

Market closed on **June 3, 2020**

ICE: CONTRACT	SETTLE
KCN0	98,20
KCU0	99,75
KCZ0	102,10
KCH1	104,40
KCK1	107,45

SPREAD: ICE (CTS/LB)	
-1,55	July/September
-2,35	September/December
-2,30	December/March
-3,05	March/May
-1,35	May/July

BM&F: CONTRACT	SETTLE
ICNU20	115,80
ICFZ20	117,85

ARBITRAGE: ICE/BM&F (CTS/LB)	
-12,21	September/September
-13,01	December/December

DOL: CONTRACT	SETTLE
DOL COM - DOLAR COMMERCIAL	5,2130

### 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 decrease their net long position within the market over the week of trade leading up to Tuesday 26th. May; to register a new net long position of 7,493 Lots. Meanwhile the longer term in nature Index Fund sector of this market increased their net long position within the market by 0.72%, to register a net long position of 42,768 Lots on the day.

Over the same week, the Non-Commercial Speculative sector of this market decrease their net long position within this market by 98.98%, to register a new net long position of 47 Lots which is the equivalent of 13,324 bags. This net long position has most likely been dramatically decreased, following the period of overall softer trade that has since followed. The respected U.S. Department of Agriculture Global Agricultural Network USDA have forecast that the new July 2020 to June 2021 Brazil coffee crop shall be 14.5% higher than last year's July 2019 to June 2020 crop due to the biennial bearing nature of the Brazil crop, and the coming year being considered a bumper and surplus crop, at a total of 67.9 million bags. This increase in production, being related to 16.59% increase in primarily natural process arabica coffee production for the coming July 2020 to June 2021 crop year to total 47.80 million bags and a 9.84% increase in conilon robusta coffee production, to total 20.10 million bags.

Of this new crop, the forecast is that Brazil will export 13.15% or 4.3 million bags more than the previous marketing year at a total of 37 million bags of green coffee supported by the large production levels expected and the steady competitiveness of Brazilian coffee as a result of the significant devaluation of the Brazil Real against the US Dollar. This number is slightly less than the 37.38 million bags of green coffee exported by Brazil during the July 2018 to June 2019 coffee marketing year, the previous on-year in the biennially bearing Brazil coffee crop cycle.

The report does come in against several respected independent forecasters for the Brazil coffee crop, that are marginally higher than the number coming to the fore from the USDA, which can only contribute towards the prevailing bearish sentiment within the coffee markets.

The July to July contracts arbitrage between the London and New York markets broadened yesterday; to register this at 45.70 usc/Lb. This equates to 46.50% 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 642 bags yesterday; to register these stocks at 1,759,966 bags, with 91% of these certified stocks being held in Europe at a total of 1,601,204 bags and the remaining 9% being held in the USA at a total of 158,762. There was a 642 bags increase to the number of bags pending grading for this exchange; to register these pending grading stocks at 18,727 bags.

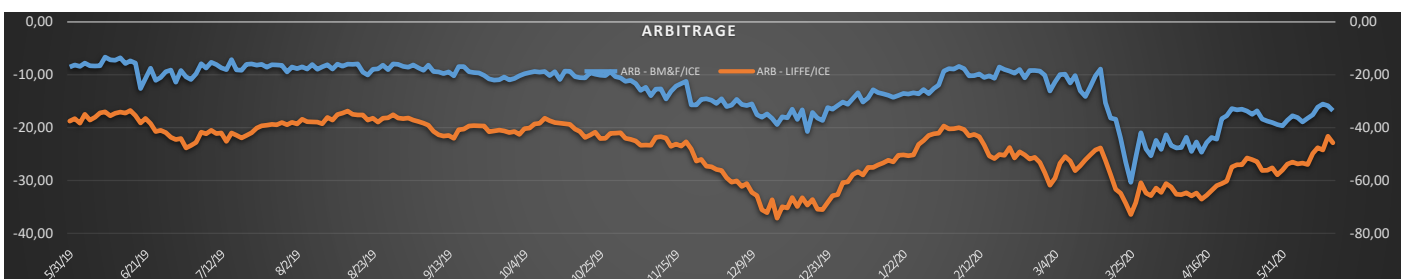
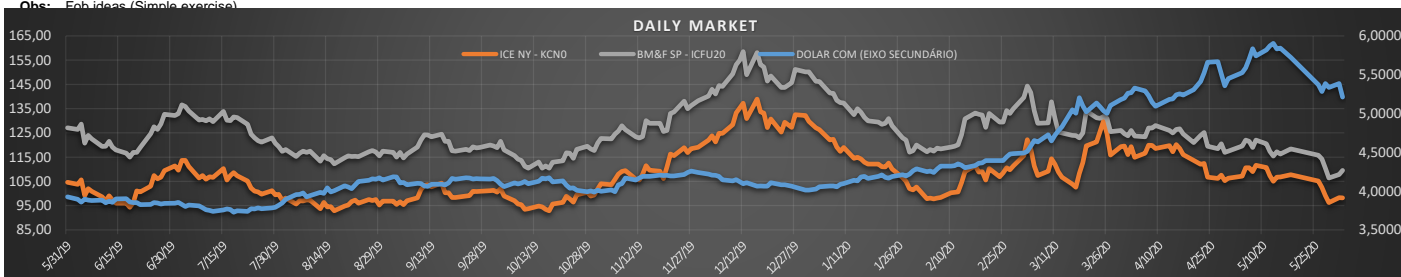
Fonte: iandmsmith.com

MARKET	PRICE IDEAS FROM BUYERS	
	PADRÃO 0 - CEREJA	R\$ 530,00
	PADRÃO 1A - FC CERRADO	R\$ 515,00
	PADRÃO 1B - FC SOUTH OF MINAS	R\$ 505,00
	PADRÃO 2 - GOOD CUP DURO	R\$ 475,00
	PADRÃO 3 - GOOD CUP 2 RIADAS	R\$ 450,00
	PADRÃO 4 - DURO RIADO RIO (7/2/1)	R\$ 430,00
	PADRÃO 5 - RIO	R\$ 360,00
	PADRÃO 6A - CONSUMO 600 DEF DURO	R\$ 320,00
	PADRÃO 6B - CONSUMO 600 DEF DURO RIADO RIO	R\$ 300,00

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	July/September
NET SELLER NY 2/3 17/18 FC CERRADO	-1
NY 2/3 15/16 FC CERRADO	-4
NY 2/3 14/16 FC CERRADO	-7
NY 2/3 17/18 FC SOUTH OF MINAS	-3
NY 2/3 14/16 FC SOUTH OF MINAS	-9
NY 2/3 17/18 GOOD CUP	-9
NY 3/4 14/16 GOOD CUP	-15
NY 2/3 17/18 GOOD CUP 2 RIOY CUPS	-13
NY 3/4 14/16 GOOD CUP 2 RIOY CUPS	-19
NY 5/6 13UP 300 DEF COB GRINDERS	-30
NY 5/6 12UP 350 DEF COB GRINDERS	-33
NY 3 17/18 RM (US\$ / 50 KGS)	75
NY 4 15/16 RM (US\$ / 50 KGS)	72
NY 4 14/16 RM (US\$ / 50 KGS)	69

Obs: Fob ideas (Simple exercise)



### COLABORADORES

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EMANUEL PERIARD  
GLAUCIENE PARANHOS DE SOUZA  
JOHN MOTA  
JOSÉ ANTONIO DOS SANTOS MANGA  
KELLY APARECIDA FERREIRA  
LEONARDO SOARES  
MARCO TULIO SARTO  
PATRÍCIA TOMAZ DE ASSIS

### ASSUNTOS

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