



MANGA

COFFEE CORPORATION

Market closed on August 17, 2018

ICE: CONTRACT	SETTLE
KCZ8	104,70
KCH9	107,95
KCK9	110,30
KCN9	112,70
KCU9	115,10

BM&F: CONTRACT	SETTLE
ICFZ18	122,40
ICFH19	125,75

DOL: CONTRACT	SETTLE
DOL COM - DOLAR COMMERCIAL	3,9160

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\$ 350,00
	PADRÃO 6B - CONSUMO 600 DEF DURO RIADO RIO	R\$ 330,00

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	-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	-19
	NY 5/6 12UP 350 DEF COB GRINDERS	-22
	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)	92

Obs: Fob ideas (Simple exercise).

SPREAD: ICE (CTS/LB)	
-3,25	December/March
-2,35	March/May
-2,40	May/July
-2,40	July/September
-3,30	September/December

ARBITRAGE: ICE/BM&F (CTS/LB)	
-12,17	December/December
-12,89	March/March

Coffee Market Report

The respected Brazilian analysts Safras & Mercado have reported that so far 88% of the countries area under coffee has been harvested, with the conilon Robusta coffee farms having mostly completed their new crop harvest and with the weather conditions favorable for harvesting, the Arabica coffee farms coming close to completion.

While in terms of volume, it is related to approximately 38 million bags of new crop Arabica coffees and to approximately 16 million bags of conilon Robusta coffees, with approximately 7.3 million bags of Arabica coffees still to be harvested.

Meanwhile with the weaker Brazil Real this week countering to a degree the negative effects of the softer coffee terminal markets, there is still steady internal market new crop coffee trade reported. But indications are that this trade is slow and steady, rather than aggressive in nature, which would usually have been expected in terms of a significantly large new crop.

One would expect that many of the Brazilian farmers are conservative sellers of new crop coffees to cover their immediate financial requirements, while they await direction from the forthcoming October to March rain season. Thinking that should there be any so far unforeseen problems with the spring and summer rain season, that a dry start to the season would both lower the next 2019 crop potential and buoy speculative sentiment within the terminal markets and to add value to their remaining new crop stocks.

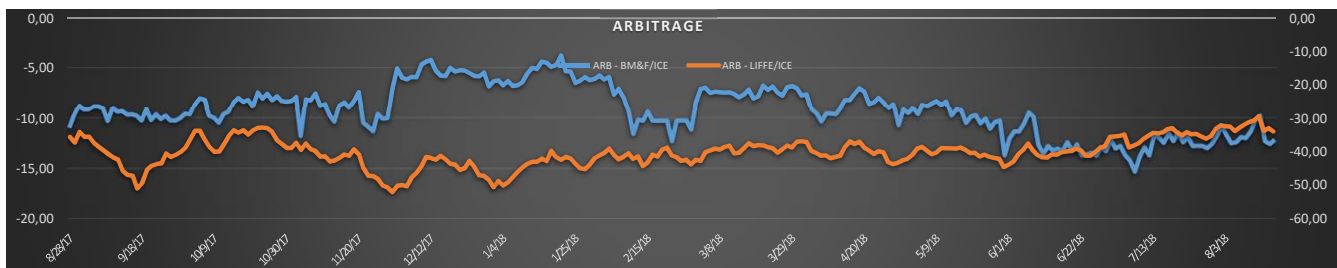
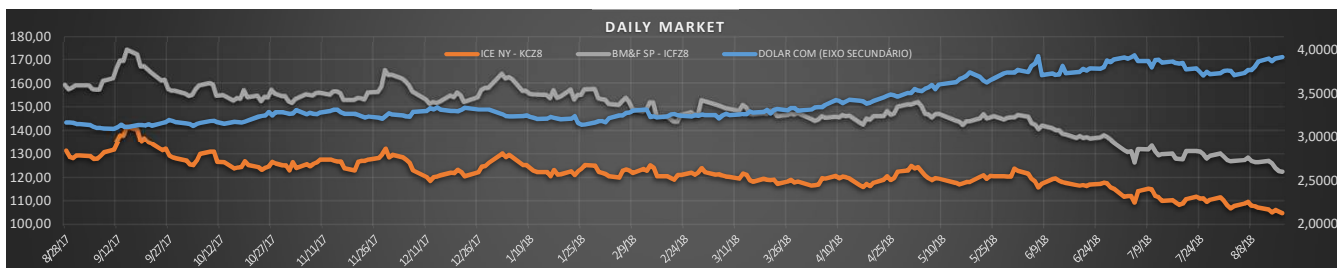
But the question is if the rains prove to be normal and indicate the potential for another good crop for the coming year, what effect this might have upon the markets for the last quarter of the year. Albeit that with the funds and speculative sectors of the markets already well sold short, there might still be some limits to the short to medium term downside potential for the New York Arabica coffee market. There might however be some additional negative sentiment due for the London market, should significant volumes of new crop Brazil conilon Robusta coffees start getting tendered to the certified stocks of this market.

It is reported that physical trade within the Asian Robusta markets is lackluster at present, with the already well sold Vietnamese farmers now looking towards the start of their new crop harvest in approximately eight weeks' time. While following the decline in value of the reference prices of the London market, there is price resistance within the internal market in Indonesia.

The November 2018 to December 2018 contracts arbitrage between the London and New York markets narrowed yesterday, to register this at 32.96 usc/Lb., while this equates to 31.29% 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 11,200 bags yesterday, to register these stocks at 2,115,055 bags. There were meanwhile a smaller in number 10,265 bags decrease in the number of bags pending grading for this exchange; to register these pending grading stocks at 219,763 bags.

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ASSUNTOS

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