

# Green Coffee Quality Report

## Brazil

It has rained substantially over coffee areas from Parana, Sao Paulo and big part of South of Minas. The wet cold mass was concentrated from the south until part of south of Minas. Other areas of Minas Gerais state-Cerrado-Zona da Mata, Bahia and Espirito Santo did not get those rains.

The trees seem to have recovered and need continuous, usual wet weather conditions to offset the effects of the hot summer period. It looks unlikely the country suffers summer dryness for the 3rd consecutive season.

CONAB announced soon start auctions of old coffee from government stocks for local roasters. Auctions shall be of 150.000 bags, twice a month. Total government stocks are roughly 1.5 million bags of good grade all yellow old taste.

### Group 1:

South of Minas cooperatives keep asking prices above BRL\$500.00 for fine qualities no matter if current or previous crop. Cooperative managers reporting that producers do not seem to be in any urgent cash needs therefore they keep holding back offers.

### Group 2:

Producers and long holders are resisting selling at current prices which are below Conilon therefore the total quantity traded is really small day by day.

### Conilon:

Small and medium size local roasters (more flexible to adapt/change blends) have already cut or some even stopped the usage of Conilon due to price disparity. However big roasters are much more cautious to change blends (fierce competition on retail market) therefore have no alternatives than keep buying Conilon.

## Colombia

Rain and sunshine in good rotation is improving the pace of coffee entering the market.

Quality remains poor, as El Niño definitely has affected the quality of the first picks of the main crop and of course, the broca infestation is at high levels!!

Measures from FNC to export undergrades were published this month, so officially Colombia can export that type of coffee. Still too early to tell differentials ...

Nov14 - Oct15 production is up 12%.

## Guatemala

Activities at this time entail coffee picking, observing different collecting percentages depending on the altitude being harvested. Those areas which began in August and September, at an altitude below 800 masl are now about to end, these cherries producing prime and extra prime coffees.

The Semi Hard Bean harvest began in October and November marks the beginning of the Hard Bean Crop. Farms are finishing up wet mill maintenance and repairs.

We now see a presence of intermediaries and exporters purchasing considerable quantities of cherries and parchment coffees.

It is important to note that at this time bean picking is still seen affected by persistent rains. This is registered in all of the coffee regions and this is presenting difficulties in the drying process, the rains do also support the growth for some fungal diseases and cherry abortion.

At this time reports show there is no significant damage in the road and bridge infrastructure close to the farms due to the rainy season, however due to soil saturation and persisting rains exporters are not ruling out unexpected river overflow, landslides and infrastructure damage

## Honduras

Favourable weather conditions throughout the country with rains at night and sunshine during the day. The coffee flow is in good swing with improving yields.

There are still concerns that up to 45% of the coffee currently arriving to the mills in Honduras is "damaged", this is, due to the number of defects and cupping, the coffee is not suitable to be processed. This 45% is rather higher than the usual 20% "damage" rate.

The reason behind this problem is the persistent drought that affected the country this winter, and that not only affected the coffee for lack of rain, but also didn't allow the farmers to properly fertilize their fields, bringing serious doubts about the size and the quality of the coming crop.

But let's not be too pessimistic. We are still at the early stages of the harvesting, and we will have to wait a little bit more before making any assumptions, when higher altitude and quality coffees begin to arrive to the mills.



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Intermediaries are the most active players, building stocks and waiting for better prices. IHCAFE estimates that exports during the 15/16 season will rise 9.9% to reach 5.52 Mio bags.

#### **Costa Rica**

Cherries flow steady in the southern region. Mixed weather conditions countrywide. Crop develops well for this time of the year.

#### **Peru**

Harvest is ending soon with little buying opportunities. Sizable coffee stocks are held back by farmers and middlemen with higher asking prices than replacement levels. A ongoing dry spell in the northern growing regions continues.

#### **El Salvador**

In El Salvador the activity is still slow, despite the positive forecasts for the coming crop that announce an increase of at least 8%.

#### **Ethiopia**

The ongoing harvest of the new crop is progressing well. However, continuous rainfall in the areas of Yirga and Sidamo are delaying the parchment drying process. First new crop arrivals of washed qualities are expected to start soon.

#### **Kenya**

Main crop parchment eagerly awaited by the mills. Sunny days have complemented the harvesting and processing of the late crop which is now in full swing in all areas.

#### **Tanzania**

Substantial amounts of rainfall have been recorded in the north and south of the country.

Dry mills in the south receive what might potentially be the remnants of parchment from the current crop. Exporters estimate that about 35% of the crop is still held in the dry mills in the south. Some harvesting activity is still ongoing in parts of the north while the parchment deliveries to dry mills gains momentum.

#### **Uganda**

##### **Arabica**

Good weather conditions countrywide. The peak of the harvest is supporting the internal flow of washed Arabicas. Quality outlook is pleasant.

##### **Robusta**

Weather is the key factor and more sun is needed to dry the cherries properly, but there are no concerns about the volumes and the quality of the new crop.

#### **India**

The heavy rains that have been seen this month finally shifted to the east with Tamil Nadu reporting heavy rains and local floods. Harvesting has started in Kerala and some first fly crop picking has been seen in Karnataka. The continuously rainy weather slows down the picking and will delay the crop by a couple of weeks.

#### **PNG**

Arrivals of green and parchment have remained this month and it is showing signs of staying the same through the off season. The Highland regions have had good rains which helped the previously set pin-heads and much needed moisture for the parched trees. Additionally round of flowering in the eastern highlands is beginning.

#### **Vietnam**

Farmers have begun harvesting the first 10-20% of the crop.

#### **Indonesia**

Rains have reduced the stress of the tress and in the highlands where the majority of

The coffee is produced, the situation is reported to improve. The low lands still need rain. Damages cannot be determined for the time being.

Sources: Flavour, Volcafe, Atte, Taylor Winch, ICONA



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