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65 AÑOS

# TENDENCIAS DEL MERCADO DE CAFÉ EN TAIWÁN


**YI-LING WU**

TAIWAN COFFEE ASSOCIATION

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# TAIWAN COFFEE ASSOCIATION

YILING WU

CHAIRMAN

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# TAIWAN COFFEE MARKET TREND

# 2005–2025 Guatemala Coffee World Exports Quantity

| Years | Export (1000x60kg bags） |
|---|---|
| 2005 | 3,450 |
| 2008 | 3,450 |
| 2010–2013 | 3,200–3,500 |
| 2014–2018 | 2,800–3,200 |
| 2019–2021 | 3,000–3,400 |
| 2022–2023 | 3,200 |
| 2024–2025 | 2,860 |
| 2025–2026（est） | 2,980–3,200 |

# 2005 Guatemala Coffee World Export Market

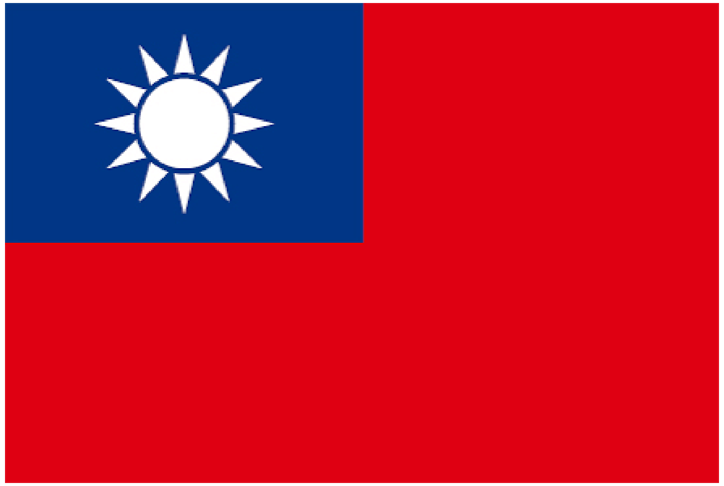
| Country | Export (1000x60kg bags） | Share % |
|---|---|---|
| United States | 1,574 | 45% |
| Japan | 573 | 16% |
| Canda | 282 | 8% |
| Germany | 268 | 8% |
| Nordic Countries | 124 | 4% |
| Other European | 573 | 17% |

# 2023–2025 Major Exporting Countries

| Country/Region | Market share | Characteristics |
|---|---|---|
| United States | 41% | Largest market; coexistence of specialty and commercial-grade beans |
| Canada | 8–10% | Growth of the specialty sector in North America |
| Japan | 7–9% | Market for high-quality SHB (Strictly Hard Bean) coffee |
| Belgium | 5–6% | European hub for transshipment and roasting |
| Italy | 4–5% | Increased usage in espresso blends |
| South Korea | 3–4% | Rapid growth of the specialty sector |
| Germany | 3–4% | Traditional European market |

# 2023–2025 Major Exporting Countries

| Country/Region | Market share | Factor |
| --- | --- | --- |
| Asia (Total) | 20% | Fastest-growing region |
| Europe as a whole | 26% | Stable, high-value market |
| North America as a whole | 52% | Core market |



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# Guatemala Coffee Promotion in Taiwan 2005–2025

# 20 Years Promotion Timeline

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2005–2010 **Brand**
2011–2015 **Education**
2016–2020 **Premium/specialty**
2021–2025 **Integrated**

# 2005–2010

Coffee Exhibition 2003 until now

Embassy Events

CATO(Central American Trade Office)

2026.7.24. LACTO *(Latin American and the Caribbean Trade office)*

Coffee cupping/Tastings

# Coffee Exhibition from 2003

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# Coffee Exhibition


# 2011–2015

Introduce Eight Regions

Cupping

Buyer Missions

Farm Visits

Business Matching

Direct Trade

# Visit Anacafé

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# Farm Visits

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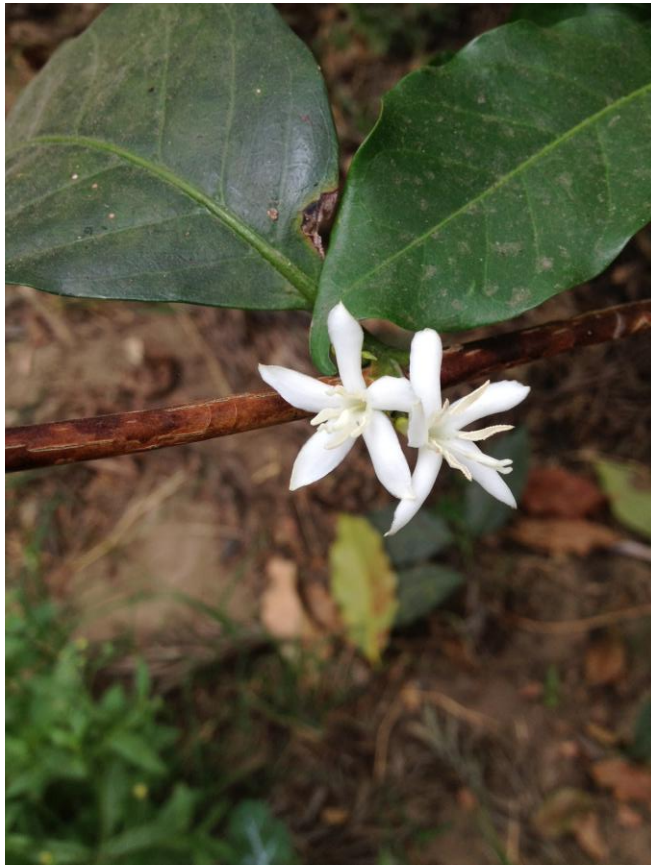
# Farm Visits



# Farm Visits


# Farm Visits

# Visit Anacafé

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# Anacafé Cupping

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# Buyer Mission

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# 2016–2020

Geisha

Micro Lots

Processing Innovation

# Coffee Cupping in Taiwan


# Coffee Cupping in Taiwan

# Coffee Cupping in Taiwan

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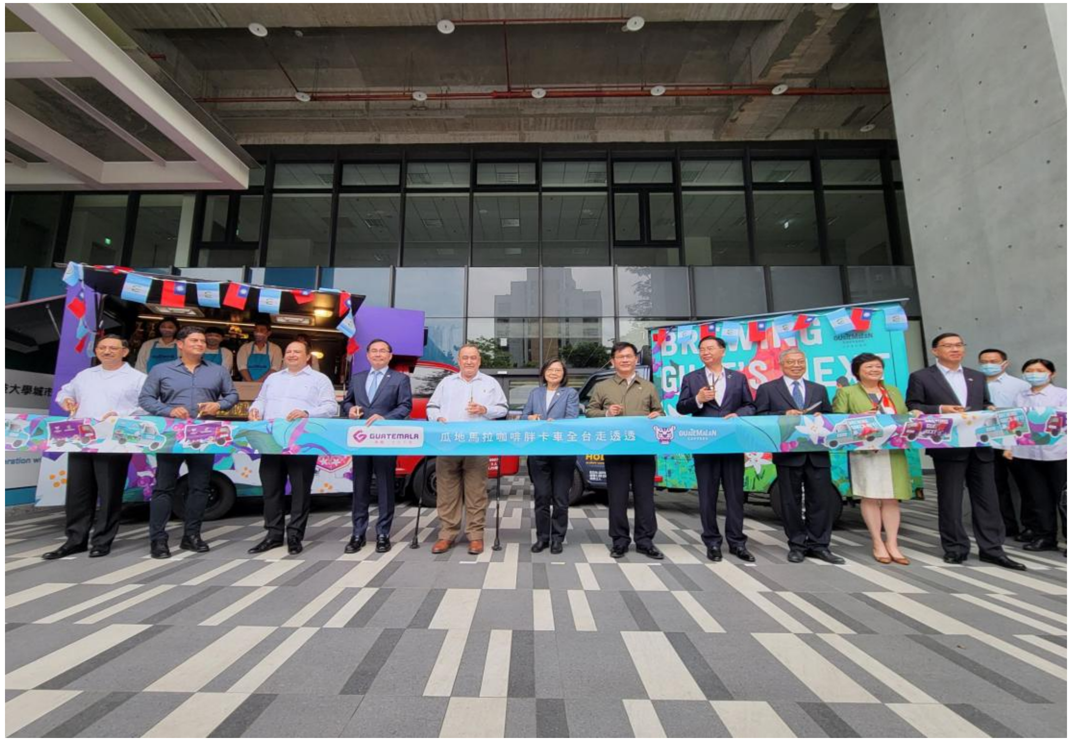
# 2021–2025

Coffee Culture Month
Coffee Truck
Coffee Exhibition
Social Media

# Coffee Culture promotion




# Coffee Culture promotion

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# Coffee Truck


# Achievements

Brand recognition(Guatemala Coffee)

Buyer relationships

Trade growth

Consistency

Education

Collaboration

台灣咖啡協會

Taiwan Coffee Association

Taiwan Coffee Association

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Taiwan Barista Championship TBC

Taiwan Latte Art Championship

Taiwan Cup Tasters Championship

Taiwan Roasting Championship

Taiwan Brewers Cup Championship

Taiwan Coffee in Good Spirits

# Taiwan's World Coffee Champions

**Jacky Lai: 2014** World Coffee Roasting Champion (WCRC)

**Lupin Liu: 2014** World Cup Tester Champion (WCTC)

**Berg Wu: 2016** World Barista Champion (WBC)

**Chad Wang: 2017** World Brewers Cup Champion (WBrC)

**Sherry Hsu: 2022** World Brewers Cup Champion(WBrC)

**Ethan Hsieh: 2024** World Latte Art Champion (WLAC)

**Bala Lin Shaoxing : 2026** World Latte Art Champion (WLAC)

# (Guatemala import to Taiwan) 1989 – 2000 Green coffee

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| Year | Total trade volume | |
|---|---|---|
| | USD | increase/decrease ratio % (year-on year) |
| 1989 | --- | --- |
| 1990 | --- | --- |
| 1991 | --- | --- |
| 1992 | 22,579 | --- |
| 1993 | 22,408 | -0.757 |
| 1994 | --- | --- |
| 1995 | --- | --- |
| 1996 | 3,179 | --- |
| 1997 | --- | --- |
| 1998 | 90,148 | --- |
| 1999 | 99,434 | 10.301 |
| 2000 | 349,741 | 251.732 |

# (Guatemala import to Taiwan) 2001 - 2010 Green coffee

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| Year | Total trade volume | |
|---|---|---|
| | USD | increase/decrease ratio % (year-on year) |
| 2001 | 69,135 | -80.233 |
| 2002 | 138,805 | 100.774 |
| 2003 | 315,392 | 127.219 |
| 2004 | 508,825 | 61.331 |
| 2005 | 705,355 | 38.624 |
| 2006 | 2,345,913 | 232.586 |
| 2007 | 4,311,675 | 83.795 |
| 2008 | 5,783,895 | 34.145 |
| 2009 | 2,539,840 | -56.088 |
| 2010 | 7,399,860 | 191.351 |

# (Guatemala import to Taiwan) 2011 – 2020 Green coffee

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| year | Total trade volume | |
|---|---|---|
| | USD | increase/decrease ratio % (year-on year) |
| 2011 | 9,715,718 | 31.296 |
| 2012 | 8,328,481 | -14.278 |
| 2013 | 6,785,256 | -18.529 |
| 2014 | 9,314,952 | 37.282 |
| 2015 | 10,988,054 | 17.961 |
| 2016 | 10,528,425 | -4.183 |
| 2017 | 12,776,151 | 21.349 |
| 2018 | 12,583,829 | -1.505 |
| 2019 | 10,953,666 | -12.954 |
| 2020 | 14,946,510 | 36.452 |

# (Guatemala import to Taiwan) 2023 – 2025 Green coffee

| Year | country | ranking | USD | % | Kg | USD/kg | growth % |
|---|---|---|---|---|---|---|---|
| 2025 | Guatemala | 4 | **28,197,625** | 8.755 | 3,307,532 | 8.525 | **57%** |
| 2024 | Guatemala | 4 | 19,956,168 | 9.872 | 3,686,307 | 5.414 | -9% |
| 2023 | Guatemala | 4 | 22,534,619 | 11.594 | 3,767,659 | 5.981 | |

# Taiwan Green Coffee Import 2023/01 - 2023/12

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| 中文名稱 | 英文名稱 | ranking | 金額(USD美元) | % | 重量(KGM) | USD/Kg Avg/kg |
|---|---|---|---|---|---|---|
| 國別/地區 | Global-Country | --- | 194,361,314 | 100 | 37,179,127 | 5.228 |
| | | | | | | |
| 巴西 | Brazil | 1 | 48,564,047 | 24.986 | 12,246,498 | 3.966 |
| 衣索比亞 | Ethiopia | 2 | 34,277,373 | 17.636 | 4,946,146 | 6.930 |
| 哥倫比亞 | Colombia | 3 | 30,245,726 | 15.562 | 5,357,823 | 5.645 |
| 瓜地馬拉 | Guatemala | 4 | 22,534,619 | 11.594 | 3,767,659 | 5.981 |
| 印尼 | Indonesia | 5 | 17,667,350 | 9.090 | 4,110,043 | 4.299 |
| 尼加拉瓜 | Nicaragua | 6 | 10,799,507 | 5.556 | 2,213,153 | 4.880 |
| **巴拿馬** | **Panama** | **7** | **5,856,828** | **3.013** | **171,535** | **34.144** |
| 哥斯大黎加 | Costa Rica | 8 | 5,582,216 | 2.872 | 584,984 | 9.543 |
| 越南 | Viet Nam | 9 | 2,863,726 | 1.473 | 999,118 | 2.866 |
| 巴布亞新幾內亞 | Papua New Guinea | 10 | 2,200,231 | 1.132 | 471,005 | 4.671 |

# Taiwan Green Coffee Import 2024/01 - 2024/12

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| | | ranking | (USD美元) | % | (KGM) | USD/Kg Avg/kg |
|---|---|---|---|---|---|---|
| 國別/地區 | Global-Country | --- | 202,156,869 | 100 | 38,882,507 | 5.199 |
| | | | | | | |
| 巴西 | Brazil | 1 | 57,701,498 | 28.543 | 13,938,608 | 4.140 |
| 衣索比亞 | Ethiopia | 2 | 37,542,326 | 18.571 | 6,133,630 | 6.121 |
| 哥倫比亞 | Colombia | 3 | 26,697,173 | 13.206 | 4,827,049 | 5.531 |
| **瓜地馬拉** | **Guatemala** | **4** | **19,956,168** | **9.872** | **3,686,307** | **5.414** |
| 印尼 | Indonesia | 5 | 19,695,860 | 9.743 | 3,438,661 | 5.728 |
| 尼加拉瓜 | Nicaragua | 6 | 8,316,739 | 4.114 | 1,685,655 | 4.934 |
| 越南 | Viet Nam | 7 | 6,515,002 | 3.223 | 1,601,133 | 4.069 |
| 哥斯大黎加 | Costa Rica | 8 | 5,068,341 | 2.507 | 621,887 | 8.150 |
| 巴拿馬 | Panama | 9 | 4,727,987 | 2.339 | 164,528 | 28.737 |
| 宏都拉斯 | Honduras | 10 | 2,410,190 | 1.192 | 417,925 | 5.767 |

# Taiwan Green Coffee Import 2025/01 - 2025/12

| 中文名稱 | 英文名稱 | ranking | USD(美元) | % | (KGM) | Avg/Kg |
|---|---|---|---|---|---|---|
| 全球_國別/地區 | Global-Country | --- | 322,057,031 | 100 | 43,584,863 | 7.389 |
| | | | | | | |
| 巴西 | Brazil | 1 | 103,893,670 | 32.259 | 15,118,641 | 6.872 |
| 衣索比亞 | Ethiopia | 2 | 70,672,061 | 21.944 | 9,296,535 | 7.602 |
| 哥倫比亞 | Colombia | 3 | 49,200,230 | 15.277 | 5,797,357 | 8.487 |
| **瓜地馬拉** | **Guatemala** | **4** | **28,197,625** | **8.755** | **3,307,532** | **8.525** |
| 印尼 | Indonesia | 5 | 20,359,844 | 6.322 | 3,449,422 | 5.902 |
| 尼加拉瓜 | Nicaragua | 6 | 15,656,705 | 4.861 | 2,230,283 | 7.020 |
| 越南 | Viet Nam | 7 | 8,545,180 | 2.653 | 1,564,582 | 5.462 |
| 哥斯大黎加 | Costa Rica | 8 | 4,146,807 | 1.288 | 415,521 | 9.980 |
| 巴拿馬 | Panama | 9 | 3,839,725 | 1.192 | 154,156 | 24.908 |
| 巴布亞紐幾內亞 | Papua New Guinea | 10 | 2,693,581 | 0.836 | 356,640 | 7.553 |

# Taiwan Green Coffee Import 2026/01 - 2026/06

| 中文名稱 | 英文名稱 | ranking | 金額(USD) | % | 重量(KGM) | Avg/Kg |
|---|---|---|---|---|---|---|
| 全球_國別/地區 | Global-Country | --- | 140,823,536 | 100 | 17,633,788 | 7.986 |
| | | | | | | |
| 巴西 | Brazil | 1 | 33,501,374 | 23.790 | 4,354,907 | 7.693 |
| 衣索比亞 | Ethiopia | 2 | 30,854,555 | 21.910 | 3,761,736 | 8.202 |
| 坦尚尼亞 | United Republic of Tanzania | 3 | 21,647,786 | 15.372 | 2,666,423 | 8.119 |
| 哥倫比亞 | Colombia | 4 | 17,510,371 | 12.434 | 1,893,317 | 9.249 |
| **瓜地馬拉** | **Guatemala** | **5** | **9,571,481** | **6.797** | **1,139,297** | **8.401** |
| 印尼 | Indonesia | 6 | 7,114,303 | 5.052 | 1,173,759 | 6.061 |
| 越南 | Viet Nam | 7 | 3,942,223 | 2.799 | 837,831 | 4.705 |
| 肯亞 | Kenya | 8 | 2,161,505 | 1.535 | 230,692 | 9.370 |
| 哥斯大黎加 | Costa Rica | 9 | 1,834,546 | 1.303 | 183,339 | 10.006 |
| 巴拿馬 | Panama | 10 | 1,601,664 | 1.137 | 45,851 | 34.932 |

# Taiwan Coffee Market

Growing **specialty** market

High acceptance of **origin coffee**

# Taiwan main sourcing regions

| Production region | Taiwan Market Positioning |
|---|---|
| Huehuetenango | Focus on floral, citrus, and specialty pour-over profiles |
| Antigua | Classic chocolate flavor profile |
| Atitlán | Clean acidity and high sweetness |
| Cobán | Fermentation notes and spice characteristics |
| Acatenango | High-altitude specialty market |
| Fraijanes | Commonly used in medium-dark roast blends |

# Guatemala coffee

| Characteristics | Acceptance in Taiwan |
| --- | --- |
| Chocolate | High |
| Caramel sweetness | High |
| Citrus acidity | High |
| Floral notes | Moderately high |
| Full body | High |
| Balance | Extremely high |

# Guatemala Coffee position in Taiwan

| Category | Representing countries |
|---|---|
| Commercial Base | Brazil, Vietname, Indonesia |
| Balanced Specialty | Guatemala, Colombia |
| Floral Specialty | Guatemala, Ethiopia, Kenya |
| SOE Espresso | Guatemala, Costa Rica |
| High-End Auction Lot | Panama, Ethiopia, Guatemala |

# Guatemala Specialty Coffee in Taiwan

| Period | Shifts in the Taiwan Market | Guatemala's Role |
|---|---|---|
| Before 2005 | Dominance of espresso blends | Supporting role in blends |
| 2010–2015 | Rise of the Third Wave coffee movement | Entering the single-origin market |
| 2015–2020 | Maturation of the pour-over coffee culture | Becoming a mainstay of specialty coffee |
| 2020–2025 | Growth of SOE (Single Origin Espresso) and specialty coffee chains | A core origin known for high consistency |

# Taiwan & Japan Similarity

| Characteristics | Japan | Taiwan |
|---|---|---|
| Preference for medium roasts | high | High |
| Balance | high | High |
| Clean cup | high | High |
| Emphasis on terroir | high | High |
| Tolerance for over-fermentation | Low | Moderately high |

# Taiwan Coffee Consumer Market Observation And Analysis

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Taiwan's coffee market has shown **a booming development** and **high competition** trend in recent years

Coffee has transformed from a "**Exquisite enjoyment**" into

**"Essential Daily needs"**

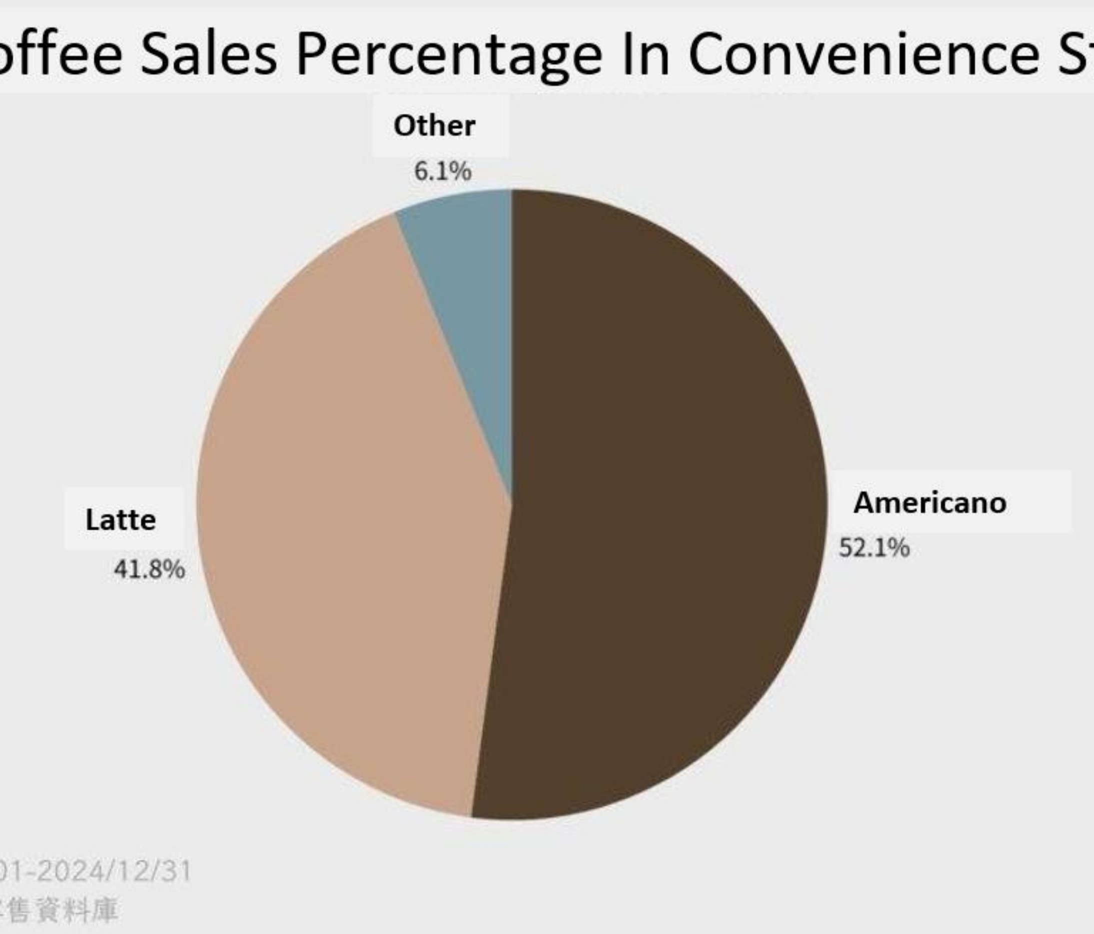
# Specialty Coffee Flavor Preferences

- Specialty coffee tends to be light-roasted to present bright, multi-layered flavors like **floral, fruity, and tea-like**; highlighting the distinct terroir of its origin.
- Consumers prioritize the subtlety and personalization of flavor when choosing specialty coffee, with **pour-over brewing** being particularly popular.
- Buyers are willing to pay extra for pour-over specialty coffee,  signifying their emphasis on experience and quality
- Specialty coffee market emphasizes **sustainability**, **origin stories**, and **social responsibility**, representing a segment of consumers seeking a lifestyle and cultural symbols.

# Most Popular Types Of Coffee

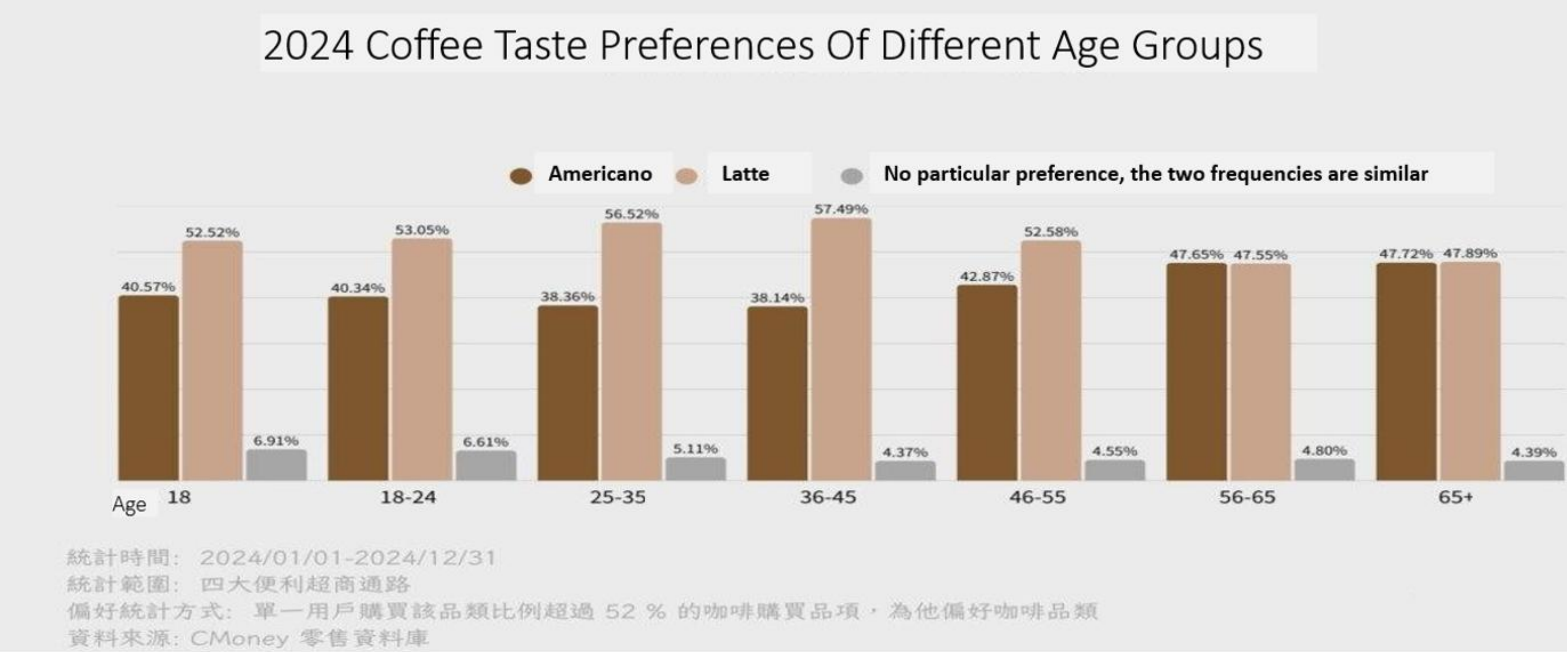
- **Latte and Americano :** the respondents who have a habit of drinking coffee, **Latte** had the highest preference (over 60%), secondly is **Americano**
- **Hot and cold :** the preference of iced coffee and hot coffee is roughly equal, with no obvious one-sided trend
- **Flavor innovation :** Innovative flavored beverages, such as **fruit-flavored coffee** (Sicilian lemon coffee) had seen significant growth, it can effectively attract the "adventurers of new tastes" in young generation

# Coffee Sales Percentage In Convenience Stores

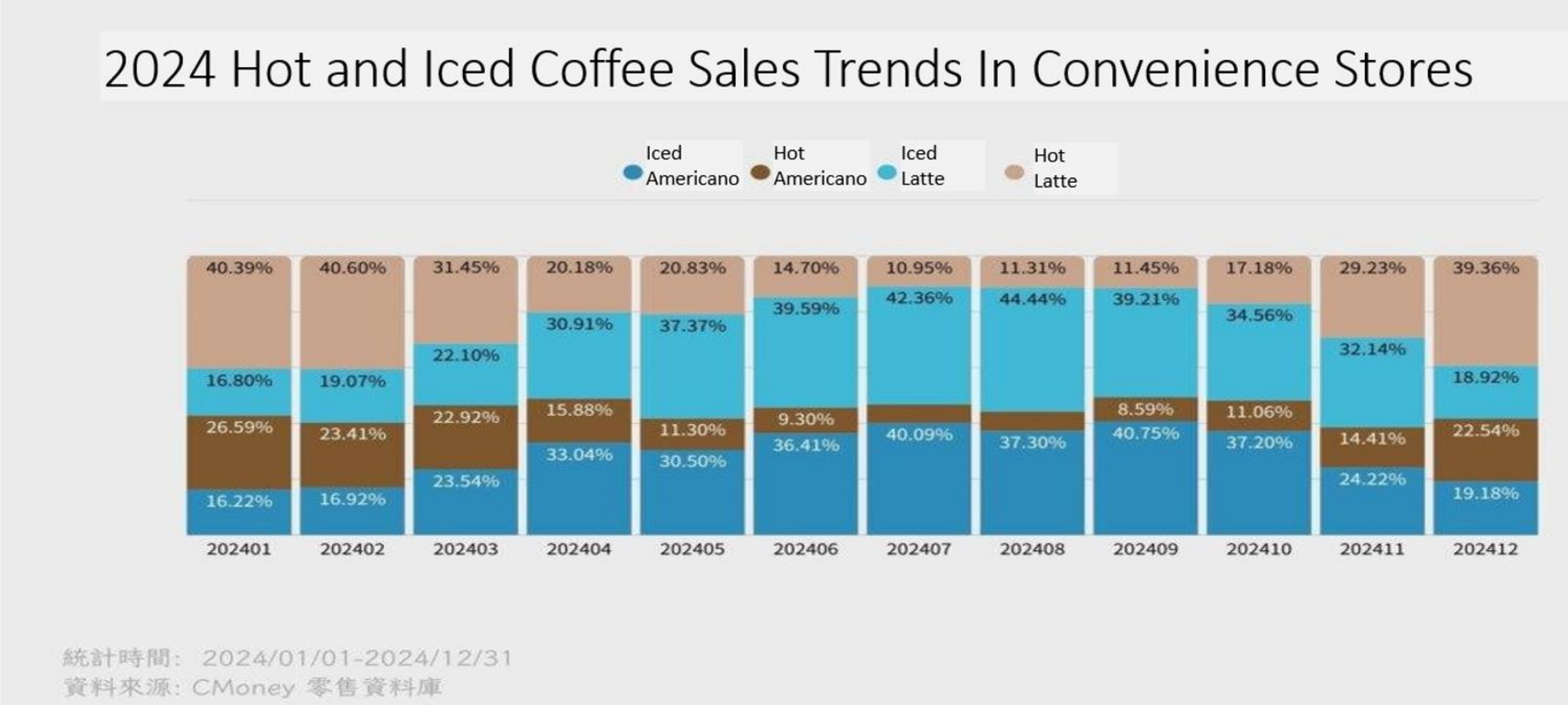



# Decoding Coffee CVS Consumer Behavior In 2024

# Consumer age distribution

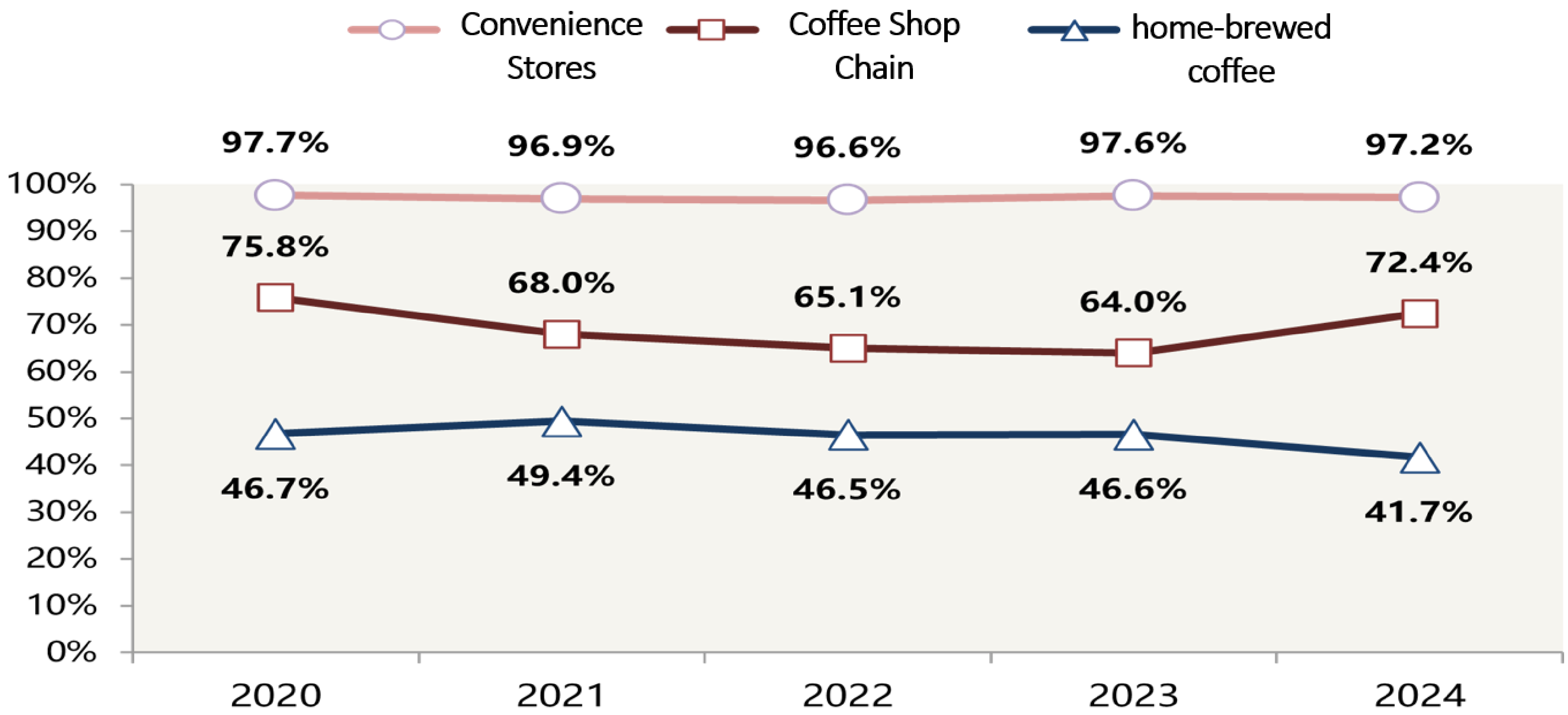


# Hot And Iced Coffee Sales Trends In Convenience Stores



# 40 up generation's are biggest coffee drinker

# 2020～2024 Coffee Drinking Location Analysis



# Convenient Coffee Locations

7-11( City café) : **8,200 shops**
FamilyMart (Let's café): **4,470 shop**
Hi-Life ( Hi-café):**1,800 shops**
Ok Mart: 700
PX-Mart (Off Café): **1,280 shops**
Individual Coffee shops : **6,000 shops**



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34 CONGRESO DE LA CAFICULTURA
GUATEMALA


# Chain Brands And Price Points

- **Price Range:** the majority of consumers (over 50%) spend **an average of $51–100 NTD/cup of coffee**
- Convenience stores dominate in sales volume, **(7-11,Familymart**, **Hi-Life)**
- **Starbucks** maintains the highest market share and brand awareness across all age groups due to its **comfortable ambience**
- **Other brand : Louisa Coffee , 85°C,Cama**, win on **price** and **convenience location**

# Comparison: Specialty Coffee Shops Vs Chain Coffee Shops

| Item | Specialty Coffee Shops | Chain Coffee Shops |
|---|---|---|
| Flavor | **Light roast**, distinct floral/fruity notes, bright acidity, multi-layered | Mainly Latte & Americano, stable taste, emphasizes milk and dark roast |
| Consumer Preference | Refined flavors, **prefer pour-over**, value experience and personalization | Mass-market taste, focus on convenience and brand identity |
| Purchase Motive | Pursuit of quality, flavor differentiation, and **cultural identity** | Emphasis on functionality, price, and purchase convenience |
| Market Trend | Focus on sustainability and **local characteristics**; significant growth in specialty market | **High market share** for chains; quick-service remains popular |

# Comparison: Specialty Coffee Shops Vs Chain Coffee Shops

**In summary:**

Taiwan's specialty coffee focuses on **flavor complexity** and brand **stories**, appealing to those who seek **high quality**.

Coffee chains target the mass market with a focus on **stability and convenience**.

Each has its own clear niche and customer base

# Summary of Core Differences

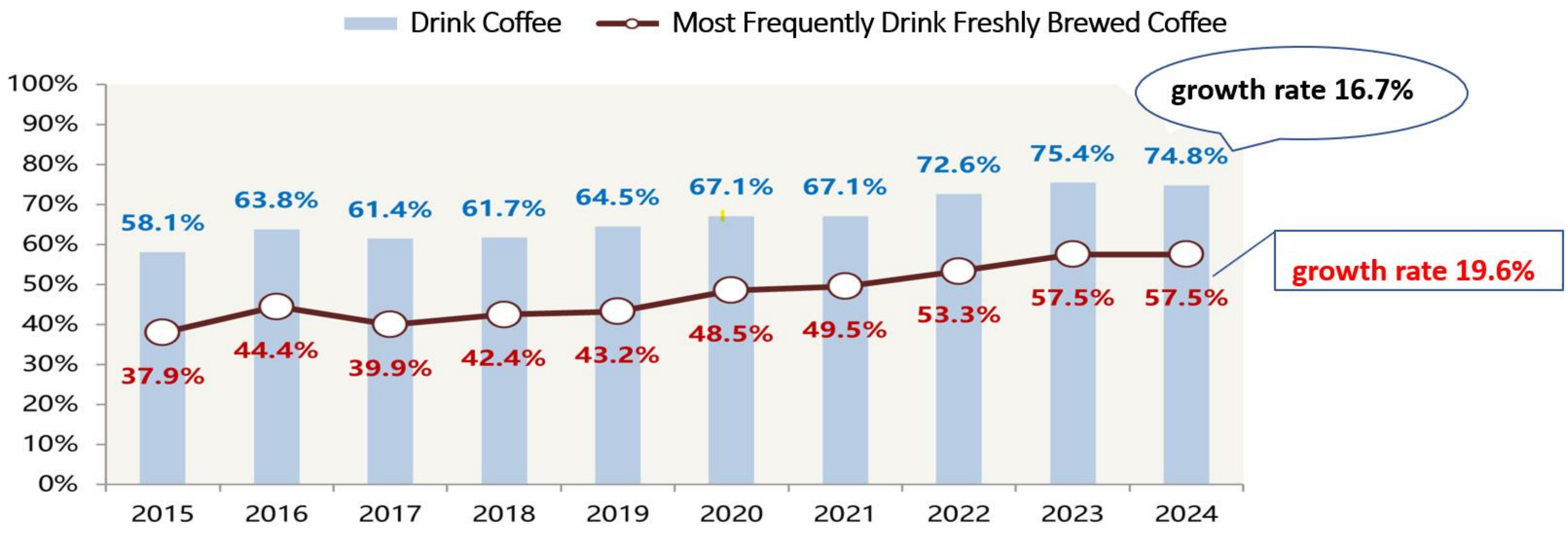
**Specialty coffee market is largely driven by younger generations - especially Millennials**, who prioritize quality and cultural experience.

Conversely, chain coffee is popular across all age groups, but appeals more to those prioritizing **convenience and price**

# Taiwan Coffee Market Scale and Growth

- **Market with high and sustained growth**
- **High per capita consumption:** In 2023, total consumption was about 4.24 billion cups, averaging **180 cups** / person per year
- **Freshly brewed coffee is the mainstream**: 57.5% of coffee drinkers prefer "freshly brewed coffee," with a (19.6% over 10 years) outpacing the overall coffee-drinking population, the market growth rate t expansion is driven by **freshly brewed coffee**

# Drink Coffee VS Most Frequently Drink Freshly Brewed Coffee



# Promotion Strategy

## Establish "Guatemala Coffee Taiwan“

Focus on **coffee-growing regions** each year, deepening **the region's story** and flavor characteristics.

Promote the **"Producer to Consumer"** model, inviting plantation owners to Taiwan to share their experiences and establish direct connections between producers and consumers.

# Future Vision

Festival

Guatemala Coffee Week

Innovation Forum

Origin Seminar

Producer Visit

Cup of Excellence coffee sharing


LIBERTAD
15 DE
SEPTIEMBRE
DE 1821


Café
Azotea
Café con Cultura




# Taiwan Coffee Market Expectation

**C**onsumer

Reasonable Price

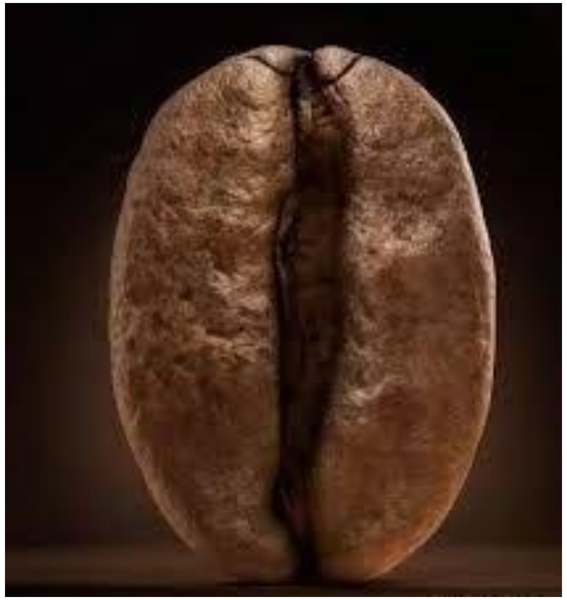
**C**onvenience

**C**offee

Good Quality

**C**hoice

Diversified & Unique



# Guatemala Coffee

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## Value

Guatemalan coffee in Taiwan will be more than just coffee

it will represent

**Terroir, Culture, Sustainability, Premium and People**

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# G R A C I A S

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