

BRAZIL

Continued precipitation has boosted flower setting, improving next year's crop expectations. Differentials have firmed with the NY market decline as producers are well-positioned and not under selling pressure. October experienced a strong number of shipments, largely due to improvements in the port backlog.

MEXICO AND CENTRAL AMERICA

Climatic conditions have been favorable since July, supporting cherry development. The crop is behind by 2-3 weeks, with expectations of improved coffee flow by mid-November.

BURUNDI

Exports remain slow as most private exporters still await price approvals from regulators. Approximately 75% of the crop is estimated to still be in the country, far behind the regular export pace. The rainy season has begun, and the initial bloom is promising. However, a lack of consistent precipitation has introduced uncertainty about next season's crop potential.

ETHIOPIA

New crop minimum prices have been published, showing increases across all grades. The National Bank of Ethiopia (NBE) announced the launch of an online Interbank Money Market platform designed to enhance liquidity across the banking sector and ease the financial bottlenecks affecting exporters and trading companies. Unseasonal rains continue to delay new crop harvesting and processing activities.

KENYA

The harvest pace has picked up, and parchment deliveries to mills are increasing. Rains are expected to stop in the coming two weeks. The government is in the process of providing inputs to farmers, especially fertilizers, for next year's early crop. Volumes at auction are picking up with larger lots and quality is stable. Demand for ABs, AAs, and Grinders remains solid, bringing differentials higher.

TANZANIA

Arabica: Parchment flow into mills is slowing down with the harvest almost finished. Mills remain full beyond capacity, with slow milling due to power problems in different regions.

Robusta: The season is essentially over with local traders keeping small inventories. Only around 10% of the crop remains unsold.

UGANDA

Robusta: Coffee flow to Kampala is stable. Some districts have begun harvesting in Central Uganda, but heavy rains have slowed down drying and transport to hulling stations. Most regions will be actively harvesting by mid-November.

Arabica: The volume of Arabica reaching Kampala is lower-grade Semi-Washed. Local prices for Dried Arabicas (DRUGAR) have moved up significantly due to limited availability and aggressive purchases by local traders. The harvest is about 75% complete, with the remaining supply expected from the Southwest. The outlook for the February to May harvest is positive, as the trees are transitioning back into an on-cycle.

INDIA

Not much activity is taking place as the Diwali festive season took precedence. Local prices have held steady despite the drop in the London market.

INDONESIA

Arabica: With several days of sunshine, harvest in Aceh is picking up steam with improved yields from cherry to green. Local prices remain stable.

Robusta: Arrivals into Lampung are decreasing as the end of the season approaches. The harvest has finished, and less than 10% of the crop is still in the hands of farmers. Differentials firmed significantly following the sell-off in the London market.