SUCAFINA

WEEK 45 | ORIGIN REPORT

BRAZIL

Market sentiment remains firm, supported by strong demand for fine cup coffees and increasing competition for available supplies. Exporters continue to accelerate coverage amid expectations of tighter farmer selling towards year-end, while field conditions remain generally favorable. Recent warmer weather, with some producing regions experiencing temperatures in the mid-30°C range, is being closely monitored as the next crop enters a critical stage of development, leaving the market attentive to any potential impact on production prospects.

COLOMBIA

Coffee availability remains steady, with buying levels largely unchanged and good volumes continuing to flow into the market when intermediaries find acceptable selling opportunities. Producer and intermediary selling remains measured, contributing to orderly market liquidity rather than aggressive movement of stocks. Exporter demand is currently well covered, resulting in limited competition for nearby coffee. Quality performance remains encouraging, with no significant issues reported and yields in Huila continuing to track at strong levels.

ETHIOPIA

Washed new-crop samples have started arriving at our QC lab, with initial quality assessments appearing promising, although the coffees will require additional time to fully stabilize and reveal their cup potential. On the logistics front, container availability is improving across most shipping lines as the export season winds down, easing some of the supply chain constraints experienced earlier in the year.

KENYA

Harvest activity is now in full swing across the country, with the Central region already estimated to be around 60% harvested. Auction volumes have remained relatively stable despite the increased pace of harvesting, with FAQs and Plus qualities beginning to show face. Overall, auction flows are expected to improve in the coming weeks as harvesting progresses across the remaining coffee-growing regions and more coffee enters the market.

UGANDA

Arabica commercialization season has concluded, with much of the South-Western supply now locked into the market. In Robusta, the market is moving beyond the peak harvest period, with significant volumes still to be commercialized. Availability for December onwards shipments remains open across most grades, while overall market conditions remain generally stable.

TANZANIA

Arabica auction volumes continue to hold at healthy levels week on week, while in Robusta, market participants remain largely bullish, with many traders selectively liquidating positions into rallies while retaining stocks in anticipation of improved prices. Export logistics remain smooth, with port operations continuing to support uninterrupted shipment flows.

ASIA

Harvest progress remains mixed across the region. In Vietnam, Robusta harvest is still in its early stages, with farmer selling continuing and differentials softening slightly amid firmer London prices, while Arabica harvest and commercialization are advancing steadily. Indonesia and India remain largely post-harvest, with crop tours providing a more optimistic view of new-crop prospects in Indonesia and limited fresh market activity in India. In China, harvest is underway and wet mills have begun operations, supporting the gradual arrival of new-crop supply. Meanwhile, PNG has largely completed harvest and commercialization, with market activity remaining subdued.

