



MANGA

COFFEE CORPORATION

Market closed on February 6, 2018

ICE: CONTRACT	SETTLE
KCH8	122,85
KCK8	125,05
KCN8	127,40
KCU8	129,75
KCZ8	133,25

BM&F: CONTRACT	SETTLE
ICF8	152,40
ICFK8	151,80

DOL: CONTRACT	SETTLE
DOL COM - DOLAR COMMERCIAL	3,2470

MARKET	PRICE IDEAS FROM BUYERS	
	PADRÃO 0 - CEREJA	R\$ 485,00
	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	9
	NY 2/3 15/16 FC CERRADO	6
	NY 2/3 14/16 FC CERRADO	3
	NY 2/3 17/18 FC SOUTH OF MINAS	6
	NY 2/3 14/16 FC SOUTH OF MINAS	0
	NY 2/3 17/18 GOOD CUP	3
	NY 3/4 14/16 GOOD CUP	-3
	NY 2/3 17/18 GOOD CUP 2 RIOY CUPS	1
	NY 3/4 14/16 GOOD CUP 2 RIOY CUPS	-5
	NY 5/6 13UP 300 DEF COB GRINDERS	-4
	NY 5/6 12UP 350 DEF COB GRINDERS	-8
	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)	124

Obs: Fob ideas (Simple exercise).

SPREAD: ICE (CTS/LB)	
-2,20	March/May
-2,35	May/July
-2,35	July/September
-3,50	September/December
-3,30	December/March

ARBITRAGE: ICE/BM&F (CTS/LB)	
-7,64	March/March
-10,29	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 decrease their net short sold position within the market by 7.32% over the week of trade leading up to Tuesday 30th. January, to register a new net short sold position of 50,231 Lots. Meanwhile the longer term in nature Index Fund sector of this market increased their net long position within the market by 3.7%, to register a net long position of 44,451 Lots on the day.

Over the same week, the Non-Commercial Speculative sector of this market decreased their net short sold position within this market by 8.49%, to register a net short sold position of 53,965 Lots. This net short sold position which is the equivalent of 15,298,838 bags has most likely been once again increased, following a period overall more negative trade that has since followed and likewise, that of the managed money fund sector of the market.

The National Coffee Growers Federation in Colombia have reported that the country's coffee production for the month of January was 144,000 bags or 11.29% lower than the same month last year, at a total of 1,131,000 bags. This has contributed to the countries cumulative production for the first four months of the present October 2017 to September 2018 coffee year to be 584,000 bags or 10.35% lower than the same period in the previous coffee year, at a total of 5,058,000 bags.

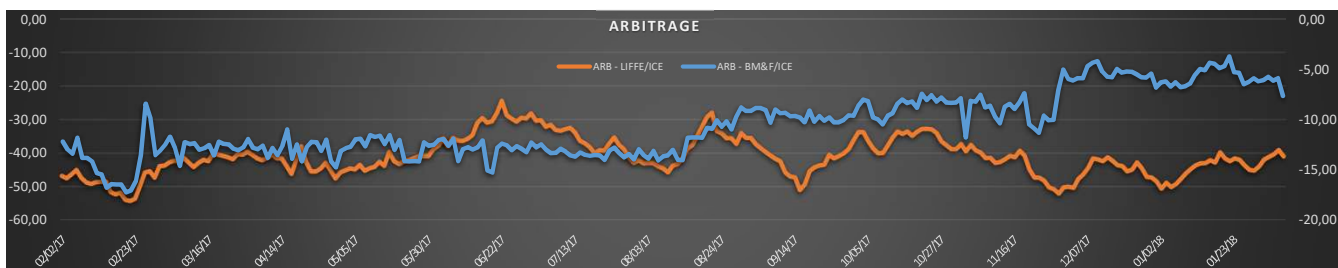
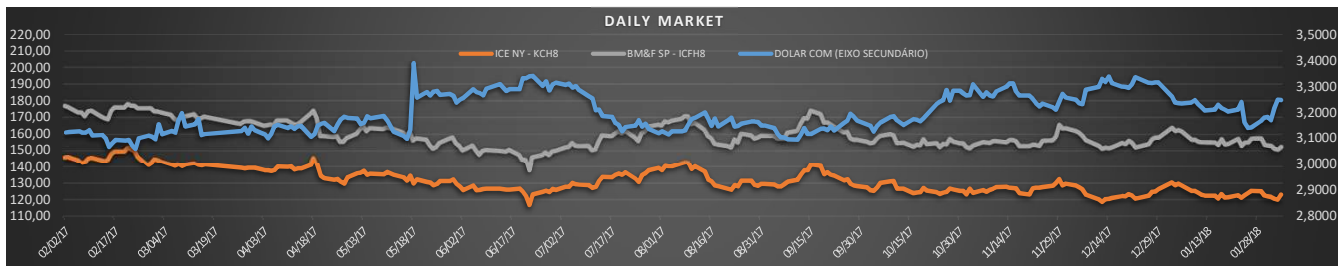
The National Coffee Growers Federation in Colombia have also reported that the country's coffee exports for the month of January were 3,000 bags or 0.27% higher than the same month last year, at a total of 1,131,000 bags. This has contributed to the countries cumulative coffee exports for the first four months of the present October 2017 to September 2018 coffee year to be 271,000 bags or 5.32% lower than the same period in the previous coffee year, at a total of 4,825,000 bags.

This dip in both production and exports over the past four months in Colombia and as the third largest coffee producer would most usually have had a been supportive for sentiment within the New York Arabica coffee market, but with many foreseeing the prospects for rising Central American and Brazil Arabica coffee supply for the year, this has not been the case so far.

While with a Reuters Poll of fourteen leading coffee trade houses and coffee analysts having come to the fore yesterday with a new Brazil crop of 60 million bags and very much in line with the Comex report above, it further fuels bearish sentiment. This bearish in nature Poll having assessed that with this larger new crop from Brazil in hand, that global coffee supply for the forthcoming October 2018 to September 2019 shall be 4 million bags of surplus coffee supply.

Albeit that South East Brazil still must be in receipt of good regular rains over the next ten to twelve weeks, if the more ambitious new Brazil coffee crop forecasts are to be close to reality. But there are so far, no weather forecasts that indicate any threat for poor rains for the coffee regions in Brazil and it is presently difficult to see any short-term chance for speculative and fund sectors of the coffee markets to change their prevailing bearish sentiment towards the coffee markets.

Source: iandmsmith.com



COLABORADORES

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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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