

UNITED STATES

The 90-day window on higher US tariffs from all origins is ending July 9th. In the meantime, companies are rushing to import goods before this date to avoid higher taxes. The biggest immediate effect is increased uncertainty. Businesses remain cautious about their sourcing and shipping strategies as tariff policies are in flux. This, in turn, leads to unpredictable demand patterns and logistical instability.

COLOMBIA

There has been a notable increase in the flow of parchment, which has led to a quick reversal from previous weeks. Exporters are expected to push aggressively for the first available coffees to meet their short-term needs, especially with a delayed harvest. Climatic conditions in the main coffee-producing regions continue to show frequent rainfall and limited sunlight. Despite months of relentless rains, precipitation levels have not decreased. So far, the humid conditions do not seem to significantly affect the development of the crop. However, considering that most Colombian coffee is sun-dried, issues related to cup quality and moisture % are rising.

INDONESIA

Arabica: Climatic conditions have improved leading to increased flow and heightened competition among processors. There have been reports of farmers in East Java and Sulawesi strip-picking greens as prices are high and where a quick turnover to cash is seen favorably. West Java's mid to high altitude areas are entering peak harvest and quality has been excellent.

VIETNAM

The Robusta crop is now almost entirely sold and farmers are in no rush to sell their remaining stocks. New crop development is adequate and in good condition for the bean development stage.