SPECIALTY COFFEE INTEL

# Specialty Coffee

## Quarterly Intel Report

Q2 2026

Generated 2026-10-05

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## Executive Summary

Green coffee arriving at US ports in Q2 2026 was concentrated in a small group of trading houses. Across 456 ocean shipments totaling 14,001 metric tons, the five largest consignees by weight, ofi (Olam), Neumann Gruppe (NKG), Atlantic (ECOM), COFCO and Cafe Imports, accounted for 48.9% of volume, and the top three alone for 32.7%. ofi led with 1,779 t across 26 shipments, 73% of it from Guatemala. NKG moved 1,521 t on 46 shipments from 26 suppliers, while Royal Coffee logged the most shipments of any consignee (48) and the widest supplier base (32 supplier records) on 975 t, a profile built on many smaller lots rather than bulk positions. Colombia was the largest recorded origin at 2,319 t (16.6% of weight, 78 shipments) and the most widely sourced, reaching 17 of the 27 consignees. Guatemala followed at 2,114 t (15.1%), though 61% of that came through ofi. Mexico (8.7%), Brazil (8.4%) and Vietnam (6.3%) completed the top five. Vietnam's share rests on only five shipments, three of them COFCO lots averaging 276 t each in early June. Supplier sharing is common: 37 supplier records shipped to two or more consignees, and Cafe Imports appears in 12 of those shared relationships, more than any other buyer. Limitations matter for this edition. The data comes from US Customs bill-of-lading records via ImportKey and covers ocean freight only. The latest arrival in the dataset is June 14, so the final two weeks of the quarter are not yet reflected, and April is thinly represented (48 shipments versus 295 in May), which more likely reflects source coverage than a true surge. Origin country is missing on 153 shipments (28.1% of weight). None of the tracked specialty roasters appear as direct consignees this quarter, which is consistent with roasters buying through importers rather than on their own bills of lading.

| SHIPMENTS | VOLUME | COMPANIES | SUPPLIERS |
|---|---|---|---|
| **456** | **14,001.1** | **27** | **236** |
| TRACKED THIS PERIOD | METRIC TONS | TRACKED | IDENTIFIED |

## Notable Movements

### ofi (Olam) Built Its Quarter on Guatemala

MEDIUM

ofi (Olam) was the largest consignee by weight at 1,779 t, and 1,295 t of that (72.8%) originated in Guatemala. A single supplier record, OLAM AGRO GUATEMALA, accounts for 1,191 t across seven shipments, all landing at Philadelphia, which makes it the largest supplier of the quarter at 8.5% of all tracked weight. The pattern points to an integrated flow through ofi's own Guatemalan export arm. Three of those entries carry an identical 338,153 kg weight on the same May 28 arrival, so the total should be confirmed against the underlying bills before it is treated as firm.

### COFCO's Early-June Vietnam Lots Drive an Entire Origin

MEDIUM

COFCO received three shipments from Vietnam between June 8 and June 11 totaling 829 t: two from TIN THANH DAT JOINT STOCK COMPANY (570 t) and one from MASCOPEX JOINT STOCK COMPANY (259 t). Those three entries make up 70% of COFCO's 1,185 t quarter and 93% of all Vietnamese weight in the dataset. At roughly 276 t per shipment they are more than 14 times the quarter's median shipment of 19.4 t, so a handful of bills account for Vietnam's 6.3% origin share.

### Royal Coffee: Most Shipments, Widest Supplier Base

HIGH

Royal Coffee logged 48 shipments, the most of any consignee, drawn from 32 supplier records and seven recorded origins. Its 975 t total ranks sixth by weight, which puts its average shipment near 20 t, roughly one container-sized lot. Colombia was its largest recorded origin at 278 t on 14 shipments. The profile fits an importer running many smaller lots for roaster clients rather than taking bulk positions.

### Atlantic (ECOM) Volume Hinges on Two Exporters

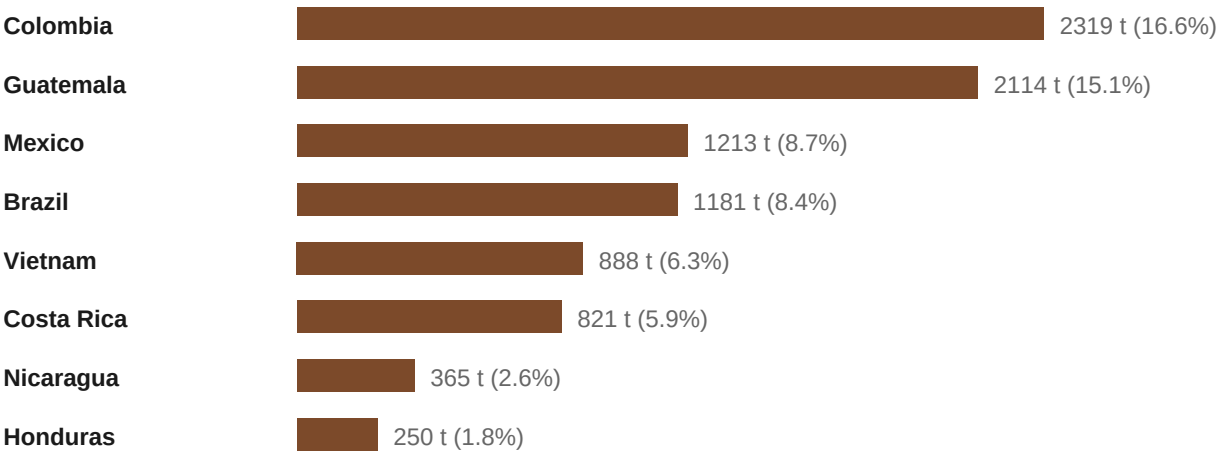
LOW

Atlantic (ECOM) ranked third by weight at 1,276 t across 28 shipments. Two supplier records listed as Guatemalan account for 682 t of that: PLANTACIONES AGROPECUARIAS on a single 337 t entry (May 28, Philadelphia) and RETRILLAS DEL PACIFICO S A on seven shipments totaling 344 t. Origin country is missing on 17 of ECOM's 28 shipments (731 t), the most unrecorded-origin weight of any consignee, so its true origin mix is uncertain.

# Origin Trends

Eighteen origin countries appear in Q2 2026, but volume is concentrated at the top. Colombia (16.6% of total weight) and Guatemala (15.1%) together account for 31.7%, and adding Mexico (8.7%), Brazil (8.4%) and Vietnam (6.3%) brings the top five to 55.1%. Shipment counts tell a different story than weight: Mexico's 53 shipments and Brazil's 45 outnumber Guatemala's 34, while Vietnam reaches its share on just five. Colombia is the broadest base, shipping to 17 consignees, against 15 for Mexico, 13 for Brazil and 8 for Guatemala. East African origins are a thin tail in this dataset, with Ethiopia at 1.5% (11 shipments, six of them to Trabocca), Uganda at 0.9%, and Kenya and Rwanda under 0.5% each. Origin is not recorded on 153 shipments carrying 28.1% of weight, so every share above is a floor rather than a precise split, and the ranking could change once those records are resolved.

### TOP ORIGINS BY WEIGHT




Source: shipment-level rollup. Top 8 origins shown.

### COUNTRY CALLOUTS

#### Colombia

78 shipments and 2,319 t, the largest recorded origin and the most widely sourced, reaching 17 of 27 consignees. NKG (337 t), Royal Coffee (278 t) and Sucafina Specialty (258 t) were the largest receivers.

#### Guatemala

2,114 t on 34 shipments, with ofi (Olam) taking 1,295 t (61%) and Atlantic (ECOM) 357 t. Without those two buyers, Guatemala's remaining 462 t would sit well below Mexico and Brazil.

#### Vietnam

888 t on five shipments. COFCO's three June entries supply 829 t; Paragon Coffee Trading received the other two (59 t) from VOLCAFE VIETNAM and SIMEXCO DAKLAK LTD.

## Shared Supplier Map

| SUPPLIER | SHARED BY |
|---|---|
| **FEDERACION NACIONAL DE CAFETEROS DE** | Cafe Imports, Mitsui, Neumann Gruppe (NKG), Walker Coffee Trading |
| **EXPORTADORA DE CAFE CALIFORNIA S A** | Ally Coffee, Cafe Imports, Neumann Gruppe (NKG), Walker Coffee Trading |
| **EXPORTADORA DE CAFE CALIFORNIA** | Ally Coffee, InterAmerican Coffee, Neumann Gruppe (NKG) |
| **DINAMICA INTERNATIONAL CROPS S A** | Bodhi Leaf Coffee, Cafe Imports, Sustainable Harvest |
| **RETRILLAS DEL PACIFICO S A** | Atlantic (ECOM), Cafe Imports |
| **TRANSCAFE S A** | Balzac Brothers, Walker Coffee Trading |
| **CECA SA** | Neumann Gruppe (NKG), Sucafina Specialty |
| **COOPERATIVA DE CAFICULTORES Y SERVI** | Balzac Brothers, Cafe Imports |
| **CAFES TOMARI SA DE CV** | COFCO, Sucafina Specialty |
| **CECA S A** | Neumann Gruppe (NKG), Vournas Coffee Trading |
| **CORPORACION AARJEA S A C** | N J DOUEK SONS INC, Sucafina Specialty |
| **TESTI TRADING PLC** | Trabocca, Vournas Coffee Trading |
| **GUAYA B ASOCIACION CIVIL** | Sustainable Harvest, ofi (Olam) |
| **PRODECOOP RL** | Cafe Imports, Paragon Coffee Trading |
| **COMPANIA UNIVERSAL DE CAFE SA** | Ally Coffee, Atlantic (ECOM) |
| **SUCAFINA COLOMBIA SAS** | Sucafina Specialty, Sustainable Harvest |
| **Federacion Nacional de Cafeteros** | Coffee America, Paragon Coffee Trading |
| **C DORMAN SEZ LIMITED** | Atlantic (ECOM), Cafe Imports |
| **FEJCEM GROUP S A DE C V** | Sucafina Specialty, Sustainable Harvest |

| SUPPLIER | SHARED BY |
|---|---|
| **SANCOFFEE COOP DOS PROD DE CAFES** | COASTAL COMMODITIES LLC, Volcafe (ED&F Man) |
| **COOPETARRAZU R L** | Royal Coffee, Walker Coffee Trading |
| **AGROINDUSTRIAS UNIDAS DE MEXICO SA** | Atlantic (ECOM), Cafe Imports |
| **CAFE FINOS DE EXPORTACIONS DE RL** | Ally Coffee, Neumann Gruppe (NKG) |
| **GRUPO COMSA S A DE C V** | Royal Coffee, Sustainable Harvest |
| **MANOS CAMPESINAS S A** | Royal Coffee, Walker Coffee Trading |
| **FEJCEM GROUP SA DE CV** | Sucafina Specialty, Sustainable Harvest |
| **CAMPESINOS ECOLOGICOS DE LA SIERRA** | Cafe Imports, Sustainable Harvest |
| **EXPORTADORA DE CAFE CALIFORNIA SA C** | Balzac Brothers, InterAmerican Coffee |
| **CARCAFE LTDA** | Atlantic (ECOM), Bodhi Leaf Coffee |
| **ARABIGOS FINOS DE NICARAGUA S A** | Royal Coffee, Sucafina Specialty |
| **ALDEA COFFEE SOCIEDAD ANONIMA** | Cafe Imports, Walker Coffee Trading |
| **SMC COMERCIAL E EXPORTADORA DE CA** | Paragon Coffee Trading, Sustainable Harvest |
| **FINCA CHURUPAMPA PERU S A C** | Paragon Coffee Trading, Sucafina Specialty |
| **DESCAFEINADORA COLOMBIANA SA** | Cafe Imports, Paragon Coffee Trading |
| **DESCAFEINADORES MEXICANOS SA DE CV** | Atlantic (ECOM), Walker Coffee Trading |
| **PETER SCHOENFELD S A** | Atlantic (ECOM), Paragon Coffee Trading |
| **CODECH S A** | Atlantic (ECOM), Cafe Imports |

## Competitive Sourcing

**OBSERVATION**

37 supplier records shipped to two or more consignees in Q2 2026. Cafe Imports appears in 12 of those shared relationships, followed by Atlantic (ECOM), Sucafina Specialty and Sustainable Harvest at eight each.

**IMPLICATION**

Cafe Imports sits at the center of the shared-supplier network, so many of its origin partners also sell to direct competitors. Buyers seeking exclusive lots from those exporters face real competition for allocation.

**OBSERVATION**

FEDERACION NACIONAL DE CAFETEROS DE (Colombia) and EXPORTADORA DE CAFE CALIFORNIA S A (Mexico) each shipped to four consignees, the widest reach of any supplier record. NKG, Cafe Imports and Walker Coffee Trading buy from both.

**IMPLICATION**

Large origin exporters act as shared infrastructure for US importers. Differentiation among those three buyers is more likely to come from lot selection and roaster relationships than from exclusive access to the exporter.

**OBSERVATION**

Atlantic (ECOM) and Cafe Imports share four supplier records, the most of any pair, spanning Guatemala, Mexico and Kenya. One of them, RETRILLAS DEL PACIFICO S A, shipped 402 t to the two importers combined.

**IMPLICATION**

The two importers draw on overlapping supply in several origins. Price or allocation pressure at those exporters would likely reach both at the same time.

**OBSERVATION**

Sucafina Specialty and Sustainable Harvest share three supplier records, as do Ally Coffee and NKG. In both pairs, two of the shared records are spelling variants of one exporter (FEJCEM GROUP and EXPORTADORA DE CAFE CALIFORNIA).

**IMPLICATION**

Exporter names are taken as filed, so the same supplier can appear under more than one spelling. Overlap counts in this report are a lower bound on how many exporters these buyers actually share.

## Companies This Quarter

| COMPANY | SHIPMENTS | WEIGHT | ORIGINS |
|---|---|---|---|
| **ofi (Olam)**<br>importer | 26 | 1,778.5 t | 4 |
| **Neumann Gruppe (NKG)**<br>importer | 46 | 1,521.3 t | 6 |
| **Atlantic (ECOM)**<br>importer | 28 | 1,275.9 t | 6 |
| **COFCO**<br>importer | 13 | 1,185 t | 4 |
| **Cafe Imports**<br>importer | 40 | 1,085.3 t | 9 |
| **Royal Coffee**<br>importer | 48 | 974.7 t | 7 |
| **Sustainable Harvest**<br>importer | 45 | 857.3 t | 8 |
| **Walker Coffee Trading**<br>importer | 40 | 848.4 t | 8 |
| **Sucafina Specialty**<br>importer | 23 | 797 t | 10 |
| **Paragon Coffee Trading**<br>importer | 26 | 796.9 t | 9 |
| **Balzac Brothers**<br>importer | 24 | 520.1 t | 7 |
| **Ally Coffee**<br>importer | 26 | 492.7 t | 6 |
| **Caravela**<br>importer | 24 | 386.7 t | 2 |
| **Volcafe (ED&F Man)**<br>importer | 8 | 187.6 t | 3 |
| **Coffee America**<br>importer | 2 | 174.6 t | 1 |
| **Atlas Coffee Club**<br>importer | 4 | 154.5 t | 2 |

| COMPANY | SHIPMENTS | WEIGHT | ORIGINS |
|---|---|---|---|
| **Louis Dreyfus Company**<br>importer | 2 | 140.4 t | 0 |
| **InterAmerican Coffee**<br>importer | 7 | 134.6 t | 1 |
| **Trabocca**<br>importer | 6 | 116.6 t | 1 |
| **Organic Products Trading (OPTCO)**<br>importer | 6 | 116 t | 1 |
| **N J DOUEK SONS INC**<br>importer | 1 | 115 t | 0 |
| **SABIO COFFEE LLC**<br>importer | 2 | 109.3 t | 1 |
| **Vournas Coffee Trading**<br>importer | 3 | 60.5 t | 3 |
| **SEAFORTH SUPPLY CHAIN SOLUTIONS INC**<br>importer | 1 | 57.5 t | 0 |
| **Bodhi Leaf Coffee**<br>importer | 3 | 56.5 t | 3 |
| **COASTAL COMMODITIES LLC**<br>importer | 1 | 38.8 t | 1 |
| **Mitsui**<br>importer | 1 | 19.3 t | 1 |

## Methodology and Limitations

Data is sourced from US Customs bill-of-lading records via ImportKey. The dataset captures inbound ocean freight only. Air freight, intra-North-American truck movements, and shipments to ports outside the United States are not represented.

This edition covers Q2 2026, but the latest arrival in the dataset is June 14, 2026. Shipments arriving after that date are not included and will appear in a later revision. Origin country was not recorded on 153 shipments (28.1% of weight). Those shipments count toward totals but are excluded from origin rankings.

Customs records typically reach the public feed with a delay of two to four weeks after vessel arrival, so the most recent days of any reporting window may be incomplete and revise upward in subsequent reports.

Consignee matching uses fuzzy text matching against a curated list of tracked importers and roasters. Supplier names are inserted as-is from the bill of lading and may not reflect the underlying farm or cooperative; the same exporter can appear under more than one spelling.

Quarterly samples can be small. Treat single-shipment patterns with caution; a movement built on a handful of bills of lading may not survive another quarter of data. This report is for competitive intelligence and is not investment advice.