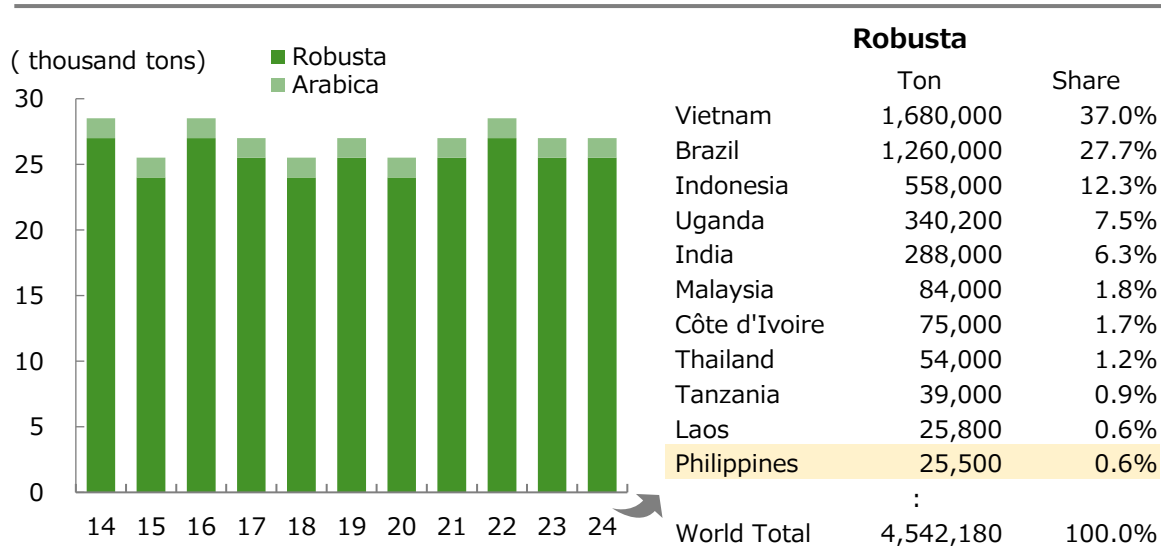


Philippines: Coffee

- Overview: Among the world's top consumers and importers of soluble coffee
 - The Philippines boasts one of the world's largest coffee consumption levels. However, domestic production is limited. Consequently, the country has a high dependence on imports.
 - Imports are primarily processed soluble coffee, with the Philippines ranking as the world's largest importer of soluble coffee in 2024*. Per capita consumption of soluble coffee is also among the highest globally.
- Production
 - According to the U.S. Department of Agriculture (USDA), Philippine coffee production has remained largely stable. Production in 2024 was 27,000 tons, nearly the same as the previous year. Of this, production of the Robusta variety, which can be cultivated in hot and humid climates, was 25,500 tons, accounting for 94% of the total.
 - The Philippines' share of global production is less than 1%, even when limited to the Robusta variety, which is primarily grown in Southeast Asia. Among major Southeast Asian countries, it remains at the lowest level (Figure 1).

*Production year (Market Year) from October to September. 2024 = October 2023 to September 2024

Figure 1: Coffee Production Volume

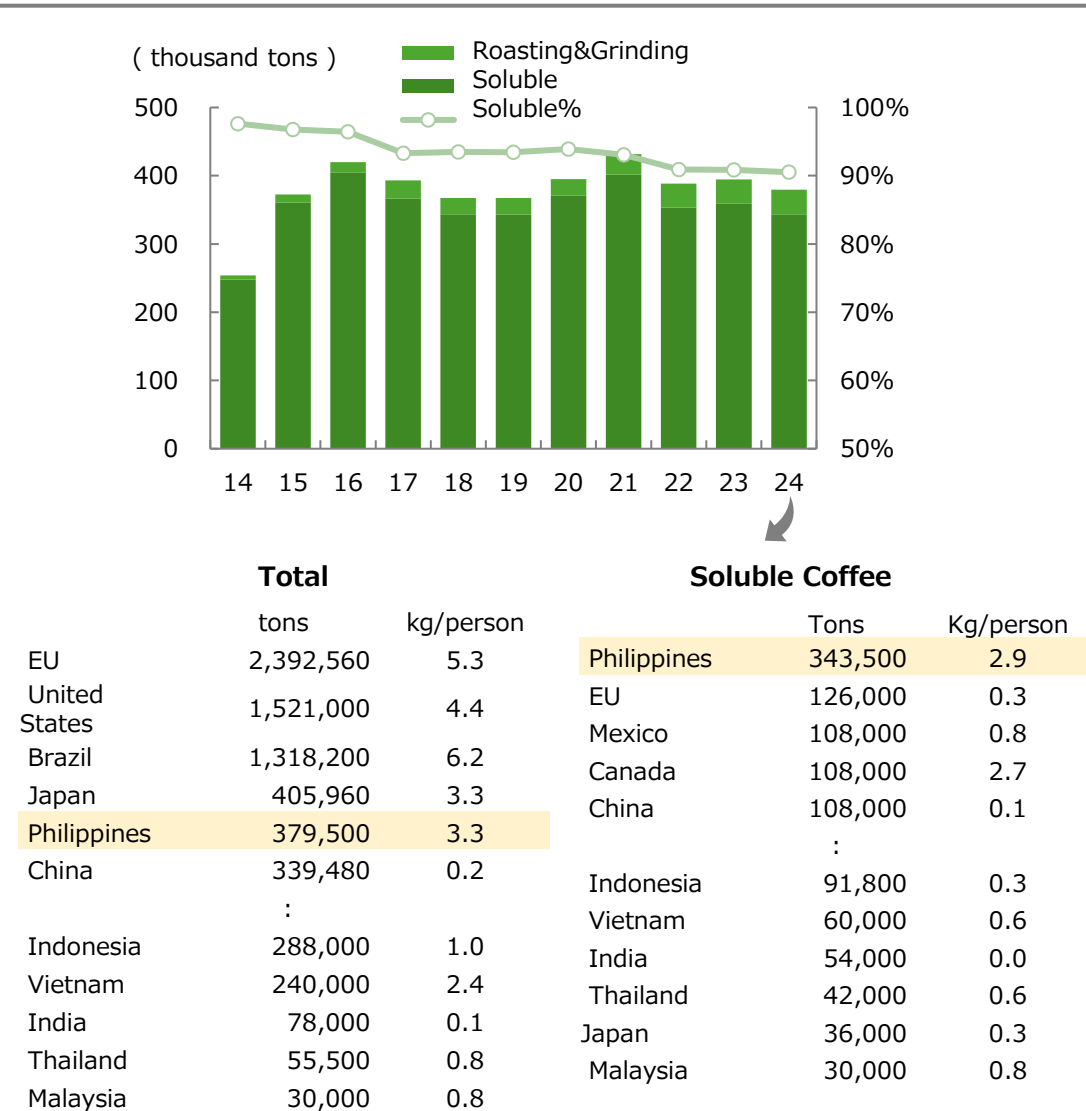


(source : USDA data)

■ Consumption

- Coffee consumption followed an upward trend from the 2000s through the mid-2010s, but has been sluggish since the latter half of the 2010s.
- Consumption in 2024 decreased by 3.9% year-on-year to 379,500 tons, marking the first decline in two years. Soluble coffee accounted for 343,500 tons, representing approximately 90% of the total.
- Despite the slowdown in consumption growth, its position as one of the world's leading coffee-consuming nations remains unchanged. Its 2024 consumption volume ranks second only to Japan, and its per capita consumption is also nearly on par with Japan. Focusing solely on soluble coffee, its consumption volume is the world's largest, and its per capita consumption significantly exceeds that of other countries (Figure 2).

Figure 2: Consumption Volume

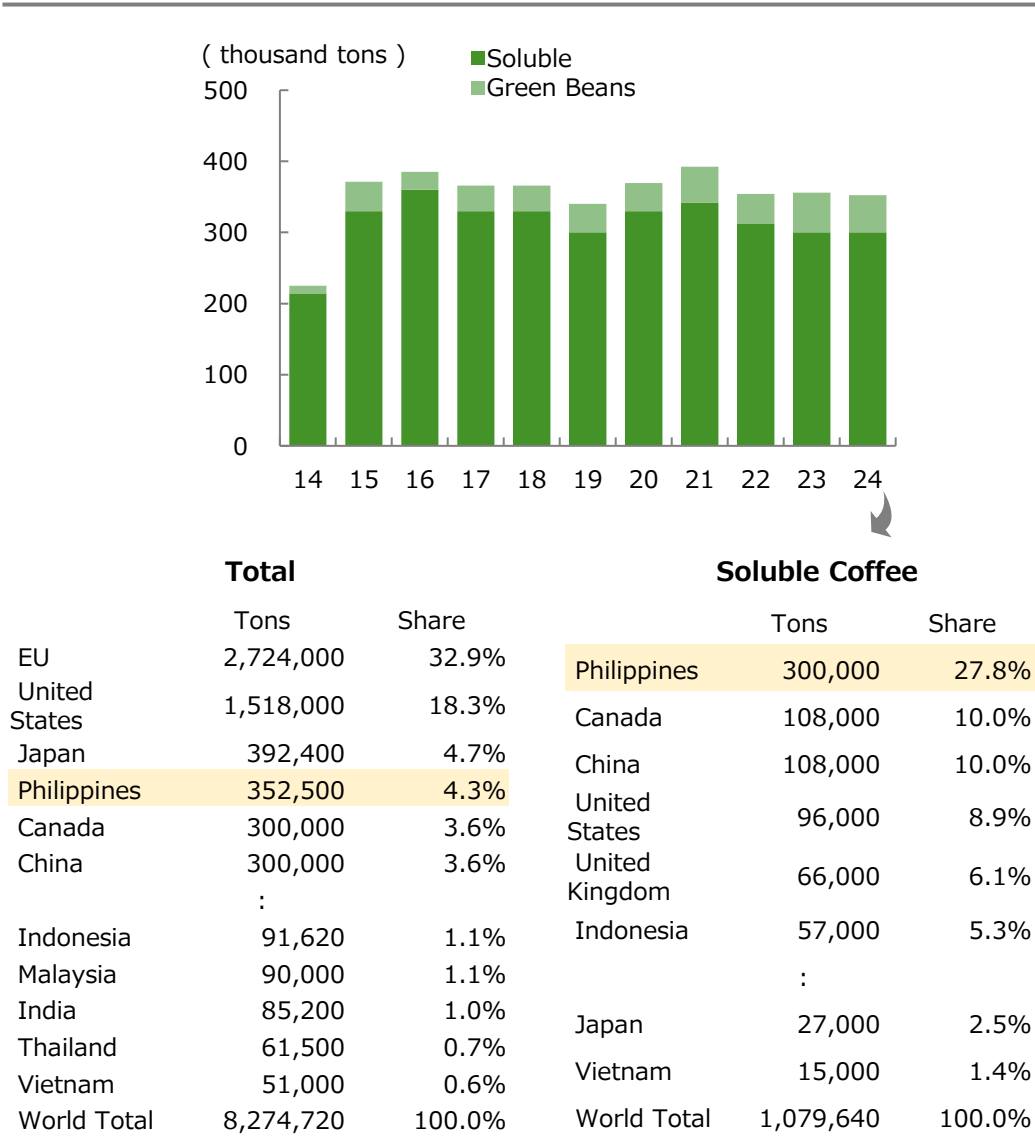


(source : USDA and UN data)

■ Imports

- Amid sluggish consumption growth, import volumes have continued to fluctuate.
- In 2024, imports decreased by 0.9% to 352,500 tons, marking the first decline in two years. Soluble coffee imports remained nearly flat at 300,000 tons compared to the previous year, accounting for 85% of the total.
- Due to limited domestic production, Japan relies heavily on imports. In 2024, Japan's total coffee imports, including green beans, ranked second globally after the United States. For soluble coffee alone, Japan imported nearly 30% of the world's total, the largest volume globally (Figure 3).

Figure 3: Import Volume



(source : USDA data)

(Ashu Research : August 2025)