

COLOMBIA

Coffee flow is very low, which is normal for this in-between-crops part of the year. Most mills are focused on finalizing their Supremo shipments due to the country's backlog of Supremo beans caused by the disappointing Mitaca crop.

ETHIOPIA

As the local currency (ETB) begins to float more freely, the local market is facing a lot of instability. Internal prices are increasing drastically, which has led to shippers holding off on offers until they assess the situation. Last week, before the ETB was floated, the exchange rate for 1 USD was at a steady 58 ETB. Today, one can exchange 1 USD for 84-90ETB. The upcoming crop has been getting consistent rain, and projected yields are positive.

TANZANIA

Robusta: Coffee flow is improving and deliveries to Dar es Salaam warehouses have begun.

UGANDA

Arabica: Crop surveys indicate another disappointing season ahead, with a production drop of at least 20%. The outlook for the upcoming months suggests local prices could rise significantly.

INDIA

Farmers are still holding coffee, which they are only slowly releasing to market, looking for local prices to improve. Shipping is now the main challenge due to a systemic shortage of containers and skyrocketing ocean freight rates.

INDONESIA

Arabica: The pace of the harvest across Java, Flores, and Sulawesi is winding down. Projections call for 2-4 weeks of adequate flow remaining. Some rains returned after a long, dry stretch. Traders are focusing on the specialty process of high-elevation cherry and the execution of shipments.

Robusta: The full flow of fresh arrivals to Lampung increased almost 20% from the previous week. Local prices continue to spiral downward, with differentials at their lowest levels of the year.

PNG

Local differentials remain firm amidst volatility in the NY market. Most exporters are actively purchasing both B & Y grades but carefully navigating the market. Crop development consensus remains for slowing but continued flow of parchment into mills.