

Market closed on July 4, 2018

ICE: CONTRACT	SETTLE
KCU8	111,90
KCZ8	115,30
KCH8	118,85
KCK9	121,25
KCN9	123,85

BM&F: CONTRACT	SETTLE
ICFU8	131,10
ICFZ8	134,85

DOL: CONTRACT	SETTLE
DOL COM - DOLAR COMMERCIAL	3,9140

MARKET	PRICE IDEAS FROM BUYERS	
	PADRÃO 0 - CEREJA	R\$ 475,00
	PADRÃO 1A - FC CERRADO	R\$ 450,00
	PADRÃO 1B - FC SOUTH OF MINAS	R\$ 440,00
	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\$ 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	JUL/SEPT
	NY 2/3 17/18 FC CERRADO	-5
	NY 2/3 15/16 FC CERRADO	-8
	NY 2/3 14/16 FC CERRADO	-11
	NY 2/3 17/18 FC SOUTH OF MINAS	-7
	NY 2/3 14/16 FC SOUTH OF MINAS	-13
	NY 2/3 17/18 GOOD CUP	-10
	NY 3/4 14/16 GOOD CUP	-16
	NY 2/3 17/18 GOOD CUP 2 RIOY CUPS	-12
	NY 3/4 14/16 GOOD CUP 2 RIOY CUPS	-18
	NY 5/6 13UP 300 DEF COB GRINDERS	-20
	NY 5/6 12UP 350 DEF COB GRINDERS	-23
	NY 3 17/18 RM (US\$ / 50 KGS)	106
	NY 4 15/16 RM (US\$ / 50 KGS)	102
	NY 4 14/16 RM (US\$ / 50 KGS)	99

Obs: Fob ideas (Simple exercise).

SPREAD: ICE (CTS/LB)	
-3,40	September/December
-3,55	December/March
-2,40	March/May
-2,40	May/July
-2,25	July/September

ARBITRAGE: ICE/BM&F (CTS/LB)	
-12,79	September/September
-13,36	December/December

Coffee Market Report

The Trade Ministry in Brazil have reported that the countries coffee exports for the month of June were 252,262 bags or 13.24% higher than the same month last year, at a total of 2,157,363 bags. Likewise, the coffee exports for the month of June were an even larger 743,646 bags or 52.6% increase over the coffee exports in May.

These rising export volumes are ahead of the rising volumes of new crop coffee supply, which should result in reasonable quantities of Brazil coffees coming to the consumer markets, for the rest of the year. But the question is with the farmers having to sell against the prevailing soft reference prices of the coffee terminal markets and despite some relief coming from the weak local currency relative to the dollar, if there shall indeed be any aggressive internal market selling activity in Brazil.

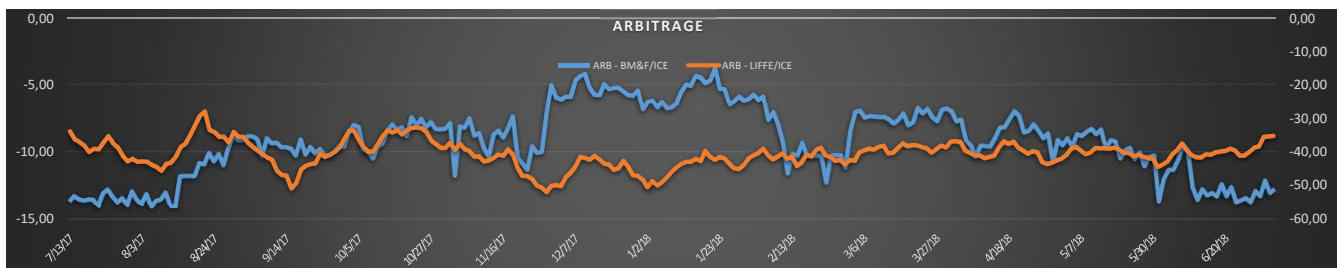
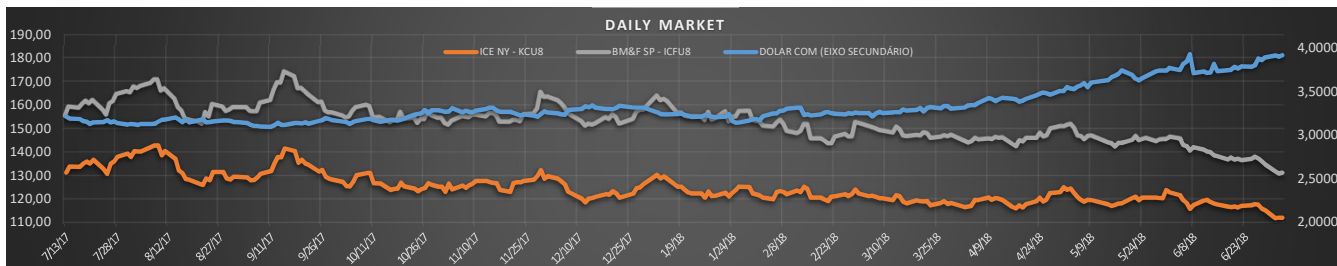
One would suspect that despite all evidence confirms that Brazil's farmers are presently bringing in a bumper new crop, that there shall be some degree of price resistance and muted selling activity on the part of many farmers, until they can assess the quality of the new October to March summer rain season and the related flowerings, towards the next crop. Thinking that while it is unlikely that there shall be any weather problems developing for the prospects of the next 2019 Brazil crop that weather is often unpredictable and that many farmers might take a wait and see approach to the short-term market and build up some coffee stocks, rather than rushing in to cash in the new crop coffees.

This is aside from the uncertainty over the Brazil exchange rate, which might be influenced to further weaken, if the scheduled October elections become indecisive and do not underpin stability and economic recovery. Thus, making one think that while the speculative sectors of the international coffee market have so far been aggressively selling short the coffee markets in anticipation of the bumper new Brazil crop, that there is the potential that a slower and lower in volume delivery of this crop, might be a trigger for many to look to buy in some profit and that the New York Arabica coffee market might be seen to be at its potential lows for the year. Albeit that this thought is very much personal speculation and it is not impossible, for the unpredictable funds to take the markets even lower.

The September 2018 to September 2018 contracts arbitrage between the London and New York markets narrowed yesterday, to register this at 35.47 usc/Lb., while this equates to 31.7% price discount for the London Robusta coffee market.

The Certified washed Arabica coffee stocks held against the New York exchange were seen to increase by 3,365 bags yesterday, to register these stocks at 2,064,501 bags. There were meanwhile a smaller in number 1,345 bags decrease in the number of bags pending grading for this exchange; to register these pending grading stocks at 13,823 bags.

Source: <http://www.iandmsmith.com>



COLABORADORES

CRISTIANE DAMASCENO
ERICKSEN SOUZA
GLAUCIENE PARANHOS DE SOUZA
JOSÉ ANTONIO DOS SANTOS MANGA
KELLY APARECIDA FERREIRA
LEONARDO SOARES
MARCOS EDUARDO CLAUDINO
PATRÍCIA TOMAZ DE ASSIS
RODRIGO BARBALAT
SANDRA GOMES
WALLAFE VITOR TAVARES

ASSUNTOS

ADMINISTRATIVO
TRAFFIC/QUALIDADE
RECEPÇÃO
DIRETOR/QUALIDADE/COMERCIAL
CERTIFICAÇÕES
DIRETOR/ADMINISTRATIVO/FINANCEIRO
COMERCIAL
ASSISTENTE ADM/FINANCEIRO
COMERCIAL/TRADING
CLASSIFICAÇÃO
CLASSIFICAÇÃO/EMBARCADOR

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