

BRAZIL

Fine cup volumes are expected to increase from mid-July, with larger screen sizes maintaining a 25% share in incoming lots and price per bag rising, presenting sourcing opportunities if liquidity arrives before New York selling off. The commercialization of the current crop is at 80% and new crop at 24%, with harvesting reaching 40%, but shipment-ready coffee still requires several weeks. Near-term demand for July is minimal, with most buyers seeking coffee for August to December deliveries, and last-minute buyers are trying to capitalize on differentials. It seems local roasters in Brazil are struggling to secure enough coffee for July deliveries due to rising prices and are waiting for better buying opportunities.

Sellers are only committing to quick deliveries, making it difficult to secure forward contracts for August, despite active trading in the past week. If this activity was to last it could cause potential operational bottlenecks which is something to keep in mind for exporters and buyers.

COLOMBIA

With the coffee year harvest at 71% and the Mitaca crop 56% completed, the Colombian internal market is becoming very tight. There is coffee availability from market to market but without a significant increase, alongside high demand from all exporters. Diffs are firms vs U26, and competitors are pushing up differentials.

The main coffee export figure for 25/26 was reduced to 12.4 million bags (Sucafina's figure). According to the FNC, production was higher than in May 25, but exports were lower due to a delayed mitaca and high Colombian prices discouraging external demand. Meanwhile, imports have increased +198.6% year to date, reaching 775k bags as of April 25.

PERU

The Peruvian harvest is at its peak. Differentials are remaining firm and offers for September are scarce, making it difficult to take positions for most exporters, resulting in slow market activity. However, the new crop in Central America and Mexico presents some opportunities.

TANZANIA

The 2026/27 crop season is now underway across Tanzania. Robusta dry cherry auctions are running on a weekly basis, with green coffee expected to begin flowing to the market within the next one to two weeks. On the Arabica side, mills are set to officially open their doors to cooperative deliveries from next week, marking the formal start of the Arabica intake season. Early crop indications are encouraging; production is forecast at 3–5% above last season's volumes for both Arabica and Robusta, mainly supported by a combination of an on-cycle crop and first harvests from newly established plantations. Port operations in Dar es Salaam remain smooth and efficient, with no disruptions to export logistics at this time.

RWANDA & BURUNDI

Harvest is expected to be 98% completed with about 2 more weeks of buying. Overall, the Rwanda crop will be about 35% smaller than last year's. The situation in Burundi is similar. Season is expected to end in 2 weeks, overall the crop exceeded expectations.

UGANDA

Volumes are remaining limited and differentials firm despite the recent improvement in London (RO). The flow is around 1 month late as of now and would expect to catch up by late August. Scr17/18 yields have been lower than expected and that's where most exporters are expecting the most delays.

On the Arabica side, the new crop is expected to be much better in term of volume, however quality might be a concern as the month of June has been quite dry resulting in potential small bean size and increased amount of floaters. The season is expected to start in late July early August.

VIETNAM

Vietnam's Robusta crop is 84% commercialized, with local shippers offering aggressively for the new crop for December onwards despite freight challenges and limited sales. Spot freight rates from Asia to Europe and North America remain high, and securing long-term rates requires booking at least two months in advance.