

UNITED STATES

The Trump administration has announced proposed fees on Chinese-built and flagged cargo ships. The fees can add up to \$1,000,000 per vessel entrance to U.S. ports. These measures stand to significantly increase shipping prices, decrease availability, and disrupt trade for a wide range of products, including coffee. The National Coffee Association (NCA) has joined a coalition of over 300 associations by signing a letter to the administration, raising the serious consequences of such fees.

BRAZIL

Port delays continue to affect shipment flow. Operators are eagerly expecting the start of the Conilon crop to resume the flow. Plenty of speculation taking place about the crop effects of hot and dry conditions that may affect yields, but recent research has not flagged any potential crop loss.

COLOMBIA

Wet climatic conditions continue to dominate in Colombia's main coffee-growing regions, benefiting the mid-year mitaca harvest. However, these same conditions could affect the flowering of the main end-of-year harvest, making it essential to closely monitor trees to assess any potential impact on future production. There is currently very limited availability of parchment coffee which has driven local prices upward. However, this trend is expected to reverse with the arrival of the mitaca harvest flow between late April and early May.

CENTRAL AMERICA

The region is essentially sold out with no fresh offers available. Shipment delays and rumblings over supplier defaults are permeating across the region, especially in Honduras.

BURUNDI

Harvest preparations are underway. Initial forecasts indicate the upcoming crop is expected to be approximately the same size as the previous one. Rains have resumed which should result in improved quality for the harvest that will begin in the days ahead. Official minimum prices are still to be communicated.

RWANDA

Rains resumed which provided much-needed relief to the fledging new crop. An increase in coffee flow is expected in the weeks to come. Approximately 65% of Washing Stations have started receiving cherries.

INDIA

Limited arrivals at mills as farmers keep holding coffee stocks after the completion of harvest. It has been noted that the yield % of A and AA beans is lower compared to previous seasons. The coffee regions of Coorg district have received beneficial showers supporting flowering.

INDONESIA

Local prices firmed as stocks continued to diminish. Coffee flow is minimal while demand from China continues strong. Eid holiday is coming up as the government and banks will be closed for 6 working days. After Eid, the harvest flow is expected to pick up, mostly in Java.

VIETNAM

Flowering in robusta regions is almost complete with good fixation. Farmers have irrigated regularly as there are no concerns over water shortages so far. Growers and local traders have released most of their coffee stocks by now.

