

Market closed on April 3, 2020

ICE: CONTRACT	SETTLE
KCK0	114,90
KCN0	116,50
KCU0	117,60
KCZ0	118,80
KCH1	119,90

BM&F: CONTRACT	SETTLE
ICNU20	123,75
ICFZ20	129,40

DOL: CONTRACT	SETTLE
DOL COM - DOLAR COMMERCIAL	5,3270

MARKET	PRICE IDEAS FROM BUYERS	
	PADRÃO 0 - CEREJA	R\$ 680,00
	PADRÃO 1A - FC CERRADO	R\$ 650,00
	PADRÃO 1B - FC SOUTH OF MINAS	R\$ 640,00
	PADRÃO 2 - GOOD CUP DURO	R\$ 590,00
	PADRÃO 3 - GOOD CUP 2 RIADAS	R\$ 550,00
	PADRÃO 4 - DURO RIADO RIO (7/2/1)	R\$ 530,00
	PADRÃO 5 - RIO	R\$ 400,00
	PADRÃO 6A - CONSUMO 600 DEF DURO	R\$ 450,00
	PADRÃO 6B - CONSUMO 600 DEF DURO RIADO RIO	R\$ 430,00

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	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	-11
NY 3/4 14/16 GOOD CUP	-17
NY 2/3 17/18 GOOD CUP 2 RIOY CUPS	-18
NY 3/4 14/16 GOOD CUP 2 RIOY CUPS	-24
NY 5/6 13UP 300 DEF COB GRINDERS	-32
NY 5/6 12UP 350 DEF COB GRINDERS	-35
NY 3 17/18 RM (US\$ / 50 KGS)	79
NY 4 15/16 RM (US\$ / 50 KGS)	76
NY 4 14/16 RM (US\$ / 50 KGS)	73

Obs: Fob ideas (Simple exercise).

SPREAD: ICE (CTS/LB)	
-1,60	May/July
-1,10	July/September
-1,20	September/December
-1,10	December/March
5,00	March/May

ARBITRAGE: ICE/BM&F (CTS/LB)	
-24,05	May/May
-20,98	September/September

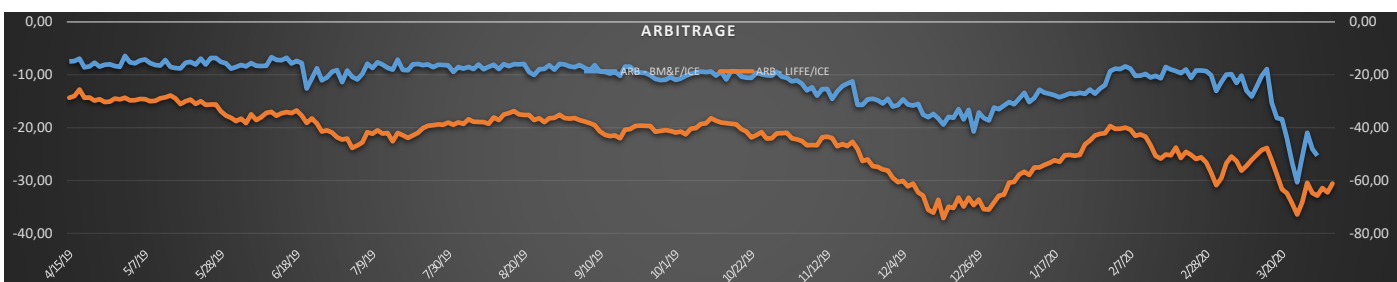
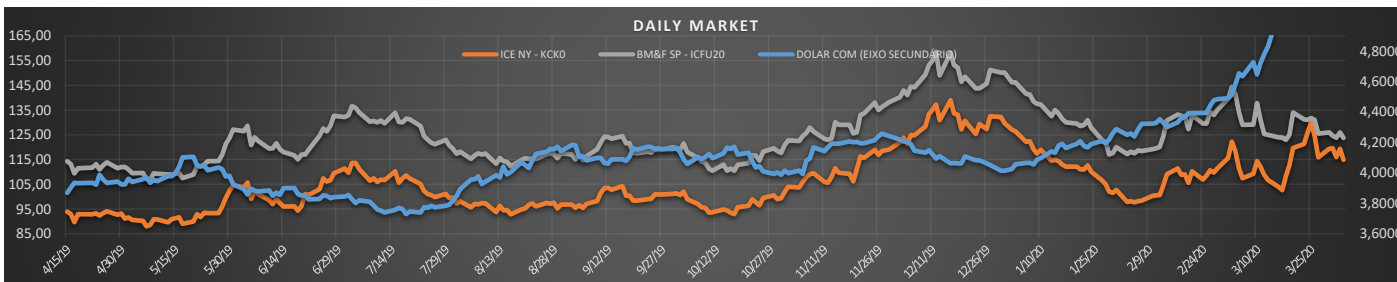
Coffee Market Report

The International Coffee Organisation ICO have reported that the global coffee exports for the month of February were 2.59% higher than the same month last year, at a total of 11.11 million bags. This they say, has contributed to the cumulative global coffee exports for the first five months of the present October 2019 to September 2020 coffee year to be 3.4% lower than the same period in the previous coffee year, at a total of 50.97 million bags. The same ICO report has estimated that global coffee consumption will rise by 0.7% for this present October 2019 to September 2020 coffee year to 169.34 million bags, which is marginally above what they estimate to be the coffee supply for this coffee year. With Global coffee production expected to fall by 0.8% to 168.86 million bags, the ICO has maintained its projected deficit of 480,000 for the October 2019 to September 2020 coffee year, however with the ever changing and developing Global Covid-19 pandemic these forecasts may change, with impacts on supply and demand, the situation is fluid and being monitored.

There have been reports coming forth on a daily basis from countries the world over, affected in one way or another by the arrival of and in reaction to, Coronavirus Covid-19. From a logistical aspect, the disruptions in origin countries, and depending on the stringency of the lockdown or social distancing, or travel ban measures that are put into place, is incurring delays and disruptions to movement of consignments are more likely than not. In some countries, India being one, the country is in day 10 of lockdown with April 9th, the target date for opening their borders. This has had immediate impact upon logistics with border closures prohibiting exports and within time sensitive agricultural harvests, the tea industry being one, certain to be affected by loss of leaf and overall crop output as tea estates are unable to pluck leaf, which cannot be recovered. A similar situation playing out in other countries and producer sectors where time sensitive horticulture and international flower export industries to name a few, are immediately impacted by the lack of air transport to get to consumer markets. In the coffee markets meanwhile, the latest news to come from largest robusta producer and exporter, Vietnam, is that the country has just implemented lockdown measures from 1st April, for a period of 15 days. Reports from the interior are that these measures are related to societal restrictions and social distancing which will impact day to day business and citizens, it would appear meanwhile that logistical services and therefore, coffee deliveries to port and exports will continue to flow to consumer markets.

The July to July contracts arbitrage between the London and New York markets broadened yesterday, to register this at 64.73 usc/Lb. This equates to 53.63% price discount for the London Robusta coffee market.

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ASSUNTOS

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