

UNITED STATES

Trump unveiled a new tariff regime covering every country the US trades with. A 15% rate will now serve as the new tariff floor for countries with which the US has a trade deficit, covering around 40 countries. And more than 20 countries will have tariff rates higher than 15%, with prominent coffee origins set as follows (*as of August 1, 2025*):

- Brazil 50%
- India 25%
- Vietnam 20%
- Indonesia 19%
- Nicaragua 18%
- Costa Rica 15%
- Papua New Guinea 15%
- Uganda 15%
- All others will remain at the current 10% level and these tariffs are planned to go into effect August 7th, 2025.

BRAZIL

The United States followed through on its threats to apply 50% tariffs on Brazil and applied sanctions on the Supreme Court justice overseeing the criminal case against former President Jair Bolsonaro. The dual measures sharply escalate the growing diplomatic crisis between the Western Hemisphere's two most populous nations. The tariffs against Brazil are the highest the US has imposed this year, but they exclude many of Brazil's key exports to the United States such as commercial aircraft, energy products and orange juice. Brazil's coffee export council Cecafe issued a statement indicating that negotiations to exempt coffee from the tariff list are still ongoing.

COLOMBIA

Local coffee flow is still sluggish despite a strong harvesting pace. Speculation and price volatility continue to discourage producers and local traders from selling. While holding coffee works for now, eventually they will be encouraged to sell due to financial needs, limited storage space or the risk of quality deterioration. It is estimated that over 60% of the Mitaca (mid-crop) has already been harvested. However, this does not necessarily mean it has been commercialized in equal proportion. Climatic conditions remain dry, supporting harvest and drying activities. This pattern is expected to change by late August with wetter conditions, a scenario that is highly favorable to stimulate flowering events for next year's crop.

KENYA

Auction volumes doubled to 10,000 bags this past week improving coffee availability. Prices softened somewhat as a result.

UGANDA

Arabica: Expectations are for the season to start early, by mid August. First washing stations will be opening soon in the western part of the country.

INDONESIA

Coffee flow is in full swing in Southern Sumatra as arrivals grew by 23% from previous weeks. Sporadic rains are still hampering harvesting activities, but with low intensity and short duration, it is not preventing farmers from continuing their work.

VIETNAM

Collectors are seeking to buy coffee proactively but farmers with stocks are waiting for the better prices. It is estimated that farmers are still holding about 10% of their production. New crop offers from local exporters are available for shipment from December onwards.

