

BRAZIL

Local prices remain steady despite NY volatility as market actors assess the fallout from 50% US tariffs. The Arabica harvest is 80% complete, while Robusta is essentially over. The rate of commercialization, however, is hovering around 35%, with plenty of coffee still in farmers' hands.

COLOMBIA

Local coffee flow is steady, with slightly lower parchment availability. There is still enough coffee flowing to cover exporters' short-term needs. Demand remains sluggish as most interest centers on Q4'25 shipments. Climatic conditions remain favorable, supporting both the ongoing harvesting and drying activities, while also encouraging the flowering that will contribute to next year's crop production.

MEXICO & CENTRAL AMERICA

Consistent seasonal rains continue to benefit crop development for the 2025/26 cycle. New crop offers have been essentially nonexistent as producers and exporters take a cautious approach to assess the aftermath of elevated US tariffs, especially for Brazil.

UGANDA

The Eastern harvest is in full swing, while the Western part of the country is expected to start over the next couple of weeks. Shipments are already being scheduled for September and October at a good pace.

VIETNAM

Collectors are buying coffee consistently as farmers release any remaining stocks. New crop offers are also starting to show up for December shipment onwards.