

BRAZIL

Coffee flow continues to improve every week, but transactions remain fragmented as market actors take a cautious approach. The volume of offers remains small as it is broadly acknowledged that plenty of coffee remains in farmers' hands. Widespread flowering has been reported, but consistent precipitation is still needed to reach the full 2026 crop potential.

COLOMBIA

Parchment flow is still very limited as main crop harvesting activities are only beginning. Despite September closing with a rainfall deficit of nearly 35%, precipitation has increased considerably across the main coffee regions. These conditions are favorable for the ripening of cherries that will soon be harvested in the main crop.

ETHIOPIA

The country is officially at the end of the season and farmers are eagerly waiting for the new crop to start in the next 2-3 weeks. With the new season ahead, expectations for cherry prices are very high. The rains have mostly stopped which is favorable for the start of the harvest. Container availability is adequate since exports have slowed down.

KENYA

The country stands at the end of the fly crop and about to begin the main crop for the 2025/26 cycle. Coffee flow at the auction had been stable for the last few weeks but is now decreasing. Local prices have been declining since the last market peak. Container availability remains a challenge. There is an overall positive sentiment in the Kenyan coffee sector due to the high prices recently achieved at the auction.

RWANDA

The season is over, and the flow of coffee has reduced significantly. Local pricing has been volatile and remained high throughout the season, driven by NY market and local competition. Climatic conditions have been adequate with the first rains of the season being beneficial for the development of the 2025/26 crop.

TANZANIA

Arabica: Local traders are confirming a tighter supply environment with the final crop estimate showing a 7.5% reduction from last season. Physical coffee flow remains steady with 70% of the crop already at mills and approximately 20-25% of the harvested crop still held upcountry by farmers who are expectant

of potential higher local prices. This strong farmer retention, coupled with increased competition from local traders participating in the auction and direct parchment buying, has driven local prices up. Overall market sentiment is defined by demand, with both local and international traders actively seeking to cover short term needs. It is broadly perceived for this to be a better-quality crop than the previous season.

Robusta: The country is facing constrained physical flow as the harvest is ending and auction volumes dry up. Local traders are currently holding stocks in anticipation of higher prices, resulting in a slower movement on to exporters. It is anticipated that coffee flow will improve following the recent LDN rally as local traders and farmers look to realize gains. Container availability is adequate, and no port congestion has been observed.

UGANDA

Arabica: The country is in the peak of the season and local traders are actively purchasing coffee. It is expected that by the end of October coffee flow will begin to decrease and end around mid-November. Local competition is stiff with long-term partnership with suppliers and cooperative as the core strategy for success and competitiveness.

INDONESIA

Robusta: Coffee flow has dropped drastically as farmers are in no hurry to sell given recent profitable seasons and steady local prices. FOB offers have also dried up as a result with limited availability to exporters for prompt shipment.

VIETNAM

Heavy rains are being experienced in the Central Highlands, the country's main coffee-growing region. Intense precipitation due to remnants from Typhoon Bualoi has caused flooding on coffee farms and roads.