

## **BRAZIL**

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Isolated frost events were experienced in coffee growing areas. While frost damage was confirmed, it was limited and localized to a small region in Cerrado. Agronomists have noted that even in areas where frost did not materialize, damage to flower buds from very low temperatures could hurt flowering and diminish next crop's potential. While field teams are conducting assessments, preliminary observations indicate frost damage is superficial and is likely to be limited to defoliated trees. The pace of new crop exports has been slow, mostly due to trade flow disruptions stemming from unprecedented 50% US tariffs. Brazilian coffee exports fell 28% in July compared to same month a year ago.

## **COLOMBIA**

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Local coffee flow continues to show a gradual decline as the Mitaca crop nears the end of the harvest. Nevertheless, producers and local traders are still holding stocks in anticipation of improved prices from supply disruptions in Brazil. Expectations of US demand migrating to Colombia are also pressuring local prices upwards. Colombia's US tariffs are currently lower than other leading coffee producing countries. Climatic conditions have shown higher precipitation in August, a favorable development after the water stress experienced in July across several coffee-growing regions.

## **ETHIOPIA**

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Coffee flow has slowed down to a trickle and business is now limited mostly to Natural processed coffees. Expectations are positive for the new crop beginning in October.

## **RWANDA**

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The harvest is over and washing stations are closing for the season. Sporadic parchment flow is still happening, but in very limited quantities. Exporters are now fully focused on fulfilling shipping commitments and securing late-season specialty sales.

## **VIETNAM**

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Relatively little trading activity has been reported as producers and local merchants try to make sense of the rally in the LDN market. New crop offers have begun to trickle in for shipments from December onwards.