

BRAZIL

The high market volatility has kept prices firm and sellers hesitant to part with their stocks. Local prices for Conilon continue trading close to Arabicas Fine Cups, increasing each day following the market rallies. Trading companies and exporters remain the most active players, working around the market movements and currency fluctuations to secure adequate differentials. Weather concerns are growing with the dry spell as high temperatures continue to be monitored, which may further compromise the flowering period and stress the market. Ports continue to be a critical factor with ongoing delays, container shortages, and vessel rollovers.

COLOMBIA

The highly disruptive transportation strike appears to be ending. The national government reached an agreement with truck drivers, which should bring the flow of goods and passengers back to normal.

PERU

The harvest is now practically finished, and coffee collections from traders and cooperatives are at 95%. The impact of climate change has been very dramatic in Peru, with unseasonal extended dry periods, historically high temperatures, and dramatic swings between the day's highs and the night's lows.

INDONESIA

Arabica: Farm visits were conducted across Sumatra, where the early fly crop is ongoing, but the main crop is still a few months away. Plenty of Java and Sulawesi stocks have found their way to even the smallest upcountry collectors in Sumatra, where they will be blended and shipped in the coming months. The coffee flow will be limited, with availability opening up for shipments from November onwards.

Robusta: Sizable coffee arrivals are being reported in Lampung. Central Java prices remain high as demand is strongest in this area. Farmers still have stocks, with estimates showing less than 25% of the crop remains available. Farmers are still harvesting cherries in East Java, but most of the crop has already been collected.