



MANGA

COFFEE CORPORATION

Market closed on **February 20, 2019**

ICE: CONTRACT	SETTLE
KCK9	101,40
KCN9	104,15
KCU9	106,90
KCZ9	110,75
KCH0	114,45

BM&F: CONTRACT	SETTLE
ICFU19	124,50
ICFZ19	129,55

DOL: CONTRACT	SETTLE
DOL COM - DOLAR COMMERCIAL	3,7170

MARKET	PRICE IDEAS FROM BUYERS	
	PADRÃO 0 - CEREJA	R\$ 420,00
	PADRÃO 1A - FC CERRADO	R\$ 410,00
	PADRÃO 1B - FC SOUTH OF MINAS	R\$ 400,00
	PADRÃO 2 - GOOD CUP DURO	R\$ 390,00
	PADRÃO 3 - GOOD CUP 2 RIADAS	R\$ 380,00
	PADRÃO 4 - DURO RIADO RIO (7/2/1)	R\$ 370,00
	PADRÃO 5 - RIO	R\$ 360,00
	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	May/July
NET SELLER NY 2/3 17/18 FC CERRADO	3
NY 2/3 15/16 FC CERRADO	0
NY 2/3 14/16 FC CERRADO	-3
NY 2/3 17/18 FC SOUTH OF MINAS	1
NY 2/3 14/16 FC SOUTH OF MINAS	-5
NY 2/3 17/18 GOOD CUP	-2
NY 3/4 14/16 GOOD CUP	-8
NY 2/3 17/18 GOOD CUP 2 RIOY CUPS	-4
NY 3/4 14/16 GOOD CUP 2 RIOY CUPS	-10
NY 5/6 13UP 300 DEF COB GRINDERS	-14
NY 5/6 12UP 350 DEF COB GRINDERS	-17
NY 3 17/18 RM (US\$ / 50 KGS)	104
NY 4 15/16 RM (US\$ / 50 KGS)	101
NY 4 14/16 RM (US\$ / 50 KGS)	97

Obs: Fob ideas (Simple exercise).

SPREAD: ICE (CTS/LB)	
-2,75	May/July
-2,75	July/September
-3,85	September/December
-3,70	December/March
-2,40	March/May

ARBITRAGE: ICE/BM&F (CTS/LB)	
-12,78	September/September
-12,81	December/December

Coffee Market Report

The delayed Commitment of Traders report from the New York arabica coffee market has seen the Non-Commercial Speculative sector of this market increase their net short sold position within the market by 0.74% over the week of trade leading up to Tuesday 29th. January, to register a new net short sold position of 62,109 Lots. This net short-sold position which is the equivalent of 17,607,626 bags has most likely been increased again, following the mixed but overall softer trade which has since followed.

Following below average rains for many of the main coffee districts in Brazil in January, there have been generally good rains reported for this month. While with weather forecasts so far seeing no problems in terms of rains for the coming month of March, the prospects for a smaller but nevertheless still good-sized new coffee crop due later this year and accompanied by the probability of significant carryover arabica coffee stocks, continues to impact negatively upon speculative market sentiment.

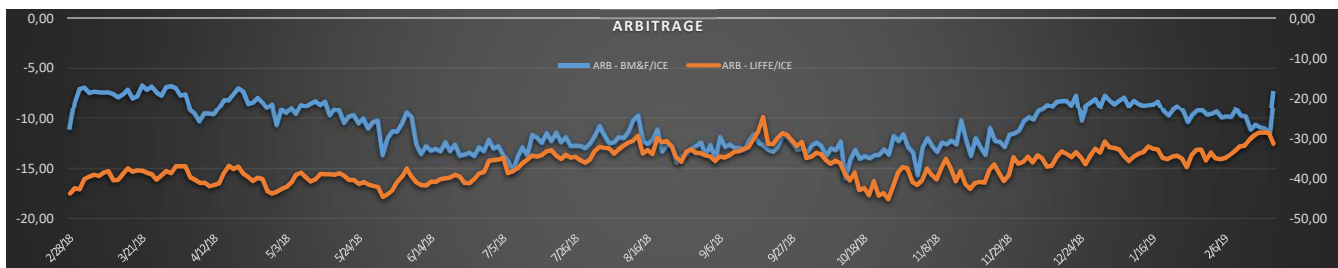
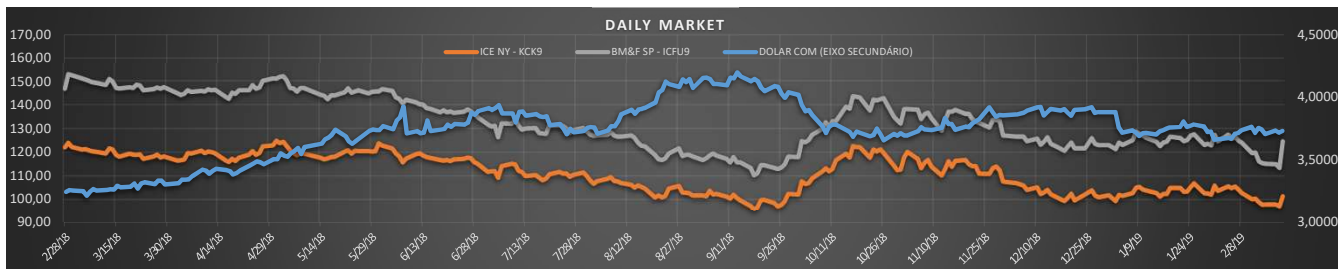
The coffee markets meanwhile remain devoid of any supportive fundamental news and the speculative and fund sectors of the volatile New York market remain significantly short sold into the market, which offers what most would see to be unrealistic prices, compared to the cost of production for most of the washed arabica coffee producers. This impacting very negatively upon the prices coming to the fore for the majority of the Mexican and Central America coffee farmers, who are presently marketing their new crop coffees. A factor that shall make it difficult for many farmers to finance the full range of inputs that shall be necessary, to ensure good yields for the follow-on crop that is due to be harvested from October 2019 to March 2020.

One might speculate that the relatively dismal sales prices coming to many farmers in Mexico and Central America this year and its impact upon farmers ability to finance their inputs, might result in excess of a 2 million bags dip in production for the next crop and the fine washed arabica coffee supply for the next October 2019 to September 2020 coffee year. Which with steadily growing global coffee consumption, shall assist to buoy sentiment and possibly bring to the fore speculative and fund short covering for the second half of this year and some degree of recovery for the New York market later this year.

The May to May contracts arbitrage between the London and New York markets narrowed yesterday, to register this at 31.09 usc/Lb., while this equates to 30.83% price discount for the London Robusta coffee market.

The Certified washed Arabica coffee stocks held against the New York exchange were seen to decrease by 250 bags yesterday, to register these stocks at 2,481,862 bags. There was meanwhile a larger in number 7,194 bags increase to the number of bags pending grading for this exchange; to register these pending grading stocks at 29,649 bags.

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



COLABORADORES

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

ASSUNTOS

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