

BRAZIL

Producer sentiment is reflecting a cautious stance amidst high price volatility. While the harvest is 90% complete, commercialization is estimated at no more than 35%, perfectly illustrating the wait-and-see approach by most growers. Timely and ample precipitation will be critical for Brazil's crop outlook in mid to late September, with weather models not flashing any warnings so far. Recent field assessments have noted a sharp contrast between Brazil's Arabica and Robusta (Conilon) production prospects. Arabica farms have been affected by drought, irregular rains and constant cold fronts. Robusta regions, in contrast, have endured less extreme conditions and are aided by the use of irrigation.



COLOMBIA

Coffee flow continues its natural, gradual decline as there is little coffee left from this Mitaca crop to be harvested. Nevertheless, there is still coffee available for commercialization as producers and local traders are holding stocks in the hunt for improved prices. The widely discussed US tariffs on Brazil could potentially lead to demand shifts towards Colombia. This scenario is already placing additional upward pressure on Colombian prices.

ETHIOPIA

The recent market rally is opening opportunities for expedited shipments, leading to the last push before the new crop begins in November.

INDONESIA

Robusta: Coffee flow has improved in response to the LDN market rally. However, expectations are for local deals to increase further as growers and local traders are holding sizable amounts of coffee. Local prices surged as a result.

Arabica: Currently in the offseason and transition between crops. Coffee flow is minimal and any remaining availability is being priced firmly.