

From Commodity to Premium: Brazilian Coffee, Consumer Dynamics and Sustainable Market Transformation in Portugal Under Global Crises (2019–2025)

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Abstract

This research explores the evolution of Brazilian coffee exporting to Portugal in terms of changes in the global value chain, specifically considering the effects of the shockwaves experienced systemically; the dynamic of coffee prices; and the increasing pressure toward sustainability during the period 2019–2025. The objective of this research is to examine how the above-mentioned forces influenced patterns of trade and the position of the Brazilian coffee in Portugal. In order to achieve this objective, the study employs a mixed methodological framework (combining quantitative statistical methods, with qualitative techniques), using trade data from COMEXSTAT for quantitative data and questionnaires for qualitative insight regarding expert opinions from AICEP Portugal and ApexBrasil. Quantitative analysis focused on trends in both volume and value of coffee exports by Brazil to Portugal. Qualitatively captured the perceptions of respondents, and their strategies relative to Brazil's market position within the coffee industry. Specifically, there has been a large increase in export value in spite of considerable fluctuations in actual physical export quantities. Such an increase indicates an upward movement in Brazil's market position as well as an upgrade towards a “premium” product. The results of the study show that recent global crises and inflation have strongly impacted the dynamics of international trade. Although Portugal is not the largest importer of coffee globally, it is a remarkable example for Brazilian exports, given the tradition and similarities between the two countries. In addition, Portugal has a developing culture for coffee consumption, accepting high quality, sustainable coffee and even reasonable prices. The contributions of this paper can be seen at two levels. Firstly, the study bridge two bodies of knowledge, quantitative trade analysis, and institutional theory, which are typically separate in academic inquiry. Secondly, the paper provides an empiric evidence of the transition from commodity-based to value-added export strategies.

Keywords

Brazilian coffee exports; global value chains; premiumization; price dynamics; sustainability; Brazil–Portugal trade; consumer behavior

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Introduction

Recent years have seen significant transformation of the global coffee industry due to several major shocks to the systems including COVID-19, geopolitical factors, climate-related issues and a growing focus on sustainable practices. The responses to these challenges have shown that the global coffee value chains have weak points and there has been a need for them to be transformed into more resilient and focused on the creation of value types of models (De Felice et al., 2025; Grabs et al., 2026). As a result of these transformations coffee, which for decades was treated simply as a raw material or commodity, is currently experiencing processes of differentiation, premiumization, and sustainability driven upgrading (Barreto

Peixoto et al., 2022). At the same time the volatility of prices for coffee and disruptions to the supply chain are changing the ways in which trade is carried out and will influence both producer and consuming countries (International Coffee Organization, 2024).

In terms of economic significance, Brazil is the largest player in the global coffee economy, as well as the largest producer and exporter of coffee. Among all European markets Portugal is particularly interesting. It is not among the largest importers of Brazilian coffee. However, it has a rich and highly developed coffee culture. Additionally, it is also one of the few European markets that shows an increase in purchasing power of consumers willing to buy premium and sustainably produced coffee (Resendes, 2025) and therefore it is a perfect illustration of a country where established consumption patterns are challenged by and respond to structural changes in global demand and supply.

At the same time, this paper aims to answer the question: What impact did global crises, changes in prices and concerns about environment have on the development and strategic position of Brazilian coffee exported to Portugal from 2019 to 2025? To address this question the study used a combination of a quantitative analysis, based on statistical data about foreign trade and qualitative data collected, via interviews with representatives of institutions involved in foreign trade. The research presented here contributes to existing studies in two areas: Firstly, it examines the relationship between Brazil and Portugal in the area of trade of coffee. Secondly, it demonstrates empirically, how trade relationships can change from purely volume-based to value-based. And thirdly, it is demonstrated that at a global level, at an international level, premium and sustainable products represent great advantages on international markets.

1. Literature review

1.1. Reconfiguring the global coffee value chain under systemic shocks

In the last couple of years, the coffee sector worldwide has changed its structure quite a bit because of the systemic shocks like the worldwide lockdown, due to the coronavirus, the tensions between different countries, and climate change (De Felice et al., 2025; Grabs et al., 2026). Because of these upheavals, the coffee production systems throughout the world that were separated geographically showed that they were quite fragile (International Coffee Organization, 2024). The ways the coffee value chains operate involve that coffee producing countries such as Brazil get only a very small percentage of the money whereas the European markets, which are the biggest consuming ones, are the ones carrying out the main commercial activities (Barreto Peixoto et al., 2022). Besides, numerous studies suggest that the effect of a crisis is not limited to merely disrupting trade but it also leads to the modification of the global value chains, by changing sourcing strategies, market access, and investment patterns (Grabs et al., 2026). Under these circumstances, a good example of a sector that is undergoing a major change from globalization driven primarily by efficiency to resilience-oriented restructuring is the coffee sector (De Felice et al., 2025).

1.2. Price dynamics, sustainability pressures, and structural adjustment in coffee trade

The global coffee industry is increasingly susceptible to volatile price swings resulting from changing weather conditions, disruption in supply chains and fluctuating consumer demand (Grabs et al., 2026). As a result of increased concerns regarding environmental issues, such as greenhouse gas emissions and resource utilization, there has been a shift toward lifecycle assessment methodology for coffee production and consumption (Zhao et al., 2024). While research shows that farming innovations, particularly cooperative breeding and technological advancements, continue to be major drivers of improved farm resilience (Ngure & Watanabe, 2024), many companies within the global coffee sector have begun transitioning toward the adoption of circular economy models, that promote recycling or reusing waste products generated during coffee processing, such as using coffee grounds for bio-fertilizers (Pongsiriyakul et al., 2024). Additionally, the role of certifications and sustainability standards continues to grow as these programs enable firms, to differentiate themselves in global markets (Moda et al., 2022). Findings from recent studies conducted in Brazil highlight that the trend of growing premiumization of coffee production in conjunction with product differentiation based upon quality, technological innovation and export orientation is driving increased competition in the global marketplace (Sera et al., 2025). In addition, to the increase in product differentiation based upon sustainability standards, the growth of sustainable business practices is also transforming how firms view their own sustainability objectives. For example, Kyrddoda et al. (2025), recently reported on how Brazilian farmers who engage in sustainable business practices develop internal firm-level organizational identities that align with their firm's long-term environmental and social goals. The increasing volatility in global coffee prices and the growing segmentation of producing countries' pricing systems are two key characteristics of recent trends in global coffee markets. Global coffee bean prices varied from \$4-\$10 per kilogram over a year-long period ending March 31st, 2025 according to

quality and country of origin (International Coffee Organization, 2024; World Bank Data, 2025). Brazil, as the world's largest coffee-producing nation has an average price range for green beans ranging from \$6-\$9 per kilogram reflecting its large scale, diversified production model. Countries primarily engaged in producing low-cost robusta coffee such as Vietnam and Uganda generally report average prices ranging from \$4-\$6 per kilogram compared to high-priced segments comprised primarily of arabica-producing nations such as Colombia and Ethiopia, with average price ranges of \$7-\$12 per kilogram for specialty coffee grades. Price differences among these countries reflect differences in costs structures, quality differentiations, certification schemes and access to higher-value added segments of the global coffee value chain (De Felice et al., 2025; Grabs et al., 2026), illustrating the structural disparities between producing and consuming regions.

Table no. 1. Average Coffee Prices by Country and Type (2025)

Country	Type of Coffee	Average Price (USD/kg)	Quality Positioning
Cuba	Arabica	8-12	Niche / Premium
Ethiopia	Arabica	6-12	Premium / Specialty
Colombia	Arabica	7-10	High quality
Brazil	Arabica & Robusta	6-9	Medium / Competitive
Vietnam	Robusta	4-6	Low-cost / Industrial
Uganda	Robusta	4-6	Low-cost

1.3. Institutional Drivers of Sustainability in Coffee Value Chains

The institutional environment continues to be a significant variable for sustainability development within the coffee supply chain. Literature emphasizes that sustainability outcomes are impacted by the interaction among sustainability-related policies established at the macro- and meso- levels (industry structure) and micro-level practices established by firms (Ramírez-Gómez et al., 2022).

The increased number of multi-stakeholder platforms and global programs supporting sustainable sourcing indicates better cooperation across the value chain (Global Coffee Platform, 2024). However, both forms of platforms demonstrate the trade-offs between business efficiencies and environmental and social objectives (De Felice et al., 2025). Another example demonstrating the integration of sustainability into coffee businesses' financial models and investments include the emergence of “green” forms of capital accumulation (Grabs et al., 2026). This has demonstrated how institutions function not only as instruments for regulation, but also as mechanisms for market transformation. Moreover, sustainability governance of coffee systems is being shaped by a variety of private and public initiatives, indicating the growing complexity of voluntary and regulatory sustainability frameworks in global value chains (Wright et al., 2024).

1.4. Evolving Consumer Preferences and Sustainable Consumption Patterns

The way consumers purchase goods and services is undergoing significant change in many affluent nations, as people increasingly consider environmental issues and social impacts when making purchasing decisions. For instance, coffee that is certified as sustainably produced is becoming an attractive option for consumers (Merbah & Benito-Hernández, 2024). Previous studies indicate that consumers will pay somewhat higher prices for products with certification labels that support their purchases based on ethically driven decision-making (Merbah & Benito-Hernández, 2024). However, the impact of social norms, information, and behaviorally-based elements upon guiding consumer choices should not be discounted (Jada & van den Berg, 2024). Furthermore, the ways in which consumers perceive the world around them along with their mental constructs regarding sustainability contribute substantially to the adoption of sustainable consumption behaviors (van den Boom et al., 2023). Additionally, these emerging trends illustrate that the demand side dynamics are supporting the structural changes taking place in global coffee markets.

1.5. Portugal as a Transforming Consumption Market within the European Context

Portugal is an emerging coffee market that has undergone numerous developments while maintaining strong cultural roots (Resendes, 2025). The COVID-19 pandemic accelerated the shift in how people consume their coffee. It moved from predominantly being consumed in cafes to increasingly being consumed in homes. As a result, there has been an increase in demand for packaged and capsule-based coffee products (Resendes, 2025), but simultaneously, consumers have demonstrated increasing interest in premium, specialty and sustainable-sourced coffees. Due to these shifts, Portugal provides an interesting case study for Europe's evolving coffee markets in terms of both the continuing influence of established coffee habits while also developing new sustainable coffee consumer behaviors.

1.6. Global Crises and the Reconfiguration of Brazil–Europe Trade Relations

As a result of the ongoing global crisis there have been significant disruptions in the flow of international trade and investment. These trends have led to the reconfiguration of existing trade networks related to coffee production and distribution, specifically regarding trade among Brazil and European Union member states (Trocinescu, 2023), and therefore can lead to new market demands and shifts in the structure of coffee consumption. Brazil is the largest coffee producing country globally and as such represents an opportunity for examining the structural relationship between a primary coffee producer (Brazil) and a large European consuming nation. This research seeks to identify the ways in which global crises and institutional changes affect trade volumes and consumer behavior in the coffee industry. Additionally, it provides a deeper examination of the coffee trade relationship between Brazil and Portugal within the larger framework of the globalization of supply chains and with consideration for the factors of sustainability, institutions, and demand.

2. Research methodology

The study has been conducted through a mixed methodology approach. The combination of both quantitative and qualitative methodologies will allow a complete understanding of the characteristics of Brazilian coffee exports to Portugal. The data collection took place between April 3rd – 10th. The data source used for the quantitative part is secondary data extracted from Comexstat, which is a public foreign trade statistic database administered by the Ministry of Development, Industry, Trade, and Services (MDIC). MDIC is responsible for providing Brazil's official foreign trade statistics. Secondary data includes all of the most important varieties of coffee products (non-roasted, roasted, decaffeinated and soluble), as well as the period from 2019 until 2025. Statistical analyses were applied descriptively to determine how the volume exported of Brazilian coffee exported to Portugal correlates with its value (USD) in each year. Results are illustrated in a comparative table to reveal the dominant trading patterns and fluctuations in price trends during this time.

Quantitative results will be supplemented with qualitative findings derived from a structured questionnaire submitted electronically via Google forms. The first questionnaire was developed in Portuguese language and contained ten questions that were arranged within seven thematic areas. The questionnaire was distributed to Mr. Hélio Campos. He is Director of the Portuguese Trade & Investment Agency in Seoul, South Korea and serves as the Economic and Commercial Counsellor of AICEP Portugal. AICEP is an autonomous agency of the Government of Portugal that is responsible for promoting foreign trade and investment.

For obtaining viewpoints related to export activities, the second questionnaire was also prepared in Portuguese language. It consisted of ten questions separated into six thematic sections. Mr. Vincent Furlan received the second questionnaire. He works as Policy Specialist at ApexBrasil in Brussels. ApexBrasil is an export support agency responsible for supporting Brazil's international positioning and export capabilities. Consequently, it will offer a comprehensive view on Brazil's trade policies, competing conditions and trade relationships. Data collected through these questionnaires was analyzed by applying descriptive and comparative approaches in addition to combining quantitative trends with qualitative interpretations. This method allows for a deeper knowledge of Brazil-Portugal coffee trade activities focusing on market conditions and strategic considerations along the entire supply chain of world coffee markets. Questionnaires were created in line with main research objectives and thematic dimensions from the literature review such as sustainability, price dynamics, consumer preference, competitiveness, and international trade relations. It contained closed and open-ended questions so respondents could give a structured evaluation and qualitative insights at the same time about the change of Brazilian coffee exports to Portugal.

In order to achieve content validity, the questionnaires employed themes features in the most recent academic studies on coffee value chains, sustainability, and international trade. The draft of the questionnaires was also critiqued and improved for transparency, logicity, and research goal alignment. Respondents were chosen by means of non-random sampling according to their institutional knowledge and professional background in international trade and coffee market issues. The representatives of AICEP Portugal and ApexBrasil were taken as examples since both institutions contribute significantly to cross-border trade between the two countries and have expert knowledge about European coffee markets, competitiveness in exports, sustainability standards, and international consumer trends.

3. Results

This section details the chief empirical results on how the Brazilian coffee exports to Portugal changed from the year 2019 till 2025. It covers the quantity and value of exports for all main coffee product categories such as non-roasted, roasted, decaffeinated, and soluble coffee. These findings are concisely presented in Table no. 2.

Table no. 2. Evolution of Brazilian Coffee Exports to Portugal (2019–2025)

Year	2019		2020		2021		2024		2025	
Indicator	Net weight (tons)	Value (USD)	Net weight (tons)	Value (USD)	Net weight (tons)	Value (USD)	Net weight (tons)	Value (USD)	Net weight (tons)	Value (USD)
Unroasted, non-decaffeinated coffee beans	7.906.810	16.875.802	5.828.036	12.624.972	5.024.005	13.599.745	10.309.420	42.917.145	7.505.487	53.184.332
Unroasted, non-decaffeinated coffee, except in bean form	38.445	71.501	224	1.207	63	410	496	7.763	52	1.227
Roasted coffee, not decaffeinated	7.575	47.603	17.373	85.084	30.573	128.964	79.196	492.964	94.777	1.050.440
Instant coffee, even decaffeinated	229	2.498	166	5.197	809	25.827	41	12.312	240	21.622
Roasted coffee, decaffeinated	N/A	N/A	5	184	20	225	N/A	N/A	4.440	84.620
Unroasted, decaffeinated coffee	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	13	563
TOTAL	7,953,059	16,997,404	5,845,804	12,716,644	5,055,470	13,755,171	10,389,153	43,430,184	7,605,009	54,342,804

Table no. 2 presents a descriptive analysis of coffee exports from Brazil to Portugal, in the period 2019–2025. Several types of coffee are presented, such as Unroasted, non-decaffeinated coffee beans; Unroasted, non-decaffeinated coffee, except in bean form; Roasted coffee, not decaffeinated; Instant coffee, even decaffeinated; Roasted coffee, decaffeinated; and Unroasted, decaffeinated coffee. Table no. 2 shows that the total amount of coffee imported by Portugal from Brazil decreased in 2020 by 26.5% compared to 2019.

In order to have a Portuguese perspective and an importer's perspective, we chose to have Mr. Hélio Campos, from AICEP Portugal, as our interlocutor. Following the qualitative research obtained with Mr. Hélio Campos, he conveyed that he observes a relative stability in terms of the evolution of Brazilian coffee imports into Portugal, during the period 2019–2025. The respondent associated Brazilian coffee with the “premium” segment of the Portuguese market, following price increases from approximately 2.1 USD/kg in 2019 to 7.1 USD/kg in 2025. The main factors that influence the choice of coffee for the Portuguese are price, quality, and brand. According to Mr. Hélio, it is uncertain whether in the future Portugal or Europe will turn to cheaper coffee suppliers. But if so, Colombia could be a competitor for Brazil in terms of coffee. The AICEP representative believes that the EU-Mercosur agreement can moderately increase Brazilian coffee exports to Europe. And the main trends for Brazilian coffee in Portugal in the next 3–5 years is to have stability in terms of demand.

In order to have both the Brazilian perspective and the exporter's perspective, the interlocutor was Mr. Vincent Furlan, from ApexBrasil. Mr. Vincent Furlan considers the Portuguese market, for coffee exports from Brazil, to be one of very high importance. Mr. Furlan, like Mr. Campos, believes that Brazilian coffee is positioned as a premium product for Portugal. The ApexBrasil representative believes that the main factors that have impacted the increase in Brazilian coffee prices were climatic conditions, production costs, increased global demand and exchange rate fluctuations. Mr. Furlan believes that coffee prices can affect coffee competitiveness, in moderation, and the main competitors could be Colombia and Ethiopia. The ApexBrasil representative indicated that sustainability certifications have a moderate influence on Brazilian coffee exports. Unlike the representative of AICEP Portugal, who believes that the EU-Mercosur agreement can moderately increase Brazilian coffee exports to Europe, the representative of ApexBrasil believes that this agreement has limited chances of leading to an increase in Brazilian coffee exports to Europe.

4. Discussion

The most popular coffee variety exported from Brazil to the Portuguese market is Unroasted, non-decaffeinated coffee beans, i.e. green coffee, and Roasted coffee, not decaffeinated. Most companies buy Unroasted, non-decaffeinated coffee beans, which are then roasted. Portugal is also an entry market for coffee in Europe, in addition to the ports of Hamburg, Antwerp or Rotterdam. This green coffee is purchased from Brazil, then roasted in Italy, Germany or Austria, and sold under local brands. For example, the famous coffee company, Starbucks, sells Brazilian coffee. With regard to geographical and logistical aspects, most Brazilian coffee shipments to Portugal take place via sea, a commonality associated with bulk commodities trade. Moreover, a significant portion of Brazil's coffee exports originate from the State of Minas Gerais, Brazil's largest coffee-producing region. Hence, Brazil maintains its role as a global supply hub. Although export values for Brazil to Portugal are rising, Portugal's ranking within Brazil's export portfolio increased from 39th place in 2019 to 37th place in 2025, surpassed by Germany, U.S., Italy, Japan, Belgium and Turkey.

The empirical data shows that coffee trade between Brazil and Portugal, during the period 2019-2025, shows real changes. While the volume of exports fluctuated considerably, the USD value of coffee exports from Brazil to Portugal increased considerably. This aspect indicates that Brazilian coffee consumers in Portugal are more oriented towards quality than price. This behavior positions Brazilian coffee as premium. The result suggests that value chains in the world are about to reconfigure, as also underlined by the recent specialized literature (De Felice et al., 2025; Grabs et al., 2026). This substantial increase in the value of Brazilian coffee exports to Portugal, the differences between the quantity imported and the USD value paid by the Portuguese market, demonstrates a change in strategy in coffee consumption. Thus, quality is positioned above quantity, as far as Brazilian coffee is concerned on the international market.

It is important to mention that the results of the qualitative research conducted on AICEP Portugal and ApexBrasil support the fact that Brazilian coffee is gaining image on the international market and the product is perceived as a premium, high-quality product on the European market. Sustainability certifications, origin branding and traceability mechanisms appear to play an increasingly important role in shaping consumer preferences and competitive positioning, supporting previous findings from Wright et al. (2024) and Ramírez-Gómez et al. (2022). Specialized academic literature highlights the fact that consumer behavior is constantly changing, and focuses on sustainable consumption (Merbah & Benito-Hernández, 2024). Portuguese consumers increasingly associate coffee consumption with quality, sustainability and ethical sourcing practices, even in the context of rising prices and global economic uncertainty.

The qualitative findings also suggest that Portugal's strong coffee consumption culture and increasing per capita consumption contribute to maintaining demand for Brazilian coffee products. At the same time, the interview highlighted the fact that sustainability (environmental impact, traceability, certifications) are particularly important for Portuguese consumers.

It is considered that the main opportunities for Brazilian coffee on the European market in the coming years are the expansion of the premium segment, and a greater valorisation of the origin of the coffee. And the main challenge for Brazilian coffee, in expanding and consolidating its position on the European market, consists in the work of building the image and brand of Brazil for coffee, so that it can even more pass on the image of premium / good quality products, in front of consumers.

Conclusions

The authors of this study examine the development of Brazilian coffee exports to Portugal from 2019 to 2025, focusing on the impact of global crisis, price movement and sustainability pressure on trade structure and position of Brazil in global supply chain. More specifically, the authors assess the relation between export quantities and export values and analyse the degree to which Brazilian coffee transitions from commodity-based products towards differentiated, high-value products with premium orientation. Based on methodology point of view, researchers use a mixed methodology.

Authors of study used secondary source of quantitative information that they received from COMEXSTAT in respect of most important types of coffee (roasted, green, decaffeinated, and soluble), during the time frame of 2019 – 2025. Data that were collected were processed using a set of descriptive statistical methods what enabled year-to-year comparison of export quantity (in tons) and export value (USD). Main analytical tools used by authors were descriptive statistic and comparative tables. These tools provided opportunities for identifying trends, fluctuations and correlation especially concerning average price per kilo. Thus, the main type of coffee imported by the Portuguese from the Brazilian market is green, unroasted and

decaffeinated coffee beans. And the quantity imported by the Portuguese in 2025 decreased by 4.4% compared to 2019, but the value paid increased in 2025 by 219.7% compared to 2019.

Qualitative component of the study was carried out based on electronic questionnaires delivered via Google Forms in Portuguese language. Two separate questionnaires with identical number of questions (ten) divided into thematic sections (market characteristics, competitiveness, sustainability, forecast), were prepared and distributed among institutional experts. One questionnaire was directed at a representative of AICEP Portugal providing importers' perspective while the other one was forwarded to an expert from ApexBrasil providing exporters', as well as government's, perspective.

Quantitatively, authors observed considerable fluctuation in export volume, including a very big drop in 2020 due to COVID-19 pandemic. Afterward there was an increase and small decrease in 2025 relative to base-line year 2019. Conversely, authors noted substantial increases in export value along the entire period of investigation with total percent growth being above 200%.

Above mentioned difference in growth between export volume and export value indicates clear decoupling between two variables, mainly caused by upward trend in prices. Such evidence can be taken as indication of producers' decision-making process focused more on creating high value-added products than on generating large amounts of low-price commodities. Also, it is proof that quality differences become increasingly important factors influencing competition for international market shares. Both AICEP Portugal and ApexBrasil representative support these findings. Also, both agree that Brazilian coffee is perceived by consumers as premium product on the Portuguese market.

However, they do not agree about the reasons why Brazilian coffee is perceived as premium product. Representative of AICEP Portugal points out that the way consumers behave, concerns related to sustainability and certification schemes are becoming increasingly important in determining demand. On the contrary, representative of ApexBrasil emphasized macro-economic factors affecting coffee production like weather conditions, costs of coffee production, demand in the world markets and exchange rates volatility. Additionally, representatives of both organizations have different opinions about the possible effects of EU-Mercosur Agreement on the trade flows between Portugal and Brazil.

However, like any piece of work, this research also has its limitations. One of the key issues is that the quantitative part of the analysis only covers the Brazil to Portugal coffee trade, so it is not really possible to make a wide range of generalizations regarding other European markets. Further research could diversify the comparative aspect by bringing in other European countries that import coffee such as Germany, Italy or France, which would help in identifying the similarities and differences in sustainable coffee consumption patterns and premiumization trends. Also, continuous research might use consumer surveys and econometric studies for a more thorough understanding of how sustainability preferences, price changes and purchasing behavior are related in the international coffee markets. Besides that, future research may consider the long-term effects of the EU-Mercosur Agreement and climate-related risks on the global coffee value chains.

Finally, researchers conclude that Brazilian coffee exports to Portugal underwent a structural transformation from a volume-based model to a value-based model.

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