



MANGA

COFFEE CORPORATION

Market closed on July 19, 2018

ICE: CONTRACT	SETTLE
KCU8	108,80
KCZ8	112,25
KCH8	115,90
KCK9	118,35
KCN9	120,80

BM&F: CONTRACT	SETTLE
ICFU8	127,65
ICFZ8	130,00

DOL: CONTRACT	SETTLE
DOL COM - DOLAR COMMERCIAL	3,8460

MARKET	PRICE IDEAS FROM BUYERS	
	PADRÃO 0 - CEREJA	R\$ 460,00
	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 (7/21)	R\$ 400,00
	PADRÃO 5 - RIO	R\$ 390,00
	PADRÃO 6A - CONSUMO 600 DEF DURO	R\$ 375,00
	PADRÃO 6B - CONSUMO 600 DEF DURO RIADO RIO	R\$ 355,00

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	-2
	NY 2/3 15/16 FC CERRADO	-5
	NY 2/3 14/16 FC CERRADO	-8
	NY 2/3 17/18 FC SOUTH OF MINAS	-5
	NY 2/3 14/16 FC SOUTH OF MINAS	-11
	NY 2/3 17/18 GOOD CUP	-7
	NY 3/4 14/16 GOOD CUP	-13
	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	-16
	NY 5/6 12UP 350 DEF COB GRINDERS	-19
	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)	
-3,45	September/December
-3,65	December/March
-2,45	March/May
-2,45	May/July
-2,35	July/September

ARBITRAGE: ICE/BM&F (CTS/LB)	
-12,30	September/September
-13,97	December/December

Coffee Market Report

The coffee markets remain devoid of any form of striking fundamental news, which can come to the fore to provide support for the markets. Rather and with many of the industry buyers on holiday and physical trade lackluster at best, the markets remain in the hands of the speculative and fund sectors of the markets. These sectors of the market continue to focus upon the negative factor of the larger new Brazil coffee crop that is soon to start coming to the market and to the forecast for another large new Vietnam coffee crop that is due to start coming to the market in only four months' time.

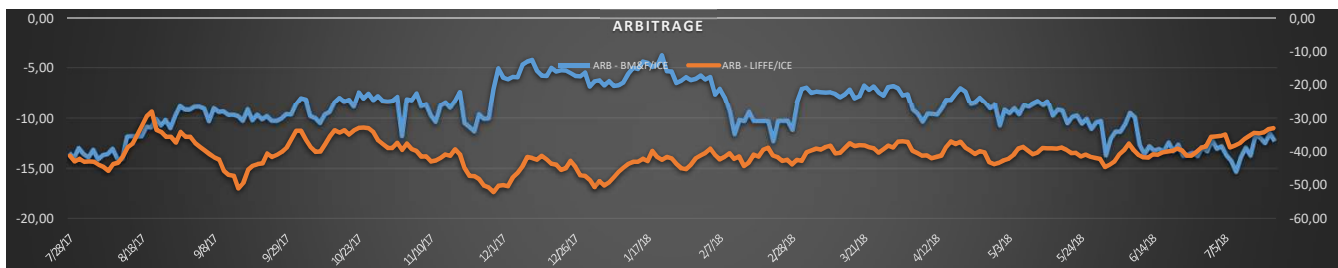
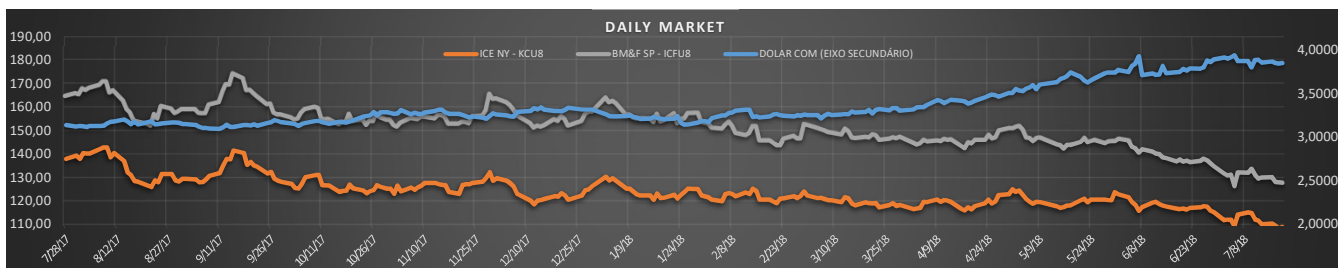
Meanwhile the Australian Bureau of Meteorology ENSO report that while the conditions within the Pacific Ocean are presently neutral, that they still foresee at least a 50% chance for a new El Niño phenomenon to develop by the end of the year. The prospects for an El Niño are however not necessarily a major worry in terms of Pacific Rim coffee producing countries 2019 crops, as if it were to be a modest El Niño it would not be too threatening to the coming years crops. Thus, for the present, this factor has not impact upon market sentiment.

One might comment though that with the prevailing coffee market prices and despite some relief for some producers from the muscle that has been shown by the U.S. dollar, that many coffee farmers globally will be struggling to make any profit out of their coffee crops. This has to impact upon the affordability of the host of fertilizer and chemical inputs that are necessary to maintain yields and on the longer term and with global coffee consumption steadily rising, shall be a factor that shall impact upon supply and market sentiment.

This factor of dismal returns from farming coffee is also threatening to reduce the land related to coffee farming within many of the coffee producing countries, as there are many reports emanating from a number of coffee producer countries of farmers looking to move to alternative crops. Many of these crops in terms of the more sensitive Arabica coffee producers, far less expensive to grow and maintain. This being a further factor that shall no doubt in time, further contribute towards a deficit coffee supply and one might speculate that during the course of the coming year that the global coffee industry could well be looking at a sharply higher coffee price range. The September 2018 to September 2018 contracts arbitrage between the London and New York markets narrowed yesterday, to register this at 33.26 usc/Lb., while this equates to 30.75% 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 4,884 bags yesterday, to register these stocks at 2,055,685 bags. There were meanwhile a smaller in number 2,542 bags decrease in the number of bags pending grading for this exchange; to register these pending grading stocks at 33,484 bags.

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COLABORADORES

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

ASSUNTOS

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COMERCIAL
ASSISTENTE ADM/FINANCEIRO
CLASSIFICAÇÃO
CLASSIFICAÇÃO/EMBARCADOR

SKYPE

mcc_fiscal
ericksen_wcs@hotmail.com
live:secretaria_4359
mangajao
kelly-ferreira1
iss_82
-
mcc_adrielle
sandra.gomes.mangacoffee
wallafe.vit7@live.com

E-MAIL

fiscal@mangacoffee.com.br
traffic@mangacoffee.com.br
secretaria@mangacoffee.com.br
manga@mangacoffee.com.br
certificacao@mangacoffee.com.br
leonardo@mangacoffee.com.br
comercial@mangacoffee.com.br
adm@mangacoffee.com.br
classificacao@mangacoffee.com.br

CEL. / WHATSAPP

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