

BRAZIL

The country's highly anticipated 2026/27 crop is shaping up to be one of the largest on record. Uniform cherry development and favorable growing conditions are supporting expectations for excellent quality across major producing regions. At the same time, Sucafina's sustainability programs continue to expand, with growing farmer participation and new initiatives focused on soil health, regenerative agriculture and carbon mapping. The next harvest cycle is expected to begin in March for Robusta and April for Arabica, with picking extending through July for Robusta and October for Arabica. Current projections suggest a record crop of 75.4 million bags, supported by strong cherry development and favorable conditions during the growing season. Arabica production is expected to drive most of the increase, reaching an estimated 49.4 million bags (26% higher than 24/25), while Robusta output is projected at 26 million bags, broadly stable year on year. Climate variability is always the main challenge for producers. Dry spells or frost events can still impact the crop; monitoring conditions throughout the season remains essential.

COLOMBIA

Colombia's highly anticipated Mitaca crop is expected to start in April and provide a much-needed boost to local coffee flow. Persistent rains, however, are raising concerns over the development of the Main crop. If precipitation maintains its current pace, the country's drying capacity could be tested in the months ahead as well as affect flowering for the Main crop.

BURUNDI

The harvest has started, but so far the pace is slow. Increased cherry flow is expected by early April.

KENYA

Rains have arrived in high quantities and earlier than usual, triggering a reassessment of the crop potential. The Coffee Act 2023 was signed into law, imposing a new Export Levy on exporters and challenging the usage of export warehouses. This is being contested by the Kenya Coffee Traders Association.

RWANDA

The season is fully underway with 27% harvest progress. Cherry prices remain high, driven by demand from specialty exporters.

TANZANIA

Both the Arabica and Robusta seasons have now concluded. Local traders holding inventories across both crops are liquidating strategically to cover costs. With banks approaching financial year-end, there is increased pressure on cooperatives and traders to close out outstanding balances. Looking ahead, the 2026/27 crop is progressing well. Cherry development across both Arabica and Robusta regions is encouraging, with early indications suggesting a higher production compared to the previous season.

UGANDA

Robusta: The country has experienced greater precipitation than normal. This is mostly good news for the crop maturation, but it also slows down coffee drying activities. Coffee flow has not been affected yet, but it could also fall behind schedule. The local market remains unpredictable due to geopolitical instability and some degree of retention of last year's crop.

