RAPIDE GROUP
OTC: RAPI · WEST PALM BEACH, FLORIDA

MARKET RESEARCH
COFFEE & COMMODITIES · ISSUE 1

ROBUSTA · INDONESIA · LAMPUNG

Robusta & Indonesia Coffee Monitor

A record world crop keeps Robusta well supplied, Robusta is the value choice for blenders, and Indonesian output and exports are growing. This report focuses on Indonesia and the province of Lampung.

THE MARKET AT A GLANCE

US$3.69/kg **WORLD BANK ROBUSTA, SEP 2026** About 40% above the 2023 average	189.7m bags **WORLD OUTPUT 2026/27** A record (USDA, July 2026)	12.5m bags **INDONESIA OUTPUT 2025/26** Up 18% (USDA FAS Jakarta)
126.40 ¢/lb **ROBUSTA'S VALUE EDGE** London–New York arbitrage, Sep 2026	~108,000 t **LAMPUNG ANNUAL OUTPUT** About 155,000 ha, almost all Robusta	30 Dec 2026 **EU DEFORESTATION RULES APPLY** Traceable supply gains an edge

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Published by Rapide Group (OTC: RAPI), which has business interests in this sector.

01 · SUMMARY

Key takeaways

A well-supplied market where Robusta is the value choice and Indonesia is growing. The six findings below frame this report.

01

Prices hold well above pre-rally levels

The World Bank Robusta benchmark averaged US$3.69/kg in September 2026, about 40% above its 2023 average of US$2.63/kg (our arithmetic). (World Bank Pink Sheet.)

02

The world is well supplied

USDA forecasts record 2026/27 production of 189.7 million bags against consumption of 179.7 million, led by Brazil's record 71.9 million-bag crop. (USDA FAS, July 2026; Inheritance Coffee.)

03

Robusta is the value choice

The London–New York arbitrage stood at 126.40 US¢/lb in September, giving roasters a reason to raise the Robusta share of blends. (ICO, September 2026.)

04

Indonesian supply and exports are growing

USDA FAS Jakarta forecasts 2025/26 production up 18% to 12.5 million bags and green exports up 27% to 7.8 million bags. (Daily Coffee News, 6 Jan 2026.)

05

Grading adds value in Lampung

Sorted, export-ready beans traded at US$2.92–3.39/kg against US$2.57–2.81/kg for ungraded asalan in April 2026. (investlampung.id.)

06

Policy and access favour exporters

The US exempted coffee from reciprocal tariffs in November 2025, a weaker rupiah lifts exporters' returns, the EU deforestation rules apply from 30 December 2026, and the EU–Indonesia agreement was signed on 21 November 2026. (KPMG; Tempo.)

OUR VIEW

Robusta is the value choice in a well-supplied market, and Indonesia is growing its output and exports into it. Grading and traceability are where suppliers can add the most value.

WHAT TO WATCH

Vietnam's harvest, ICE certified stocks, Brazil's exports, USDA's December report, the ICO monthly reports and the start of the EU deforestation rules on 30 December.

02 · DATA

Market dashboard

The indicators we track: the latest reading, how it has moved and where the figure comes from.

ICE ROBUSTA, JAN 27
US$3,204/t
London futures, end Oct

WORLD OUTPUT 2026/27
189.7m bags
A record (USDA)

INDONESIA 2025/26
12.5m bags
Up 18% (USDA FAS)

ROBUSTA'S VALUE EDGE
126.40 ¢/lb
London–NY arbitrage, Sep

INDICATOR	LATEST	CHANGE AND CONTEXT	SOURCE, DATE
PRICES			
ICE London Robusta, Jan 2027	US$3,204/t	End of October 2026	MAAIF / New Vision, 2 Nov 2026
ICE New York Arabica, Dec 2026	287.20 ¢/lb	End of October 2026	MAAIF / New Vision, 2 Nov 2026
World Bank Robusta, Sep average	US$3.69/kg	About 40% above the 2023 average (our arithmetic)	World Bank Pink Sheet
ICO Robustas indicator, Sep	167.49 ¢/lb	September 2026	ICO, September report
ICO Composite Indicator, Sep	262.18 ¢/lb	September 2026	ICO, September report
London–New York arbitrage, Sep	126.40 ¢/lb	Robusta's value edge over Arabica	ICO, September report
SUPPLY			
World production 2026/27f	189.7m bags	A record; consumption 179.7m	USDA FAS, July 2026
World Robusta output 2026/27f	83.8m bags	Arabica output rises 11.4m bags	USDA FAS, July 2026
Indonesia production 2025/26	12.5m bags	Up 18%	USDA FAS Jakarta via Daily Coffee News, 6 Jan 2026
Indonesia green exports 2025/26	7.8m bags	Up 27%	USDA FAS Jakarta via Daily Coffee News, 6 Jan 2026
Brazil exports, 1–22 October	c. 3.30m bags	Up 43.2% on the same 2025 period	Cecafé
Lampung production	~108,000 t	About 155,000 ha, almost all Robusta	ANTARA News Lampung, 2024
MACRO AND POLICY			
Rupiah per US$1	18,132	27 October 2026	Market data
Bank Indonesia BI-Rate	5.75%	Held on 21 October 2026	Bank Indonesia
EU Deforestation Regulation	30 Dec 2026	Applies to large and medium operators	Reg. (EU) 2025/2650
EU–Indonesia agreement	Signed 21 Nov	Provisional application targeted 1 Jan 2027	Tempo, 21 Nov 2026

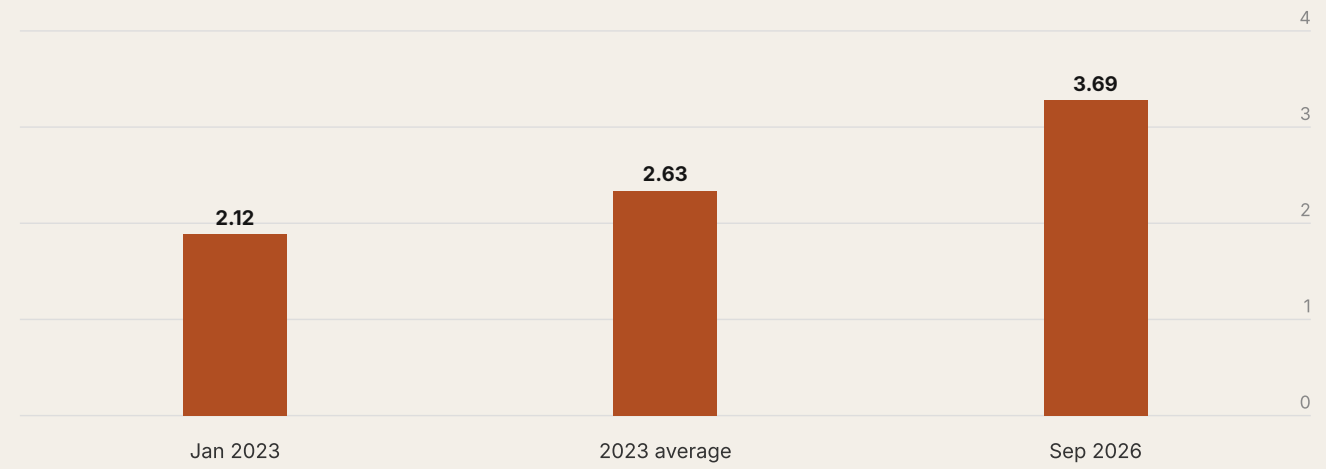
Prices and data are the latest available to us on the stated dates. ¢/lb is US cents per pound. One ICE Robusta lot is 10 tonnes; one bag is 60 kg; "f" denotes a forecast.

03 · PRICES

Robusta holds well above its pre-rally level

Robusta is trading about 40% above its 2023 average, and its discount to Arabica makes it the value choice for blenders.

Figure 1. Robusta price, World Bank benchmark (US$ per kg)



Source: World Bank Commodity Price Data (Pink Sheet), via YCharts and IndexMundi; monthly averages of ICE London-based Robusta quotations. Sep 2026 is about 40% above the 2023 average (our arithmetic).

Price levels

The World Bank Robusta benchmark averaged US$3.69/kg in September 2026, against US$2.63/kg for 2023 and US$2.12/kg in January 2023. ICE London Robusta for January 2027 stood near US$3,204 per tonne at the end of October, and ICE New York Arabica for December 2026 at 287.20 US¢/lb.

ICO GROUP INDICATOR, SEP 2026	US¢/LB
Colombian Milds	356.15
Other Milds	329.44
Brazilian Naturals	290.19
Robustas	167.49
ICO Composite	262.18

Source: International Coffee Organization, Coffee Market Report, September 2026.

ROBUSTA'S VALUE EDGE OVER ARABICA

126.40 ¢/lb

London–New York arbitrage, September 2026 (ICO). A wide gap gives roasters a clear reason to raise the Robusta share of their blends, which supports demand for the beans Indonesia grows.

04 · ORIGIN WATCH

Lampung: origin and calendar

Lampung is Indonesia's second-largest coffee province and the centre of its Robusta trade.

The province

Lampung has roughly 155,000 hectares of coffee, almost all Robusta, producing about 108,000 tonnes a year according to provincial figures. The main districts include Lampung Barat and Tanggamus. Beans move from farmer groups through collectors to processors and exporters around Bandar Lampung and the port of Panjang.

Grading adds value

In April 2026 farmers received about US$2.57–2.81/kg for dry ungraded asalan Robusta, while sorted, export-ready beans traded at US$2.92–3.39/kg. Grading and sorting therefore add real value for producers and the exporters who work with them.

Source: investlampung.id (April 2026); local prices converted at IDR 17,112 per US$ (10 April 2026).

The Lampung coffee year

PERIOD	STAGE	WHAT HAPPENS
Jan to Mar	Off-season trading	Cherries develop and stored beans are traded.
Apr to May	Early harvest	The new crop arrives at collectors.
Jun to Aug	Peak harvest	Collector stocks are highest, the best time to buy.
Sep to Nov	Flowering	Flowering sets the next crop.
Dec	Development	Cherries begin to develop.

Source: Rapide, based on investlampung.id (April 2026) and industry practice.

+18%

WHY THIS MATTERS

USDA FAS Jakarta forecasts Indonesia's 2025/26 production up 18% to 12.5 million bags, with green exports up 27% to 7.8 million bags (Daily Coffee News, 6 Jan 2026). Lampung is at the centre of that supply.

05 · OUTLOOK

Outlook and watch-list

Strong supply, a value edge for Robusta and growing Indonesian exports.

NEXT THREE MONTHS

A well-supplied market

Vietnam's harvest is reaching the market and Brazil's exports are running ahead of last year, which keeps supply plentiful for buyers. Robusta's wide discount to Arabica supports its share in blends.

INTO 2027

Quality and access

Grading and traceability add value, the EU deforestation rules apply from 30 December 2026, and the EU–Indonesia agreement targets provisional application from 1 January 2027.

Key dates

Nov to Jan	Monthly	Nov to Dec	December	30 Dec
Vietnam main harvest	ICO Coffee Market Report	Bank Indonesia policy meetings	USDA semi-annual coffee report	EU deforestation rules apply

What we are watching

INDICATOR	WHY IT MATTERS	FREQUENCY
Vietnam harvest pace	The largest near-term flow into Robusta	Weekly
ICE Robusta certified stocks	Exchange inventories available to buyers	Daily
Brazil exports	Pace at which the record crop reaches buyers	Monthly, Cecafé
Rupiah and the BI-Rate	Exporters' rupiah returns and trade finance	Daily / monthly
USDA and ICO updates	Updated world and Indonesia supply forecasts	Monthly / Dec
Lampung farmgate and graded prices	The read on local supply and grading premiums	Monthly

COMING FEATURES

Global supply and demand · Indonesia deep dive · Policy, trade and currency · Vietnam's crop · EUDR and traceability

06 · REFERENCES

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Rapide Group calculations from the sources above.

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