

## EUROPEAN UNION

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The European Parliament approved a one-year delay to the implementation of the deforestation law known as EUDR. This regulation is now expected to come into effect on December 30, 2026. Deforestation rules were originally set to be enforced at the end of 2024, but a similar one-year delay was extended to allow companies to ensure compliance. This latest postponement is not yet official as it still requires a signed amendment between the European Parliament and the Council. But both bodies have now voted in favor of postponement.

## BRAZIL

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Coffee exporters expect it will take several months to make up for the volumes they were unable to ship to the US during the period of steep tariffs imposed by the Trump administration. The decline in Brazil's shipments has resulted in a sharp reduction of certified stocks. Coffee flow has decreased despite the removal of US tariffs on Brazilian coffee as producers slow down sales before year-end. Expectations are for trade volumes to improve in January, but local market actors remain cautious. Climatic conditions remain favorable for new crop development.

## BURUNDI

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Auctions continue commercializing the tail end of the fly crop at the expected 7 to 8k bags/week. Local prices have declined in line with broader market, but only slightly. Next crop is expected to be average in terms of volume, but begin a bit early.

## KENYA

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The main coffee crop is progressing a couple weeks earlier than usual, with a peak harvest happening now. Local traders have observed whitish coffee arriving to Nairobi, indicative of overly quick drying.

## UGANDA

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Arabica: The season is over and most washing stations have either closed or plan to do so by the end of the month. Local traders and exporters are focused on fulfilling remaining shipment obligations.  
Robusta: The season is approaching its peak with more volume and quality consistency in daily deliveries to dry mills and hulling stations.

## VIETNAM

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Heavy rains and flooding have damaged coffee production areas in Vietnam. This has resulted in a substantial number of cherries falling from trees, lowering the crop outlook between 5% and 10%. The pace of harvesting has also been affected with only 15% progress compared to an average of 26% for this time of the year.

## INDONESIA

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Last Wednesday torrential rains of unprecedented scale inundated the Sumatra provinces of Aceh, North Sumatra and West Sumatra, coinciding with the region's main harvest. As of today, there are more than 500 confirmed casualties and many more unaccounted for. Widespread flooding and landslides have severed road access, electricity and communication, with tens of thousands being impacted.

The coffee growing districts of Bener Meriah and Aceh Tengah, which produce a majority of the Sumatra Arabica crop, have experienced severely damaged infrastructure, with most communities isolated at the time of this report. Urgent relief efforts are underway. Sucafina chartered a flight which departed this morning to deliver much needed assistance to our team, our suppliers and their families.

The Sucafina team are all safe and secure, but the rebuilding of essential infrastructure will take many weeks. In the meantime, we will continue to monitor and support the humanitarian effort and work to reactivate our mill.

