

BRAZIL

The local market pattern has remained unchanged for weeks due to cash constraints affecting all industry actors. The sizable price difference (around 130 USD cts/Lb) between Robusta and Arabica has shifted commercial interest towards Conilon. Weather forecasts are being monitored closely as temperatures in the Arabica coffee belt are above average and rains lacking.

COLOMBIA

Coffee availability remains extremely low as the country finds itself in the “In between” crops period. The internal market continues to experience limited parchment supply, keeping activity subdued. The Mitaca crop is progressing under favorable climatic conditions and expectations for the upcoming Fly Crop remain moderately positive. However, the outlook for the next Main Crop may not be as promising. The heavy rains in February and March could hinder the proper development of the last flowering for the 2025/26 harvest. Additionally, as a consequence of the excessive rainfall, some regions have started to experience a Roya outbreak.

MEXICO

US tariffs on Mexico were postponed for another 30 days as negotiations are ongoing to ensure the free flow of goods under the US-Mexico-Canada Trade Agreement (USMCA) signed in 2018.

CENTRAL AMERICA

Coffee availability has been vastly reduced as several US-based traders shifted sourcing plans to Central America and away from Mexico in light of tariff threats by the US government.

ETHIOPIA

Exporters are facing significant constraints for finance due to the sharp increase in local prices. Stock levels in exporters' hands are lower than last year.

RWANDA

A severe drought throughout the Eastern region has affected the crop, estimating a 10% loss vs the previous season. Rains have come back and there are hopes precipitation continues in the coming weeks to relieve stress on coffee trees.

UGANDA

Robusta: Initial conservative volume projections are materializing as dry conditions persist, reducing the crop potential by 5%. Container availability and transit times to Mombasa are adequate, but vessel schedules remain unreliable.

Arabica: The season has seen a strong coffee flow. With a sluggish market for Naturals due to lack of demand, washing stations are running at 100%+ capacity.

INDIA

Farmers are selling very little coffee as they remain well-capitalized and seek higher prices. Irrigation is being set up across several farms to mitigate the effects of shifting climatic patterns.

INDONESIA

With the Eid holiday a couple of weeks away and the closing of government and banks for 6 working days, availability for April shipment is very low. Local prices continue to climb as shippers cover short-term needs amidst low coffee flow.

VIETNAM

The robusta flowering process is estimated to be around 85% complete, with good fixation. Among the regions, Gia Lai and Kontum have almost completed flowering. Currently, the robusta crop is estimated to be 65% sold.

