

BRAZIL

The country is in the middle of a very wet period with precipitation above average across coffee-growing regions. Flowering was successful and bean development has been promising, further enhancing the outlook for the 2026/27 crop.

COLOMBIA

The ELN (longest standing Guerilla organization in Colombia) has declared a 72-hour armed strike in certain parts of the country, which is restricting movement and disrupting economic activity. Coffee operations will slow down due to increased security risks in ELN areas of influence (Cauca, Santander, Huila, Antioquia). Delays in road logistics are expected, with some key corridors already fully closed and main routes to ports experiencing disruptions. Coffee outflows, especially in the southern regions, could be most impacted.

KENYA

Recent farm tours have noted staggered fly crop development. Meanwhile, the main crop harvest is still strong with wet mills operating at full capacity. Producers are prioritizing parchment deliveries to clear storage, mitigate theft risk, and target favorable January sales prices.

UGANDA

Robusta: The season is at its peak and coffee flow has been consistent. Climatic conditions remain warm and dry, favoring harvesting and drying activities.

INDONESIA

Food and aid distribution in Sumatra is reaching farmers in the aftermath of catastrophic floods, but many areas remain inaccessible. Entire communities are short of fuel and food, with no electricity or cell signal. A significant shortage of Arabica coffee is expected as the largest production areas remain inaccessible and any existing inventories in warehouses were damaged. When coffee begins to flow again, shipments are expected to be delayed by 1-2 months.

VIETNAM

Coffee flow has been growing steadily over the past few weeks. Improving climatic conditions with steady sunshine are supporting the pace of harvest. Local prices have softened amidst a general weakness in the London market, precipitating aggressive selling by local traders.