

MEXICO AND CENTRAL AMERICA

The region faced a significant precipitation deficit in May but has since recovered. The new crop is expected to start without delay in November with an overall positive outlook.

PERU

After facing its driest and warmest period in decades, rains have returned to Peru. It is still too early to estimate any crop losses for the 2025 cycle, but growers are weary of production losses. The country is in the middle of its peak shipping period, facing chronic scarcity of vessel space. Coffee flow has all but finished, catching several traders and exported by surprise and creating a scramble for any leftover availability.

KENYA

The new crop season has officially started with Main Crop coffees expected to start flowing in the next 3 weeks. Volume expectations are like last season with the peak expected between November and December. Prices at auction remain stable for main grades and high prices for lower grades in response to high demand. There is a scarcity of food-grade containers from Maersk, MSC, and CMA CGM. MSC schedules remain unreliable with constant changes to vessel timelines. Maersk schedules are more reliable but face capacity restrictions due to overbookings.

INDONESIA

Arabica: Local prices increased this week as coffee flow remains stagnant in anticipation of Sumatra's main crop.

Robusta: The harvest is slowly approaching its end as arrivals into Lampung started to decrease. Despite the London rally the previous week, local prices stayed flat and differentials tumbled to their lowest level in months. This is allowing traders to build up inventories and fulfill shipments from November onwards.