



# MANGA

COFFEE CORPORATION

Market closed on August 30, 2018

ICE: CONTRACT	SETTLE
KCZ8	102,65
KCH9	106,00
KCK9	108,35
KCN9	110,70
KCU9	113,10

BM&F: CONTRACT	SETTLE
ICFZ18	118,20
ICFH19	122,00

DOL: CONTRACT	SETTLE
DOL COM - DOLAR COMMERCIAL	4,1450

MARKET	PRICE IDEAS FROM BUYERS	
	PADRÃO 0 - CEREJA	R\$ 460,00
	PADRÃO 1A - FC CERRADO	R\$ 440,00
	PADRÃO 1B - FC SOUTH OF MINAS	R\$ 430,00
	PADRÃO 2 - GOOD CUP DURO	R\$ 410,00
	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	1
	NY 2/3 15/16 FC CERRADO	-2
	NY 2/3 14/16 FC CERRADO	-5
	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	-6
	NY 3/4 14/16 GOOD CUP	-12
	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	-16
	NY 5/6 12UP 350 DEF COB GRINDERS	-19
	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)	
-3,35	December/March
-2,35	March/May
-2,35	May/July
-2,40	July/September
-3,40	September/December

ARBITRAGE: ICE/BM&F (CTS/LB)	
-13,29	December/December
-13,77	March/March

### Coffee Market Report

Further to the report from the General Statistical Office in Vietnam that estimated that the countries coffee exports for the first eight months of this year are 14.8% higher than the same period last year, they have reported that the revenue from these exports is 3.1% lower than that of the same period last year. This clearly illustrating the problems that coffee farmers globally and with the exception of the few countries that have benefited from weakening currency relative to the U.S. dollar, are presently facing.

It is however a much worse situation for most producer countries as even at the present price levels, the efficient and high yielding Vietnamese coffee farmers are mostly still able to make profit out of their coffee crops. But the profits shall be diminished and there is the possibility that many farmers within this the second largest coffee producer, shall be looking to plant alternative and more profit sustainable crops, such as avocado and macadamia nuts. A factor that might cap the steady growth that has been experienced over the recent years, in the Vietnam coffee industry.

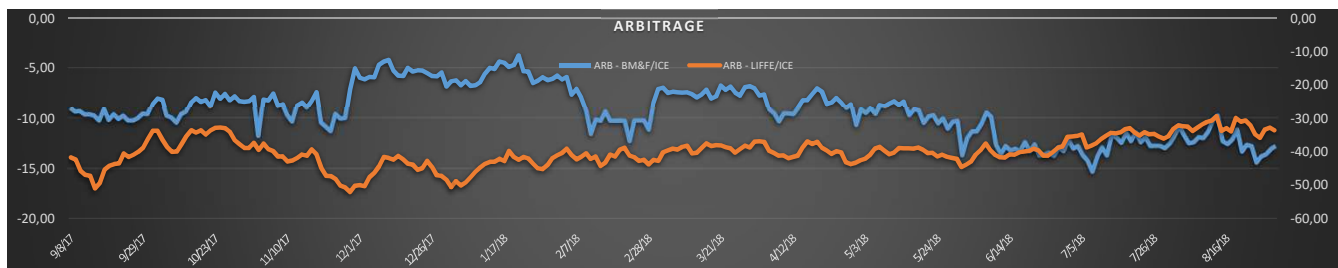
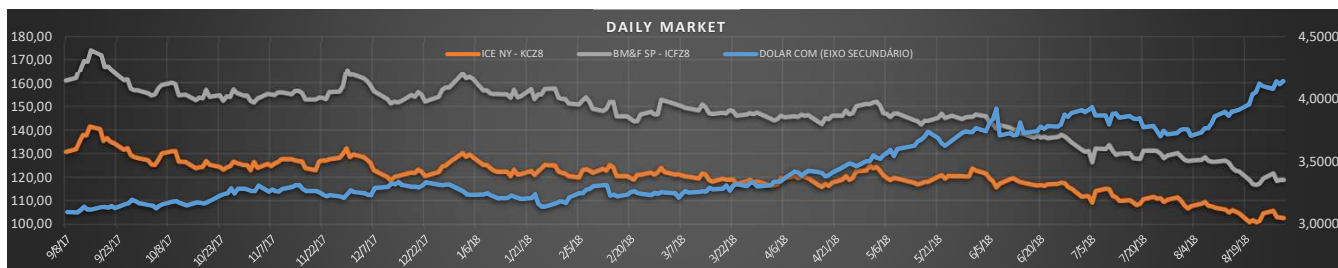
The Bureau of Meteorology in Australia have reaffirmed that there is a 50% chance for a new El Niño phenomenon to develop within the Pacific Ocean in the coming months, but with no indication of how intense this might be. Thus, in terms of short term weather factors as they relate to the coffee markets and aside from the potential damage to the new Indian crop that has come with the excessive monsoon rains in south west India, there is little in the way of weather related supportive news for the depressed and short sold coffee markets.

This aside, the markets remain devoid of any striking fundamental news and remain focused upon the evidence of the large new Brazil crop, the forthcoming new Colombian main crop, the forthcoming large new Vietnam crop and the forthcoming Mexican and Central American crop, which shall all start to impact during the last quarter of this year. While in the meantime, with the certified stocks of the volatile New York market steadily rising, it confirms that there is no shortage of coffee ahead of the surge of new crop coffee supply that is shortly due to come into play and supports the bearish sentiment of the speculative and managed money fund sectors of the coffee market.

The November 2018 to December 2018 contracts arbitrage between the London and New York markets narrowed yesterday, to register this at 32.77 usc/Lb., while this equates to 31.85% 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 7,599 bags yesterday, to register these stocks at 2,205,398 bags. There were meanwhile a smaller in number 1,582 bags decrease in the number of bags pending grading for this exchange; to register these pending grading stocks at 210,974 bags.

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