



Market closed on August 10, 2018

ICE: CONTRACT	SETTLE
KCU8	107,00
KCZ8	110,05
KCH8	113,30
KCK9	115,65
KCN9	118,05

BM&F: CONTRACT	SETTLE
ICFUB	126,50
ICFZ8	128,00

DOL: CONTRACT	SETTLE
DOL COM - DOLAR COMMERCIAL	3,8640

MARKET	PRICE IDEAS FROM BUYERS	
	PADRÃO 0 - CEREJA	R\$ 460,00
	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\$ 395,00
	PADRÃO 5 - RIO	R\$ 390,00
	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	-6
NY 3/4 14/16 GOOD CUP	-12
NY 2/3 17/18 GOOD CUP 2 RIOY CUPS	-8
NY 3/4 14/16 GOOD CUP 2 RIOY CUPS	-14
NY 5/6 13UP 300 DEF COB GRINDERS	-18
NY 5/6 12UP 350 DEF COB GRINDERS	-21
NY 3 17/18 RM (US\$ / 50 KGS)	106
NY 4 15/16 RM (US\$ / 50 KGS)	103
NY 4 14/16 RM (US\$ / 50 KGS)	99

Obs: Fob ideas (Simple exercise).

SPREAD: ICE (CTS/LB)	
-3,05	September/December
-3,25	December/March
-2,35	March/May
-2,40	May/July
-2,40	July/September

ARBITRAGE: ICE/BM&F (CTS/LB)	
-11,37	September/September
-13,29	December/December

### Coffee Market Report

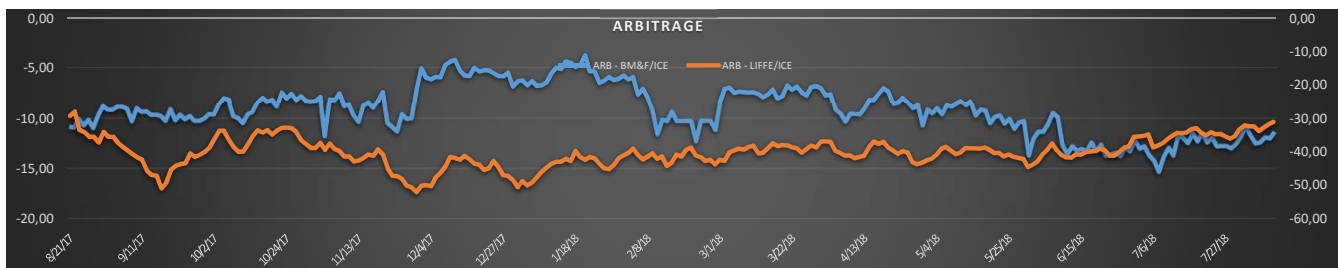
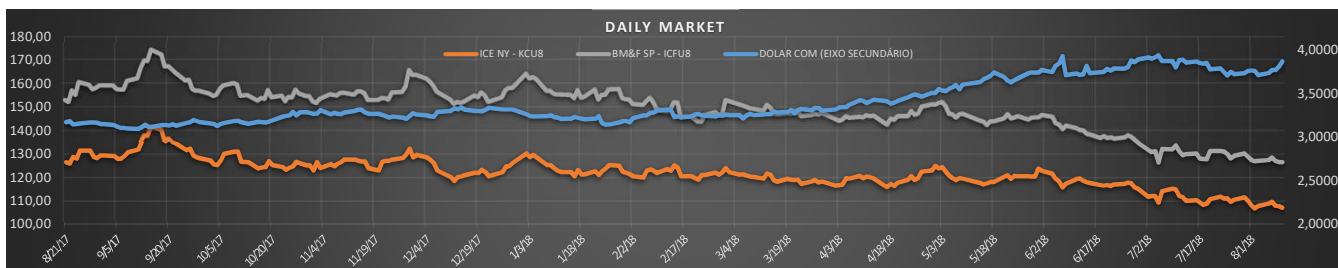
The respected Brazilian analysts Safra's & Mercado have reported that so far approximately 82% of the close to 60.5 million bags new coffee crop have been harvested, which would relate to 34 million bags of Arabica coffee and 16 million bags of conilon Robusta coffees, with approximately 26.5 million more bags of Arabica coffee still to be harvested. While they also report that close to 38% of this new crop has already been sold, to the combination of domestic industry and exporter buyers.

The Coffee Exporters Association of Brazil Cecafe have reported that Brazil's green coffee exports for the month of July were 27.7% higher than the same month last year, at a total of approximately 2.03 million bags. The association made mention of the ongoing congestion within the main coffee export ports in Brazil, which have slowed exports and inferring that without this problem, that the export volume for the month might have been higher. The traditionally conservative Brazilian Institute of Geography and Statistics IBGE have forecast that the new Brazil crop shall be 57.2 million bags, which shall be made up by 43.1 million bags of Arabica coffees and 14.1 million bags of conilon Robusta coffees. The IBGE is seen to be usually around 10% below reality with their forecasts and there fore if one is to extrapolate this forecast, it would seemingly confirm the many other forecasts that peg this new crop at close to 63 million bags and some even forecasting some higher numbers.

The U.S.A. National Weather Service's Climate Prediction Centre CPC have reported that they now foresee a 60% to 70% chance for a new El Niño phenomenon to develop within the Pacific Ocean, during the last quarter of this year. One would comment that if a new El Niño is only a modest one, it would not be significantly damaging for weather conditions for the Pacific Rim coffee producing countries and likewise, to coffee producing countries further afield. But with the chances growing for such an occurrence for the last quarter of the year and the first quarter of next year and a possibility that it could prove to be a severe El Niño, it is a factor that shall be closely watched over the coming months.

This forecast that might indicate some uncertainty over the prospects for the forthcoming October to March Brazil rain season for South East Brazil, might temporarily retard new coffee crop sales within the internal market in Brazil, as farmers await direction from the quality of the rains and the related flowerings for the next 2019 crop. A factor that might assist to limit the downside potential for the short term in the New York market, which is anyhow, already significantly short sold by the speculative and fund sectors of the market.

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