

CENTRAL AMERICA

The total lack of coffee availability out of the region is being compounded by chronic shipping delays. Nicaragua has been plagued by high port congestion and a truck driver shortage. Guatemala and Honduras suffer mostly from port congestion and a lack of container availability.

PERU

The peak of the harvest is projected to take place between June and August, compressing what is typically a longer cycle into just a few months. While harvesting generally extends into October, coffee flow outside the peak timeframe will be limited. In turn this will cause pressure to fulfill late-season shipments and bring greater price volatility outside of peak harvest months. On the logistical front, such a concentrated harvest will also lead to congestion at ports as well as capacity bottlenecks at processing plants.

BURUNDI

The country has entered peak harvesting, and both output and quality are high.

ETHIOPIA

Minimum prices were revised downwards for washed coffees, but Naturals remain unchanged. Flowering for the next crop in the Sidamo region is slightly behind schedule, while Yirgacheffe is right on target with expectations of a higher crop in 2025/26.

KENYA

Climatic conditions have been favorable. Wet mills are reporting improved cherry quality vs earlier expectations.

UGANDA

Robusta: Wet climatic conditions have slowed down coffee deliveries and drying. However, harvesting activities continue at a steady pace in the field.

INDONESIA

Arabica: Heavy rains in West Java continue to slow down collection and processing activities. Local prices remain firm as more traders focus on Java, with the crop in Sumatra ending soon.

Robusta: Coffee flow slowed down as local prices fell following the decline of the London market. Local traders and collectors suffered losses as the market drop continued.