

BRAZIL

Weather forecasts show a substantial increase in rainfall over the next several days across major coffee-growing regions. Such abundant precipitation comes at a crucial stage following uneven flowering in September. Improved and consistent moisture could help stabilize the 2026 crop outlook by supporting fruit set and early bean development. Agronomists have noted rains appearing after several days of dry and hot weather, which has helped stimulate the main flowering period. A few (3-5) days of dryness following a flowering is ideal as it allows cross pollination and drying out of the flower buds that then fixate to cherries, as long as follow up rains materialize.

COLOMBIA

Coffee flow has picked up slightly as the main crop gets underway. Parchment availability will continue to increase as we move closer to the November peak. Exporters remain relatively quiet, likely a reflection of relatively few open commitments for prompt shipment. Demand continues to increase slowly, with a stronger concentration toward 2026 shipments. Climatic conditions remain favorable for the development of the latest flowerings tied to the 2025/26 fly crop. Forecasts for October point to a return of rains that should support the last flowering phase, but excessive rainfall could pose risks. Based on the flowering events observed between July and September, the next Mitaca (fly crop) is expected to be on time (Apr/May 2026), contrary to this year's delayed pattern.

PERU

A national transportation strike in Peru has closed major motorways and coffee flow to the ports of Callo and Paita is being affected. Public outrage over political corruption and instability has been a long-standing issue in Peru. Protesters say the government is not addressing the country's worsening economic situation and rising crime rates. The coffee hub town of Jaen in Cajamarca is completely paralyzed and there is no clarity when the situation will normalize. Delays on short-term coffee shipments are now a real possibility.

Peru's congress has removed President Dina Boluarte, who came to power after her predecessor was sacked in 2022. Boluarte was removed amid a spiraling crime wave, anger over her crackdowns on protestors, and allegations of corruption. One of the least popular leaders in the world, with an approval rating below 4%, she is the third Peruvian president impeached in just five years. Congress chief José Jeri has taken over as interim leader, vowing a "war on crime." He must hold scheduled elections next spring.

KENYA

The country is at the end of the fly crop season and getting ready for the main crop. Coffee flow at the auctions had been stable for the last several weeks but is now decreasing. Local prices have been declining in response to the NY market. Container availability from various shipping lines remains a challenge.

UGANDA

Robusta: The coffee season is approaching its end with very little flow. Offers are limited for nearby deliveries with most exporters focused on January onward shipments. The UCDA recently released export data indicating record Robusta exports for the Oct 24/Sep 25 crop year.

