



# MANGA

COFFEE CORPORATION

Market closed on September 12, 2018

ICE:	CONTRACT	SETTLE
	KCZ8	102,10
	KCH9	105,50
	KCK9	107,90
	KCN9	110,30
	KCU9	112,65

BM&F:	CONTRACT	SETTLE
	ICFZ18	117,90
	ICFH19	121,20

DOL:	CONTRACT	SETTLE
	DOL COM - DOLAR COMMERCIAL	4,1500

MARKET	PRICE IDEAS FROM BUYERS	
	PADRÃO 0 - CEREJA	R\$ 450,00
	PADRÃO 1A - FC CERRADO	R\$ 420,00
	PADRÃO 1B - FC SOUTH OF MINAS	R\$ 410,00
	PADRÃO 2 - GOOD CUP DURO	R\$ 400,00
	PADRÃO 3 - GOOD CUP 2 RIADAS	R\$ 390,00
	PADRÃO 4 - DURO RIADO RIO (7/2/1)	R\$ 380,00
	PADRÃO 5 - RIO	R\$ 370,00
	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
NET SELLER	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	-11
	NY 2/3 14/16 FC SOUTH OF MINAS	-17
	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	-18
	NY 5/6 12UP 350 DEF COB GRINDERS	-21
	NY 3 17/18 RM (US\$ / 50 KGS)	94
	NY 4 15/16 RM (US\$ / 50 KGS)	91
	NY 4 14/16 RM (US\$ / 50 KGS)	87

Obs: Fob ideas (Simple exercise).

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

ARBITRAGE: ICE/BM&F (CTS/LB)	
-12,97	December/December
-13,88	March/March

### Coffee Market Report

The latest assessment of the traditionally very conservative Brazil Institute of Geography and Statistics for the new Brazil coffee crop that they now estimate at 57.4 million bags, is proving to be yet another negative nail for sentiment within the coffee markets. One would usually see this institutes numbers to be approximately 10% below reality and if one is to extrapolate the number, it is supportive for the many other forecasts that had pegged this crop at between 62 million and 64 million bags.

The forecasts for early spring rains due over the main coffee districts in Brazil and the softening of the Brazil Real relative to the U.S. dollar over and above the prospects for a surplus coffee supply for the new October 2018 to September 2019 coffee year, had its impact within the volatile New York market yesterday. A market that looks to fundamental news that aside from some problems in India, is nothing but negative in nature.

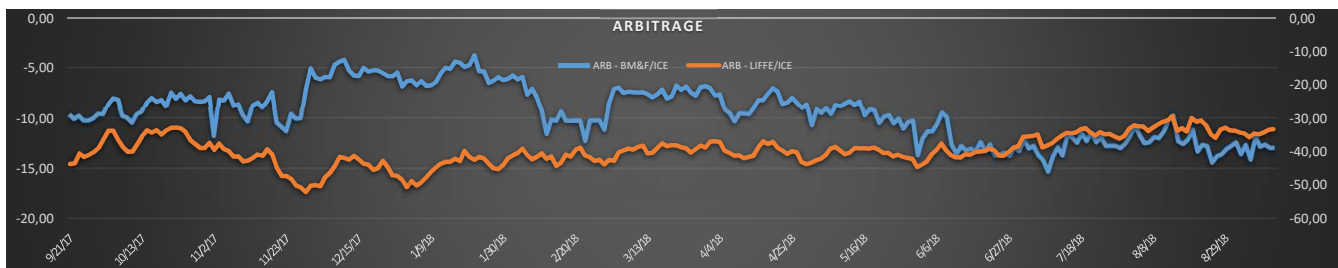
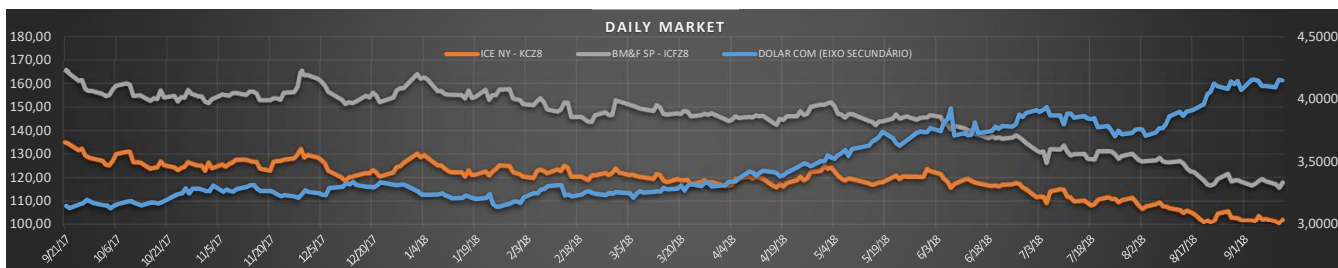
This is a dismal situation for coffee farmers in both the Mexican and Central American producer bloc and Vietnam, with their new crop harvest now only a few weeks away from starting, as they focus upon soft reference prices within the coffee terminal markets. While with the mainstream coffee markets in Europe, North America and Japan having had an extraordinarily hot summer that has impacted upon overall coffee consumption, it has resulted in more than sufficient stocks at hand within these markets, to limit the volumes of nearby demand.

The November 2018 to December 2018 contracts arbitrage between the London and New York markets narrowed yesterday, to register this at 33.41 usc/Lb., while this equates to 33.26% 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 11,245 bags yesterday, to register these stocks at 2,275,034 bags. There were meanwhile a larger in number 17,634 bags decrease in the number of bags pending grading for this exchange; to register these pending grading stocks at 172,454 bags.

The Certified Robusta coffee stocks held against the London exchange were seen to increase by 32,500 bags or 2.61% over the week of trade leading up to Monday 10th. September, to see these stocks registered at 1,275,667 bags on the day.

<http://www.iandmsmith.com>



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