

COLOMBIA

Coffee flow has improved from the previous week, with the mitaca crop expected to peak between late June and early July. Local prices have already gone through their sharpest phase, driven by limited availability. As more coffee hits the internal market, prices are likely to stabilize in the weeks ahead. Climatic conditions remain wet across the country, and while neutral conditions are expected by Q3, there's still a significant chance of a La Niña event. These conditions could pose a risk to the main crop later in the year.

BURUNDI

Harvesting activities are accelerating after a delayed start. The quality of the cherry so far has been excellent. Local price remains unclear, with the minimum price not set by the government yet and volumes to be confirmed. Better visibility is expected by late May.

ETHIOPIA

This year the shipping season started late but coffee is moving to Addis at a good pace. Container availability is slightly better, mostly with MSC.

UGANDA

Arabica: The Season is almost over in the West, with less than 5% of cherry remaining. Some wet mills are expected to stay open throughout the "off season" as there will still be some coffee in the highlands.

Robusta: The April-September season is starting strong with coffee flow doubling in volume from April/May '24.

INDONESIA

Arabica: Local prices are firming up as the Sumatra harvest approaches its conclusion. Competition in Java is also heating up with Medan exporters leading the way. Initial forecasts for West Java's crop being 34% down are being re-evaluated with a warning to decrease even further due to heavy rains.

VIETNAM

Arabica flowering is estimated to be around 80% complete and Robusta flowering is finished with good fixation. Scattered showers are also supporting the coffee growth stage. Farmers have sold around 80% of their production.