

UNITED STATES

Last Wednesday the Trump administration announced generalized tariffs triggering a global trade war. Tariffs of at least 10% were announced across all countries, with rates going even higher for select nations. Among them are 46% for Vietnam, 34% for China and 20% for the European Union. For the main coffee-origin imports to the US, the tariffs are:

- Vietnam 46%
- Indonesia 32%
- India 28%
- Nicaragua 18%
- Brazil 10%
- Colombia 10%
- Perú 10%
- Honduras 10%
- Guatemala 10%
- Costa Rica 10%
- El Salvador 10%
- Papua New Guinea 10%

For the time being, the only exception to tariffs will be goods from Canada and Mexico that comply with the USMCA agreement.

BRAZIL

Much attention has been drawn to the dry spell experienced in Brazil during the month of March. While temperatures were indeed above average, there are no clear indications yet of any yield loss.

COLOMBIA

Wet climatic conditions continue to dominate in Colombia's main coffee-growing regions as La Niña pattern takes hold. Well above precipitation is leading to adverse impacts on flowering.

ETHIOPIA

Fresh coffee flow is making its way to Addis due to local market stability over the past few weeks. Local traders are also being incentivized by regional governments to move inventories to Addis resulting in improved stocks. The minimum price for washed coffees has decreased boosting washed sales locally.

KENYA

The buying window for the 24/25 main crop is slowing down, with the auction shifting to a bi-weekly schedule. Quality and volumes available for purchase have halved since their peak in February. Rains are continuing but with uneven distribution, while flowering is promising for a potentially good main crop to be harvested in late 2025. Motivated by favorable prices, farmers are actively seeking farm

inputs, and initial cherry payouts are being released from mid to late April, coinciding with school holidays. The President is touring Central Kenya, highlighting coffee sector reforms and good payouts, while market actors are lobbying against newly introduced levies to protect farmer earnings.

RWANDA

The new season has started and washing stations across the country are actively receiving cherries. Precipitation is adequate, and cherry flow is gaining momentum.

TANZANIA

Arabica is currently in the offseason. Growing regions have experienced favorable rainfall, and an improved crop output is anticipated. Robusta regions have received less rainfall, raising concerns about a potentially lower yield in the upcoming season.

