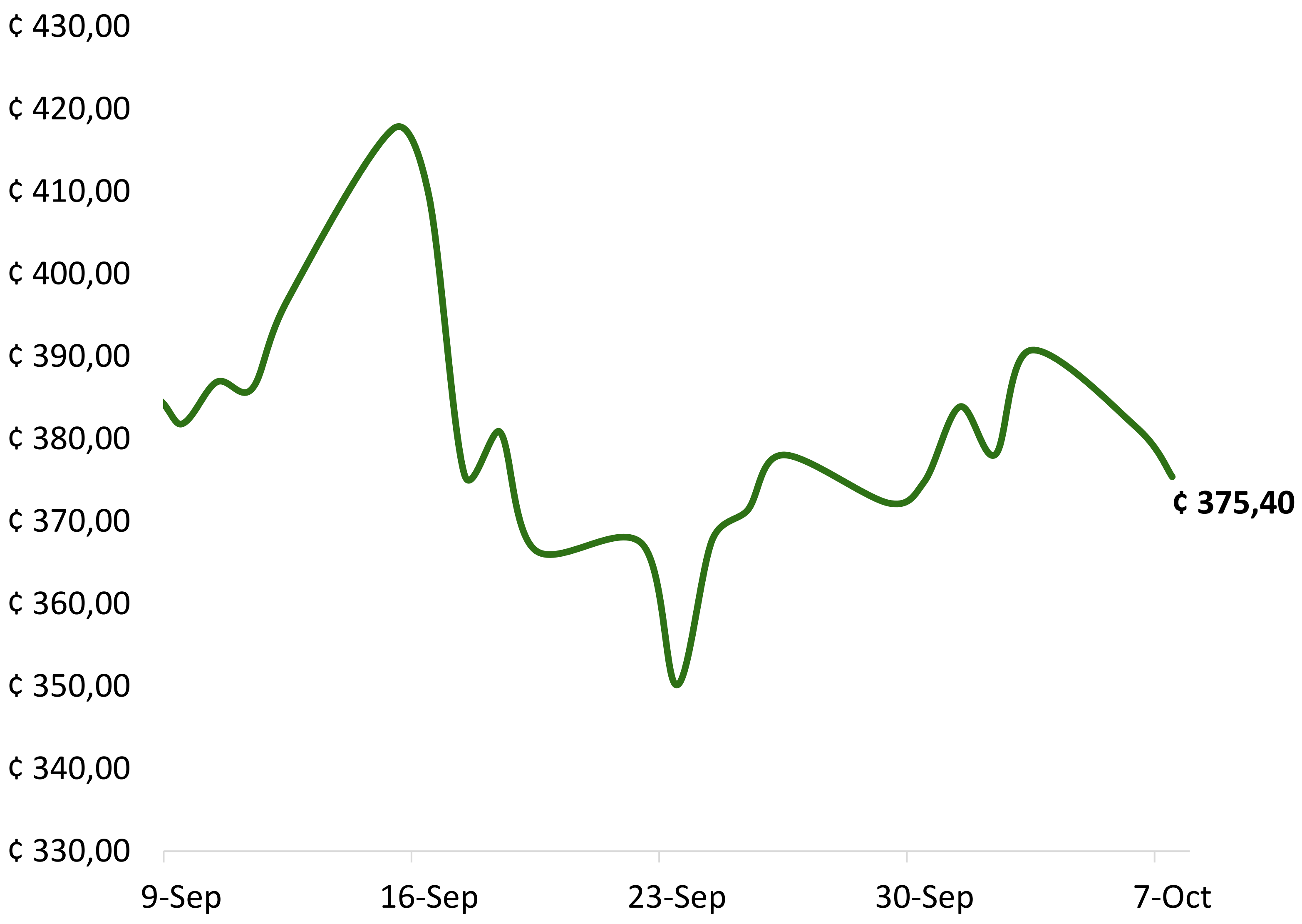
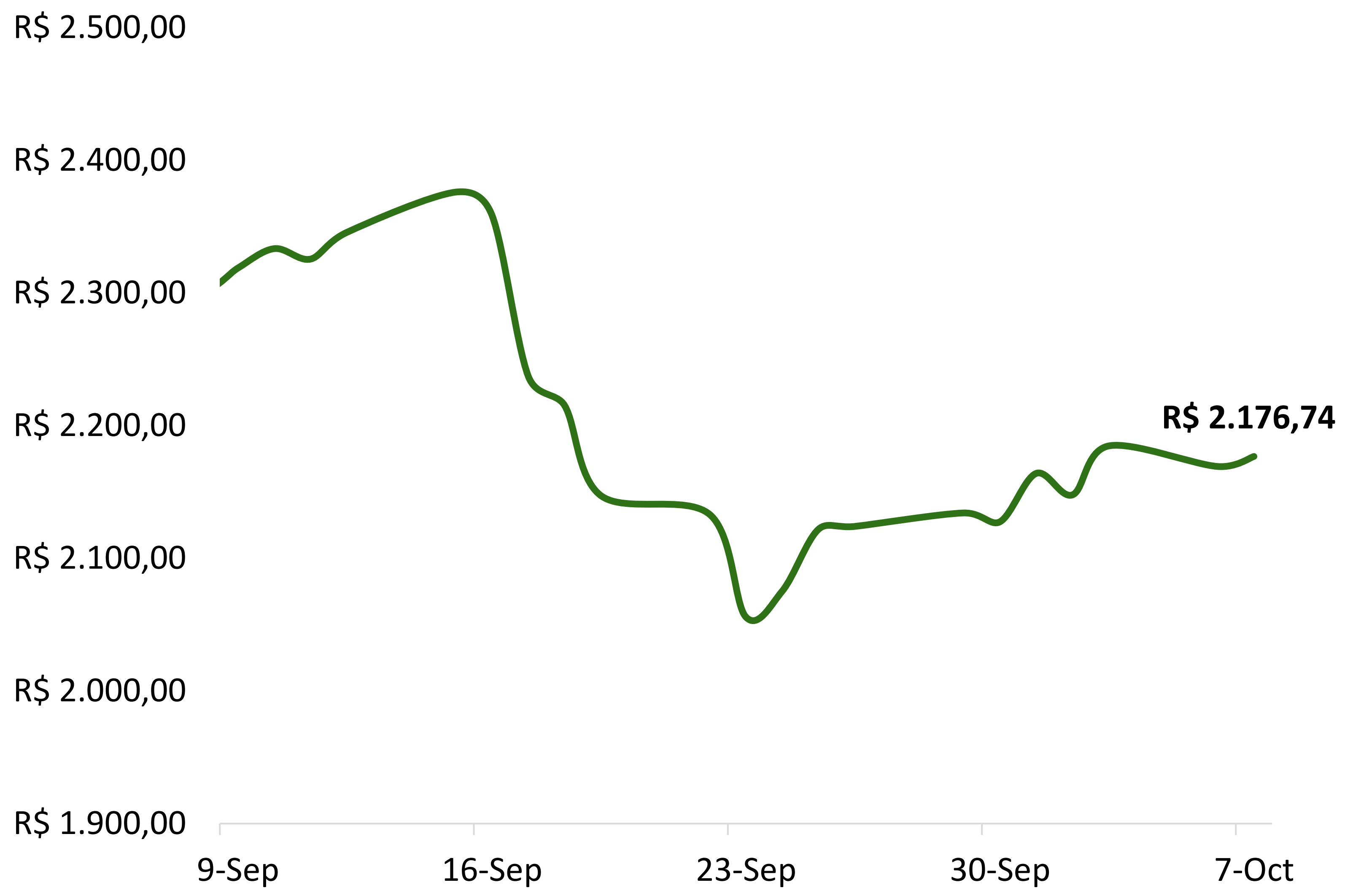
Arabica Coffee ICE/NY (US$ c/lb)



Source: ICE/NY, compiled by DATAGRO

Arabica Coffee CEPEA (R$/sc)



Source: CEPEA, compiled by DATAGRO

Highlights:

- Arabica prices for the DEC/25 contract closed Tuesday lower, reaching US$ 375.40 c/lb, a decline of 1.56% compared to the previous day. Robusta, for the NOV/25 contract, dropped 1.27%, trading at US$ 4,414 per metric ton compared to Monday;
- Certified Robusta and Arabica stocks fell versus 10/06;
- FNC – Colombia's coffee production reaches 14.87 million bags in 24/25;
- Black Rock Coffee Bar coverage on NASDAQ begins with optimistic outlooks.

Closing 10/07 – Arabica and Robusta decline:

Daily summary:

On Tuesday, Arabica and Robusta coffee prices fell across all contracts listed on the NY and LON exchanges for the second consecutive day. The DEC/25 Arabica contract dropped 595 points, trading at US$ 375.40 c/lb, down 1.56% from the previous session. Robusta, with delivery in NOV/25, lost 57 points and settled at US$ 4,414 per ton, down 1.27%.Meanwhile, according to FNC, Colombia's coffee production reached 14.87 million 60-kg bags for the 2024/25 crop, a 17% increase from the previous cycle and the largest volume in more than three decades. In the specialty coffee market, Black Rock Coffee Bar (BRCB) has become the focus of new equity coverage reports from major Wall Street banks, which express optimism regarding the company's growth potential.

International prices:

The DEC/25 Arabica contract in New York closed Tuesday at US$ 375.40 c/lb, a drop of 595 points (-1.56%) from the previous session. The MAR/26 contract closed at US$ 359.15 c/lb, down 580 points (-1.59%). During the session, the DEC/25 contract fluctuated by 1,015 points, ranging between US$ 372.15 c/lb and US$ 382.30 c/lb.

The NOV/25 Robusta contract in London closed at US$ 4,414/ton, down 57 points (-1.27%) from the prior session. The JAN/26 contract ended at US$ 4,388/ton, down 76 points (-1.70%). Throughout the day, the NOV/25 contract fluctuated by 109 points, ranging from US$ 4,412/ton to US$ 4,521/ton.

Domestic prices:

In Brazil, the DEC/25 Arabica contract on B3 closed at US$ 450.25/bag, down 1.17% from the previous close. According to CEPEA, Arabica prices rose 0.35% on the day, quoted at R$ 2,176.74 per bag. The Conilon indicator fell 0.48%, closing at R$ 1,387.19 per bag.

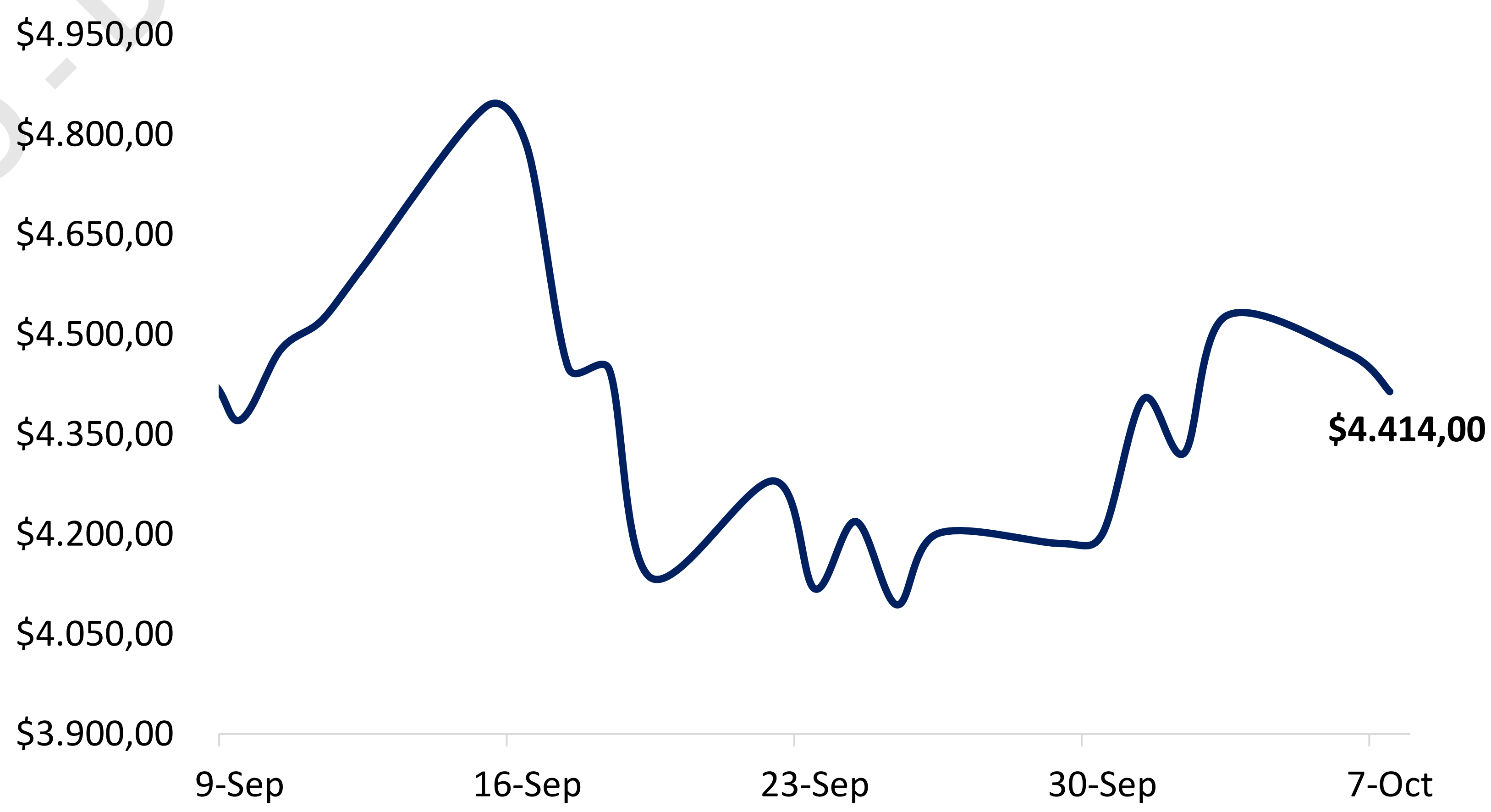
The Brazilian real slightly weakened on Tuesday, with the USD closing at R$ 5.35 (+0.75%).

Stocks:

Certified Arabica stocks at ICE/NY stood at 534,670 bags on 10/07, down 471 bags from 10/06. There are also 2,480 pending bags awaiting approval, an increase of 330.

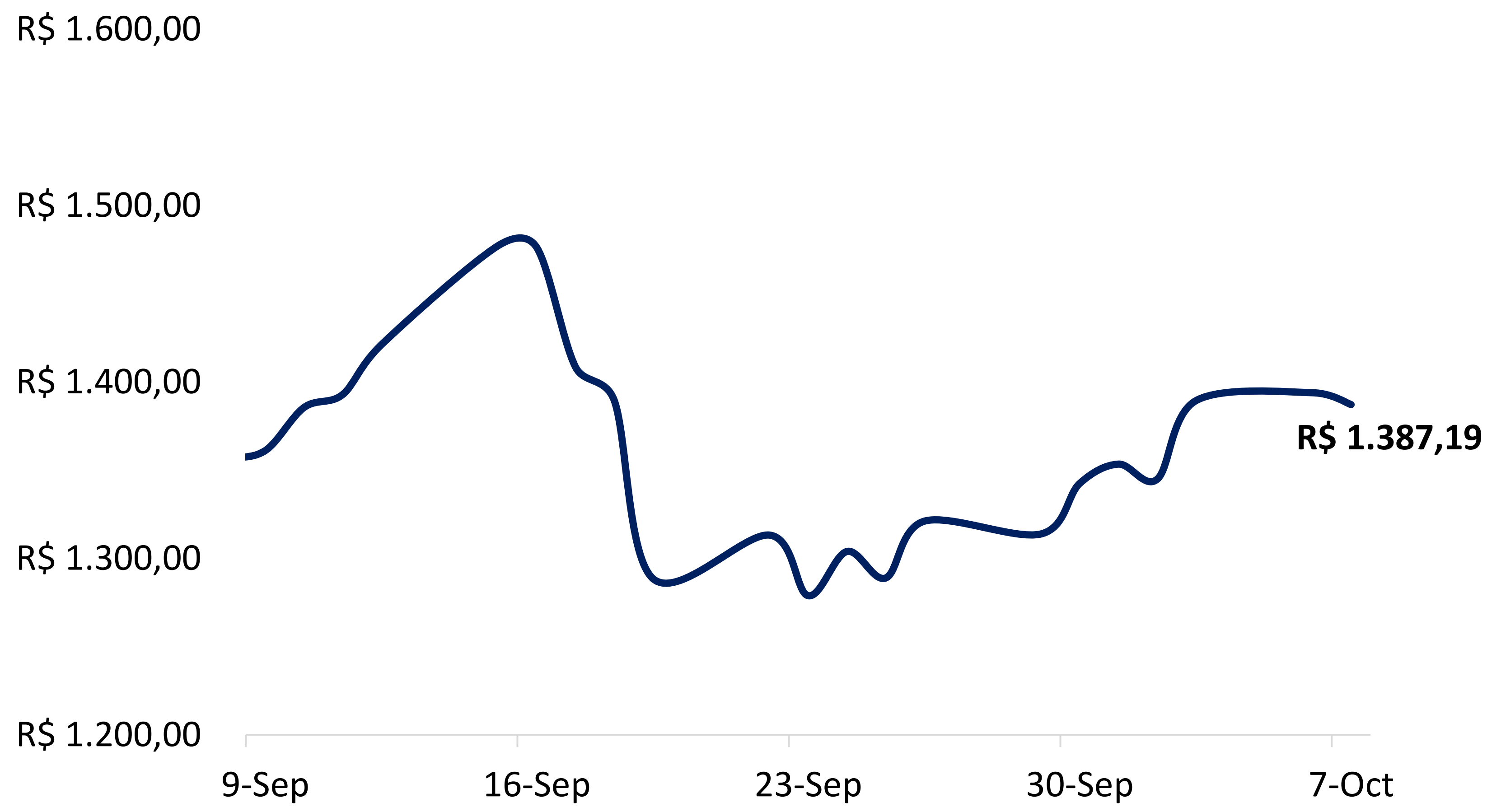
Certified Robusta stocks at ICE/LON were 1.05 million bags on 10/06, a decline of 6,670 bags compared with 10/05.

Robusta Coffee ICE/EU (US$/ton)



Source: ICE/LON, compiled by DATAGRO

CEPEA Conilon (R$/bag)



Source: CEPEA, compiled by DATAGRO

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FNC – Colombia's Coffee Production Reaches 14.87 Million Bags in 24/25:

According to the Federación Nacional de Cafeteros (FNC), Colombia's coffee production totaled 14.87 million 60-kg bags in the 2024/25 crop year. This represents a 17% increase from the previous cycle and marks the country's best harvest in 33 years. The result was driven by the renovation of coffee plantations, efficient crop management, and favorable weather conditions.
Exports also grew 12%, reaching 13.3 million bags, while domestic consumption remained stable at 2.25 million, and imports totaled 893,000 bags.
For the 2025/26 crop, FNC's executive director, Germán Bahamón Jaramillo, projects a slight production decline due to natural plant response and less favorable weather. Accordingly, DATAGRO estimates production at 12.5 million 60-kg bags for Colombia in 25/26.

Black Rock Coffee Bar Coverage on NASDAQ Begins with Optimistic Views:

Black Rock Coffee Bar (BRCB), a specialty coffeehouse chain listed on Nasdaq, recently completed its IPO, raising US$ 338.2 million in gross proceeds. Following its market debut, BRCB shares became the subject of equity coverage from major Wall Street banks.
Jefferies initiated coverage with a Buy rating and a US$ 30.00 price target, citing the company's promising trajectory and competitive advantages. Similarly, Morgan Stanley, Stifel, and Baird launched coverage with equivalent Buy ratings and targets of US$ 28.00, US$ 27.00, and US$ 32.00, respectively. In contrast, JPMorgan took a more conservative stance, assigning a Neutral rating and a US$ 24.00 price target, noting that much of the short-term upside had already been priced in since the IPO in September.

Opening 10/08:

Today, the Arabica market opened higher. The DEC/25 and MAR/26 C contracts gained 460 and 305 points, respectively (+1.23% and +0.85%), trading at US$ 380.00 c/lb and US$ 362.20 c/lb.

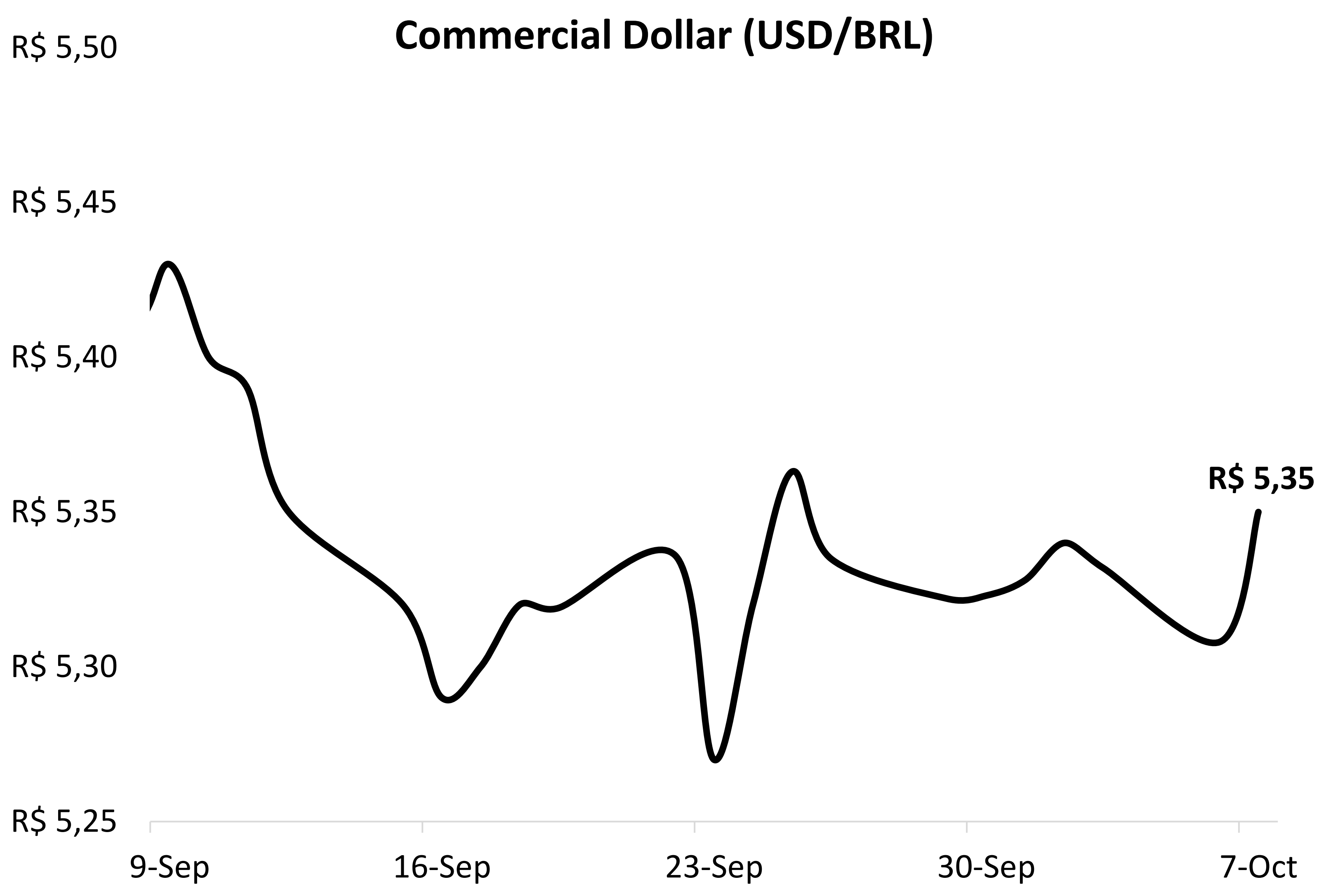
London Robusta followed suit, opening higher for both NOV/25 and JAN/26 contracts, trading at US$ 4,478 and US$ 4,424 per ton, up 64 and 36 points (+1.45% and +0.82%), respectively.

Prices 10/07:

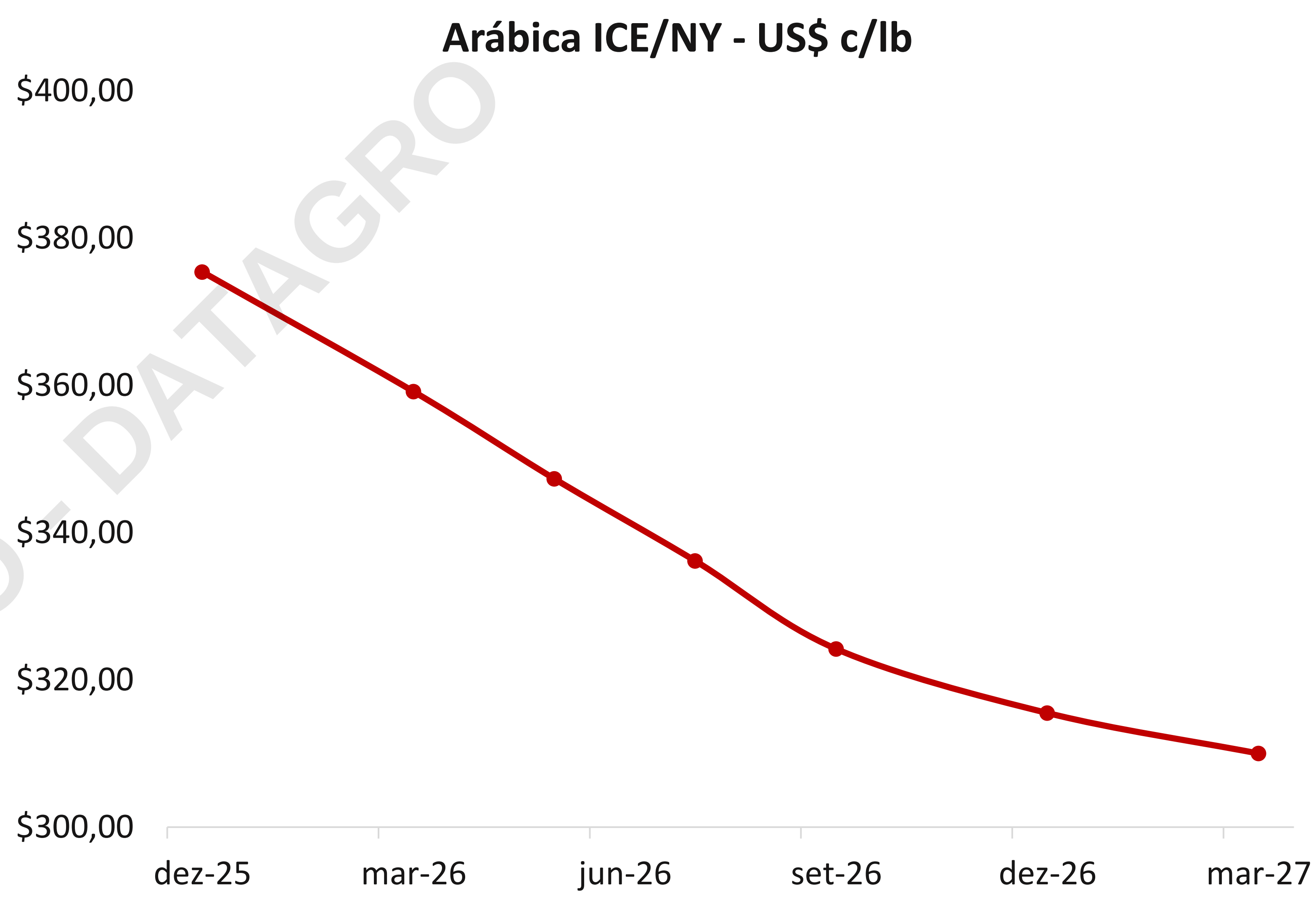
☕ Arabica Coffee
CEPEA: R$ 2,176.74/bag
ICE/NY DEC/25: US$ 375.40 c/lb
ICE/NY MAR/26: US$ 359.15 c/lb
B3 DEC/25: US$ 450.25/bag
B3 MAR/26: US$ 443.65/bag

☕ Robusta Coffee
CEPEA: R$ 1,387.19/bag
ICE/LON NOV/25: US$ 4,414/ton
ICE/LON JAN/26: US$ 4,388/ton

💵 Dollar
Spot: R$ 5.35
NOV/25: R$ 5.39
DEC/25: R$ 5.41



Source: DATAGRO Markets, compiled by DATAGRO



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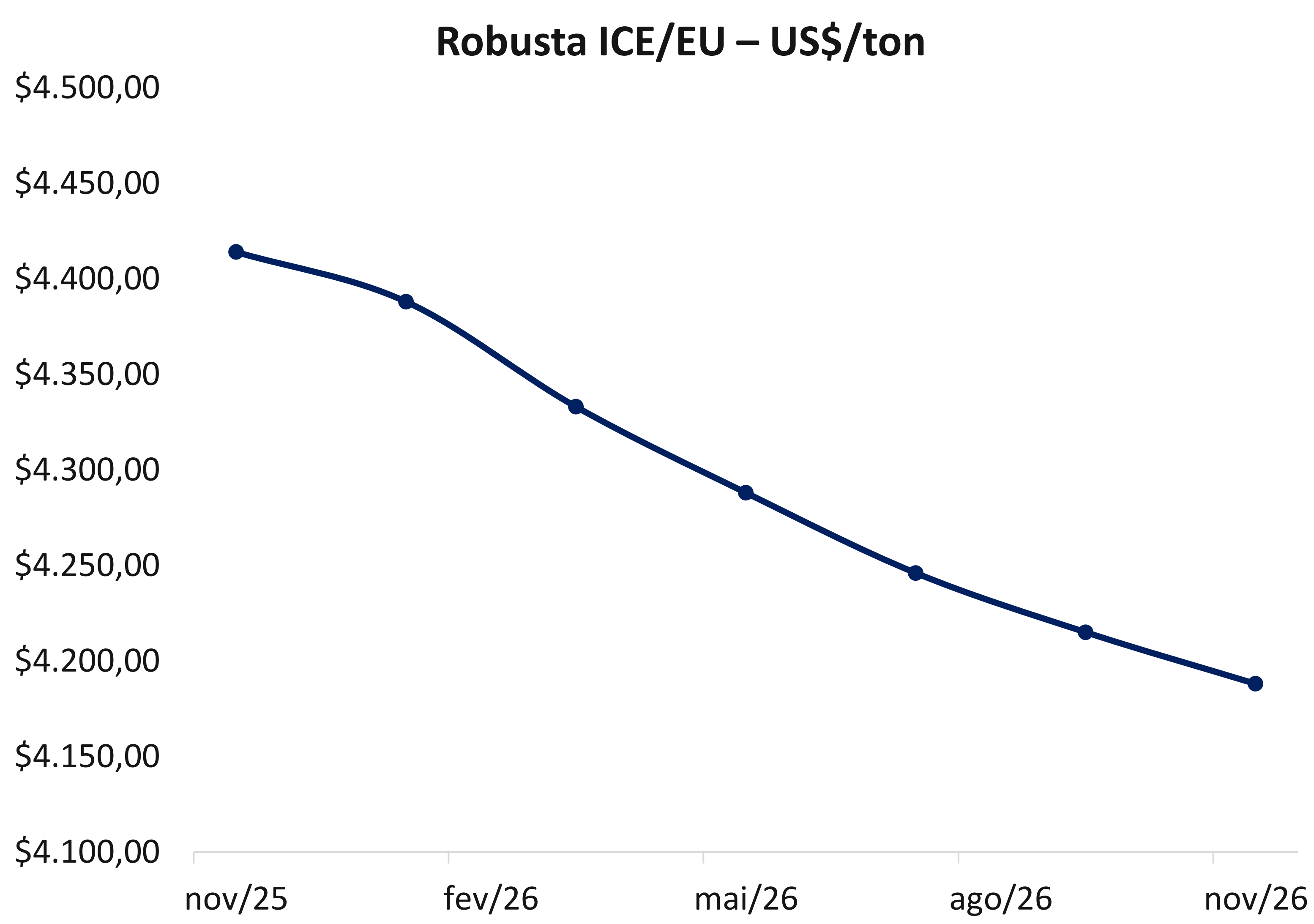

Source: DATAGRO Markets, compiled by DATAGRO

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