



# MANGA

COFFEE CORPORATION

Market closed on **September 3, 2018**

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

BM&F: CONTRACT	SETTLE
ICFZ18	116,65
ICFH19	120,25

DOL: CONTRACT	SETTLE
DOL COM - DOLAR COMMERCIAL	4,1520

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	-4
	NY 2/3 14/16 FC CERRADO	-7
	NY 2/3 17/18 FC SOUTH OF MINAS	-7
	NY 2/3 14/16 FC SOUTH OF MINAS	-13
	NY 2/3 17/18 GOOD CUP	-8
	NY 3/4 14/16 GOOD CUP	-14
	NY 2/3 17/18 GOOD CUP 2 RIOY CUPS	-11
	NY 3/4 14/16 GOOD CUP 2 RIOY CUPS	-17
	NY 5/6 13UP 300 DEF COB GRINDERS	-18
	NY 5/6 12UP 350 DEF COB GRINDERS	-21
	NY 3 17/18 RM (US\$ / 50 KGS)	96
	NY 4 15/16 RM (US\$ / 50 KGS)	92
	NY 4 14/16 RM (US\$ / 50 KGS)	89

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)	
-13,62	December/December
-14,19	March/March

### Coffee Market Report

The latest Commitment of Traders report from the New York Arabica coffee market has seen the Non-Commercial Speculative sector of this market decrease their net short sold position within the market by 3.98% over the week of trade leading up to Tuesday 28th. August, to register a new net short sold position of 101,878 Lots. This net short-sold position which is the equivalent of 28,881,962 bags has most likely been marginally increased, following the period of negative trade which has since followed.

The latest Commitment of Traders report from the London Robusta coffee market has seen the Speculative Non-Commercial sector of this market increase their net short sold position within this market by 5.82% during the week of trade leading up to Tuesday 28th. August, to register a net short sold position of 34,106 Lots on the day. This net short sold position which is the equivalent of 5,684,333 bags has most likely been further increased, following the period of softer trade, which has since followed.

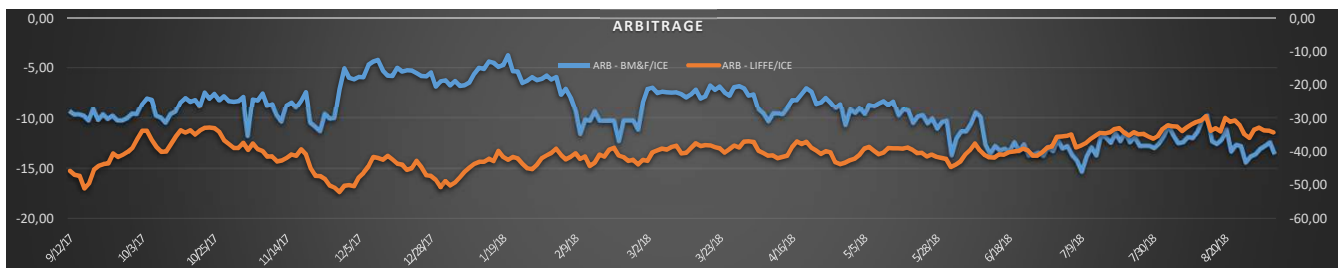
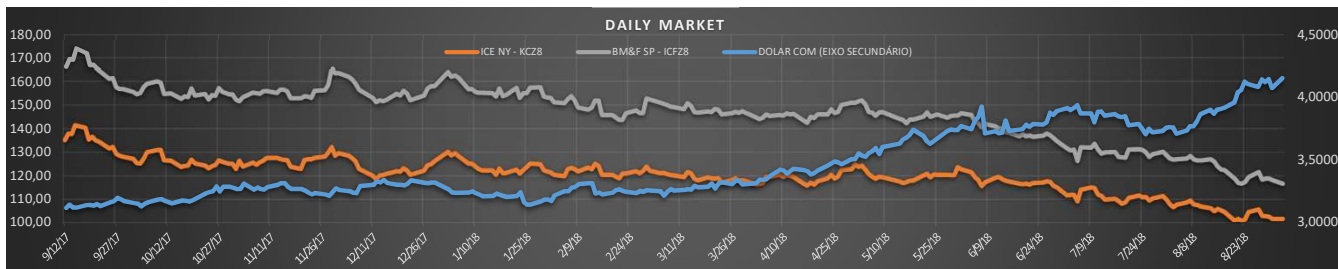
The Indonesian government trade data from Sumatra which is the leading coffee producing island within Indonesia, has reported that the islands Robusta coffee exports for the month of August were 398,150 bags or 67.25% lower than the same month last year, at a total of 193,897 bags. This number and following a similarly modest export performance for the previous months has contributed to the cumulative coffee exports for the first eleven months of the present October 2017 to September 2018 coffee year to be 2,859,819 bags or 67% lower than the same period in the previous coffee year, at a total of 1,408,395 bags.

The European Coffee Federation ECF have reported that the port warehouse stocks held within reporting warehouses in the ports in Belgium, Germany, France and Italy increased by 82,750 bags or 0.72% during the month of June, to register these stocks at the end of the month at 11,517,283 bags. These stocks do not however include the unreported stocks from the industry on site inventory stocks, the transit bulk container stocks and stocks being held within non-reporting warehouses throughout Western and Eastern Europe.

The combination of West and East Europe consuming approximately 1.05 million bags of coffee a week, one might guess that the additional stocks that were not included in the report, could contribute as much as 2.5 million bags to the reported stocks. Thus, indicating that as at the end of June, the European coffee stocks might have been close to the equivalent in excess of a relatively safe, thirteen weeks of Western and Eastern European roasting demand. This is a contributing factor which supports the prevailing bearish sentiment on the part of the speculative sector of the coffee markets and likewise, contributes to a degree of complacency on the part of the consumer market industries.

The November 2018 to December 2018 contracts arbitrage between the London and New York markets broadened on Friday, to register this at 33.72 usc/Lb., while this equates to 33.12% price discount for the London Robusta coffee market.

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