



MANGA

COFFEE CORPORATION

Market closed on **November 26, 2018**

ICE: CONTRACT	SETTLE
KCH9	110,80
KCK9	113,65
KCN9	116,30
KCU9	118,95
KCZ9	122,60

BM&F: CONTRACT	SETTLE
ICFH19	130,30
ICFU19	137,55

DOL: CONTRACT	SETTLE
DOL COM - DOLAR COMMERCIAL	3,9180

MARKET	PRICE IDEAS FROM BUYERS	
	PADRÃO 0 - CEREJA	R\$ 455,00
	PADRÃO 1A - FC CERRADO	R\$ 440,00
	PADRÃO 1B - FC SOUTH OF MINAS	R\$ 430,00
	PADRÃO 2 - GOOD CUP DURO	R\$ 420,00
	PADRÃO 3 - GOOD CUP 2 RIADAS	R\$ 410,00
	PADRÃO 4 - DURO RIADO RIO (7/21)	R\$ 395,00
	PADRÃO 5 - RIO	R\$ 370,00
	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	December/March
NET SELLER NY 2/3 17/18 FC CERRADO	-5
NY 2/3 15/16 FC CERRADO	-8
NY 2/3 14/16 FC CERRADO	-11
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	-10
NY 3/4 14/16 GOOD CUP	-16
NY 2/3 17/18 GOOD CUP 2 RIOY CUPS	-12
NY 3/4 14/16 GOOD CUP 2 RIOY CUPS	-18
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)	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)

-2,85	March/May
-2,65	May/July
-2,65	July/September
-3,65	September/December
-3,70	December/March

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

-12,30	March/March
-14,97	September/September

Coffee Market Report

The latest Commitment of Traders report from the London robusta coffee market has seen the Speculative Managed Money sector of this market increase their net short sold position within this market by 8.7% during the week of trade leading up to Tuesday 20th. November; to register a net short sold position of 300 Lots on the day. This net short sold position which is the equivalent of 50,000 bags has most likely been little changed to perhaps marginally increased, following the period of mixed but overall marginally softer trade, which has since followed.

The new crop coffee harvest in Vietnam that was last week seen to be over 40% complete is presently being interrupted within many districts, as Tropical Storm Usagi and bringing with it heavy rains, is skirting the south of the main central highlands coffee farming districts. This is however not really seen to be too much of a problem, as there is already a good volume of new crop coffees that have been harvested and the perspective is that this storm shall soon pass and that by later in the week, the new crop harvest shall continue.

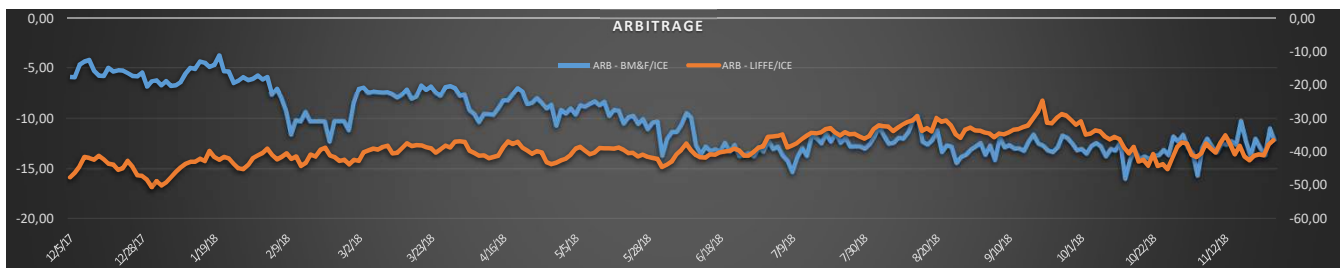
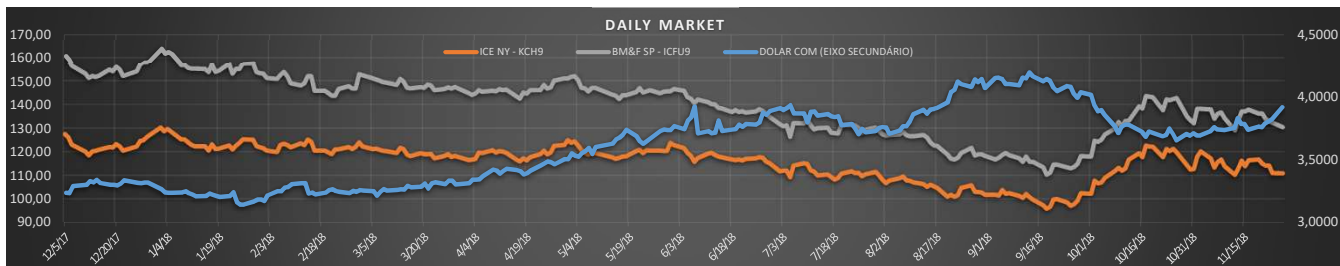
With rising labour costs and low international coffee prices, many if not most Colombian coffee farmers are struggling to make any profit and most likely, there are many that are presently losing money with their new crop coffees. This has inspired the move towards mechanisation but mostly in the form of vibrating coffee lances to knock ripe cherries off the trees, as the majority of steep hillside coffee farmers cannot make use of the self-drive or towed coffee harvesters that are common in Brazil.

One might speculate that automated harvesting shall increase the percentages of underripe cherry that shall be harvested and therefore, increase the percentages of lower grades coming from the mechanised coffee farms. This is for Brazil not so much of a problem, as the country unlike Colombia, has a significant domestic consumption of in excess of 21 million bags per annum, which is friendly to the use of lower priced secondary grade coffees. But could if these coffee harvesting lances become popular in Colombia, become a problem for the mechanised Colombian coffee farms, to find a reasonable value market for their lower grade coffees.

The March 2019 to March 2019 contracts arbitrage between the London and New York markets narrowed on Friday, to register this at 37.60 usc/Lb., while this equates to 33.89% price discount for the London Robusta coffee market.

The Certified washed Arabica coffee stocks held against the New York exchange were seen to be unchanged on Friday, to register these stocks at 2,455,443 bags. There were though 1,375 bags increase to the number of bags pending grading for this exchange; to register these pending grading stocks at 26,361 bags.

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



COLABORADORES

CRISTIANE DAMASCENO
ERICKSEN SOUZA
GLAUCIENE PARANHOS DE SOUZA
JOSÉ ANTONIO DOS SANTOS MANGA
KELLY APARECIDA FERREIRA
LEONARDO SOARES
MARCOS TULLIO SARTO
PATRÍCIA TOMAZ DE ASSIS
SANDRA GOMES
WALLAFE VITOR TAVARES

ASSUNTOS

ADMINISTRATIVO
TRAFFIC/QUALIDADE
RECEPÇÃO
DIRETOR/QUALIDADE/COMERCIAL
CERTIFICAÇÕES
DIRETOR/ADMINISTRATIVO/FINANCEIRO
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