

BRAZIL

It has been a busy time for Brazilian coffee producers. The combination of the high NY market with local currency depreciation motivated growers to sell, and coffee flow improved. However, sellers remain disciplined in timing the right moments to place offers. Demand for nearby shipments is firm, especially for Conilon, where shipping delays are pressuring importers, given the low stock situation. Harvest progress continues at the right pace.

COLOMBIA

The Mitaca crop is coming to an end, and coffee flow is decreasing every week. Timely contract fulfillment all over the country continues to be a challenge, mostly for Supremo prep, due to poor yields, as Supremo beans decreased from 35% to less than 20% within parchment. On the climatic front, the country is experiencing a shift from dry to wet weather, ideal at this point for main crop development.

BURUNDI

The harvest season will be concluding in the days ahead. Fuel shortages are making parchment transport difficult, and the scarcity of Burundi Francs is causing delays in business transactions. Foreign exchange is also limited, and inflation continues to surge. Fuel can only be found on the black market at around triple the official price.

TANZANIA

The harvest has started, with parchment making its way to drying tables. Auctions are expected to start in August.

UGANDA

Robusta: Across most growing regions, the summer crop is now 85-90% harvested. Estimates suggest that 5% of the crop remains in the hands of farmers awaiting further price increases. The recent market rally is expected to incentivize farmers to retain their coffee stocks longer and release them gradually, resulting in decreased flow.

Arabica: It is the off-season in both Eastern and Western regions, and initial assessments indicate the new harvest will begin in mid-September and peak in October. However, the 24/25 crop year is uncertain and will likely not reach its 1M bag potential production. Recent drought conditions in the West have already compromised approximately 5-10% of the crop, with potential further losses if adequate rainfall does not occur within the next 3-4 weeks.

INDONESIA

Robusta: Coffee flow remains stable, with some aggressive buyers snatching most arrivals from upcountry. Most of the harvest has come from Lampung, but the Java harvest is slowly gaining momentum.

Arabica: Rains slowed harvesting and drying across Java, which dampened cherry prices as most processors reduced purchases to manage capacity constraints.

