

ETHIOPIA

Minimum prices have increased slightly for both naturals and washed as natural coffee prices remain higher than washed. Coffees have started to flow into Addis, but we might see some delays in March shipments.

RWANDA

Cherry harvest has started in the North-western region while the rest of the country is expected to start this week.

TANZANIA

Arabica: The latest auction took place and quality has begun to diminish, signalling the season is coming to an end. Very little coffee left for sale and the focus is now on logistics and exports.

UGANDA

Robusta: Exporters are scrambling for the last flow of coffee by keeping upward pressure on local prices. However, the depreciation of the Ugandan Shilling helped ease the differential and maintained it below other origins. The Main Crop will begin during the first half of April.

Arabica: No significant coffee flow yet as the main exporters have not entered the market yet. The first coffee harvested in the West is now sun-drying and will be flowing into market in the last week of February.

INDIA

Robusta: Harvesting has slowed down mainly due to labor shortages. Coffee Flow has diminished reflecting slow harvesting differentials are strengthening accordingly. Strong international demand has been seen to cover nearby commitments.

INDONESIA

Arabica: Local prices are firm as Sumatra's harvest flow remains subdued but expected to pick up in March. The Java crop will start in March and operators are busy refurbishing washing stations, meeting with suppliers, and preparing for certification/compliance audits. A relatively slow week as many exporters were on holiday for Lunar New Year and National Elections. Vote counts to date indicate a convincing victory for the Prabowo-Gibran ticket, which is viewed as favorable for the economy by continuing Jokowi's policies.

Robusta: Another short week due to Election day as supplies remain very tight. New crop from low lands has started to flow with inferior quality. Trade houses are conducting crop surveys before fasting month starts on March 11th.

VIETNAM

Climatic conditions have been favorable to the crop with ample sunshine in the central highlands. There is also no concern over water shortages at the moment. Farmers have finished the 1st irrigation round and in some regions in Gia Lai farmers have conducted the 2nd one. The flowering rate is estimated at 60% with good fixation.

