

Market closed on **August 6, 2019**

ICE: CONTRACT	SETTLE
KCU9	97,05
KCZ9	100,60
KCH0	104,15
KCK0	106,50
KCN0	108,65

BM&F: CONTRACT	SETTLE
ICFU19	116,60
ICFZ19	121,40

DOL: CONTRACT	SETTLE
DOL COM - DOLAR COMMERCIAL	3,9570

MARKET	PRICE IDEAS FROM BUYERS	
	PADRÃO 0 - CEREJA	R\$ 470,00
	PADRÃO 1A - FC CERRADO	R\$ 410,00
	PADRÃO 1B - FC SOUTH OF MINAS	R\$ 400,00
	PADRÃO 2 - GOOD CUP DURO	R\$ 385,00
	PADRÃO 3 - GOOD CUP 2 RIADAS	R\$ 360,00
	PADRÃO 4 - DURO RIADO RIO (7/2/1)	R\$ 340,00
	PADRÃO 5 - RIO	R\$ 300,00
	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	2
NY 2/3 15/16 FC CERRADO	-1
NY 2/3 14/16 FC CERRADO	-4
NY 2/3 17/18 FC SOUTH OF MINAS	-1
NY 2/3 14/16 FC SOUTH OF MINAS	-7
NY 2/3 17/18 GOOD CUP	-4
NY 3/4 14/16 GOOD CUP	-10
NY 2/3 17/18 GOOD CUP 2 RIOY CUPS	-9
NY 3/4 14/16 GOOD CUP 2 RIOY CUPS	-15
NY 5/6 12UP 300 DEF COB GRINDERS	-15
NY 5/6 12UP 350 DEF COB GRINDERS	-18
NY 3 17/18 RM (US\$ / 50 KGS)	84
NY 4 15/16 RM (US\$ / 50 KGS)	81
NY 4 14/16 RM (US\$ / 50 KGS)	77

Obs: Fob ideas (Simple exercise).

SPREAD: ICE (CTS/LB)	
-3,55	September/December
-3,55	December/March
-2,35	March/May
-2,15	May/July
-2,05	July/September

ARBITRAGE: ICE/BM&F (CTS/LB)	
-8,90	September/September
-8,82	December/December

### Coffee Market Report

The latest Commitment of Traders report from the New York arabica coffee market has seen the shorter term in nature Managed Money fund sector of this market increase their net short sold position within the market by 77.06% over the week of trade leading up to Tuesday 30th. July; to register a new net short sold position of 26,323 Lots. Meanwhile the longer term in nature Index Fund sector of this market decreased their net long position within the market by 6.16%, to register a net long position of 42,912 Lots on the day.

Over the same week, the Non-Commercial Speculative sector of this market increased their net short sold position within this market by 37.61%; to register a new net short sold position of 32,570 Lots. This net short-sold position which is the equivalent of 9,233,451 bags has most likely been further increased, following the period of mixed but overall softer trade that has since followed and likewise, that of the Managed Money Fund sector of the market.

The National Coffee Growers Federation in Colombia have reported that the country's coffee production for the month of July was 266,000 bags or 25.31% higher than the same month last year, at a total of 1,317,000 bags. This has contributed to the countries cumulative production for the first ten months of the present October 2018 to September 2019 coffee year to be 156,000 bags or 1.36% higher than the same period in the previous coffee year, at a total of 11,659,000 bags.

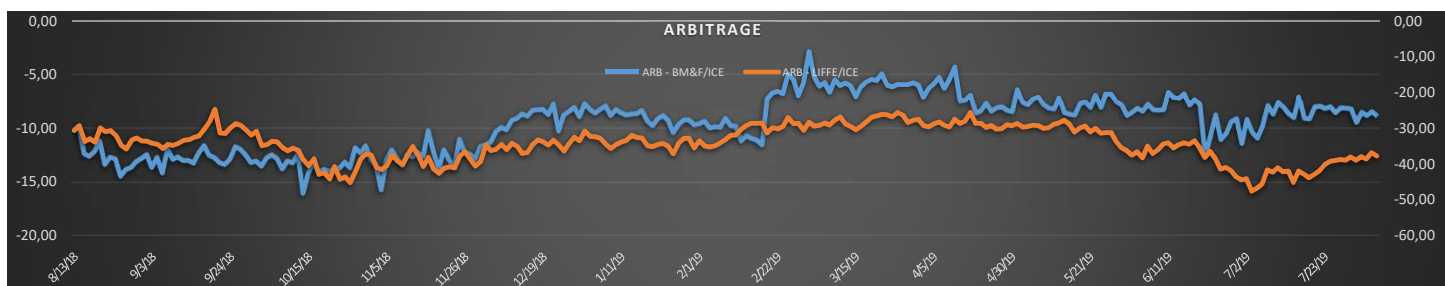
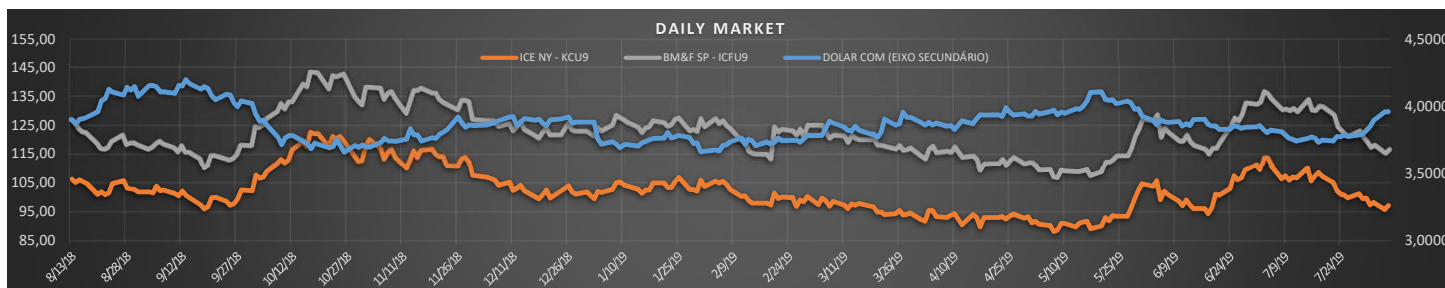
The National Coffee Growers Federation in Colombia have also reported that the country's coffee exports for the month of July were 96,000 bags or 9.04% higher than the same month last year, at a total of 1,158,000 bags. This has contributed to the country's cumulative coffee exports for the first ten months of the present October 2018 to September 2019 coffee year to be 777,000 bags or 7.21% higher than the same period in the previous coffee year, at a total of 11,549,000 bags.

The Ugandan Coffee Development Authority have reported that their country's coffee exports for the month of June were 22,597 bags or 7.08% higher than the same month last year, at a total of 341,628 bags. This has contributed to the country's cumulative coffee exports for the first nine months of the present October 2018 to September 2019 coffee year to have been 129,713 bags or 3.97% lower than the same period in the previous coffee year, at a total of 3,137,118 bags.

Well illustrating the negative effects upon coffee producers of the reference prices of the soft coffee terminal markets over the recent months is the fact that while the volume of Ugandan coffee exports were 3.9% lower for the first nine months of the coffee year, the value of these exports for the period was 13.17% lower, at a total of US\$ 310,231,166.00. A negative financial factor that is common to coffee producers in general.

The November to December contracts arbitrage between the London and New York markets narrowed yesterday; to register this at 39.14 usc/Lb. This equates to 39.48% price discount for the London Robusta coffee market.

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



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