

Market closed on August 7, 2019

ICE: CONTRACT	SETTLE
KCU9	96,90
KCZ9	100,30
KCH0	103,85
KCK0	106,15
KCN0	108,25

BM&F: CONTRACT	SETTLE
ICFU19	117,50
ICFZ19	122,35

DOL: CONTRACT	SETTLE
DOL COM - DOLAR COMMERCIAL	3,9770

MARKET	PRICE IDEAS FROM BUYERS	
PADRÃO 0 - CEREJA		R\$ 460,00
PADRÃO 1A - FC CERRADO		R\$ 430,00
PADRÃO 1B - FC SOUTH OF MINAS		R\$ 420,00
PADRÃO 2 - GOOD CUP DURO		R\$ 405,00
PADRÃO 3 - GOOD CUP 2 RIADAS		R\$ 375,00
PADRÃO 4 - DURO RIADO RIO (7/2/1)		R\$ 350,00
PADRÃO 5 - RIO		R\$ 305,00
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	6
NY 2/3 15/16 FC CERRADO	3
NY 2/3 14/16 FC CERRADO	0
NY 2/3 17/18 FC SOUTH OF MINAS	4
NY 2/3 14/16 FC SOUTH OF MINAS	-2
NY 2/3 17/18 GOOD CUP	0
NY 3/4 14/16 GOOD CUP	-6
NY 2/3 17/18 GOOD CUP 2 RIOY CUPS	-6
NY 3/4 14/16 GOOD CUP 2 RIOY CUPS	-12
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)	85
NY 4 15/16 RM (US\$ / 50 KGS)	81
NY 4 14/16 RM (US\$ / 50 KGS)	78

Obs: Fob ideas (Simple exercise).

SPREAD: ICE (CTS/LB)	
-3,40	September/December
-3,55	December/March
-2,30	March/May
-2,10	May/July
-2,05	July/September

ARBITRAGE: ICE/BM&F (CTS/LB)	
-8,07	September/September
-7,81	December/December

### Coffee Market Report

The International Coffee Organisation ICO have reported that as against a global coffee supply of 168.77 million bags for the present October 2018 to September 2019 coffee year, that they estimate global coffee consumption to be approximately 164.84 million bags. This surplus supply estimate of 3.93 million bags for the present coffee year they add to the surplus coming from the previous coffee year, to estimate an overall 8 million bags surplus ahead of the forthcoming October 2019 to September 2020 coffee year.

One would speculate though that with global coffee supply for the coming October 2019 to September 2020 coffee year likely to be a deficit supply of approximately 2 to 3 million bags and global coffee consumption to rise by approximately 3 million bags during this coming coffee year, that the surplus supply indicated within the latest ICO report is not really that massive. It is nevertheless an indication of surplus supply and continues to support the prevailing bearish sentiment within the markets, which are presently further suffering from the negative nature of commodity markets in general.

The big question remains over the prospects for the forthcoming 2020 Brazil crop, which is very much a weather-related issue and while one would consider the frost season to be over, the focus has to be towards the prospects for the forthcoming spring and summer Brazil rain season for south east Brazil. Presently the conditions within the Pacific Ocean is seen to be neutral and with neither a El Niño or a La Niña in play and one cannot foresee either of these having any influence, but global weather is uncertain and any delay or extended interruptions during this rain season, would bring aggressive volatility to the markets.

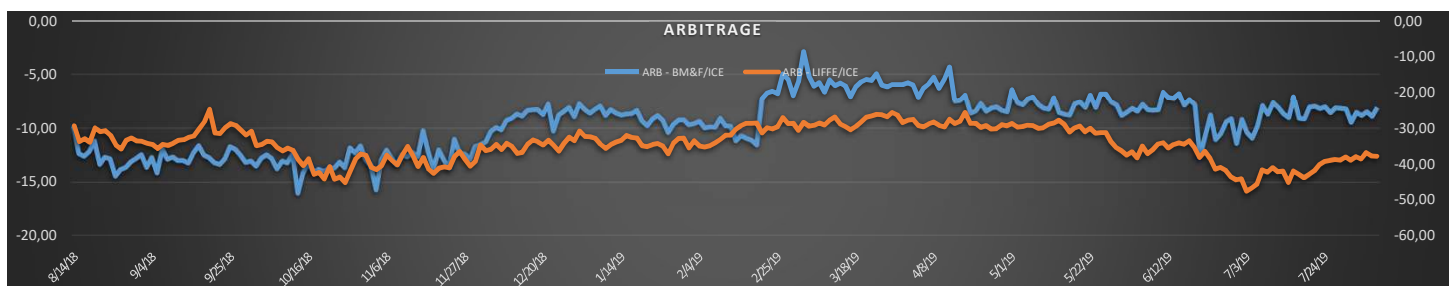
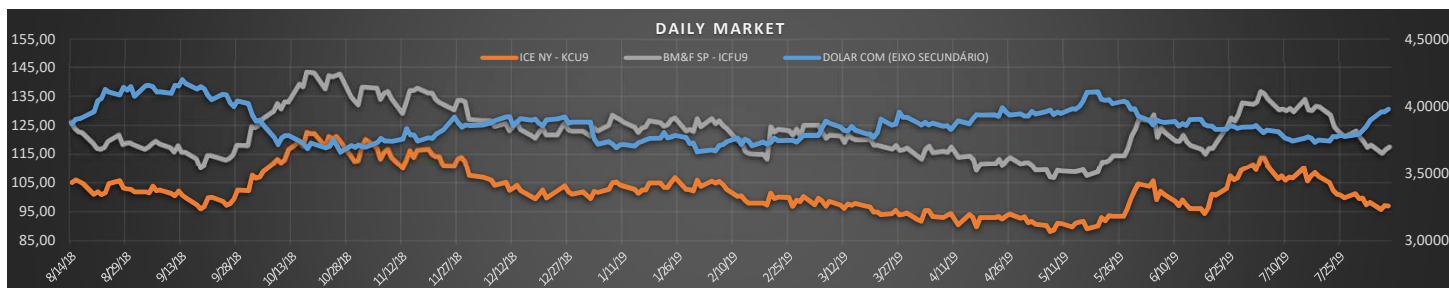
In the meantime, there are many trade and industry players who presuming that there shall not be any weather issues due for Brazil, who have been forecasting a biennially bearing larger new crop for Brazil and in this respect, something in the order of the size of the previous 2018 crop. These forecasts for the present and with their indication for a surplus coffee supply for the 2020/2021 coffee year, adding to the prevailing bearish sentiment within the market.

The November to December contracts arbitrage between the London and New York markets broadened yesterday; to register this at 40.09 usc/Lb. This equates to 39.85% 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 1,000 bags yesterday; to register these stocks at 2,352,833 bags. There was meanwhile no change to the number of bags pending grading for this exchange; to register these pending grading stocks at 40,796 bags.

The Certified Robusta coffee stocks held against the London exchange were seen to increase by 37,333 bags or 1.54% over the week of trade leading up to Monday the 5th of August, to see these stocks registered at 2,458,000 bags, on the day.

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



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