

COLOMBIA

Coffee flow is slowly starting to increase as crop development estimates project peak harvesting between late May and early June. The elevated NY market should help stabilize local prices. The potential of the 2025/26 crop continues to flash warning signs due to extreme wet conditions that prevent optimal flowering.

CENTRAL AMERICA

The region is now completely sold out, as exporters scramble to fulfill commitments amidst logistical chaos. Vessel rollovers, blank sailing and container shortages are now commonplace. Flowering events have been reported across the region with precipitation in line with historical averages.

PERU

The new crop 2025/26 has begun with early harvesting in lower elevation areas. Output is expected to increase 10% compared to last year, bringing much-needed relief to local traders still reeling from last year's shortage. Capital requirements to collect the crop are the main concern for cooperatives, millers, and exporters, who foresee a fundamental shortage of funds amidst historically high prices.

INDONESIA

Arabica: A transitional time with Sumatra approaching the end of harvest and Java just beginning. Constant rains are slowing coffee procurement and processing. Demand is steady with interest from a wide range of qualities and destinations.

Robusta: Coffee flow increased 50% from the previous week as purchasing interest grows.

VIETNAM

Robusta flowering is complete with good fixation. Moderate rainfall is expected to arrive in coffee regions in the next several days, continuing to support crop development. Estimates indicate farmers have sold around 77% of their crop.