

BRAZIL

Local prices remain elevated as cash constraints keep holding back coffee flow. Domestic roasters are active in the market, especially on Conilon. FOB offers are sparse, with shy demand and limited offers. Climatic conditions are being monitored closely as the temperatures in the Arabica coffee belt remain above average. The forecast shows improved conditions for the end of March.

CENTRAL AMERICA

Coffee availability has been vastly reduced as most producer cooperatives, local traders and exporters focus on fulfilling existing commitments, pausing new offers.

INDONESIA

With the Eid holiday a couple of weeks away, the government and banks will be shutting down and coffee availability for April shipment has dried up. Local prices continue to firm as shippers cover short-term needs amidst minimal flow as the harvest is between cycles. After Eid, it is expected that harvest flow to pick up.

PNG

Recent crop tours have confirmed the crop is progressing in line with expectations. Rains have aided canopy and bean development. The first flow into mills is expected within 3 weeks and full-fledged harvesting by late April. Local prices remain firm as availability is minimal and exporters are actively covering short-term commitments.

VIETNAM

The arabica flowering process is approximately 30% complete while Robusta is at 90%, with good fixation. It is estimated that 70% of robusta farmers' stocks have already been released to the market.