

**LONDON ICE MARKET**



LONDRES					
Posición	último	dif	alto	bajo	cierre
MAY25	5112	175	5134	4961	5099
JUL25	5073	177	5076	4896	5049
SEP25	5000	167	5000	4832	4971
NOV25	4925	158	4925	4768	4899

NUEVA YORK					
Posición	último	dif	alto	bajo	cierre
MAY25	358,30	15,45	359,30	341,60	342,85
JUL25	353,90	12,30	355,40	340,05	341,60
SEP25	347,70	10,25	350,20	335,90	337,45
DEC25	340,95	8,30	344,25	331,20	332,65

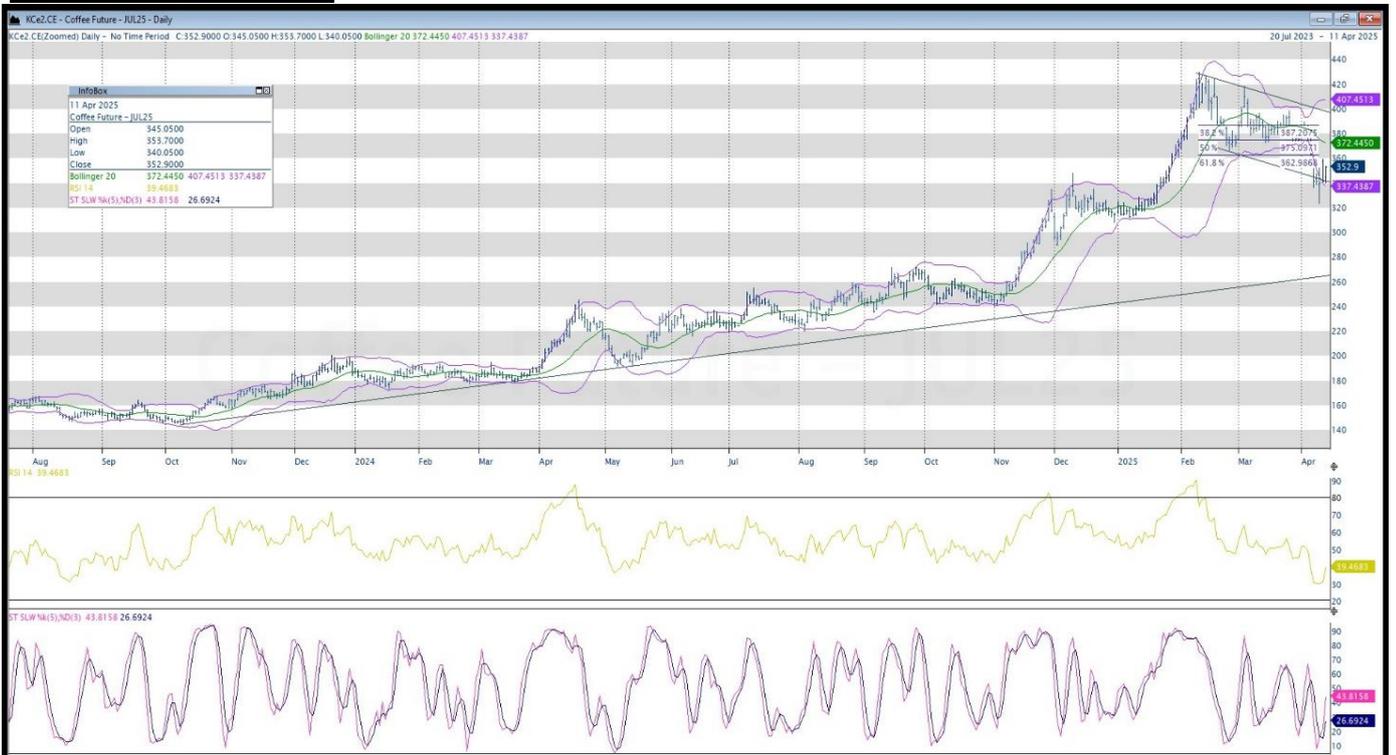
**London ICE:**

Supports: 4935, 4840, 4630 & 4450-4400  
Resistances: 5070, 5170, 5275 & 5375

**New York ICE:**

Supports: 354,25, 350,50, 339,00 & 312,75  
Resistances: 367,50, 379,50, 392,75 & 428,50

**NEW YORK ICE MARKET**



WEEKLY MARKET REPORT



**BRAZIL**

Brazil's green coffee shipments dropped to 2.95 million bags in March from about 4 million a year earlier, exporter group Cecafé says in a report. Arabica coffee exports fell 11% y/y to 2.8m bags. Robusta shipments decreased 84% to 138,582 bags. Total coffee exports (green, roasted and soluble) fell 25% to ~3.3m bags.

Exports of all forms of coffee also fell in the first quarter, by 11.3%, to 10,707,100 bags. Exports of green coffee totaled 9,715,601 bags (12.9%). A slight decrease (-2.7%) was recorded for Arabicas, whose shipments amounted to 9,012,433 bags. Robusta exports, on the other hand, fell sharply (-62.8%) to 703,168 bags. Sales of processed coffee rose (+8.3%) to 991,499 bags.

In the coffee-producing areas of Minas Gerais, rains between 5 and 30 mm have occurred, but dry conditions are expected in the coming days. During next week, another period of more active showers and thunderstorms is very likely to reach the south of Minas, Cerrado, and Zona da Mata, though a brief period of less frequent rain may occur from Friday through the weekend with much limited amounts. Overall, completely dry weather is unlikely, and temperatures are projected to remain mild over the next ten days, with daily highs between 25 to 30 degrees Celsius and nighttime lows ranging from 15 to 22 degrees Celsius.

**VIETNAM**

Past Wednesday, millions of Vietnamese people stayed up all night following the negotiation results between Vietnam and the US delegations in Washington, while the coffee market was heavily in red. FAQ coffee prices dopped to VND122.000/kg or US\$4.7, but recovered again Thursday when Trump paused tariffs globally, raising to 125% only to China. U.S. has agreed to begin negotiations on a reciprocal trade agreement with Vietnam to see if there will be additional tariff or not outside the current 10%. The scenario is extremely uncertain, and it will be necessary to await developments in the negotiations and the details of the measures announced by Trump's Administration to understand what will happen next.

The Customs reported Vietnam exported 181,115 tons of coffee worth of US\$1,063m, up 6.6% in volume and 10.3% in value over previous month. For the 1st quarter period 2025, the country shipped 495,780 tons of coffee valued US\$2,81m. down -15.3% but up 45.8% in value year on year.

Weather conditions remain healthy for tree development with farms receiving 2nd or 3rd irrigation combined with fertilizing.

**CENTRAL AMERICA / COLOMBIA**

A total of 27,000 bags of **Arabica milds** were presented for grading on Thursday against NY ICE Exchange, bringing the cumulative total to over 80,000 bags. Market participants expect to see continued grading in Europe due to U.S. tariffs.

**OTHERS**

As **India's** exports expand, so too does its domestic coffee industry. While traditionally a nation of tea drinkers, the almost 1.5 billion people that call it home are increasingly switching leaves for beans. The Coffee Board of India estimated that in 2023 domestic consumption reached 91,000 tons of green bean equivalent, up from 84,000 tons in 2012. Now the world's seventh largest coffee producer – and fifth largest Robusta producer – India is one of the major consumer players.

**DEMAND / INDUSTRY**

**Nescafé** is expanding its Ready-to-Drink cold coffee range to India, the Middle East and North Africa (MENA) region, and Brazil. The company says the role out of the range aims to meet the needs of younger consumers "who prioritize convenience, variety, and on-the-go options that align with their fast-paced and dynamic lifestyles".

**QUOTATION EURO / US DOLLAR**

€/US\$ rate	last	high	low
EUR/USD Euro/US Dollar	1,1295	1,14736	1,11966

EUR/USD demonstrated remarkable strength yesterday, surging over 2% and breaking through critical technical barriers amid broad dollar weakness triggered by continued trade tensions and tariff uncertainties. Recent US inflation data showing CPI cooling to 2.4% year-over-year in March, combined with the US administration's decision to pause reciprocal tariffs, has significantly undermined confidence in the dollar.

The European Central Bank's hawkish stance and improving Eurozone economic sentiment have provided substantial support for the euro, with the currency pair reaching a session high of 1.124 after breaching the psychologically important 1.10 level. Market participants are increasingly viewing European assets as an attractive safe-haven alternative to US Treasuries, particularly German bunds, which has further bolstered the euro's position.

**ADDITIONAL COMMENTS**

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