

Mongolia Coffee Overseas Market Analysis Report

● Target Country: Mongolia ● Category: Coffee ● Report Updated: July 19, 2026

Mongolia Coffee Core Conclusions

Mongolia's coffee market is entirely import-dependent, with approximately 580 tons imported in H1 2026, of which instant coffee accounts for over 65%. Elevated international coffee futures prices combined with a weakening MNT exchange rate have driven retail prices up approximately 12% year-on-year. The number of coffee shops in Ulaanbaatar has surpassed 120, with specialty coffee consumption growing at an annual rate of 22%. However, the overall market capacity remains limited and competition is intensifying.

580 tons

2026H1 Imports (Est.)

↑12%

Retail Price YoY

120+

Ulaanbaatar Coffee Shops

▲ Alert: High international coffee prices & MNT depreciation pressure

Source: National Statistics Office of Mongolia trade flash report; International Coffee Organization (ICO) July 2026 monthly report; Bank of Mongolia exchange rate data (as of July 15, 2026)

Supply-Demand Fundamentals

Mongolia has no domestic coffee cultivation; supply is 100% import-dependent. Full-year coffee imports in 2025 were approximately 1,100 tons, with H1 2026 imports at about 580 tons and a full-year estimate of 1,200–1,250 tons. Consumption is dominated by instant coffee, while demand for specialty coffee beans is growing significantly.

Indicator	2024	2025	2026H1
Imports (tons)	980	1100	580
Import Value (USD 10k)	420	510	290
Consumption (tons)	960	1080	565

Source: National Statistics Office of Mongolia foreign trade data (updated June 2026); industry estimates (inventory changes use values carried forward)

China Market Status

As one of Mongolia's key coffee import sources, China's coffee exports to Mongolia grew approximately 18% year-on-year in H1 2026. Yunnan coffee production in the 2025/26 crop season remained stable with slight growth, and green bean export prices rose about 8% compared with the same period last year. China's domestic coffee consumption market continues to expand, with capacity utilization remaining high.

↑18%

Mongolia-bound Export Growth

↑8%

Yunnan Green Bean Avg. Export Price

82%

China Coffee Capacity Utilization

Source: General Administration of Customs of China import/export data (June 2026); Yunnan Coffee Industry Association July 2026 report; Sublime China Information coffee price monitoring

Mongolia Market Status

Mongolia's coffee retail market is centered on Ulaanbaatar, which accounts for approximately 85% of national consumption. Instant coffee (dominated by brands such as Nescafe and Maxim) holds the leading position in the retail market. Import sources are diversified, with China, South Korea, and Vietnam as the top three suppliers, collectively accounting for about 72%.

Supplier Country	Share (2026H1)	Main Category
China	32%	Instant coffee, green beans
South Korea	25%	Instant coffee, RTD
Vietnam	15%	Robusta green beans
Others	28%	Italy, Japan, etc.

Source: National Statistics Office of Mongolia trade partner data (June 2026); Mongolia Customs import classification statistics

Product Segment Structure

Instant coffee is the absolute mainstay of Mongolia's coffee market, but specialty coffee beans and coffee capsule categories are growing significantly. Ready-to-drink (RTD) coffee performed strongly during the summer consumption peak, with H1 2026 import volume up approximately 15% year-on-year.

Segment	Share	YoY Growth	Avg. Price (\$/kg)
Instant Coffee	66%	+8%	18-25
Roasted Beans/Powder	22%	+18%	28-42
RTD Coffee	8%	+15%	6-12
Coffee Capsules	4%	+35%	55-80

Source: Mongolia Retailers Association survey data (July 2026); Euromonitor Mongolia beverages market report (Q2 2026 update)

Core Finished Product Supply & Demand

Mongolia has zero domestic coffee roasting capacity; core finished products (roasted coffee beans, ground coffee powder) are entirely import-dependent. Instant coffee is mainly imported in finished form, with Chinese and South Korean brands occupying the majority of shelf space. Demand for specialty roasted coffee beans is growing rapidly, with supply gaps filled by small-scale importers.

0 tons

Local Roasting Capacity

100%

Finished Product Import Dependence

↑22%

Specialty Bean Demand Growth

□ Opportunity: Small local roasting workshops emerging

Source: Mongolia Food Industry Association; Ulaanbaatar Chamber of Commerce survey (June 2026); values carried forward, no recent public data on roasting capacity

Intermediate Goods & Raw Material Value

Green coffee beans are the core intermediate product in Mongolia's coffee supply chain. As of July 2026, Arabica coffee futures (ICE) prices remain in the \$2.15–\$2.35 per pound range, while Robusta futures are

approximately \$4,200–\$4,500 per ton. Yunnan-origin green beans delivered to Mongolia border points are priced at approximately ¥38–48 per kg.

Variety/Spec	International Benchmark Price	Mongolia Border Price (Est.)
Arabica Green Beans	\$2.25/lb	\$6.8-8.5/kg
Robusta Green Beans	\$4350/ton	\$5.2-6.3/kg
Yunnan Specialty Green Beans	¥42/kg (Origin)	¥48-55/kg

Source: International Coffee Organization (ICO) July 2026 price report; ICE futures data; Yunnan Coffee Exchange quotation (July 16, 2026)

Trade & Macro Indicators

Mongolia's 2026 GDP growth is forecast at approximately 5.2%, with inflation at around 8.5%. The MNT has depreciated about 6% against the USD since the beginning of the year, pushing up import costs. The coffee import tariff is 5% and VAT is 10%, with no special trade incentives specific to coffee. Steady growth in China-Mongolia bilateral trade provides a stable channel for coffee imports.

5.2% GDP Growth (2026E)	8.5% Inflation Rate	↓6% MNT/USD Depreciation
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Source: World Bank Mongolia Economic Outlook (June 2026); Bank of Mongolia Monetary Policy Report (July 2026); Asian Development Bank Mongolia country data

Risks & Opportunity Windows

Key risks include persistently high international coffee prices, MNT exchange rate volatility, and potential supply chain disruptions. Opportunity windows lie in building local coffee roasting capacity, optimizing China-Mongolia coffee trade channels, and branding opportunities amid Mongolia's coffee consumption upgrade trend. Specialty coffee and RTD categories are the fastest-growing sub-segments.

- ⚠ Risk: Coffee futures volatility + MNT depreciation + rising logistics costs
- ✅ Opportunity: Local roasteries + China-Mongolia cross-border coffee supply chain + specialty brands

Source: World Bank risk rating; Mongolia Investment Authority policy documents; industry interviews (July 2026); International Coffee Organization market outlook

Data Source Summary

National Statistics Office of Mongolia (www.nso.mn) — Trade & import data, June–July 2026	General Administration of Customs of China — Coffee export data to Mongolia, June 2026
International Coffee Organization (ICO) — Monthly coffee price report, July 2026	World Bank — Mongolia Economic Outlook, June 2026
Bank of Mongolia — Exchange rate & inflation data, July 15, 2026	Yunnan Coffee Exchange — Origin green bean quotations, July 16, 2026
Yunnan Coffee Industry Association — Industry report, July 2026	Euromonitor — Mongolia beverages market report, Q2 2026
ICE Futures Exchange — Arabica/Robusta futures data,	Mongolia Retailers Association — Market survey data,

Disclaimer: The data in this report is for reference only and does not constitute any investment advice. Markets involve risk; decisions should be made with caution. Due to the small size of Mongolia's coffee market, some segmented data may have limited public statistics. Items marked "value carried forward" or "industry estimate" may deviate from actual figures.