



MANGA

COFFEE CORPORATION

Market closed on **March 9, 2018**

ICE:	CONTRACT	SETTLE
KCK8		120,15
KCN8		122,40
KCU8		124,60
KCZ8		127,95
KCH9		131,40

BM&F:	CONTRACT	SETTLE
ICFU8		149,10
ICFZ8		152,75

DOL:	CONTRACT	SETTLE
DOL COM - DOLAR COMMERCIAL		3,2520

MARKET:	PRICE IDEAS FROM BUYERS	
PADRÃO 0 - CEREJA		R\$ 450,00
PADRÃO 1A - FC CERRADO		R\$ 440,00
PADRÃO 1B - FC SOUTH OF MINAS		R\$ 430,00
PADRÃO 2 - GOOD CUP DURO		R\$ 420,00
PADRÃO 3 - GOOD CUP 2 RIADAS		R\$ 410,00
PADRÃO 4 - DURO RIADO RIO (7/2/1)		R\$ 400,00
PADRÃO 5 - RIO		R\$ 390,00
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	FEBRUARY/JULY
NET SELLER	NY 2/3 17/18 FC CERRADO	6
	NY 2/3 15/16 FC CERRADO	3
	NY 2/3 14/16 FC CERRADO	0
	NY 2/3 17/18 FC SOUTH OF MINAS	4
	NY 2/3 14/16 FC SOUTH OF MINAS	-2
	NY 2/3 17/18 GOOD CUP	1
	NY 3/4 14/16 GOOD CUP	-5
	NY 2/3 17/18 GOOD CUP 2 RIOY CUPS	-2
	NY 3/4 14/16 GOOD CUP 2 RIOY CUPS	-8
	NY 5/6 13UP 300 DEF COB GRINDERS	-2
	NY 5/6 12UP 350 DEF COB GRINDERS	-6
	NY 3 17/18 RM (US\$ / 50 KGS)	126
	NY 4 15/16 RM (US\$ / 50 KGS)	123
	NY 4 14/16 RM (US\$ / 50 KGS)	119

Obs: Fob ideas (Simple exercise).

SPREAD: ICE (CTS/LB)	
-2,25	May/July
-2,20	July/September
-3,35	September/December
-3,45	December/March
-2,20	March/May

ARBITRAGE: ICE/BM&F (CTS/LB)	
-11,88	September/September
-12,48	December/December

Coffee Market Report

The Customs authorities in Vietnam have reported that the countries coffee exports for the month of February were 2,164,883 bags, which is lower than the earlier estimate of 2.25 million bags, but is not a bad performance for what was a short month and one that had a week-long interruption, while the country celebrated the Tet New Year holidays. There are in the meantime forecasts coming from the trade in Vietnam forecasts that coffee exports for the month of March shall be between 2.5 million and 2.8 million bags and in terms March being an uninterrupted month and with some consumer market catch up demand to satisfy, one might think that the exports might actually be closer to the higher forecast number.

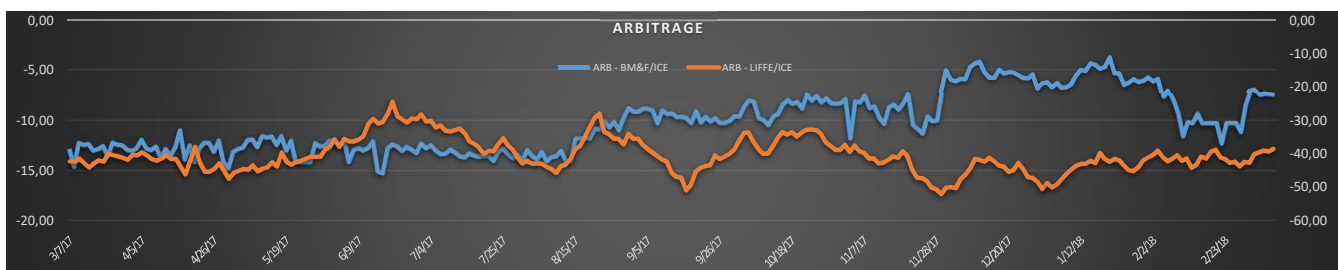
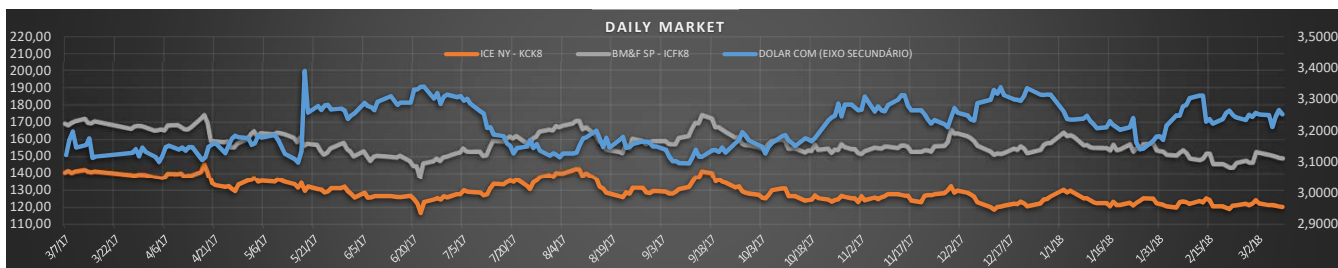
The European Coffee Federation ECF have reported that the port warehouse stocks held within warehouses in the ports of Antwerp, Hamburg, Genoa, Le Havre and Trieste increased 147,217 bags or 1.51% during the month of January, to register these stocks at the end of the month at 9,925,900 bags. These stocks do not however include the unreported stocks from the warehouses in the port of Bremen, who no longer contribute to the end month stock figures. Nor does this report consider the industry on site inventory stocks, the transit bulk container stocks and stocks being held within non-reporting private warehouses throughout Western and Eastern Europe.

This said and with the combination of West and East Europe consuming approximately 1.05 million bags of coffee a week, one might guess that the additional stocks that were not included in the report, might contribute to as much as 2.5 million bags to the reported stocks. Thus, indicating that as at the end of December, the European coffee stocks might have been close to the equivalent of close to a relatively safe, eleven and half weeks of Western and Eastern European roasting demand.

The rains keep falling over the main Brazil coffee districts and including the main conilon Robusta districts in the north of Espírito Santo, which is forwarding speculation that there shall be some delay in the ripening of the coffee cherries, to see the new conilon Robusta crop starting to be harvested in mid-May, rather than the end of April. But in the meantime, the northern coffee province of Rondônia is due to start harvesting the new conilon Robusta coffee crop by the end of this month, which shall see new crop conilon Robusta coffees starting to impact in volume by the end of next month.

These conilon Robusta coffees are initially due to only target the Brazilian domestic roasting industry, but by July this year and with the new conilon Robusta crop expected to exceed domestic market demand by close to 4 million bags, one can expect that they shall start to target the consumer markets. These coffees therefore and in terms of the resulting hedge selling activity and along with tendering to the certified stocks as an alternative market, a potential threat for the medium-term fortunes of the presently relatively steady London market.

Source: iandmsmith.com



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ASSUNTOS

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