



*Coffee trees in Eatan Cooperative, Krong-Nang District*

## Vietnam Coffee Market Overview February 2026



February saw sharp price drops then modest recovery post-holiday, as tight farmer selling and steady demand kept supply constrained and market gradually stabilised.

## Market Summary

Vietnam's coffee market in February was influenced by the Lunar New Year holiday, global price declines, and continued tight farmer selling. Trading slowed ahead of the holiday and only gradually resumed afterward.

Despite a mid-month drop in prices following global weakness, the market stabilised toward the end of the month as farmers continued to hold stocks and demand recovered.

## Demand

Demand remained steady throughout the month as exporters continued to fulfil existing contracts. However, trading was slowed by a mismatch between buyer bids and seller expectations.

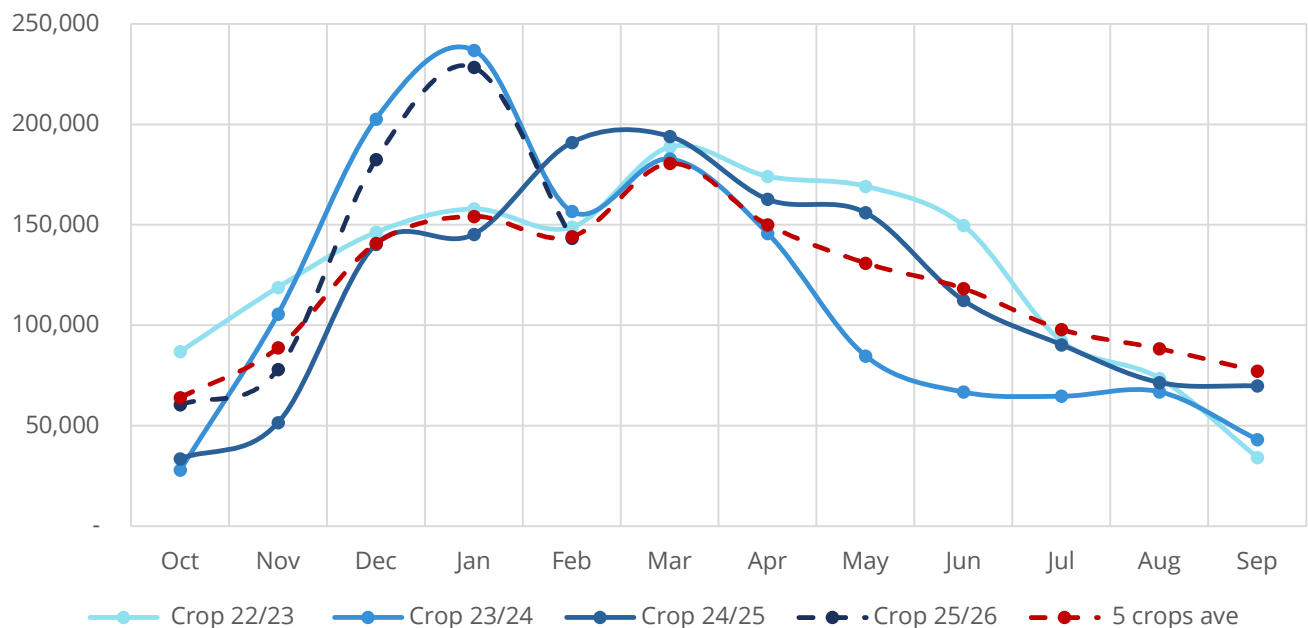
Demand improved after the Lunar New Year holiday as market activity resumed.

## Inventory & Supply

Supply remained tight throughout February as farmers continued to sell cautiously. Many held back beans before and after the Lunar New Year, expecting better prices.

Traders estimated that farmers still held more than 50% of the 2025/26 crop, limiting market liquidity even after harvest.

### Vietnam Green Coffee Bean Export



## Export

Vietnam exported around 143,300 tons of coffee in February, down 37% from the previous month and broadly in line with the five-year average.

## Price

Domestic Robusta prices dropped sharply early in the month before recovering gradually.

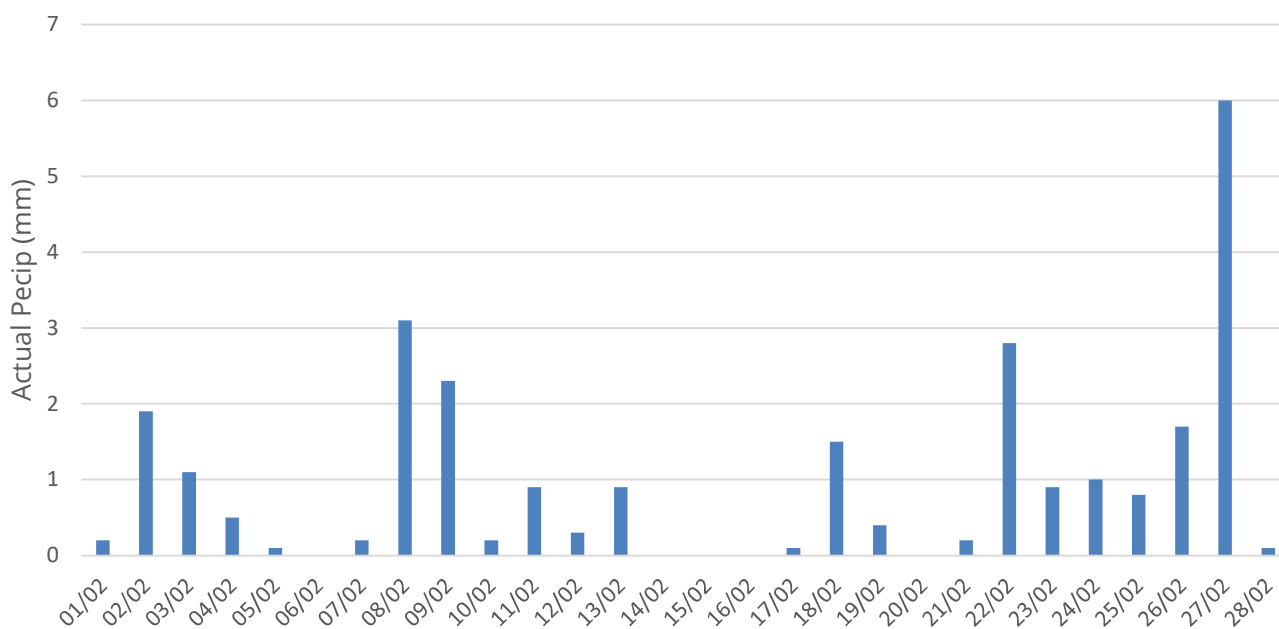
Prices in the Central Highlands moved from 101,200–102,300 VND/kg at end-January to 93,800–94,800 VND/kg early February, then rose to 96,500–97,500 VND/kg by month-end.

London Robusta (May) fell to around USD 3,689/MT early in the month before stabilising near USD 3,700/MT. Export differentials shifted from discounts to a premium of USD 50–60/MT by late February.

## Weather

Weather conditions in the Central Highlands remained favourable, supporting crop development with adequate water supply. No major weather disruptions were reported during the month.

### Dak Lak Precipitation February 2026



## Outlook

The market is expected to remain supported by tight farmer selling and steady demand. With Indonesia's new crop not expected until April, Vietnam will continue to play a key role in global Robusta supply. Prices may gradually recover if farmers continue to hold stocks and global demand remains stable.

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