

BRAZIL

CONAB is cutting its 2025/26 Arabica crop estimate by 5%, citing lower yields from harvested fruit. The combination of 50% US tariffs, high anticipation of the start of the rainy season and the ensuing volatility has resulted in most market actors opting for a cautious approach. Logistical challenges continue to hurt export pace with an acute shortage of containers amongst the main shipping lines. Vessel rollovers are now a common occurrence, with chronic delays affecting exporters.

COLOMBIA

The Mitaca crop has been finalized and diminished coffee flow is expected in September. Local prices have firmed up in response to reduced availability and steady short-term demand. The main crop is expected to start soon, with harvesting activities picking up pace by early October. For the upcoming 2025/26 Mitaca crop, climatic conditions remain ideal.

MEXICO & CENTRAL AMERICA

The Central American crop outlook is very positive and perhaps even more importantly, harvesting is expected to start earlier than last year. Rising prices are being anticipated as sizable Brazil replacements by US roasters will likely begin during Q1'26 in response to 50% tariffs.

INDONESIA

Robusta: Coffee flow increased very sharply from previous weeks and prices softened as a result. Java, Flores and other smaller regions are also selling aggressively, taking advantage of high prices.
Arabica: Currently, in the transition between crops and coffee flow is minimal. Sumatra's main harvest is projected to start in October, but so far, there are few offers as traders struggle to predict the effect of 19% US tariffs.

VIETNAM

Most offers are now scheduled for December onwards with only Grade 2 coffees available for prompt shipment.