

BRAZIL

The harvest continues to advance and gain pace over the past few weeks. Local prices for both Arabica and Conilon have plummeted following the market movement. Exports continue at historically high volumes, according to CECAFE. The weather is optimal for harvesting activities and there are no alerts to report.

MEXICO & CENTRAL AMERICA

The weather for the development of New Crop 24/25 has been adequate. Sporadic rains since March and stronger rains in April have triggered flowering, enhancing the crop potential. Most countries in the region are eagerly awaiting the full rainy season to consolidate in the first half of May.



PERU

The country will become the center of attention in the months ahead as harvesting has just started. The crop is slightly delayed and peak of harvesting is expected in June/July.

UGANDA

Robusta: The crop is looking very healthy for the start of the May harvest, and the first flow to Kampala looks promising with the beans grading above normal. This is the result of positive weather conditions since November. Differentials eroded with the increase of coffee flow to Kampala, sustained by high LDN levels and exporters' realization that continuously raising prices will not result in increased volume of sales. However, the recent LDN fall will likely reverse the diff trend with a sharp strengthening to be expected. There is a shortage of containers in Uganda owing to delays in operations in Mombasa due to the Red Sea crisis.

INDONESIA

Robusta: Arrivals of fresh crop into Lampung are still not meeting expectations and, despite the significant sell off in London, local prices have remained mostly unchanged. The lower-than-expected arrivals and price volatility means new offers are hard to find.

Arabica: Flow of coffee from Aceh has dried up with 95% of the harvest complete. Local traders are still holding some inventories so flow into Medan is expected to continue until the end of May.

VIETNAM

Rains took place in the coffee areas of Daklak and Lamdong. In Gialai and Dak Nong, concerns of drought affecting new crop are growing. London market moved down sharply triggering sales by farmers and local merchants. Offer prices got lower every day this past week.

YUNNAN

A 2-day work week due to National Holidays in China meant minimal trade happened. Most local traders have stopped daily buying, and international companies have also slowed down purchasing pace. Cherry processing will conclude in the weeks ahead. There is a weather alert as a serious lack of precipitation is impacting the Yunnan region. If rains don't materialize in the next 7-10 days, there will be significant impacts for next year's crop.

