

BRAZIL

The latest reports show Brazilian Arabica millers and traders are cautiously optimistic about improved yields this season, thanks to better rainfall and improved climatic conditions compared with 2024/25. Meanwhile, Conilon growers in Espírito Santo expect a production decline due to normal cyclical patterns coming off a strong 2024/2025 crop.

COLOMBIA

A significant appreciation of the Colombian peso relative to the USD is reducing export competitiveness for coffee cooperatives and exporters (they receive fewer pesos per dollar earned). As the USD tumbles to 4-month lows, margins for coffee operators are being squeezed despite historically high coffee prices. The country is entering the in-between crops period, where coffee flow is at its lowest. Mitaca crop harvesting is expected to start in April.

ETHIOPIA

The harvest is nearing the end in most mid and high altitude regions. As a result, both green and parchment coffee have started to move from upcountry to Addis. At this stage, it is mostly washed coffee as traders await for the government to issue licenses to move natural lots. Commercial Naturals are expected to arrive in Addis by mid February, with the bulk of overseas shipments taking place from April onwards.

TANZANIA

Both Arabica and Robusta seasons have concluded. Local traders holding residual stocks are liquidating strategically to maintain profit margins and avoid losses. Port operations at Dar Es Salaam continue to be adequate and fairly reliable.

UGANDA

The country is still in the aftermath of a Presidential election with limited internet access and mobile money services. Economic activity remains subdued due to political uncertainty but things are expected to normalize in the days ahead. Climatic conditions have been adequate for the development and maturation of coffee cherries.