



# MANGA

COFFEE CORPORATION

Market closed on August 3, 2018

ICE:	CONTRACT	SETTLE
	KCU8	107,75
	KCZ8	111,10
	KCH8	114,60
	KCK9	117,00
	KCN9	119,40

BM&F:	CONTRACT	SETTLE
	ICFU8	127,00
	ICFZ8	129,00

DOL:	CONTRACT	SETTLE
	DOL COM - DOLAR COMMERCIAL	3,7080

MARKET	PRICE IDEAS FROM BUYERS	
	PADRÃO 0 - CEREJA	R\$ 440,00
	PADRÃO 1A - FC CERRADO	R\$ 425,00
	PADRÃO 1B - FC SOUTH OF MINAS	R\$ 415,00
	PADRÃO 2 - GOOD CUP DURO	R\$ 410,00
	PADRÃO 3 - GOOD CUP 2 RIADAS	R\$ 390,00
	PADRÃO 4 - DURO RIADO RIO (7/2/1)	R\$ 380,00
	PADRÃO 5 - RIO	R\$ 370,00
	PADRÃO 6A - CONSUMO 600 DEF DURO	R\$ 360,00
	PADRÃO 6B - CONSUMO 600 DEF DURO RIADO RIO	R\$ 340,00

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	JUL/SEPT
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	-5
	NY 3/4 14/16 GOOD CUP	-11
	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)	103
	NY 4 15/16 RM (US\$/ 50 KGS)	100
	NY 4 14/16 RM (US\$/ 50 KGS)	97

Obs: Fob ideas (Simple exercise).

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

ARBITRAGE: ICE/BM&F (CTS/LB)	
-11,74	September/September
-13,58	December/December

### Coffee Market Report

The respected Brazilian Analysts Safras & Mercado have reported that as so far, approximately 75% of the new Brazil coffee crop has been harvested. Talking in terms of approximately 30 million bags of Arabica coffees and 15 million bags of conilon Robusta coffees, with the latter conilon Robusta coffee crop close to completion and anticipation of a further 15 million bags of Arabica coffee still to be harvested.

The South East of Brazil encountered a short spell of good rains, which has been welcomed by the coffee farmers. Many farms have had no rain for over two months and albeit a seasonal factor and not unexpected, the rains have brought with them relief for the post-harvest and being harvested coffee trees.

In the meantime, with farm coffee stocks building up, the soft nature of the reference prices of the international coffee terminal market is posing a problem for Brazil's coffee farmers, as despite some weakness in the country's currency, it does not completely counter the declining value. This is contributing to a degree of price resistance and a lack of selling aggression, to result in a quiet internal coffee market for the present.

Reuters report that traders in Vietnam anticipate that coffee exports for the month of August shall slow and total between 1.67 to 2 million bags. While they report that farm stocks are now quite low and with the soft nature of the international market and the lack of demand from the main consumer markets that are still within the summer holiday season, the internal market activity is likewise lacking aggression.

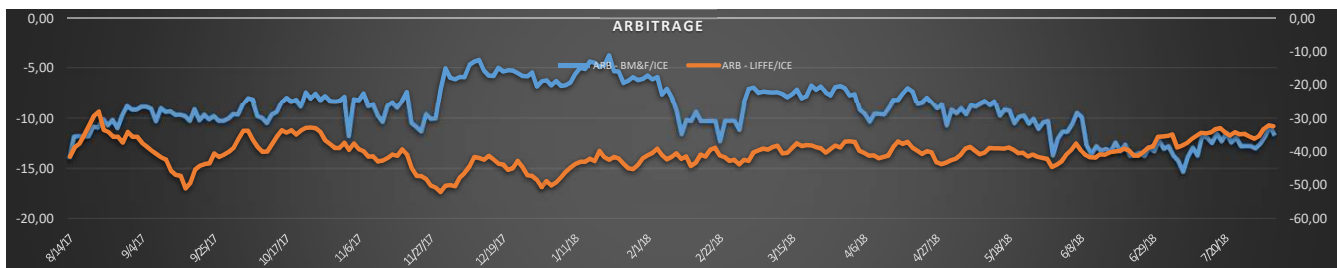
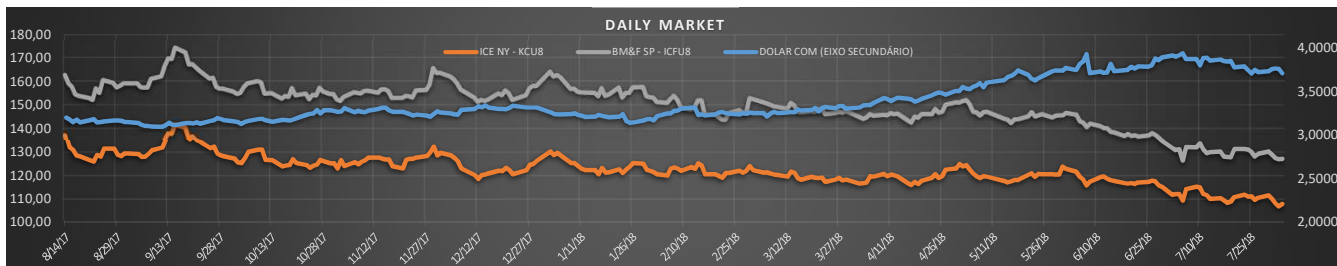
Meanwhile the new Indonesian Robusta coffee crop harvest is peaking and is likely to see prices falling and becoming more export market friendly, which shall likely see increasing volumes coming to the export markets in the coming weeks. These coffees likely to be accompanied by sales of new crop conilon Robusta coffees that shall contribute to steady Robusta coffee supply, ahead of the anticipated large new Vietnam crop that is due to start being harvested in approximately ten to eleven weeks' time.

Market sentiment in terms of the New York market is encountering rising certified Arabica stock levels, which supports the prevailing bearish sentiment and to a lesser degree, there are coffees trickling into the certified Robusta coffee stocks of the London market. This alternative market likely in a couple of months' time and so long as the spring rains come to Brazil in good order, likely to start to attract good volumes of new crop conilon Robusta coffees.

The November 2018 to December 2018 contracts arbitrage between the London and New York markets narrowed yesterday, to register this at 36.03 usc/Lb., while this equates to 32.72% 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 2,705 bags yesterday; to register these stocks at 2,060,396 bags. There were meanwhile a larger in number 10,840 bags increase in the number of bags pending grading for this exchange; to register these pending grading stocks at 105,789 bags.

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### 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  
SANDRA GOMES  
WALLAFE VITOR TAVARES

### ASSUNTOS

ADMINISTRATIVO  
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DIRETOR/ADMINISTRATIVO/FINANCEIRO  
COMERCIAL  
ASSISTENTE ADM/FINANCEIRO  
CLASSIFICAÇÃO  
CLASSIFICAÇÃO/EMBARCADOR

### SKYPE

mcc.fiscal  
ericksen\_wcs@hotmail.com  
live.secretaria\_4359  
mangajao  
kelly-ferreira1  
lss\_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

+55 35 9 8810 5347  
+55 35 9 9199 4980  
+55 35 9 9800 1785  
+55 35 9 8433 3280  
+55 35 9 8817 3837  
+55 35 9 8893 9033  
+55 35 9 8898 8100  
+55 35 9 9237 6798  
+55 35 9 8834 5601  
+55 35 9 9215 0026

### CEL. ADICIONAL

-  
+55 35 9 8721 5876  
+55 35 9 8879 9169  
-  
+55 35 9 8722 3328  
+55 35 9 8879 9171  
+55 35 9 9813 7640  
+55 35 9 8705 7164  
+55 35 9 8839 8466