



MANGA

COFFEE CORPORATION

Market closed on August 31, 2018

ICE: CONTRACT	SETTLE
KCZ8	101,80
KCH9	105,10
KCK9	107,45
KCN9	109,75
KCU9	112,10

BM&F: CONTRACT	SETTLE
ICFZ18	118,20
ICFH19	121,80

DOL: CONTRACT	SETTLE
DOL COM - DOLAR COMMERCIAL	4,0730

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: QUALITY - CONSIDERING THE STRING	JUL/SEPT
NY 2/3 17/18 FC CERRADO	0
NY 2/3 15/16 FC CERRADO	-3
NY 2/3 14/16 FC CERRADO	-6
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	-9
NY 3/4 14/16 GOOD CUP 2 RIOY CUPS	-15
NY 5/6 13UP 300 DEF COB GRINDERS	-17
NY 5/6 12UP 350 DEF COB GRINDERS	-20
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
-2,30	May/July
-2,35	July/September
-3,45	September/December

ARBITRAGE: ICE/BM&F (CTS/LB)	
-12,44	December/December
-13,02	March/March

Coffee Market Report

The respected Brazilian analysts Safras and Mercado who have forecast the new Brazil crop at what many see to be a conservative number of 60.5 million bags, have estimated that 94% of this new crop has been harvested.

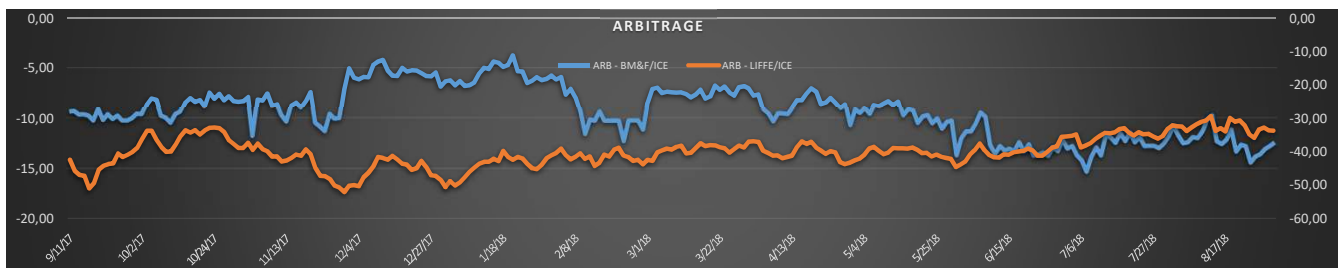
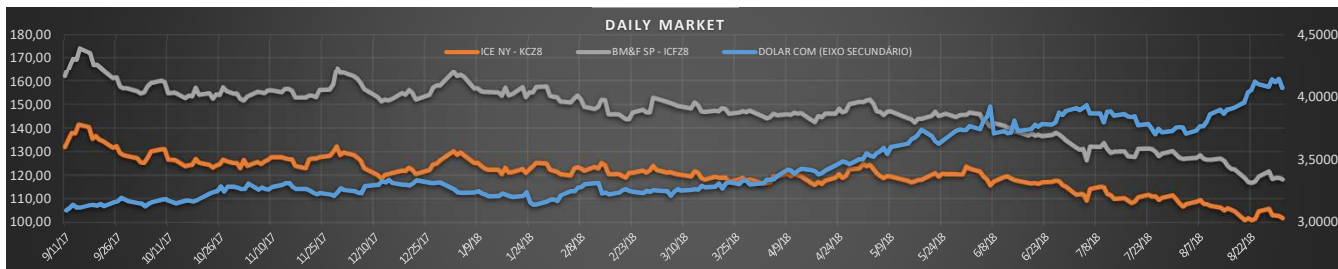
While in terms of quality, they have estimate that it is good and with a relatively high percentage of bolder bean. In terms of weather in Brazil with the spring season starting this weekend, the main coffee districts are forecast to be mostly dry for the coming couple of weeks, but this is seasonally normal and with the new spring and summer rain season traditionally only due by early October. There have though been some unseasonal rains in the recent weeks and some incidents of early flowering towards the next 2019 crop, with speculation being voiced that much of this might without follow on rains, suffering from abortion.

It is however early days and while there are already reports that presume that the next 2019 Brazil crop and following this year's bumper crop, shall suffer from biennial bearing and come in with numbers much lower than the present crop, these forecasts are having no impact upon short term market sentiment. But there most certainly be focus on the rainfall reports out of Brazil in the month of October, as this shall determine the size and quality of the flowerings towards the coming years crop and in the meantime for the coming few weeks, one would expect Brazil weather news to have minimal influence upon market sentiment.

The coffee robusta coffee markets in Asia are presently quiet with the Vietnam internal market stocks low and some degree of price resistance slowing business, while there is little in the way of selling aggression within the well sold internal market in Indonesia. It is however and depending on the end of the rain season in Vietnam only five to six weeks before the new crop harvest is due to start, with the possibility that the large new conilon robusta coffee crop in Brazil shall come to the fore and provide for some degree of competition for the Vietnam coffees within the consumer markets.

One might speculate that despite the fact that the availability of four to five million bags of Brazil robusta coffees coming to the consumer markets in the coming months, shall be dwarfed by the volume of robusta coffee that is due from another bumper Vietnam crop, that they shall have an influence upon sentiment within the London market. Thinking that if by late October the weather conditions in Brazil are looking normal and with good rains being experienced and indicating the possibility for another good crop in the coming year, that it shall inspire internal market conilon robusta coffee sales and with these surplus to domestic market demand coffees flowing towards the certified stocks of the market.

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ASSUNTOS

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