



MANGA

COFFEE CORPORATION

Market closed on January 30, 2018

ICE: CONTRACT	SETTLE
KCH8	122,30
KCK8	124,65
KCN8	127,05
KCU8	129,40
KCZ8	132,85

BM&F: CONTRACT	SETTLE
ICFH8	153,60
ICFK8	151,30

DOL: CONTRACT	SETTLE
DOL COM - DOLAR COMMERCIAL	3,1800

MARKET	PRICE IDEAS FROM BUYERS	
PADRÃO 0 - CEREJA		R\$ 490,00
PADRÃO 1A - FC CERRADO		R\$ 455,00
PADRÃO 1B - FC SOUTH OF MINAS		R\$ 445,00
PADRÃO 2 - GOOD CUP DURO		R\$ 435,00
PADRÃO 3 - GOOD CUP 2 RIADAS		R\$ 425,00
PADRÃO 4 - DURO RIADO RIO (7/2/1)		R\$ 415,00
PADRÃO 5 - RIO		R\$ 400,00
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	11
	NY 2/3 15/16 FC CERRADO	8
	NY 2/3 14/16 FC CERRADO	5
	NY 2/3 17/18 FC SOUTH OF MINAS	8
	NY 2/3 14/16 FC SOUTH OF MINAS	2
	NY 2/3 17/18 GOOD CUP	5
	NY 3/4 14/16 GOOD CUP	-1
	NY 2/3 17/18 GOOD CUP 2 RIOY CUPS	2
	NY 3/4 14/16 GOOD CUP 2 RIOY CUPS	-4
	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)	130
	NY 4 15/16 RM (US\$ / 50 KGS)	127
	NY 4 14/16 RM (US\$ / 50 KGS)	124

Obs: Fob ideas (Simple exercise).

SPREAD: ICE (CTS/LB)	
-2,35	March/May
-2,40	May/July
-2,35	July/September
-3,45	September/December
-3,25	December/March

ARBITRAGE: ICE/BM&F (CTS/LB)	
-6,18	March/March
-10,27	May/May

Coffee Market Report

The latest Commitment of Traders report from the New York Arabica coffee market has seen the shorter term in nature Managed Money fund sector of this market increase their net short sold position within the market by 11.33% over the week of trade leading up to Tuesday 23rd. January, to register a new net short sold position of 54,198 Lots. Meanwhile the longer term in nature Index Fund sector of this market increased their net long position within the market by 2.5%, to register a net long position of 42,866 Lots on the day.

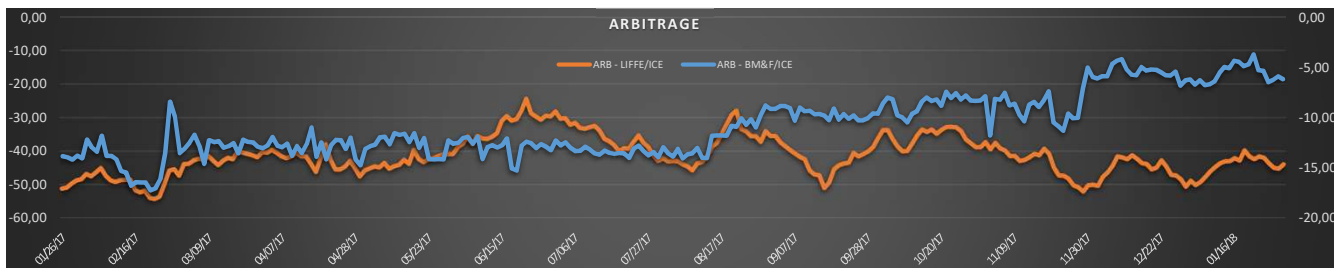
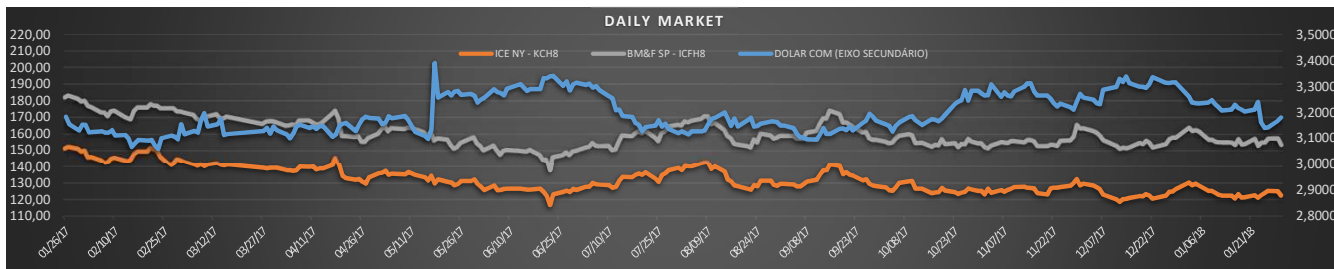
Over the same week, the Non-Commercial Speculative sector of this market increased their net short sold position within this market by 7.12%, to register a net short sold position of 58,970 Lots. This net short sold position which is the equivalent of 16,717,734 bags has most likely been once again decreased, following a period mixed but overall more positive trade that has since followed and likewise, that of the managed money fund sector of the market. The certified washed Arabica coffee stocks continued to decline yesterday, but one would suggest that this is no reflection upon the availability of new crop washed Arabica coffee supply, but is perhaps more an interest in these relatively inexpensive coffees on the part of industries, as a reaction to the price resistance that is inflating export differentials from both many washed Arabica coffee producers and for the new crop Brazil natural Arabica coffees. Thus, and with no doubt that there are significant volumes of new crop Mexican and Central American washed Arabica coffees still to come to the market, one would think that these few days of declining certified stocks cannot really be seen to be a positive fundamental for the New York market.

There are effectively now only a dozen trading days to the fore before the advent of the eve of the week-long Tet New Year holiday in Vietnam and with farmers looking to raise cash to celebrate the bringing in of the new Year of the Dog, one might see this to be a factor that shall put some pressure upon the fortunes of the London Robusta coffee market for the short term. While in terms of the New York market and with the speculative and fund sectors of the market already heavily sold short and many producers maintaining some degree of price resistance towards the relatively soft prices that this market dictates, there might not be as much short-term pressure coming to the New York market. If this proves to be the case and it is not a certainty but more a possibility, it would be likely to be a factor that would contribute to a broadening of the arbitrage between the two markets in the coming days.

The March 2018 to March 2018 contracts arbitrage between the London and New York markets broadened yesterday, to register this at 45.25 usc/Lb., while this equates to 36.21% price discount for the London Robusta coffee market.

The Certified washed Arabica coffee stocks held against the New York exchange were seen to decrease by 12,201 bags yesterday, to register these stocks at 1,967,165 bags. There was meanwhile a smaller in number 6,140 bags increase to the number of bags pending grading for this exchange; to register these pending grading stocks at 36,848 bags.

Source: iandmsmith.com



COLABORADORES

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MARCOS EDUARDO CLAUDINO
PATRICIA TOMAZ DE ASSIS
RODRIGO BARBALAT
SANDRA GOMES
WALLAFE VITOR TAVARES

ASSUNTOS

COMERCIAL ADMINISTRATIVO
TRAFFIC/QUALIDADE
DIRETOR/QUALIDADE/COMERCIAL
CERTIFICAÇÕES
DIRETOR/ADMINISTRATIVO/FINANCEIRO
TORRADO E MOIDO/PROJETOS
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