



# MANGA

COFFEE CORPORATION

Market closed on August 15, 2018

ICE: CONTRACT	SETTLE
KCZ8	106,00
KCH9	109,25
KCK9	111,65
KCN9	114,00
KCU9	116,35

BM&F: CONTRACT	SETTLE
ICFZ18	123,90
ICFH19	127,50

DOL: CONTRACT	SETTLE
DOL COM - DOLAR COMMERCIAL	3,9010

MARKET	PRICE IDEAS FROM BUYERS	
	PADRÃO 0 - CEREJA	R\$ 440,00
	PADRÃO 1A - FC CERRADO	R\$ 420,00
	PADRÃO 1B - FC SOUTH OF MINAS	R\$ 415,00
	PADRÃO 2 - GOOD CUP DURO	R\$ 405,00
	PADRÃO 3 - GOOD CUP 2 RIADAS	R\$ 395,00
	PADRÃO 4 - DURO RIADO RIO (7/2/1)	R\$ 385,00
	PADRÃO 5 - RIO	R\$ 365,00
	PADRÃO 6A - CONSUMO 600 DEF DURO	R\$ 340,00
	PADRÃO 6B - CONSUMO 600 DEF DURO RIADO RIO	R\$ 320,00

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	-4
NY 2/3 15/16 FC CERRADO	-7
NY 2/3 14/16 FC CERRADO	-10
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	-22
NY 5/6 12UP 350 DEF COB GRINDERS	-25
NY 3 17/18 RM (US\$ / 50 KGS)	99
NY 4 15/16 RM (US\$ / 50 KGS)	96
NY 4 14/16 RM (US\$ / 50 KGS)	93

Obs: Fob ideas (Simple exercise).

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

ARBITRAGE: ICE/BM&F (CTS/LB)	
-12,34	December/December
-12,86	March/March

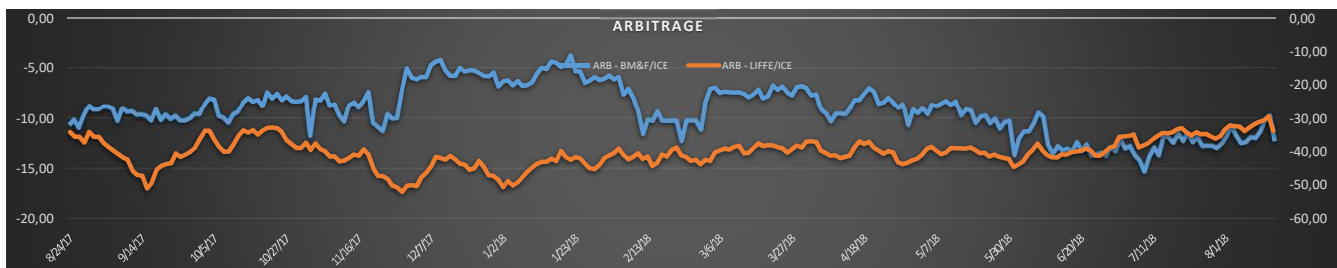
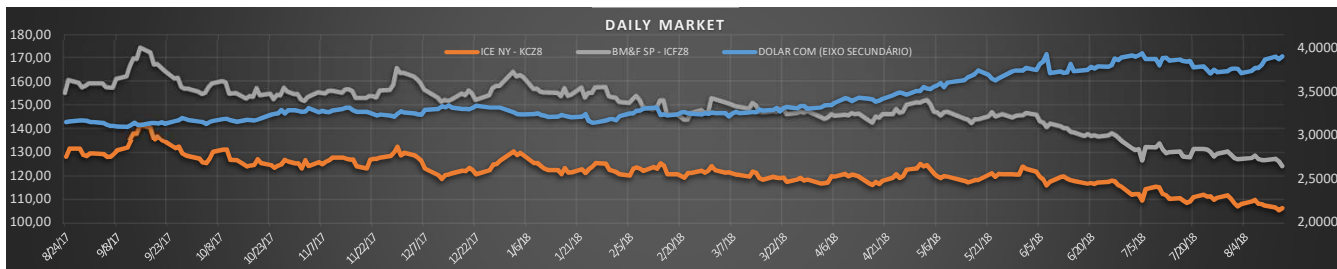
### Coffee Market Report

The largest coffee cooperative in Brazil Cooxupé has reported that its farmer members have so far harvested 77.8% of their new coffee crop, which is well below the 87.9% that had been harvested at the same time last year. However, with a significantly larger new Brazil crop coming in this year, one might presume that in terms of volume that there is little difference in the new crop stocks at hand, when compared to the same time last year.

The coffee markets meanwhile, are devoid of any supportive fundamental news and the speculative and fund sectors of the markets continue to pressure the coffee markets lower, to set record net short sold positions within the New York market. This selling pressure forcing the reference prices of the terminal markets ever lower and causing much stress for farmers within many producer countries, which is no doubt going to have an impact upon medium term coffee supply. A factor that one would suggest shall start to come to the fore early in the coming year, which shall trigger a short covering rally for the coffee markets and particularly so, the volatile New York market. Meanwhile with the new crop cherries ripening and the year end harvest on the horizon, there is a steady flow of past crop Mexican and Central American coffees coming to the alternative market that is the Certified coffee stocks of the New York market. This producer bloc now accounting for 75.58% of the stocks and followed by Peru, with a 11.25% share of the stocks. The balance made up by the 7.87% share that come from the African producers Burundi, Rwanda and Uganda, while Colombia contributes to 2.56% of the stocks and with Brazil and Papua New Guinea almost equally, contributing to the balance of the stocks.

Traditionally mid-August was considered the end of the Frost season for termination of the frost threat season for Brazil and thus now, all focus is upon the start of the new spring and summer rain season for Brazil that usually starts during the second half of September. Albeit that it is not uncommon for the rains to be delayed into early October, by when and if there has been little rain over the main coffee districts of the country, the speculation of dry weather damage for the next 2019 crop would start to impact upon market sentiment. But for the present and with medium term weather forecasts not indicating any medium to longer term threat of climatic problems for south east Brazil, coffee market sentiment remains bearish.

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