

BRAZIL

Climatic conditions remain normal, with minimum temperatures warm enough to ease any immediate frost concerns. Brazilian growers remain mostly undersold and are active sellers, improving coffee flow. While the risk of cold fronts has diminished, we are not out of the frost season yet. The peak risk period is the last week of July and the first week of August.

COLOMBIA

The weather has improved with lower rainfall. However, some coffee-producing regions are still experiencing high humidity. While these conditions are not significantly affecting the crop itself, they can cause delays and complications in the drying process.

INDIA

The Robusta crop is 65% sold, while the Arabica crop is already 80% commercialized. Constant rain is starting to affect trees. The crop remains healthy for the moment affected by the exception in some regions with black rot due to excessive moisture.

INDONESIA

Arabica: Local prices remain firm despite uncertain demand as the USA may rise tariffs sharply after the 90-day pause. Most market operators are producing more specialty grades to protect values and command higher premiums.

Robusta: Arrivals to Lampung have dropped sharply due to lower prices. The harvest pace has also been slower due to sustained rains. Moisture on local deliveries has been higher by 2-3% due to lack of sunlight.

VIETNAM

The Trump administration announced it had reached a trade agreement with Vietnam, ahead of a self-imposed July 9 deadline. The US will apply a 20% tariff on Vietnamese goods, including coffee. This rate is double the current minimum tariff the US is charging on products from Vietnam and virtually every other country.