

COLOMBIA

The country's main crop is well underway, with volume and availability expected to improve in the weeks ahead. However, the effects of climate change are palpable across production areas. Smaller bean sizes and a higher incidence of unfilled cherries are the direct result of extended dry and hot conditions earlier in the year. Flowering has also become spotty and scattered, resulting in uneven cherry ripening.

KENYA

Rains have finally begun in Central Kenya with intense harvesting expected in the weeks ahead. Cooperatives are receiving subsidized fertilizer from the Cereals Board which positively impacts expectations for next year's crop. Farmers are holding onto their parchment as auction prices are below last year's average.

UGANDA

Arabica: Coffee flow has finally begun arriving in Kampala from the South-West. Most fresh coffee is commanding high prices due to a disappointing harvest both in volume and quality. The outlook for the February to May 2025 harvest is slightly more optimistic, with production projected to increase by 5%, but still below its historical potential.

Robusta: The flow from early harvest remains stable. Tropical rains have delayed the final maturation stage of the cherries, pushing ripening back to mid-December. The peak of the fly crop is now anticipated in January. The parliament of Uganda passed the controversial government's bill to dissolve the UCDA (Uganda Coffee Development Authority). Starting in 2025, the Ministry of Agriculture will assume all UCDA functions, from field operations to exports.

VIETNAM

Farmers are not keen to sell fresh cherries as much as they did in previous years. They prefer to sell in green bean form in the current volatile pricing environment. The harvest is only 10% complete compared to 18% at this same time last year.