



# MANGA

COFFEE CORPORATION

Market closed on **November 12, 2018**

ICE: CONTRACT	SETTLE
KCZ8	110,15
KCH9	114,00
KCK9	116,90
KCN9	119,65
KCU9	122,20

BM&F: CONTRACT	SETTLE
ICFZ18	129,00
ICFH19	133,50

DOL: CONTRACT	SETTLE
DOL COM - DOLAR COMMERCIAL	3,7570

MARKET	PRICE IDEAS FROM BUYERS	
	PADRÃO 0 - CEREJA	R\$ 450,00
	PADRÃO 1A - FC CERRADO	R\$ 425,00
	PADRÃO 1B - FC SOUTH OF MINAS	R\$ 420,00
	PADRÃO 2 - GOOD CUP DURO	R\$ 410,00
	PADRÃO 3 - GOOD CUP 2 RIADAS	R\$ 390,00
	PADRÃO 4 - DURO RIADO RIO (7/2/1)	R\$ 380,00
	PADRÃO 5 - RIO	R\$ 360,00
	PADRÃO 6A - CONSUMO 600 DEF DURO	R\$ 380,00
	PADRÃO 6B - CONSUMO 600 DEF DURO RIADO RIO	R\$ 360,00

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	September/December
NET SELLER NY 2/3 17/18 FC CERRADO	-4
NY 2/3 15/16 FC CERRADO	-7
NY 2/3 14/16 FC CERRADO	-10
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	-8
NY 3/4 14/16 GOOD CUP	-14
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	-13
NY 5/6 12UP 350 DEF COB GRINDERS	-16
NY 3 17/18 RM (US\$ / 50 KGS)	100
NY 4 15/16 RM (US\$ / 50 KGS)	97
NY 4 14/16 RM (US\$ / 50 KGS)	94

Obs: Fob ideas (Simple exercise).

SPREAD: ICE (CTS/LB)

-3,85	December/March
-2,90	March/May
-2,75	May/July
-2,55	July/September
-3,55	September/December

ARBITRAGE: ICE/BM&F (CTS/LB)

-12,63	December/December
-13,08	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 11.29% over the week of trade leading up to Tuesday 6th. November; to register a new net short sold position of 39,372 Lots. This net short-sold position which is the equivalent of 11,161,788 bags has most likely been little changed, following the period of mixed but overall sideways trade, that has since followed.

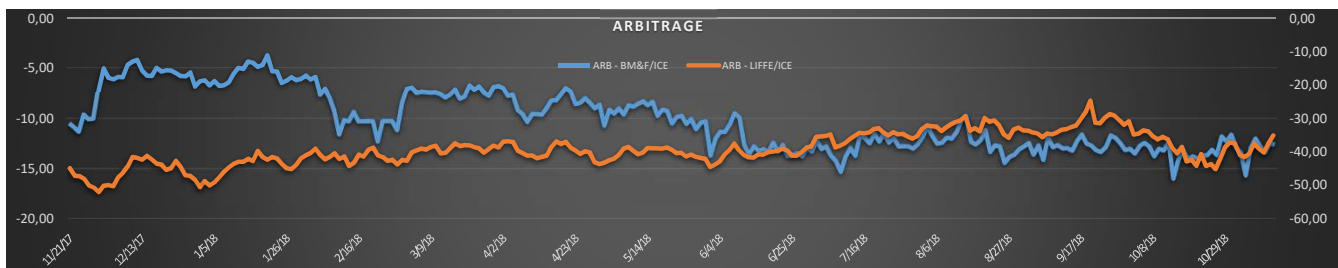
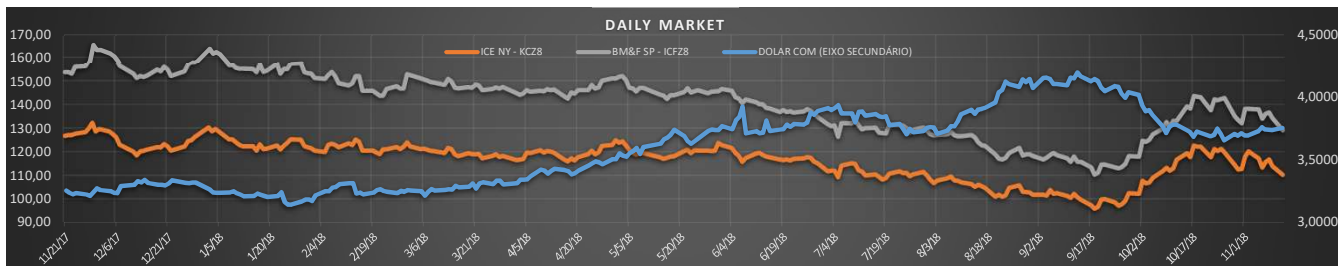
The latest Commitment of Traders report from the London robusta coffee market has seen the Speculative Managed Money sector of this market decrease their net short sold position within this market by 25.2% during the week of trade leading up to Tuesday 6th. November; to register a net short sold position of 3,580 Lots on the day. This net short sold position which is the equivalent of 596,667 bags has most likely been little changed to perhaps marginally increased, following the period of mixed but overall more sideways trade, which has since followed.

The International Coffee Organisation ICO have reduced their forecast for global coffee production for the just completed October 2017 to September 2018 coffee year, to 163.51 million bags, which they say fuelled a global surplus coffee supply of a more modest 1.59 million bags. But this was ahead of the significantly larger new Brazil crop this year, which many foresee shall assist to fuel a global coffee supply surplus for the new October 2018 to September 2019 coffee year, which shall result in a global coffee supply surplus of in excess of 8 million bags. A factor that presently supports the prevailing bearish sentiment within the coffee markets.

The well-respected U.S. Department of Agriculture USDA have revised upwards by 5.32% their assessment of the new Brazil coffee crop this year, to now report this crop at 63.4 million bags. This latest assessment they say has resulted in a new Brazil coffee crop this year, which is 12.5 million bags or 24.56% larger than the previous years coffee crop, with the new crop being related to 46.9 million bags of arabica coffees and 16.5 million bags of conilon robusta coffees. Resulting in an 8.4 million bags increase in Brazil arabica coffee supply and a 4.1 million bags increase in conilon robusta coffee supply, for the present October 2018 to September 2019 coffee year.

The Vietnam Customs Department have reported that the countries coffee export for the month of October were 2,301,850 bags, which they say has contributed to the country's cumulative coffee exports for the first ten months of this year to be 22.2% higher than the same period in the previous year, at a total of in excess of 26.3 million bags. But they do note that despite the sharp increase in volume of coffee exports that in line with the softer nature of the international coffee prices, that revenue from these exports was only 1.8% higher, at approximately 3 billion U.S. dollars.

Source: <http://www.iandmsmith.com>



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