

Market closed on **July 19, 2019**

ICE: CONTRACT	SETTLE
KCU9	107,30
KCZ9	111,15
KCH0	114,80
KCK0	117,10
KCN0	119,10

BM&F: CONTRACT	SETTLE
ICFU19	131,30
ICFZ19	135,00

DOL: CONTRACT	SETTLE
DOL COM - DOLAR COMMERCIAL	3,7460

MARKET	PRICE IDEAS FROM BUYERS	
	PADRÃO 0 - CEREJA	R\$ 440,00
	PADRÃO 1A - FC CERRADO	R\$ 425,00
	PADRÃO 1B - FC SOUTH OF MINAS	R\$ 415,00
	PADRÃO 2 - GOOD CUP DURO	R\$ 405,00
	PADRÃO 3 - GOOD CUP 2 RIADAS	R\$ 395,00
	PADRÃO 4 - DURO RIADO RIO (7/2/1)	R\$ 375,00
	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	September/December
NET SELLER NY 2/3 17/18 FC CERRADO	0
NY 2/3 15/16 FC CERRADO	-3
NY 2/3 14/16 FC CERRADO	-6
NY 2/3 17/18 FC SOUTH OF MINAS	-2
NY 2/3 14/16 FC SOUTH OF MINAS	-8
NY 2/3 17/18 GOOD CUP	-5
NY 3/4 14/16 GOOD CUP	-11
NY 2/3 17/18 GOOD CUP 2 RIOY CUPS	-7
NY 3/4 14/16 GOOD CUP 2 RIOY CUPS	-13
NY 5/6 13UP 300 DEF COB GRINDERS	-21
NY 5/6 12UP 350 DEF COB GRINDERS	-24
NY 3 17/18 RM (US\$ / 50 KGS)	102
NY 4 15/16 RM (US\$ / 50 KGS)	98
NY 4 14/16 RM (US\$ / 50 KGS)	95

Obs: Fob ideas (Simple exercise).

SPREAD: ICE (CTS/LB)	
-3,85	September/December
-3,65	December/March
-2,30	March/May
-2,00	May/July
-1,95	July/September

ARBITRAGE: ICE/BM&F (CTS/LB)	
-8,04	September/September
-9,09	December/December

### Coffee Market Report

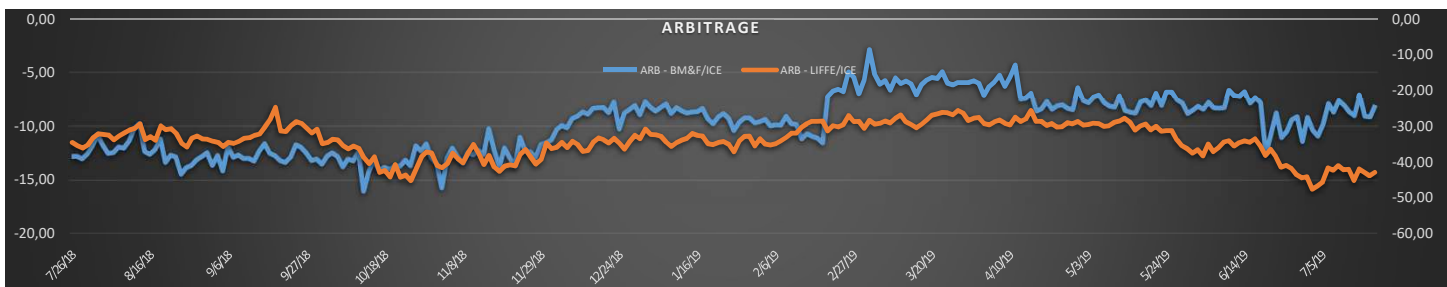
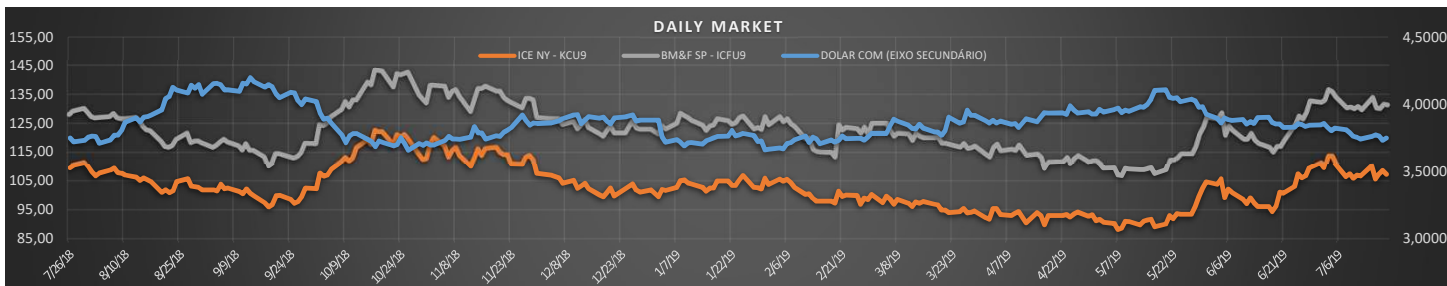
The Brazilian analysts Safras & Mercado who have forecast the new Brazil coffee crop at 58.9 million bags have estimated that so far 75% of the new crop has been harvested, which they relate to approximately 27.6 million bags of arabica coffees and to approximately 16.5 million bags of conilon coffees. Their expectation being that the new crop shall finally be made up from approximately 40.6 million bags of arabica coffees and from approximately 18.3 million bags of conilon robusta coffees, with the latter conilon robusta coffee crop coming near to completion. Meanwhile with the U.S. dollar that the International Monetary Fund have speculated is significantly over valued losing some weight, it is impacting upon firming value of the Brazil Real, which is tending to dampen export selling activity and internal market new crop sales within Brazil. It is however the slow summer holiday season for the main northern hemisphere consumer markets for Brazil coffees and following the past few months of relatively high volumes of Brazil coffee exports, there is presently no tightness of supply for these coffees.

There remains some modest degree of speculative caution over the prospects for the cold weather to continue over the weekend for the southern coffee districts in Brazil, but with the coming week forecast to bring with it warmer weather, one would think that the frost threat factor shall shortly become history and focus shall start to be upon the start of the new rain spring and summer rain season that is due to start in about nine to ten weeks' time.

Weather conditions within the main central highlands coffee districts in Vietnam remain normal and with the new crop cherries benefiting from regular rains, which is indicating that another large new crop is due to start being harvested in approximately thirteen to fourteen weeks' time. Meanwhile with internal market farm and internal trade stocks of the past harvest now depleted and with the price dictates of the soft London terminal market having an influence, the mills and exporters in Ho Chi Minh City continue to experience price resistance in terms of their ability to cover forward contracts and to support new business and asking export differentials remain firm.

The September to September contracts arbitrage between the London and New York markets broadened yesterday, to register this at 43.87 usc/Lb., while this equates to 40.4% 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 825 bags yesterday; to register these stocks at 2,363,140 bags. There was meanwhile no change to the number of bags pending grading for this exchange; to register these pending grading stocks at 32,376 bags.

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



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