

## INDONESIA

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Business was quiet this week with no real movement from shippers or roasters on Arabica or Robusta. However, the first ever Cup of Excellence in Indonesia kicked off this week with 79 coffees making it into the first round. The Rupiah continued to firm.

## PNG

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Parchment flow continues to trickle in from fly crop and coronavirus-related restrictions continue to increase; the Western Highlands is rumored to be next to lock down.

## VIETNAM

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The Robusta harvest is likely to be a bit late but thus far 2-3% has been harvested in the lowlands of Daklak, Kon Tum, and Gia Lai and most areas will start by end Nov. For Arabica farmers have finished the first round (25% of the total) of harvesting in the North (Son La and Dien Bien). The southern Arabica harvest has begun in the low lands, mainly for semi washed. No change in domestic trade; still quiet.

## KENYA

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This week's auction saw 4500 bags on offer of mainly FAQ and Grinder Plus qualities. The week was also a short one, we had a public holiday on Wednesday the 20th in celebration of "Mashujaa" or hero's day. The weather has been sunny with some showers during the morning hours. Cherry picking is gradually picking up in most regions, both quality and quantity look promising.

## ETHIOPIA

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The harvest should begin in the southern areas within a couple weeks and thus far the trees and harvest look good and have experienced the optimal weather for ripening. In Bench Maji harvest has already begun and cherry prices are all over the place which gives a sign of things to come this year as new exporters with vertical integration come along and old exporters with only ties to ECX are a bit sidelined.

## BRAZIL

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This week saw a pickup in activity with producer selling current crop and some forward crop. Conilon prices eased a bit as the local industrial roasters eased their aggressive buying campaign.

The BRL weakened this week to 5.627 v 5.455 last week mostly due to the government's expectation of high welfare spending. Several economists and industry leaders are warning of a fertilizer squeeze due to higher prices of oil and voiced concern over the 2023 crop nutrition. Flowerings continue to be good with only about 10% remaining to flower.

## COLOMBIA

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Internal flow remains steady but no peaks are expected in collection. Demand remains very firm keeping purchase diffs from producers and middlemen at the same level despite any increases in NY. Harvest for the year is around 80% completed.

