

BRAZIL

Climatic conditions have been favorable for the development of the 2026/27 crop. Temperatures have been mild with no excessive heat and adequate moisture in the soil. All eyes will be on the timing and frequency of precipitation for the all-critical flowering period in September.

COLOMBIA

The Mitaca crop is over and coffee flow has diminished sharply. It is, however, broadly rumored that producers and local traders may still be holding coffee in anticipation of higher prices. The flow from Mitaca may extend for another couple of weeks, while the first deliveries from the main crop are expected soon, particularly from lower-altitude regions in the north of the country. August has closed with rainfall around seasonal averages. These conditions remain favorable for 2026 Mitaca flowerings and for the maturation of cherries from the upcoming main crop, although excessive rainfall remains a risk to be monitored.

PERU

The harvest is now complete with an overall sentiment of limited availability. A sense of supply tightness has taken hold, stemming from 50% US tariffs on Brazil.

INDIA

The US followed through on its threat to double tariffs on imports from India to 50% after it had previously instituted a 25% baseline duty on Indian goods. This latest round of tariffs on India seeks to punish the country for importing Russian oil, according to the White House. Tariffs on India, the world's fifth-largest economy, are now matching those on Brazil, which has the highest rate across the globe.

INDONESIA

Robusta: Coffee flow has been disappointing as farmers and local traders feel emboldened to stay firm on their asking price expectations. Most exporters are focused on fulfilling existing commitments and new offers are scarce. Forecasts call for more rain ahead, causing concern in West Lampung as farmers worry about flowering failure due to excessive precipitation.