
BRAZIL

Local prices for both Arabica and Conilon coffee have increased following the recovery of futures from the previous week. Buyers are holding back on aggressive purchases while sellers are raising their price expectations, leading to reduced trade volume. Producers are now focused on the harvest and the quality of the new crop, while exporters grapple with the logistical challenges at Brazil's ports. According to CECAFE, exports continue at historically high volumes. Climate conditions in coffee growing areas has been favorable for harvesting activities.

MEXICO & CENTRAL AMERICA

Widespread rains have been experienced throughout the region. This will trigger new flowering in what is generally seen as benign conditions for crop development.

PERU

The crop is expected to be lower by approximately 10%. This is mainly due to a higher incidence of leaf rust disease.

RWANDA

We are currently at the peak of cherry harvesting with approximately 50% of the crop progress. There has been a downward move in local prices with a partial offset by elevated differentials. Parchment drying is taking longer due to continued rains. Parchment is expected to begin flowing into dry mills next week.

INDONESIA

Robusta: There has been a slight increase in coffee flows but fresh FOB offers remain scarce as there are virtually no May/June shipment offers available.

Arabica: Demand is slow as local prices remain the same as before the NY selloff. The Sumatra harvest is nearly finished while West Java is approaching peak.

VIETNAM

Farmers are holding around 20% of their crop and only selling in small increments. There has been increased selling pressure from local taders, but not in a sustained way.

YUNNAN

The monsoon rains started at the end of the week bringing much needed relief to very dry growing areas. There have been some adverse impact on trees that had already flowered. We will be watching closely to assess new flowering events triggered by recent precipitation.