MONTHLY REPORT

SEP 2026

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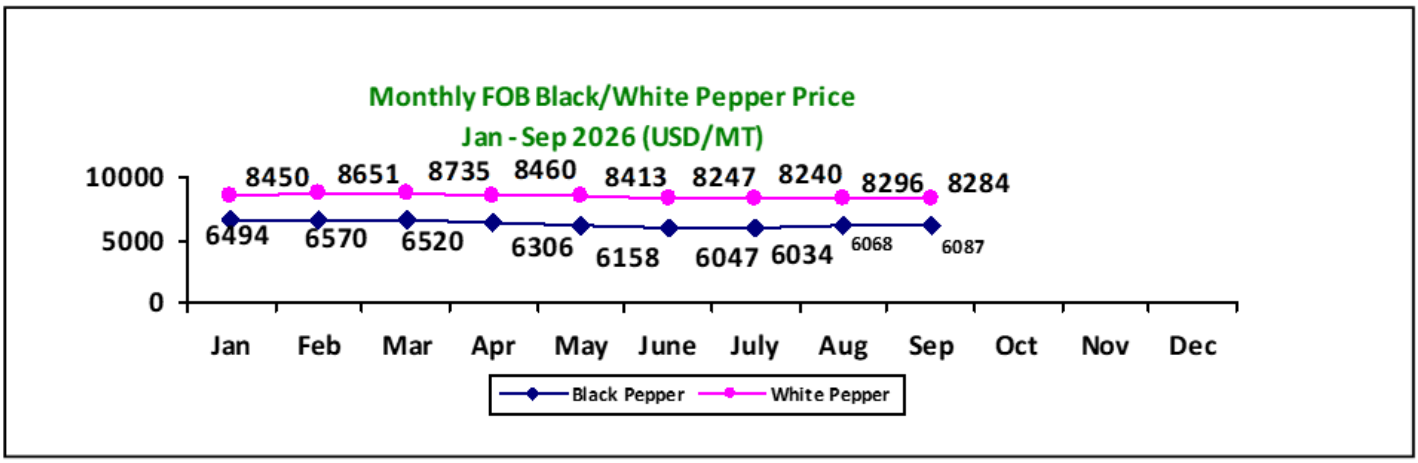


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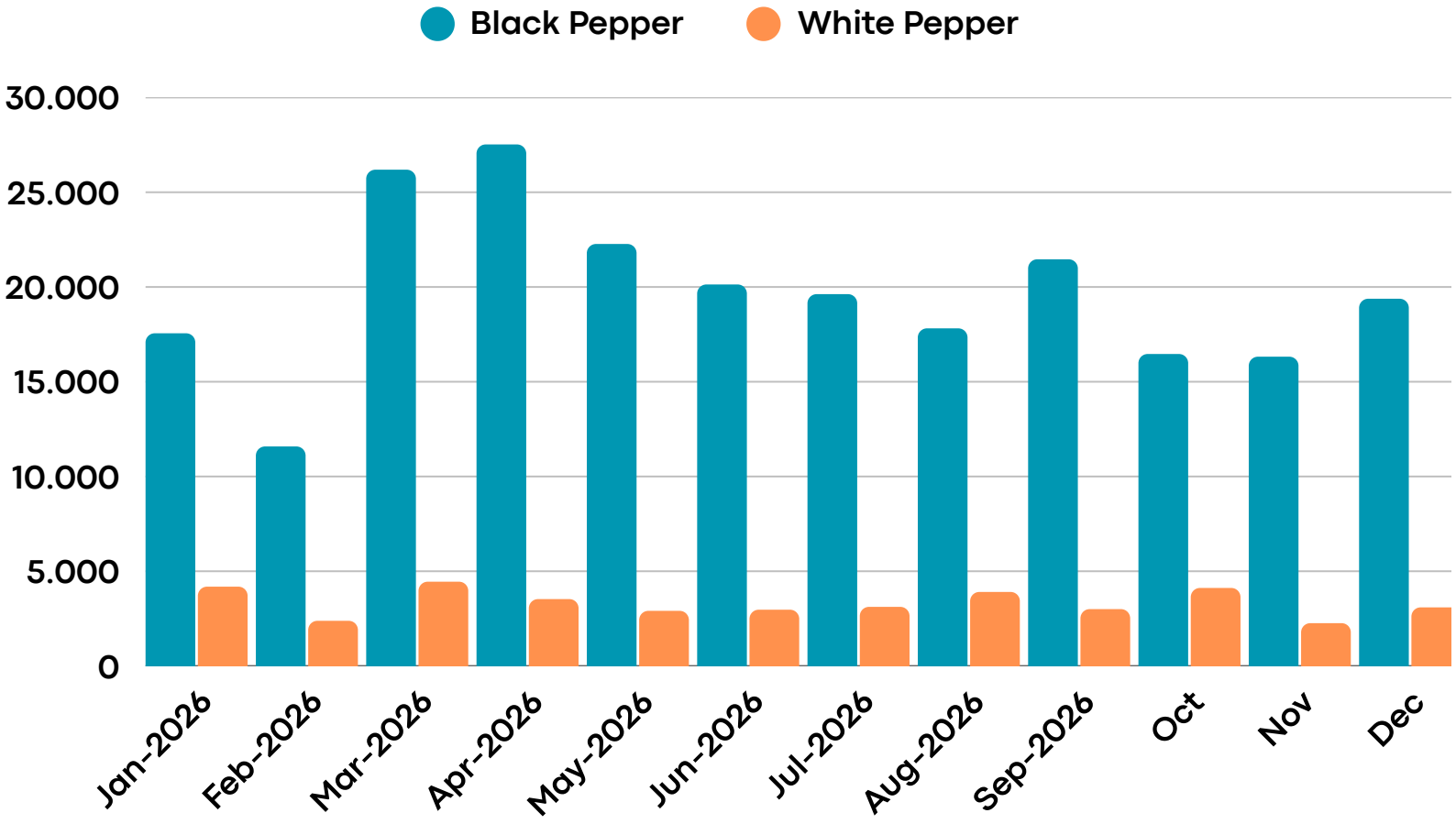
1. Vietnam Black & White Pepper:

- According to preliminary statistics from VPSA, in September 2026, Vietnam exported 25,580 tons of pepper, earning $164.9 million, an increase of 17.7% in volume and 17.0% in value compared to August 2026, and an increase of 24.9% in volume compared to September 2025, corresponding to increases of 3,856 tons and 5,093 tons respectively. The average export price in September was $6087, relatively stable compared to August 2026, but down 6% compared to the same period last year.



- Growth was primarily driven by increased exports to the United States and China, while the European market continued to decline. Asia remained the largest consumer region with 13,591 tonnes, accounting for 53.1% of total exports, up 17.2% from the previous month and 40.4% year-on-year. China reached 4,409 tonnes, up 30.3% from August and 112.9% from September 2025, accounting for 17.2%. The UAE reached 1,864 tonnes, up 26.2% from the previous month but down 5.0% year-on-year. Thailand reached 909

tonnes, up 8.2% and 5.3% respectively; Singapore reached 752 tonnes, a sharp increase of 125.8% and 302.1%. Exports to the Americas reached 6,798 tons, accounting for 26.6%, an increase of 55.9% compared to the previous month and 42.2% compared to the same period last year. Of this, the United States was the largest export market with 6,272 tons, accounting for 24.5%, an increase of 72.4% compared to August 2026 and 46.7% compared to September 2025.



Note: Volume in Metric ton per month MT/month



2. Vietnam Robusta Coffee Beans:

- According to the Vietnam Coffee-Cocoa Association (Vicofa), Vietnam exported nearly 1.5 million tons of coffee in the first nine months of 2026, a 16.2% increase compared to the same period in 2025. Total export turnover reached approximately US$6.6 billion.
- In September alone, coffee exports were estimated at around 124,000 tons, up 53% year-on-year. This significant rise in volume indicates that shipping activity remained robust as the 2025–2026 coffee crop year drew to a close.

- However, the increase in volume was insufficient to offset the impact of declining export prices. Vicofa reported that the average export price index for the nine-month period fell by 16.66% compared to the same period in 2025. This was the primary reason why, despite double-digit growth in export volume, total revenue declined.
- The US Department of Agriculture (USDA) forecasts that global coffee production for the 2025–2026 crop year could reach approximately 178.8 million 60-kg bags, an increase of 3.5 million bags over the previous season.



- For the 2026–2027 crop year, global production is projected to rise further to about 189.7 million bags - an increase of over 10 million bags, or approximately 6%.
- Brazil, the world's largest coffee producer, is expected to contribute significantly to this supply growth with an output of nearly 72 million bags.
- In Vietnam, production is also expected to improve, rising from approximately 31.7 million bags to 32.5 million bags in the new crop year—an increase of about 2.5%. Vietnam's 2026–2027 coffee crop year will begin in November, as supplies from the new harvest gradually enter the market.
- Increased supply is expected to help exports maintain positive momentum during the final months of the year. Vicofa forecasts that Vietnam's coffee export volume in 2026 could rise by approximately 8–10% compared to 2025.
- Domestic production is also expected to improve, rising from around 31.7 million bags to 32.5 million bags in the new crop year—an increase of approximately 2.5%.

Contact Us:

PHUC LOI IMPORT - EXPORT TRADING CO., LTD

For further information, please reach out to us:

Address: Vinhomes Central Park - Landmark 5 Building, 9th Floor, No. L5-9.13 & L5-9.14

720A Dien Bien Phu Street, Thanh My Tay Ward, Hochiminh City, Vietnam

Hotline/WhatsApp: +84 888 420 199

Email: phucloi.imexport@phucloi.vn **Teams: phucloi-imexport**

Website: www.phucloi.vn