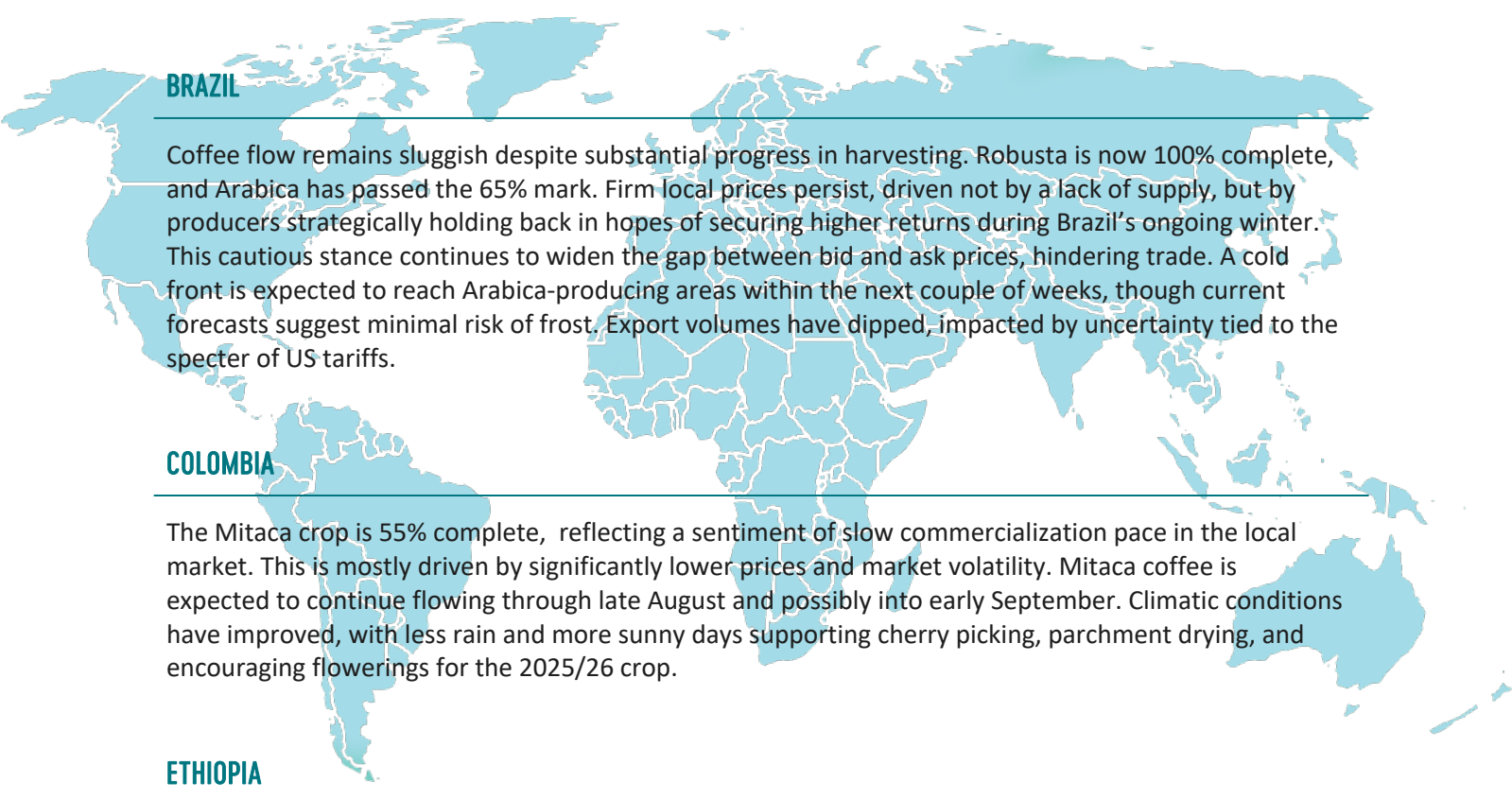


UNITED STATES

The chairs of the United States Congressional Coffee Caucus issued a letter with bipartisan support to the head of the US Trade Agency, urging coffee to be exempted from current and future tariffs. The letter explains to the US Trade Representative that an exemption would protect jobs and support the coffee industry, which is completely dependent on imported green beans. It also emphasizes that, unlike many other goods affected by recent tariffs, coffee is not produced at a scale in the United States that can meet domestic demand. It goes on further to explain that because there is no viable domestic substitute, tariffs on imported coffee create unique challenges for the industry.



BRAZIL

Coffee flow remains sluggish despite substantial progress in harvesting. Robusta is now 100% complete, and Arabica has passed the 65% mark. Firm local prices persist, driven not by a lack of supply, but by producers strategically holding back in hopes of securing higher returns during Brazil's ongoing winter. This cautious stance continues to widen the gap between bid and ask prices, hindering trade. A cold front is expected to reach Arabica-producing areas within the next couple of weeks, though current forecasts suggest minimal risk of frost. Export volumes have dipped, impacted by uncertainty tied to the specter of US tariffs.

COLOMBIA

The Mitaca crop is 55% complete, reflecting a sentiment of slow commercialization pace in the local market. This is mostly driven by significantly lower prices and market volatility. Mitaca coffee is expected to continue flowing through late August and possibly into early September. Climatic conditions have improved, with less rain and more sunny days supporting cherry picking, parchment drying, and encouraging flowerings for the 2025/26 crop.

ETHIOPIA

Local prices remain elevated as coffee flow to Addis is slowing down and local buyers are not as active as in the past few weeks. Container availability is getting worse, with wait times over 20 days.

KENYA

Coffee quality of the current flight crop is coming in above expectations. However, expectations on the size of the upcoming main crop have been revised downwards on reports of early and uneven flowering.

TANZANIA

Arabica: Flow of parchment is slowly increasing, but drying at mills is taking longer due to cold and overcast conditions.

Robusta: Volume of dry cherry traded at auction has increased in response to new minimum prices communicated by the TCB.

INDONESIA

Robusta: Coffee flow is expected to improve in the weeks ahead. Farmers remain hopeful that local prices will rebound to recent historical highs. Flowering in some areas is improving expectations for the next crop cycle.

