

BRAZIL

The ongoing market volatility has continued to create opportunities, fostering a favorable environment for buyers to meet local asking prices. Demand for nearby shipments remains strong, further supporting prices. Operational bottlenecks are causing shipment delays, which is in turn putting pressure on traders with low stock levels. On the other hand, Cecafe reports record shipments intended to ease destination inventory concerns.

RWANDA

The coffee harvest is nearing completion across the country and most washing stations will close in the coming weeks. The consensus on the 2024 crop is that it is 20% below expectations, mostly due to lingering rains at the beginning of the season.

TANZANIA

Robusta: Cherry auctions are ongoing and coffee flow has improved recently.

Arabica: The harvest has started with parchment already drying on tables. Auctions are expected to start from August onwards.

UGANDA

Robusta: Across most growing regions, the summer crop is now 90% completed. The recent market rally is expected to incentivize farmers to retain their coffee stock longer and release it gradually.

Arabica: We are in the off-season in both Eastern and Western regions. Initial assessments indicate the harvest is expected to begin in September, peaking in October. However, the 24/25 crop year is uncertain and will likely not reach its projected output. Recent drought conditions in the West have already compromised approximately 5-10% of the crop, with potential further losses if adequate rainfall does not occur within the next 3-4 weeks.

INDONESIA

Arabica: Improved climatic conditions are helping alleviate drying capacity constraints while cherry flow across southern Indonesia is at near peak levels. With the NY rally, differentials have eased, increasing local trade flows.

Robusta: There is little international demand due to elevated LDN levels, except for the occasional buyer looking for urgent nearby coverage. This has been offset by strong demand from local roasters.

PNG

Coffee flow remains low, keeping differentials firm despite the NY rally. Global interest in this unique Asia-Pacific origin has increased, mostly for higher grade washed coffees.



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