



MANGA

COFFEE CORPORATION

Market closed on **May 15, 2018**

ICE: CONTRACT	SETTLE
KCN8	116,95
KCU8	119,25
KCZ8	122,80
KCH9	126,30
KCK9	128,60

BM&F: CONTRACT	SETTLE
ICF08	143,65
ICFZ8	145,20

DOL: CONTRACT	SETTLE
DOL COM - DOLAR COMMERCIAL	3,6620

MARKET	PRICE IDEAS FROM BUYERS	
	PADRÃO 0 - CEREJA	R\$ 470,00
	PADRÃO 1A - FC CERRADO	R\$ 455,00
	PADRÃO 1B - FC SOUTH OF MINAS	R\$ 450,00
	PADRÃO 2 - GOOD CUP DURO	R\$ 430,00
	PADRÃO 3 - GOOD CUP 2 RIADAS	R\$ 420,00
	PADRÃO 4 - DURO RIADO RIO (7/2/1)	R\$ 410,00
	PADRÃO 5 - RIO	R\$ 395,00
	PADRÃO 6A - CONSUMO 600 DEF DURO	R\$ 370,00
	PADRÃO 6B - CONSUMO 600 DEF DURO RIADO RIO	R\$ 350,00

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	APR/JULY
NET SELLER NY 2/3 17/18 FC CERRADO	-1
NY 2/3 15/16 FC CERRADO	-4
NY 2/3 14/16 FC CERRADO	-7
NY 2/3 17/18 FC SOUTH OF MINAS	-3
NY 2/3 14/16 FC SOUTH OF MINAS	-9
NY 2/3 17/18 GOOD CUP	-8
NY 3/4 14/16 GOOD CUP	-14
NY 2/3 17/18 GOOD CUP 2 RIOY CUPS	-10
NY 3/4 14/16 GOOD CUP 2 RIOY CUPS	-16
NY 5/6 13UP 300 DEF COB GRINDERS	-21
NY 5/6 12UP 350 DEF COB GRINDERS	-24
NY 3 17/18 RM (US\$ / 50 KGS)	112
NY 4 15/16 RM (US\$ / 50 KGS)	109
NY 4 14/16 RM (US\$ / 50 KGS)	106

Obs: Fob ideas (Simple exercise).

SPREAD: ICE (CTS/LB)	
-2,30	July/September
-3,55	September/December
-3,50	December/March
-2,30	March/May
-2,20	May/July

ARBITRAGE: ICE/BM&F (CTS/LB)	
-10,65	September/September
-13,03	December/December

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 10,02% over the week of trade leading up to Tuesday 9th. May; to register a new net short sold position of 40,725 Lots. Meanwhile the longer term in nature Index Fund sector of this market increased their net long position within the market by 0,7%, to register a net long position of 35,890 Lots on the day.

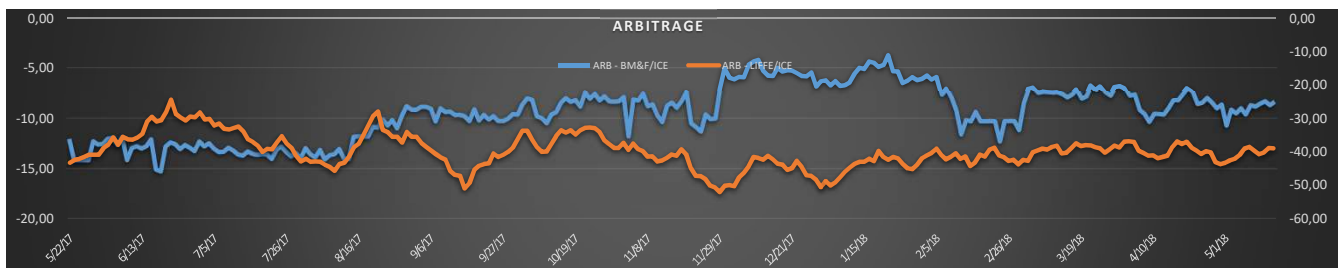
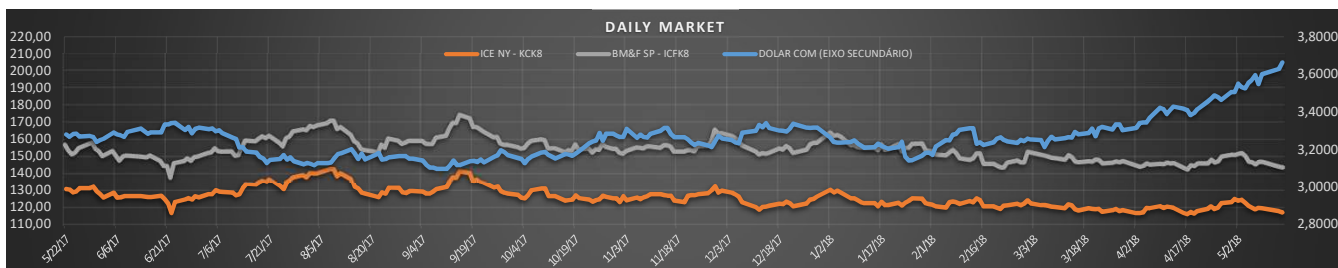
Over the same week, the Non-Commercial Speculative sector of this market decreased their net short sold position within this market by 8,14%, to register a net short sold position of 41,785 Lots. This net short sold position which is the equivalent of 11,845,862 bags has most likely been increased again, following the period of mixed by overall more negative trade that has since followed and likewise, that of the managed money fund sector of the market. The evidence of the reduction of the net short sold position of the speculative and fund sectors of the New York market and to a lesser extent the London market, has proved to be negative for sentiment for the start of the weeks trade within the markets. With the funds and lacking any supportive fundamental news, seemingly once again sellers of the coffee markets. Despite being still relatively well short sold into the New York market and ahead of the risk period, that comes with the generally side-lined Brazil frost season.

The United States Department of Agriculture have reported that Ecuador once an exporter of both Arabica and Robusta coffees but over the past couple of decades an importer of green coffee and exporter of value added soluble coffees, is experiencing some degree of growth in coffee production. In this respect they foresee that the countries green coffee production for the October 2018 to September 2019 coffee year shall increase by 50,000 bags or 24,39%, to total 255,000 bags. This made up from an approximate 53 to 47 ratio, of Arabica and Robusta coffees.

However, with an estimated domestic coffee consumption of 217,000 bags per annum and with exports of mostly soluble coffees which account for close to 81% of total coffee exports of the equivalent of 742,000 bags of coffee, the country remains very much a consumer rather than producer country. While in terms of the prevailing soft prices of green coffee, it is really only Ecuador and with its value add of green coffee imports and within this very significant coffee producer regions of South America and surrounded by leading producers, who is presently making reasonable profits out of being in the coffee industry.

The July 2018 to July 2018 contracts arbitrage between the London and New York markets narrowed yesterday, to register this at 38.58 usc/Lb., while this equates to 32,81% price discount for the London Robusta coffee market.

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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