



MANGA

COFFEE CORPORATION

Market closed on August 16, 2018

ICE:	CONTRACT	SETTLE
	KCZ8	105,35
	KCH9	108,55
	KCK9	110,90
	KCN9	113,30
	KCU9	115,65

BM&F:	CONTRACT	SETTLE
	ICFZ18	122,70
	ICFH19	125,50

DOL:	CONTRACT	SETTLE
	DOL COM - DOLAR COMMERCIAL	3,9060

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	-3
	NY 2/3 15/16 FC CERRADO	-6
	NY 2/3 14/16 FC CERRADO	-9
	NY 2/3 17/18 FC SOUTH OF MINAS	-4
	NY 2/3 14/16 FC SOUTH OF MINAS	-10
	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	-9
	NY 3/4 14/16 GOOD CUP 2 RIOY CUPS	-15
	NY 5/6 13UP 300 DEF COB GRINDERS	-21
	NY 5/6 12UP 350 DEF COB GRINDERS	-24
	NY 3 17/18 RM (US\$ / 50 KGS)	100
	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)	
-3,20	December/March
-2,35	March/May
-2,40	May/July
-2,35	July/September
-3,35	September/December

ARBITRAGE: ICE/BM&F (CTS/LB)	
-12,59	December/December
-13,68	March/March

Coffee Market Report

The Green Coffee Association of the U.S.A. have announced that the countries port warehouse stocks decreased by 8,600 bags or 0.13% during the month of July, to register these stocks at 6,835,629 bags at the end of the month. The overall Green Coffee stocks reported, do not include the in-transit bulk container coffees or the onsite roaster inventories, which with an approximate combined U.S.A. and Canadian weekly consumption that is supported by these stocks of approximately 570,000 bags per week, would conservatively have been at least 1.1 million bags. If one is to consider the additional unreported stocks the end month stocks, this would equate to more than thirteen and half weeks of roasting activity, which most would consider to be a very safe reserve.

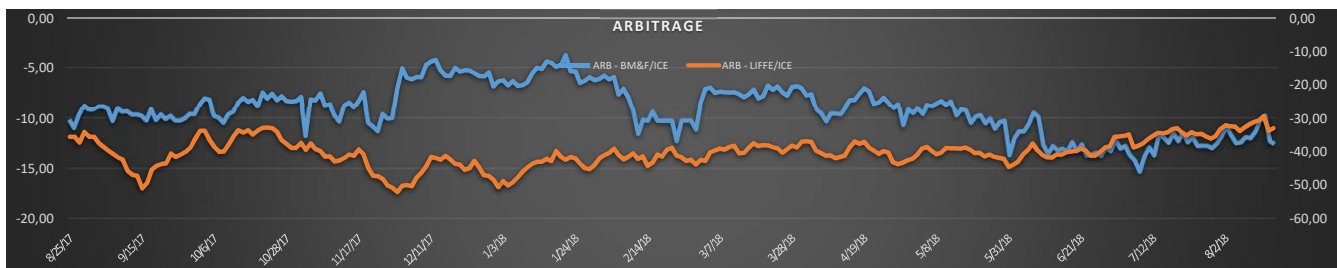
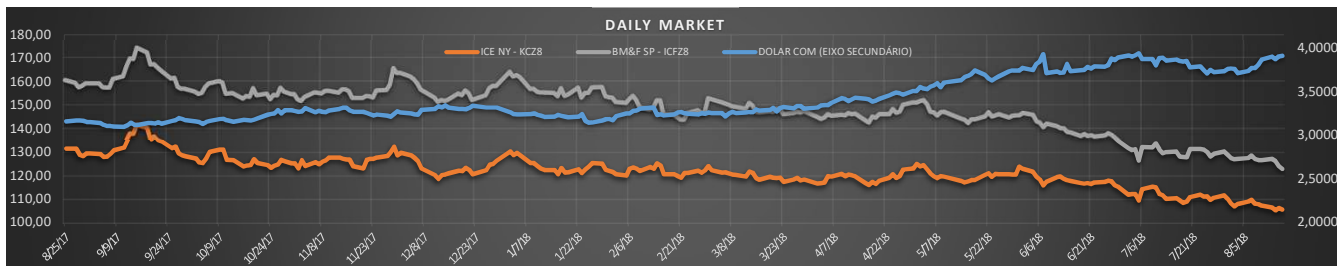
This relatively high level of coffee stocks within North America is of course ahead of the delivery of new crop coffees from the larger new Brazil crop this year, but one might imagine that with the soft nature of the reference prices of the international coffee and some degree of internal market price resistance within Brazil, that there might not be a surge of new Brazil coffees coming to significantly buoy the already more than sufficient stocks. Albeit that this issue of the larger Brazil crop, the pending year end repeat large new Vietnam crop and along with the pending new year end Mexican and Central American crop and on top of good levels of consumer market coffee stocks, continues to fuel bearish sentiment within the global coffee markets.

Presently with the exception of the excessive rains that are being encountered in South West India and over many of the coffee producing districts, there are no other weather issues being reported as being threatening to medium to longer term coffee production. While the Australian governments Bureau of Meteorology still only foresees a 50% chance for a new El Niño phenomenon to develop in the Pacific Ocean in the coming months, which results in global coffee weather reports have no impact upon the prevailing bearish sentiment within the coffee markets.

The November 2018 to December 2018 contracts arbitrage between the London and New York markets narrowed yesterday, to register this at 33.79 usc/Lb., while this equates to 31.88% 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 10,709 bags yesterday, to register these stocks at 2,103,855 bags. There were meanwhile a smaller in number 4,969 bags decrease in the number of bags pending grading for this exchange; to register these pending grading stocks at 230,028 bags.

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MARCOS EDUARDO CLAUDINO
PATRÍCIA TOMAZ DE ASSIS
SANDRA GOMES
WALLAFE VITOR TAVARES

ASSUNTOS

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