

UNITED STATES

Effective May 14, a 90-day pause on certain tariffs was agreed between the US and China. US tariffs dropped from 145% to 30%, and Chinese tariffs from 125% to 10%. A sharp increase in cargo shipments from China to the US is now anticipated due to previously delayed orders by US importers awaiting tariff clarity. Carriers are likely to reverse recent blank sailings, though timing depends on vessel locations, possibly leading to temporary capacity shortages and rising rates. US ports, currently experiencing low volumes, may face congestion and delays within 3–6 weeks due to a surge in cargo volumes.

BRAZIL

The coffee harvest is gaining momentum as more producers focus on gathering and processing the crop. For both Arabica and Conilon coffee, the expectation of increased supply is significant, potentially providing some relief to global markets. However, local prices remain firm, dampening buyer appetite and leading to decreased trading activity. New crop sales remain low, with both buyers and sellers seeking better opportunities. Exports continue at a solid pace and climatic conditions are favorable for harvesting activities.

COLOMBIA

Coffee flow has been severely delayed by constant rains throughout the country. Local prices are very volatile, following the NY Market and speculating when coffee from Mitaca will finally begin to flow. The 25/26 Main crop coming up towards year's end has big question marks on both volume and quality.

ETHIOPIA

Ethiopia exported 5.9M bags of coffee during the first 10 months of the 2024/2025 cycle, 70% higher than the previous crop year. Floor prices have remained steady for the past several weeks, supporting trading activity.

KENYA

Auctions are paused until July 8th. Central Kenya's accelerated rains have made growers optimistic, although crop forecasts vary by region. Fly crop harvesting has begun, and farmers have been content with pay rates. Cooperatives are actively handling input supply amid payment reform discussions.

UGANDA

Arabica: The season is over and the volume of coffee remaining at washing stations is small.

Robusta: The April-September season continues to pick up pace due to improved weather. Local prices had been relatively stable until the market drop this past week.

INDONESIA

Arabica: The West Java crop figure has been revised downwards due to the increased spread of fungus because of excessive rain. Unfortunately, the forecast has not improved much. The peak season has yet to start in East Java, Sulawesi and Flores as early pickings are still showing poor quality. Sumatra is essentially finished. Exporters are focused on nearby shipments and remain cautious about putting on business beyond August.

Robusta: Coffee flow is now in full swing. Arrivals at mills and collection stations have risen by 45% from previous weeks.

VIETNAM

The new crop is developing well, and farmers are applying fertilizers during the rainy season. Adequate investments in coffee farms are expected. Traders are now liquidating any remaining stocks, cautious over price volatility.

