



MANGA

COFFEE CORPORATION

Market closed on August 8, 2018

ICE: CONTRACT	SETTLE
KCU8	107,85
KCZ8	111,00
KCH8	114,30
KCK9	116,60
KCN9	119,00

BM&F: CONTRACT	SETTLE
ICFUB	126,90
ICFZ8	128,75

DOL: CONTRACT	SETTLE
DOL COM - DOLAR COMMERCIAL	3,7670

MARKET	PRICE IDEAS FROM BUYERS	
	PADRÃO 0 - CEREJA	R\$ 445,00
	PADRÃO 1A - FC CERRADO	R\$ 435,00
	PADRÃO 1B - FC SOUTH OF MINAS	R\$ 425,00
	PADRÃO 2 - GOOD CUP DURO	R\$ 415,00
	PADRÃO 3 - GOOD CUP 2 RIADAS	R\$ 405,00
	PADRÃO 4 - DURO RIADO RIO (7/2/1)	R\$ 390,00
	PADRÃO 5 - RIO	R\$ 385,00
	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: NET SELLER	QUALITY - CONSIDERING THE STRING	JUL/SEPT
	NY 2/3 17/18 FC CERRADO	4
	NY 2/3 15/16 FC CERRADO	1
	NY 2/3 14/16 FC CERRADO	-2
	NY 2/3 17/18 FC SOUTH OF MINAS	1
	NY 2/3 14/16 FC SOUTH OF MINAS	-5
	NY 2/3 17/18 GOOD CUP	-2
	NY 3/4 14/16 GOOD CUP	-8
	NY 2/3 17/18 GOOD CUP 2 RIOY CUPS	-4
	NY 3/4 14/16 GOOD CUP 2 RIOY CUPS	-10
	NY 5/6 13UP 300 DEF COB GRINDERS	-14
	NY 5/6 12UP 350 DEF COB GRINDERS	-17
	NY 3 17/18 RM (US\$ / 50 KGS)	110
	NY 4 15/16 RM (US\$ / 50 KGS)	107
	NY 4 14/16 RM (US\$ / 50 KGS)	103

Obs: Fob ideas (Simple exercise).

SPREAD: ICE (CTS/LB)	
-3,15	September/December
-3,30	December/March
-2,30	March/May
-2,40	May/July
-2,35	July/September

ARBITRAGE: ICE/BM&F (CTS/LB)	
-11,92	September/September
-13,67	December/December

Coffee Market Report

The International Coffee Organization have increased their assessment for global coffee consumption for the present October 2017 to September 2018 coffee year by 0.82%, to now foresee a consumption factor of 161.23 million bags. This they now adjudge and based on the smaller 2017 Brazil, shall result in a deficit coffee supply for the present coffee year of 2.67 million bags.

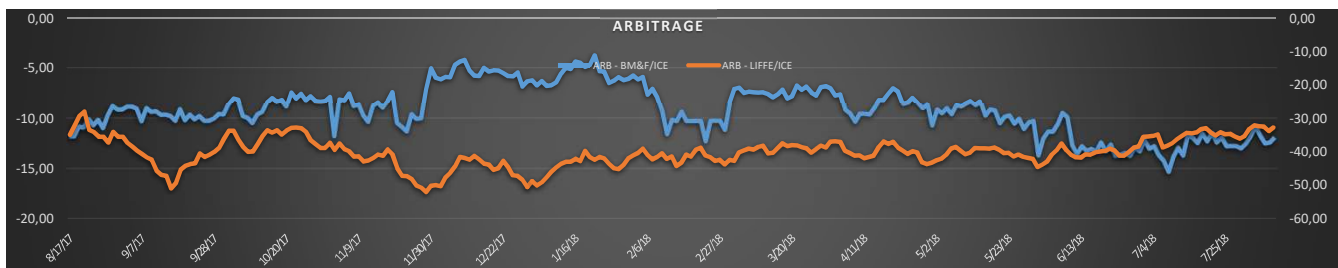
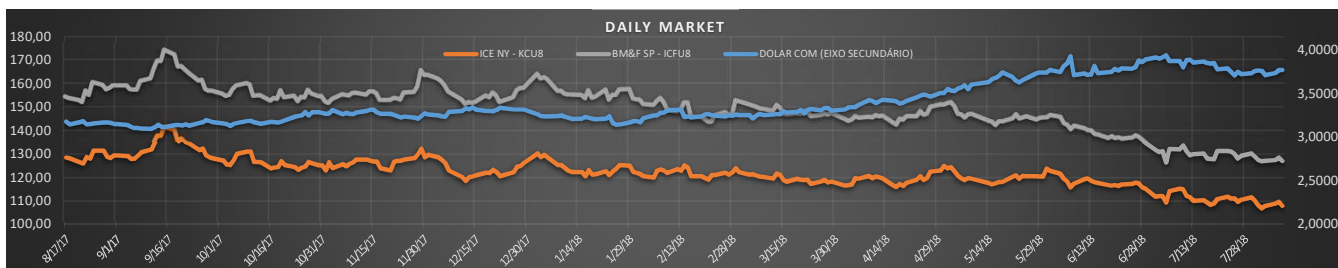
This report and an indication of a marginal deficit coffee supply for the present coffee year has no impact upon market sentiment, as the present October 2017 to September 2018 coffee year also encountered what could be considered to be excessive consumer market stocks. But what is really having an impact in negating the supportive influence of the assessment for deficit supply for the present coffee year, is that large new Brazil coffee crop and its contribution towards something in the order of 5 million to 8 million bags global coffee surplus supply for the forthcoming October 2018 to September 2019 coffee year.

This perception of surplus supply continues to depress prices within the coffee terminal markets, with the speculative and fund sectors of the market sold short and perhaps one could consider them to be excessively so for the New York market. While of late there has been little in the way of weather issues for the tropical belt around the world and within which, coffee is grown. The question is how long this might continue, as outside of the tropics there have been some severe weather problems and the chances are that in time, there has to be weather issues coming to the fore for the tropics as well.

Making one comment that with global coffee consumption steadily rising and with the soft prices over the past year likely to have some negative impact upon yields for many producers, that there is a probability that the coffee markets shall start to encounter a change in sentiment by the first quarter of next year. But perhaps even earlier, should Brazil not have a normal rain season during the last quarter of this year. Albeit that this latter dry weather in Brazil factor is for the present, not being forecast.

Some of the main coffee districts in South East Brazil have been in receipt of somewhat unseasonal rains over the past few days, which will assist the coffee trees that have encountered the stress of both the dry winter season and the harvest. But there have been some that have voiced fears that the rains might trigger early flowering for the next 2019 crop, which would most likely be aborted and shall have impact upon the potential for next year's crop. But this has yet to be seen, to be believed.

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ASSUNTOS

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