

BRAZIL

The rapid and sustained recovery of the NY coffee futures market has helped producers meet their price targets, incentivizing coffee sales. Crop projections warn that output for the 2025/26 cycle could fall by 13%.

COLOMBIA

Torrential rains continue to impact the country, likely reducing the 2025/26 crop potential. The mid-year harvest season has been delayed due to extensive rains, now expected to start in May. Output is expected to be strong and quality appears promising as well.

CENTRAL AMERICA

Coffee flow has slowed down drastically and availability is practically nonexistent. Climatic conditions for new crop development have been favorable, with strong flowering events reported.

PERU

Harvesting for the 2025/26 cycle has begun at lower elevations, with the peak projected for early June. Output is expected to improve compared to the disappointing harvest of 2024/25. The elevated NY market has producer cooperatives and exporters struggling to raise the necessary capital to meet projected cash requirements.

INDONESIA

Arabica: Demand has picked up as differentials have become attractive relative to historic standards. If strong demand is sustained, availability could become a concern on already limited coffee flow between now and the start of Sumatra's main crop in October.

Robusta: Coffee flow has increased sharply from previous weeks, matching aggressive demand from local and international traders.