

UNITED STATES

U.S. Customs and Border Protection has been instructed by a Court of International Trade judge to begin refunding tariffs imposed last year by President Trump. Tariffs were ruled to be illegal after a ruling by the Supreme Court on February 20th. Since then, much discussion has centered on the procedure for reimbursements and whether these will even happen at all. Over 1,000 companies, including FedEx and Costco, have filed lawsuits in the U.S. Court of International Trade to recover billions of dollars in tariffs paid on imported goods. In a court filing, Brandon Lord, Executive Director of Trade Policy and Programs at CBP, stated that the agency is “making all possible efforts” to have a new automated process ready within 45 days. “CBP will provide guidance on how to file refund declarations in the new system”, Lord went on to say.

BRAZIL

Coffee growing regions have been relatively dry, with only scattered areas receiving isolated rainfall. Looking ahead, the forecast indicates rainfall is expected to increase, with daily totals reaching up to 20 millimeters. The heaviest rainfall is anticipated in São Paulo, Sul de Minas, southern Cerrado Mineiro, and Zona da Mata. Additional showers and thunderstorms are forecasted to continue into the second half of the month, ensuring that most coffee production areas will continue to receive beneficial rains.

COLOMBIA

Heavy rains continue to cover the country, raising concerns over potential crop losses for the upcoming Main crop in late 2026. If the current pace of precipitation continues, drying capacity could also become a critical choke point during the upcoming Mitaca crop in April.

ETHIOPIA

CMA has suspended all Djibouti service. MSC and Maersk are still operating, but container availability is limited. If this situation remains for an extended period of time, demand will surpass the capacity of the two active carriers and containers will become extremely scarce in the coming weeks. Elevated local minimum prices have also slowed down coffee flow.

KENYA

Early rains are boosting the country’s fly crop, with early picking already starting in Meru. However, volumes remain low, and auctions are expected to recess in a few weeks as growers have sold 80% of their main crop. Next crop assessments are ongoing to forecast the upcoming season.

UGANDA

Arabica: Local prices have begun to track the NY market, easing back after the relentless market selloff and recovering slightly in recent days. Local traders are thankful for the price recovery, as many of them had been holding expensive stocks. All eyes are now on the possible easing of differentials to ensure the country remains competitive and exporters ship on time. The rainy season has started and it should channel more cherry volumes into Centralized Washing Stations.

Robusta: Farmers and local traders liquidated stocks over the past few days as prices improved due to market consolidation. The exchange rate has been volatile, making exporters pause before accepting new commitments.

VIETNAM

In early 2026, coffee exports have surged with January-February volumes rising 14% year-over-year. Building on this positive momentum, the 2025/26 coffee cycle is expected to see a 6% increase in production, cementing the country's role as a major global supplier.

