

BRAZIL

Despite global market volatility, local prices have moved in a narrow range, reducing trading activity and coffee flow. Forward delivery offers remain scarce and at elevated levels due to the inverted market spreads. Rains continue to be ample and consistent across the coffee belt, improving the outlook for the 2026/27 crop potential.

CENTRAL AMERICA

Harvesting activities have begun at lower elevations and new crop evolution is on pace to peak in Dec/Jan. Quality is expected to improve vs last season based on adequate climatic conditions during the bean development period.

ETHIOPIA

The new crop harvest has begun in lowland areas, with cherry prices experiencing a sharp increase once minimum prices are announced. The price difference is, on average, 20% above last season.

KENYA

The main coffee crop is arriving earlier than usual and accelerating due to recent rains, with the peak expected in November. This compressed timeline, combined with the wet weather, is creating significant processing challenges and posing a risk to coffee quality. While regional volume forecasts are mixed, some areas are optimistic about a significantly larger harvest compared to last year.

TANZANIA

A very slow week for the coffee sector due to the aftermath of the Presidential election and the internet shutdown. The re-elected President was sworn in and directed the nation to resume normal activities. Businesses and mills are slowly resuming operations. Port delays are expected due to the congestion brought about by the shutdown.

Arabica: Coffee flow has slowed down with 95% of the crop already at mills, with the balance still held upcountry by farmers.

Robusta: The harvest has come to an end and the auction coffee flow has dried up. Local traders are currently holding any remaining inventories and selling strategically.

UGANDA

Arabica: Coffee flow remains strong even though the country is entering the post-peak phase of the season. Harvesting is expected to continue until mid-December. Climatic conditions, as well as the cocoa season, are complicating both drying and truck availability to transport coffee to dry mills.

Robusta: New crop harvesting has not picked up pace yet, with very little coffee flow. The weather has been benign for new crop development with no production alerts to note.

INDONESIA

New crop harvesting and processing activities have begun in Sumatra, but quality is poor so far due to excessive rains. This is further compounding problems for a crop that was already projected to be smaller and is already behind schedule.

VIETNAM

Typhoon Kalmaegi hammered through the country, killing several people. The Central Highlands region, where most coffee is produced, was largely spared. The climatic instability remains, however, and now typhoon Fung-wong is also threatening the country.

