

BRAZIL

Coffee flow continues to improve despite high market volatility. Local prices have increased and attracted more sellers to the market. However, growers remained disciplined and only offer when conditions are favorable. Demand for nearby shipments remains strong and could support prices in the coming weeks. Operational bottlenecks are still the main problem, causing delays in coffee processing and shipments, and putting pressure on importers coping with low stock levels. The harvest continues to progress steadily for Arabica, while Conilon is reaching its end.

MEXICO & CENTRAL AMERICA

Heavy rains are being experienced throughout the region, at least partially offsetting the moisture deficit in the soil after an overly dry and hot spring. The harvest outlook remains positive, barring any impacts from tropical storms as we enter the peak of hurricane season in the Atlantic.

PERU

The peak of the season has come and gone in a snap. A country traditionally relied upon for long harvesting periods has experienced highly concentrated cherry maturation, creating substantial processing bottlenecks. Shipments will continue through November or December, but availability will diminish in the months ahead.

INDONESIA

Arabica: Improved weather conditions are favoring a sizable harvest across Java and Sulawesi. Expectations are for coffee flow to continue its current strong pace for at least another month. The harvest in Sumatra is still a couple of months away.

Robusta: Coffee flow has improved significantly as global demand continues to soften due to elevated differentials.