



# MANGA

COFFEE CORPORATION

Market closed on August 24, 2018

ICE: CONTRACT	SETTLE
KCZ8	104,70
KCH9	108,00
KCK9	110,35
KCN9	112,70
KCU9	115,00

BM&F: CONTRACT	SETTLE
ICFZ18	119,40
ICFH19	123,30

DOL: CONTRACT	SETTLE
DOL COM - DOLAR COMMERCIAL	4,1040

MARKET	PRICE IDEAS FROM BUYERS	
	PADRÃO 0 - CEREJA	R\$ 450,00
	PADRÃO 1A - FC CERRADO	R\$ 430,00
	PADRÃO 1B - FC SOUTH OF MINAS	R\$ 425,00
	PADRÃO 2 - GOOD CUP DURO	R\$ 405,00
	PADRÃO 3 - GOOD CUP 2 RIADAS	R\$ 400,00
	PADRÃO 4 - DURO RIADO RIO (7/2/1)	R\$ 390,00
	PADRÃO 5 - RIO	R\$ 375,00
	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	-6
	NY 2/3 15/16 FC CERRADO	-9
	NY 2/3 14/16 FC CERRADO	-12
	NY 2/3 17/18 FC SOUTH OF MINAS	-10
	NY 2/3 14/16 FC SOUTH OF MINAS	-16
	NY 2/3 17/18 GOOD CUP	-11
	NY 3/4 14/16 GOOD CUP	-17
	NY 2/3 17/18 GOOD CUP 2 RIOY CUPS	-13
	NY 3/4 14/16 GOOD CUP 2 RIOY CUPS	-19
	NY 5/6 13UP 300 DEF COB GRINDERS	-20
	NY 5/6 12UP 350 DEF COB GRINDERS	-23
	NY 3 17/18 RM (US\$ / 50 KGS)	97
	NY 4 15/16 RM (US\$ / 50 KGS)	93
	NY 4 14/16 RM (US\$ / 50 KGS)	90

Obs: Fob ideas (Simple exercise).

SPREAD: ICE (CTS/LB)	
-3,30	December/March
-2,35	March/May
-2,35	May/July
-2,30	July/September
-3,45	September/December

ARBITRAGE: ICE/BM&F (CTS/LB)	
-14,44	December/December
-14,79	March/March

### Coffee Market Report

The respected Brazilian analysts Safras & Mercado who have forecast that the new Brazil coffee crop shall total 60.5 million bags, have reported that with the conilon Robusta coffee harvest over, that so far 92.56% of the new crop harvest has been completed. In this respect they estimate the 88% of the new Brazil Arabica coffee crop is now harvested, with a further 6 million bags of Arabica coffee still to be harvested.

In the meantime, and following some unseasonal rains this month and with more rains forecast for south east Brazil over the coming days, there has already been some flowerings towards the new crop reported. This has brought to the fore some fears being voiced that without follow on nearby rains that some of these flowerings might abort and damage the potential for the next 2019 coffee crop, but these are countered by speculation that the ground water retention levels are mostly sufficient enough, for the trees to carry these flowers.

With the new crop harvest on the horizon that National Coffee Association in Guatemala Anacafé have voiced their fears that with this crop now focused upon the prevailing soft reference prices of the New York Arabica coffee market, that farmers shall struggle to finance their usual numbers of labor for this harvest. In this respect criticizing their government for not doing enough to assist to support the countries coffee farming industry, so as to counter the negative effects of the soft international coffee prices.

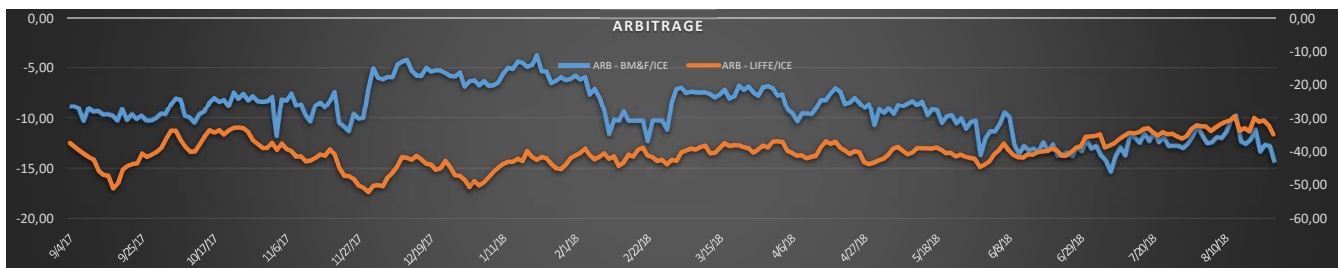
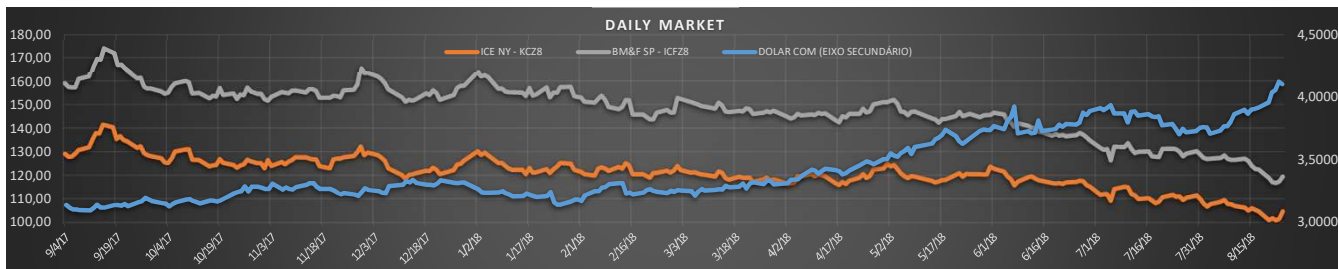
The trade in Vietnam and with the new crop cherries maturing towards the start of the new crop harvest in October are presently talking about a bumper new crop of mostly Robusta coffees, which might exceed 30 million bags. This perception of a further large new crop to come, impacting upon the bearish sentiment within the coffee markets at present and negating any market support that might have come from the reports of crop damaging rains in south west India.

In terms of the excessive monsoon rains over the coffee districts in south west India the Coffee Exporters Association of India have speculated that the damage to the coffee farms and in the form of landslides and cherry drop, might cause losses of in excess of 1 million bags of the potential crop, for the forthcoming October 2018 to September 2019 coffee year. While in terms of coffee deliveries from the present coffee stocks, they estimate that as much as 333,000 bags of contracted coffee exports have been delayed by the disruption to internal market transport infrastructure.

The November 2018 to December 2018 contracts arbitrage between the London and New York markets broadened yesterday, to register this at 32.06 usc/Lb., while this equates to 31.59% 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 10,630 bags yesterday; to register these stocks at 2,162,825 bags. There were meanwhile a larger in number 12,870 bags decrease in the number of bags pending grading for this exchange; to register these pending grading stocks at 191,085 bags.

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