



MANGA

COFFEE CORPORATION

Market closed on **April 9, 2018**

ICE: CONTRACT	SETTLE
KCN8	120,55
KCU8	122,55
KCZ8	125,90
KCH9	129,40
KCK9	131,80

BM&F: CONTRACT	SETTLE
ICFU8	145,75
ICFZ8	148,50

DOL: CONTRACT	SETTLE
DOL COM - DOLAR COMMERCIAL	3,4210

MARKET	PRICE IDEAS FROM BUYERS	
	PADRÃO 0 - CEREJA	R\$ 460,00
	PADRÃO 1A - FC CERRADO	R\$ 450,00
	PADRÃO 1B - FC SOUTH OF MINAS	R\$ 440,00
	PADRÃO 2 - GOOD CUP DURO	R\$ 425,00
	PADRÃO 3 - GOOD CUP 2 RIADAS	R\$ 415,00
	PADRÃO 4 - DURO RIADO RIO (7/2/1)	R\$ 405,00
	PADRÃO 5 - RIO	R\$ 395,00
	PADRÃO 6A - CONSUMO 600 DEF DURO	R\$ 380,00
	PADRÃO 6B - CONSUMO 600 DEF DURO RIADO RIO	R\$ 360,00

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	APR/JULY
	NY 2/3 17/18 FC CERRADO	1
	NY 2/3 15/16 FC CERRADO	-2
	NY 2/3 14/16 FC CERRADO	-5
	NY 2/3 17/18 FC SOUTH OF MINAS	-2
	NY 2/3 14/16 FC SOUTH OF MINAS	-8
	NY 2/3 17/18 GOOD CUP	-6
	NY 3/4 14/16 GOOD CUP	-12
	NY 2/3 17/18 GOOD CUP 2 RIOY CUPS	-9
	NY 3/4 14/16 GOOD CUP 2 RIOY CUPS	-15
	NY 5/6 13UP 300 DEF COB GRINDERS	-15
	NY 5/6 12UP 350 DEF COB GRINDERS	-18
	NY 3 17/18 RM (US\$ / 50 KGS)	120
	NY 4 15/16 RM (US\$ / 50 KGS)	116
	NY 4 14/16 RM (US\$ / 50 KGS)	113

Obs: Fob ideas (Simple exercise).

SPREAD: ICE (CTS/LB)	
-2,00	July/September
-3,35	September/December
-3,50	December/March
-2,40	March/May
-2,20	May/July

ARBITRAGE: ICE/BM&F (CTS/LB)	
-12,37	September/September
-13,64	December/December

Coffee Market Report

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 10.2% during the week of trade leading up to Tuesday 3rd. April; to register a net short sold position of 61,685 Lots on the day. This net short-sold position which is the equivalent of 17,487,424 bags has most likely been reduced a little, following the period of overall more positive trade, which has since followed.

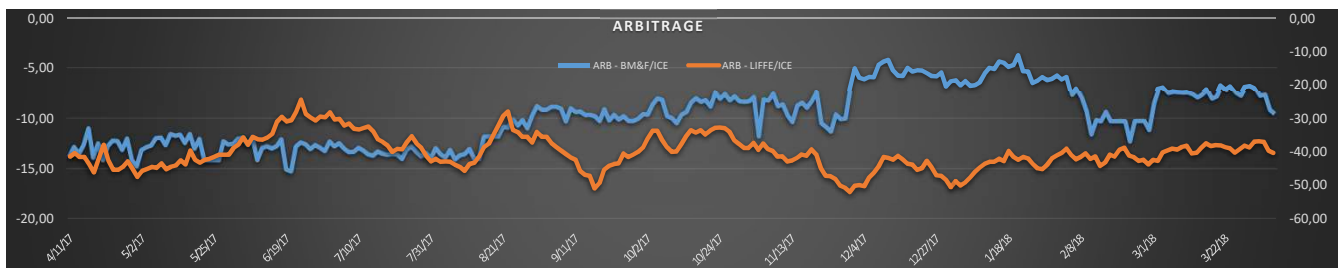
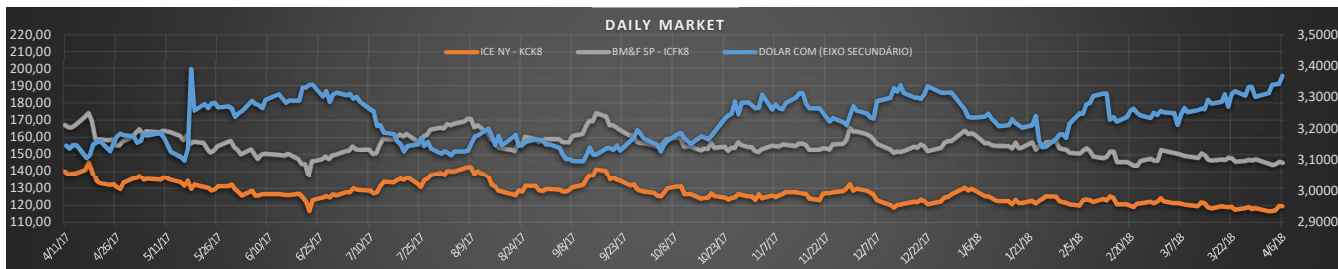
The latest Commitment of Traders report from the London Robusta coffee market has seen the Speculative Non-Commercial sector of this market decrease their net short sold position within this market by 3.19% during the week of trade leading up to Tuesday 3rd. April; to register a net short sold position of 20,912 Lots on the day. This net short sold position which is the equivalent of 3,485,333 bags is probably little changed, following the period of mixed but overall sideways trade through the rest of last week.

The evidence of the significantly short sold status of the coffee terminal markets at present that reflects the prevailing bearish sentiment of the speculative and fund sectors of the coffee markets, provides for a rather depressing backdrop for the 121st. Session of the Council of the International Coffee Organization is due to start today. But there really is nothing very much that the producer members of the ICO can do about the problem of low coffee prices as history has proven that with so many producers in play, that the retention of coffee stocks programs are unaffordable for most producers and finally such schemes fail.

One might however speculate that with global coffee consumption steadily increasing and with the soft coffee prices more than likely due to have some impact upon medium to longer term yields for many producers and particularly the relatively high cost Mexicans and Central Americans, that this shall bring to the fore forecasts for smaller new crops. While with the major negative factor being the pending bumper new Brazil coffee crop that post the harvest that many shall start to forecast a biennial bearing small Brazil crop for 2019 and that such forecasts might well start to impact upon longer term market sentiment, by as early as the end of the third quarter of this year.

A change in sentiment that would potentially bring with it speculative and fund short covering activity, which could assist towards some degree of market buoyancy and a modest recovery for the second half of the year. While in terms of global weather it is erratic and unstable and while the coffee industry has come through a couple of years of generally stable weather, that the probability is that there shall be some weather issues due for one or the other of the main producer blocs by the end of the year, which might be further supportive for coffee market sentiment and prices. But it is meanwhile a rather depressing time for the coffee producers.

Source: iandmsmith.com



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

ASSUNTOS

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