



MANGA

COFFEE CORPORATION

Market closed on January 19, 2018

ICE: CONTRACT	SETTLE
KCH8	121,25
KCK8	123,70
KCN8	126,10
KCU8	128,40
KCZ8	131,85

BM&F: CONTRACT	SETTLE
ICFH8	154,25
ICFK8	150,00

DOL: CONTRACT	SETTLE
DOL COM - DOLAR COMMERCIAL	3,2020

MARKET	PRICE IDEAS FROM BUYERS	
	PADRÃO 0 - CEREJA	R\$ 480,00
	PADRÃO 1A - FC CERRADO	R\$ 460,00
	PADRÃO 1B - FC SOUTH OF MINAS	R\$ 450,00
	PADRÃO 2 - GOOD CUP DURO	R\$ 440,00
	PADRÃO 3 - GOOD CUP 2 RIADAS	R\$ 430,00
	PADRÃO 4 - DURO RIADO RIO (7/2/1)	R\$ 425,00
	PADRÃO 5 - RIO	R\$ 410,00
	PADRÃO 6A - CONSUMO 600 DEF DURO	R\$ 415,00
	PADRÃO 6B - CONSUMO 600 DEF DURO RIADO RIO	R\$ 395,00

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: NET SELLER	QUALITY - CONSIDERING THE STRING	JANUARY/JULY
	NY 2/3 17/18 FC CERRADO	13
	NY 2/3 15/16 FC CERRADO	10
	NY 2/3 14/16 FC CERRADO	7
	NY 2/3 17/18 FC SOUTH OF MINAS	10
	NY 2/3 14/16 FC SOUTH OF MINAS	4
	NY 2/3 17/18 GOOD CUP	7
	NY 3/4 14/16 GOOD CUP	1
	NY 2/3 17/18 GOOD CUP 2 RIOY CUPS	4
	NY 3/4 14/16 GOOD CUP 2 RIOY CUPS	-2
	NY 5/6 13UP 300 DEF COB GRINDERS	-1
	NY 5/6 12UP 350 DEF COB GRINDERS	-5
	NY 3 17/18 RM (US\$ / 50 KGS)	133
	NY 4 15/16 RM (US\$ / 50 KGS)	129
	NY 4 14/16 RM (US\$ / 50 KGS)	126

Obs: Fob ideas (Simple exercise).

SPREAD: ICE (CTS/LB)

-2,45	March/May
-2,40	May/July
-2,30	July/September
-3,45	September/December
-3,25	December/March

ARBITRAGE: ICE/BM&F (CTS/LB)

-4,64	March/March
-10,30	May/May

Coffee Market Report

The official crop supply agency in Brazil Conab have come to the fore yesterday, in support of the many other forecasts for a significantly larger new Brazil coffee crop for this year. In this respect they have forecast the new crop could be between 54.44 million and 58.51 million bags and based upon a new Arabica coffee crop of between 41.74 million bags and 44.55 million bags, which is significantly larger than their estimate of the 2017 Arabica coffee crop of 34.2 million bags. While the report has forecast that the countries new Conilon Robusta coffee crop which they had pegged at 10.72 million bags for the previous 2017 crop, shall rise this year to between 12.69 to 13.95 million bags.

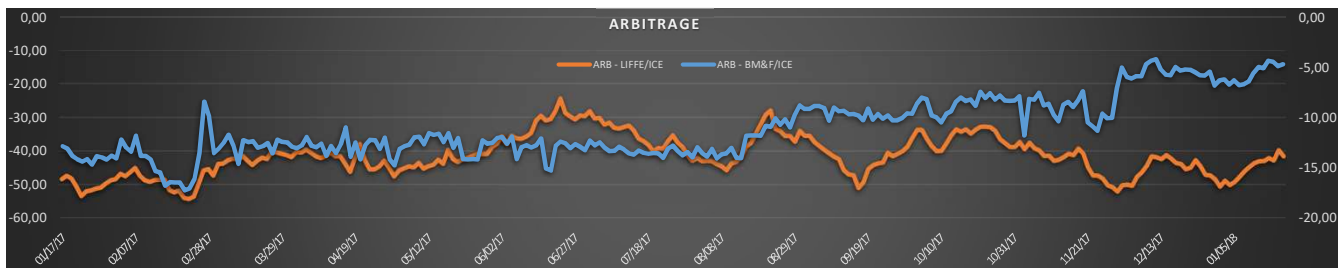
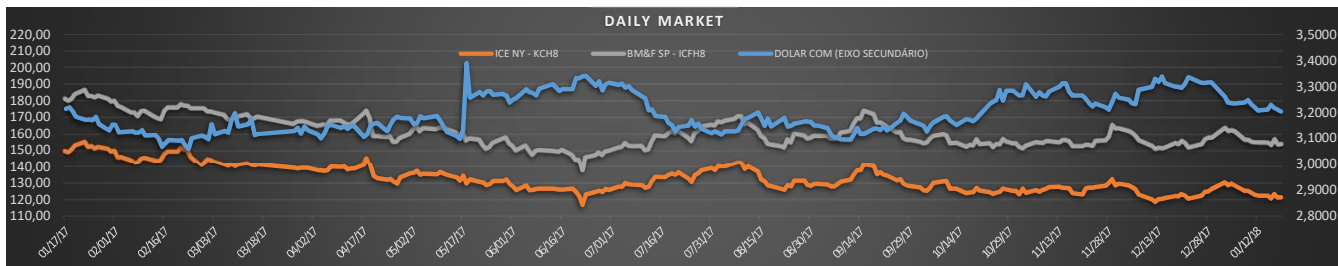
This report and coming from a traditionally conservative source, had a marked negative effect upon sentiment within the New York market, but did not impact upon the buoyancy that prevailed within the London market in yesterday's trade. But this is not really an unusual scenario, as in the terms of the price discounted Conilon Robusta coffees which are mostly consumed within the internal market in Brazil, the increase in production would indicate the potential release of even higher volumes of the new Arabica coffee crop for export to the consumer markets. Meanwhile the weather reports from Brazil have indicated very good rains so far, this month for the southern coffee districts of the country, with more modest rainfall for the more northern coffee districts. But nevertheless, the more northern districts have had some rains and with forecasts for more rains to come over the next couple of weeks,

there are no weather-related concerns over the prospects for the larger new Brazil coffee crop this year. There is though and following last year's smaller Brazil Arabica coffee crop and with the Brazil Real relatively firm against the U.S. dollar and while the New York market is presently trading at close to the bottom end of the prevailing soft price trading range, a degree of internal market price resistance. This factor and with the resulting relatively firm asking export differentials for new Arabica coffee sales, due to suppress the export volumes of Brazil Arabica coffees for the next few months. But with the consumer market industries not really showing any concern, as with increased volumes of new crop Arabica coffees now available from Mexico, Central America, there really is no tightness in overall Arabica coffee supply.

The March 2018 to March 2018 contracts arbitrage between the London and New York markets narrowed yesterday, to register this at 39.77 usc/Lb., while this equates to 32.84% 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 5,321 bags yesterday; to register these stocks at 2,012,166 bags. There was meanwhile a larger in number 6,246 bags decrease to the number of bags pending grading for this exchange; to register these pending grading stocks at 40,749 bags.

Source: iandmsmith.com



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RODRIGO BARBALAT
SANDRA GOMES
WALLAFE VITOR TAVARES

ASSUNTOS

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DIRETOR/ADMINISTRATIVO/FINANCEIRO
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ASSISTENTE ADM/FINANCEIRO
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