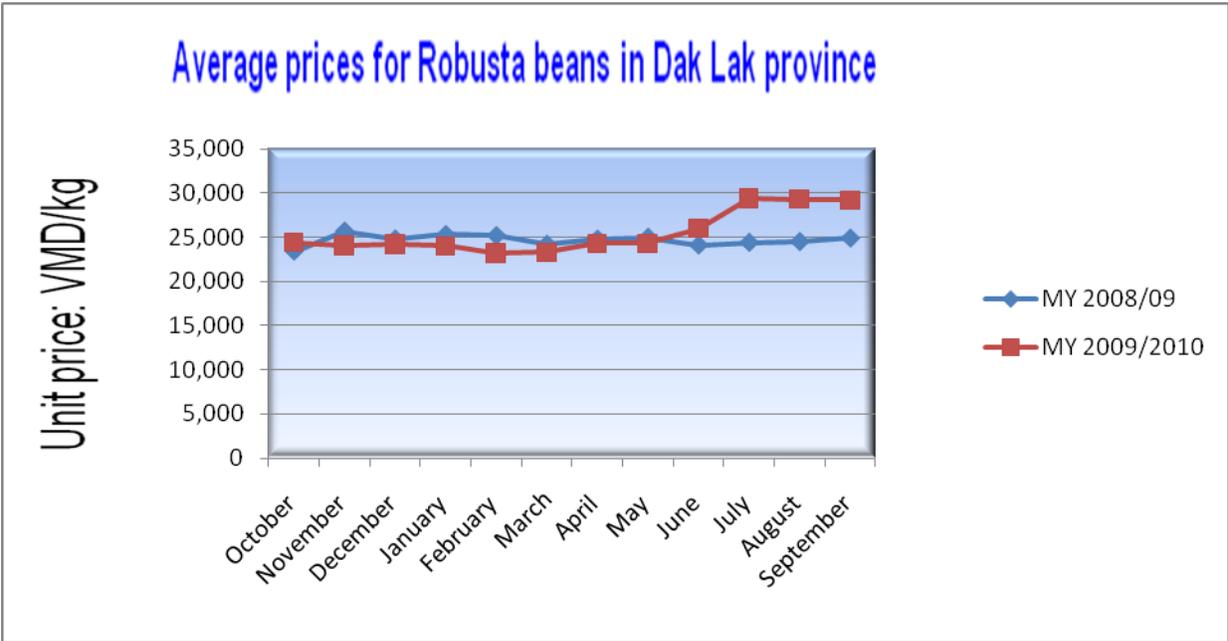


Table 9: Average prices for Robusta beans in Dak Lak province

Month	Common Coffee bean			
	MY 07/08 (VND)	MY 08/09 (VND)	MY 09/10 (VND)	Changes MY 09/10 over MY 08/09 (%)
October	25,900	23,400	24,400	4.3
November	26,800	25,700	24,100	-6.2
December	26,900	24,800	24,200	-2.4
January	29,800	25,300	24,000	-5.3
February	35,300	25,200	23,200	-7.9
March	36,300	24,200	23,300	-3.7
April	32,500	24,800	24,300	-2.1
May	32,800	25,000	24,300	-2.8
June	35,000	24,100	26,000	7.9
July	36,100	24,400	29,400	20.5
August	35,600	24,500	29,300	19.6
September	31,200	24,900	29,200	17.3

Source: Dak Lak Trade, Investment & Tourism Promotion Center (Daktip); (Exchange rate: VND 19,607 = \$1, as of October 22, 2010)

Stocks:

Post's estimate for MY 2010/11 coffee carry-in stocks is 1.4 million 60kg-bags, or 85 tmt of green beans, a 16 percent increase over the previous year. The GVN has not given an official estimate for MY 2010/11 carry-in stocks. Most of the export-ready beans were shipped during the end of MY 2009/10 when prices reached unprecedented levels. Post presumes that most of the 85 tmt of carry-in stocks on our balance sheet are being held on the farm for blending with the first beans of the new harvest.

According to ICO production data, Vietnam produces about 15 percent of the world's coffee, but according to unofficial estimates, only holds about 5 percent of world stocks. Because of the low level of stocks held domestically, the local industry is very sensitive to seasonal price differences. In an effort to combat this problem, the GVN and VICOFA have created a program to help build domestically held stocks.

According to VICOFA, the GVN approved a 200,000 ton coffee stockpiling program in 2009 for MY 2009/10. The goal of this program was to remove some of the seasonality in domestic coffee prices by increasing the buffer stocks held by VICOFA members. According to industry sources, this program only successfully purchased about 40,000 tons of coffee and did not meaningfully impact coffee stocks.

VICOFA has proposed to the GVN an even larger stockpiling program for MY 2010/11. The new proposed program is for 5 million 60 kg-bags (or 300 tmt) of green beans. An approval decision from the GVN about this program is expected in December, 2010.

Post's estimate for MY 2011/12 coffee carry-in stocks is 2 million 60kg-bags, or 120 tmt of green beans, a 40 percent increase over MY 2010/11 year, yet still low by international standards for exporting countries.

Policy:**Vietnam Stockpiling Program**

Recently, VICOFA has asked the GVN to support a national stockpiling program for coffee beans, and it is proposing that this program be in effect indefinitely. VICOFA proposed that the GVN provide preferential loans with low interest rates to help companies stockpile at least 300 tmt of beans. The stated goal of the program is to stabilize internal prices and thereby allow farmers to sell their beans at better prices throughout the year.

The Dak Lak Provincial Government Proposed that GVN Supports the Stockpiling Program
The People's Committee of Dak Lak province, the largest coffee growing area in Vietnam, has recently asked the State Bank of Vietnam to give instructions to various commercial banks including investment-development banks, industry and trade banks, and Agribank, to increase the liquid capital of their branches located in the province to support the stockpiling program in MY 2010/11. The provincial government also proposed to extend the credit period from three months to six months to support local coffee exporters.

Government issued a guideline for coffee tree re-plantation

Recently, MARD's Department of Crop Cultivation issued Decision 254/QD-TT-CNN which gives detailed guidelines of processes and techniques for replanting coffee trees in low-yielding and old-tree areas. According to these guidelines, provincial Departments of Agriculture and Rural Development in coordination with the Western Highland Agro-Forestry Scientific and Technical Institute (WASI) will be responsible for instructing all companies and coffee growers to have a coffee tree re-plantation plan in accordance with the Decision.

The Decision requires that re-planting be applied to plantations over 20 years old, with either: a) yields consistently below 1.5 tons, per hectare; or b) growing in bad conditions and consistently yielding much less than the surrounding area. All of the plantations slated for re-planting must be in the government-designated coffee areas.

Vietnam to Give 23 New Commodities Including Coffee Export Credit Guarantees in 2011

On Nov. 5, 2010, the Prime Minister issued Decision 2011/QD-TTg, creating a new trial program aimed at encouraging exports from Vietnamese firms by: 1) insuring against potential political and economic risks from abroad, and 2) providing easy credit with a goal to insure 3 percent of all exports of designated products. According to this program, 23 new commodities will receive export credit guarantees starting in 2011, including rice, coffee, fruits, vegetables, textiles, garments, and footwear. Export credit guarantees will be provided by export credit agencies. Currently, Petro Viet Nam Insurance, Bao Minh Joint Stock Corporation and QBE Limited Company are the only three insurance companies providing credit guarantees for exports. Now, many more companies are expected to enter the fray, including a few banks and several non-life insurance firms, such as BIC and Bao Viet.

Marketing:

INDUSTRY ACTIVITIES

HD Bank Funds VND 2 Trillion for Coffee Exporters

Beginning in November 2010, Ho Chi Minh City Housing Development Commercial Joint Stock Bank (HD Bank) has launched a 2 trillion VND (≈\$100 mil USD) program of funding working capital for coffee production and trade. Under this program, customers can use their own finished coffee products as the guaranteed assets to borrow money from the bank with preferential interest rates. Borrowers can access the capital by opening an account at HD Bank. The bank will disburse the loan within one working day if the customers meet all the requirements.

Vietnam's Third Coffee Festival Organized in March 2011 in Buon Ma Thuot, Dak Lak province

Vietnam's third Coffee Festival will be held by the Dak Lak People's Committee in Buon Ma Thuot City, Dak Lak province from March 10 – 13, 2011. The goal of the festival is to introduce Vietnam's coffee, in general, and the Buon Ma Thuot coffee trademark, in particular, to a wide audience ranging from industry analysts, marketers, and traders to tourists and diplomats.

Trung Nguyen Coffee Company Owns Four Coffee Processing Factories

In September, Trung Nguyen Coffee Company expanded its business by acquiring the Sai Gon Coffee Factory from the Vietnam Dairy Products Joint Stock Company (Vinamilk). The factory is located in the My Phuoc industrial zone, Binh Duong province. This coffee plant has an annual capacity of 1,500 tons of instant coffee and 2,600 tons of roast and ground coffee. Currently, Trung Nguyen has four operational coffee processing factories including two ground coffee and two instant coffee plants.

Construction began in June 2009 on an 800 billion VND (≈\$40 mil USD) ground coffee plant in Buon Ma Thuot City, Dak Lak province. This facility is expected to be operational by 2013 or 2014. Trung Nguyen Coffee Company plans to produce more value-added coffee products including a variety of roast and ground coffee, instant coffee and canned coffee products for both domestic consumption and export markets.

VinaCapital buys a stake in coffee exporter – Thai Hoa group

Thai Hoa coffee group will sell a 10 percent stake to VinaCapital. Under this acquisition, VinaCapital will support Thai Hoa in both internal processes and external marketing and logistics. Internal support will be provided in the areas of corporate governance, financing and human resources. External support will be provided in the areas of seeking new export markets and strengthening the company's brand identity in overseas markets where they are already present. The support of VinaCapital will also help Thai Hoa Group strengthen its position in the domestic market through improving its marketing and distribution systems.

Production, Supply and Demand Data Statistics:

Table 10: Vietnam's Coffee Production, Supply and Demand (PSD table)

Coffee, Green Vietnam 1000 HA, MILLION TREES, 1000 60 KG BAGS	2008/2009		2009/2010		2010/2011	
	Market Year Begin: Oct 2008		Market Year Begin: Oct 2009		Market Year Begin: Oct 2010	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	531	0	536	0	0	0
Area Harvested	500	0	504	0	0	0
Bearing Trees	620	0	629	0	0	0
Non-Bearing Trees	75	0	80	0	0	0
Total Tree Population	695	0	709	0	0	0
Beginning Stocks	1,057	1,057	1,740	1,689	1,496	1,423
Arabica Production	480	480	450	450	475	480
Robusta Production	17,520	17,520	17,050	17,050	18,250	18,253
Other Production	0	0	0	0	0	0
Total Production	18,000	18,000	17,500	17,500	18,725	18,733
Bean Imports	70	98	75	51	80	80
Roast & Ground Imports	1	3	1	1	1	1
Soluble Imports	25	25	25	25	25	27
Total Imports	96	126	101	77	106	108
Total Supply	19,153	19,183	19,341	19,266	20,327	20,264
Bean Exports	16,333	16,283	16,675	16,483	16,675	16,667
Rst-Grnd Exp.	25	42	25	50	50	50
Soluble Exports	105	105	110	110	115	115
Total Exports	16,463	16,430	16,810	16,643	16,840	16,832
Rst,Ground Dom. Consumption	850	964	925	1,080	1,050	1,115
Soluble Dom. Cons.	100	100	110	120	125	135
Domestic Use	950	1,064	1,035	1,200	1,175	1,250
Ending Stocks	1,740	1,689	1,496	1,423	2,312	2,182
Total Distribution	19,153	19,183	19,341	19,266	20,327	20,264

Source: FAS

Table 11: Coffee Export Trade Matrix MY08/09-MY09/10

Country	Vietnam		
Commodity	Coffee, Green		
Time Period	Oct. - Sept.	Units:	MT
Exports for:	2009		2010
U.S.	157,000	U.S.	143,156
Others		Others	
Germany	174,000	Germany	150,559
Spain	100,000	Spain	74,818
Italy	80,000	Italy	68,540
Belgium	61,000	Japan	50,492
Japan	44,000	Belgium	45,529
South Korea	44,000	Switzerland	28,268
France	37,000	Philippines	28,244
United Kingdom	29,000	United Kingdom	27,772
Algeria	28,000	South Korea	30,345
Russia	23,000	Russia	26,664
Total for Others	620,000		531,231
Others not Listed	200,000		314,632
Grand Total	977,000		989,019

Sources: Vicofa, General Statistics Department, Customs Office, Global Trade Atlas.

Table 12: Green Coffee Import Trade Matrix in MY08/09-MY09/10

Country	Vietnam		
Commodity	Coffee, Green		
Time Period	Oct. -Sept.	Units:	MT
Imports for:	2009		2010
U.S.	0	U.S.	0
Others		Others	
Laos	2,953	Indonesia	844
Indonesia	1,997	Laos	819
China	251	China	436
Total for Others	5,201		2,099
Others not Listed	662		963
Grand Total	5,863		3,062

Sources: Vicofa, General Customs Office, Global Trade Atlas

Attachment	Attachment Link
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