



MANGA

COFFEE CORPORATION

Market closed on January 2, 2018

ICE: CONTRACT	SETTLE
KCH8	130,20
KCK8	132,40
KCN8	134,70
KCU8	137,00
KCZ8	140,40

BM&F: CONTRACT	SETTLE
ICF8	163,90
ICFK8	161,55

DOL: CONTRACT	SETTLE
DOL COM - DOLAR COMMERCIAL	3,2610

MARKET	PRICE IDEAS FROM BUYERS
PADRÃO 0 - CEREJA	R\$ 490,00
PADRÃO 1A - FC CERRADO	R\$ 460,00
PADRÃO 1B - FC SOUTH OF MINAS	R\$ 450,00
PADRÃO 2 - GOOD CUP DURO	R\$ 435,00
PADRÃO 3 - GOOD CUP 2 RIADAS	R\$ 425,00
PADRÃO 4 - DURO RIADO RIO (7/21)	R\$ 415,00
PADRÃO 5 - RIO	R\$ 400,00
PADRÃO 6A - CONSUMO 600 DEF DURO	R\$ 410,00
PADRÃO 6B - CONSUMO 600 DEF DURO RIADO RIO	R\$ 390,00

Note: Standard qualities considering 25% of screen 17/18 and 20% of leakage (maximum of 0,5% of impurity), except quality 6A and 6B.

FOB: QUALITY - CONSIDERING THE STRING	DECEMBER/JULY
NY 2/3 17/18 FC CERRADO	4
NY 2/3 15/16 FC CERRADO	1
NY 2/3 14/16 FC CERRADO	-2
NY 2/3 17/18 FC SOUTH OF MINAS	1
NY 2/3 14/16 FC SOUTH OF MINAS	-5
NY 2/3 17/18 GOOD CUP	-4
NY 3/4 14/16 GOOD CUP	-10
NY 2/3 17/18 GOOD CUP 2 RIOY CUPS	-6
NY 3/4 14/16 GOOD CUP 2 RIOY CUPS	-12
NY 5/6 13UP 300 DEF COB GRINDERS	-9
NY 5/6 12UP 350 DEF COB GRINDERS	-13
NY 3 17/18 RM (US\$ / 50 KGS)	131
NY 4 15/16 RM (US\$ / 50 KGS)	128
NY 4 14/16 RM (US\$ / 50 KGS)	125

Obs: Fob ideas considering price ideas from buyers (Simple exercise).

SPREAD: ICE (CTS/LB)	
-2,20	March/May
-2,30	May/July
-2,30	July/September
-3,40	September/December
-0,45	December/March

ARBITRAGE: ICE/BM&F (CTS/LB)	
-6,30	March/March
-10,27	May/May

Coffee Market Report

The 2017 year has ended with the Reuters Equal Weight Continuous Commodity Index that is made up from 17 markets flat and ending the year only 0.017% lower than the end of the previous year, but with the coffee terminal markets having fared worse than the overall mix of commodity markets. The New York Arabica coffee market ending the year 7.92% lower and the London Robusta coffee market even more dramatic 19.64% lower, that the end of the previous year.

The latest Commitment of Traders report from the New York Arabica coffee market has seen the Non-Commercial Speculative sector of this market increase their net short sold position within the market by 0.86% during the week of trade leading up to Tuesday 26th. December; to register a net short sold position of 58,558 Lots on the day. This net short-sold position which is the equivalent of 16,600,933 bags has most likely been since reduced a little, following the period of more positive trade that has since followed.

The Indonesian government trade data from Sumatra which is the leading coffee producing island within Indonesia, has reported that the islands Robusta coffee exports for the month of December were 350,761 bags or 70.87% lower than the same month last year, at a total of 144,152 bags. This number and following a similarly modest export performance for the previous couple of months has contributed to the cumulative coffee exports for the first three months of the present October 2017 to September 2018 coffee year to be 1,094,527 bags or 66.61% lower than the same period in the previous coffee year, at a total of 548,635 bags.

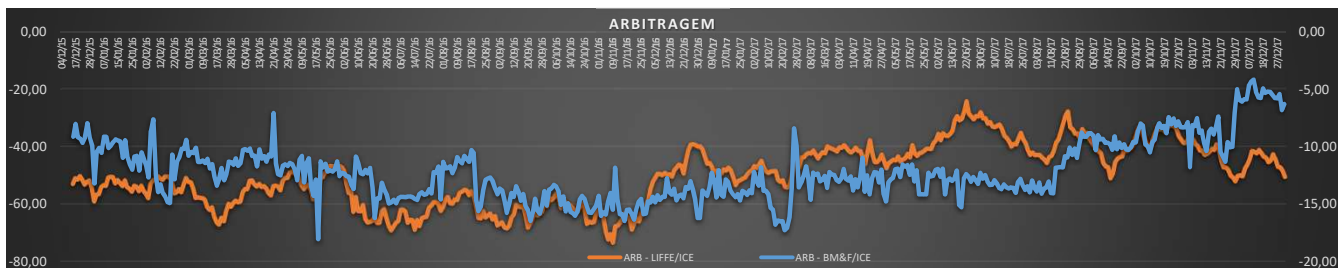
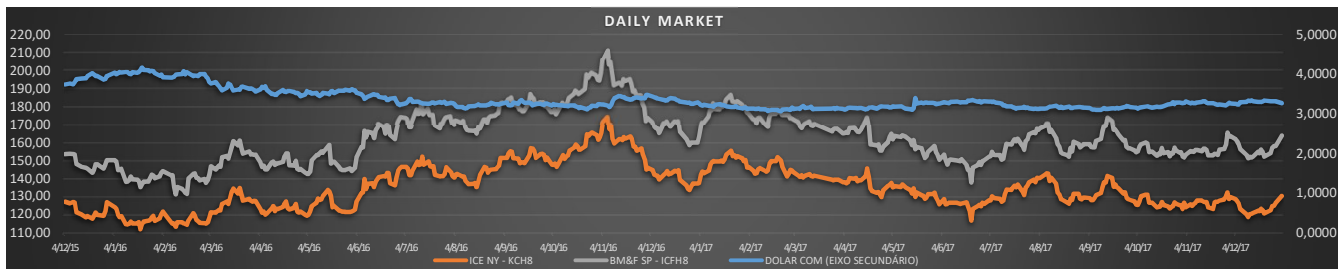
The drying up of Indonesian Robusta coffee supply is however not foreseen to be an issue on the part of the consumer market industries, as with the prospects for a new and larger Vietnam Robusta coffee crop that is now starting to come into play, focus is now upon a good and steady supply of Vietnam Robusta coffees for the coming months.

There is likewise seemingly no major concern on the part of the consumer market industries in terms of medium term Arabica coffee supply, as they continue to draw upon good levels of mainstream consumer market Arabica coffee stocks, while looking to the fore in terms of the forecast for an overall larger new Mexican and Central American fine washed Arabica coffee crop. This new crop presently in full harvest and with exports from this new crop, already starting to be shipped.

The March 2018 to March 2018 contracts arbitrage between the London and New York markets broadened on Friday, to register this at 48.27 usc/Lb., while this equates to 38.25% price discount for the London Robusta coffee market.

The Certified washed Arabica coffee stocks held against the New York exchange were seen to increase by 1,339 bags on Friday; to register these stocks at 1,973,669 bags. There was meanwhile no change to the number of bags pending grading for this exchange; to register these pending grading stocks at 56,765 bags. These stocks having ended the year 2017 728,290 bags or 58.48% higher than their level, at the end of the previous year.

Source: iandmsmith.com



COLABORADORES

ALBERT MIRANDA PAIVA
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ERICKSEN SOUZA
JOSÉ ANTONIO DOS SANTOS MANGA
KELLY APARECIDA FERREIRA
LEONARDO SOARES
LILIAN G. TRIGOLO
MARCOS EDUARDO CLAUDINO
PATRICIA TOMAZ DE ASSIS
RODRIGO BARBALAT
SANDRA GOMES
WALLAFE VITOR TAVARES

ASSUNTOS

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DIRETOR/ADMINISTRATIVO/FINANCEIRO
TORRADO E MOIDO/PROJETOS
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ASSISTENTE ADM/FINANCEIRO
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CLASSIFICAÇÃO
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