

Market closed on **June 15, 2020**

ICE: CONTRACT	SETTLE
KCN0	95,20
KCU0	97,00
KCZ0	99,25
KCH1	101,50
KCK1	103,00

SPREAD: ICE (CTS/LB)	
-1,80	July/September
-2,25	September/December
-2,25	December/March
-1,50	March/May
-2,50	May/July

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

ARBITRAGE: ICE/BM&F (CTS/LB)	
-9,46	September/September
-10,16	December/December

DOL: CONTRACT	SETTLE
DOL COM - DOLAR COMMERCIAL	5,0460

Coffee Market Report

The Vietnam Customs Authority has reported that the country has exported 2,171,400 bags in the month of May, or 10.90% lower than the same month last year. This brings cumulative exports for the first five months of this calendar year, to a total of 13.58 million bags, a 4.8% increase on that of the same five months in the previous year. The value of Vietnam coffee exports for this largest robusta producer, for the first five months of the year, is indicated to be around US\$ 1.37 billion, an increase of 3.3% on that of the same five months in the year before.

The news coming from importing coffee consumer countries continue to report negative impact for coffee consumption over these past three to four months, in reaction to the varying degrees of market economic and social lockdowns within these countries. The impact immediately felt by the out of home sector, where coffee shops, restaurants, catering, hotel, tourism sectors have been hard hit. These, often small independent family owned establishments forced to close doors and not trade, in the regulated reaction to Covid-19 lockdown in many countries, have continued to incur overhead costs, without turnover, a situation that barring a degree of structured financial support to the sector on the part of individual government institutions, would otherwise be untenable. The northern hemisphere coffee consumer markets are gradually easing social and movement restrictions as these countries move into the summer holiday season, allowing the HORECA sector of their individual economies to gradually reopen for business.

Within the prevailing environment meanwhile, a publicised announcement by Starbucks came to the markets yesterday, to confirm that the organisation will fast track the closure of 400 of their stores in the States, over the next 18 months. This, the organisation has stressed, was already planned within their store transformation strategy to happen over a period of three to five years. At the same time this multinational coffee shop chain has predicted a significant revenue decline that is attributable to the global Covid-19 reaction. Within this announcement, to have similarly confirmed the plan to open 300 new stores in the States, there is an emphasis that a recovery is being experienced as local consumer market permissible trade conditions start to ease.

The September to September contract arbitrage between the London and New York markets widened yesterday; to register this at 42.04 usc/lb. This equates to 43.03% 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 14,953 bags yesterday; to register these stocks at 1,682,084 bags, with 91.19% of these certified stocks being held in Europe at a total of 1,533,882 bags and the remaining 8.81% being held in the USA at a total of 148,202 bags. There was meanwhile no change in the number of bags pending grading for this exchange; to register these pending grading stocks at 54,344 bags.

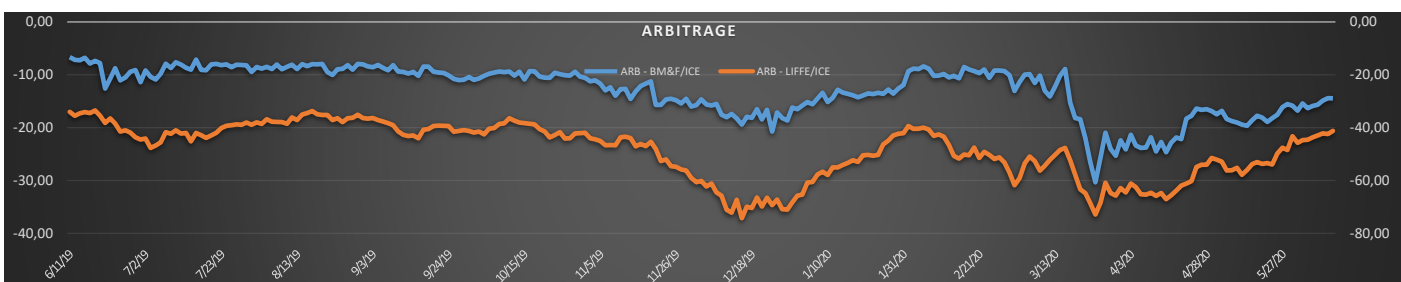
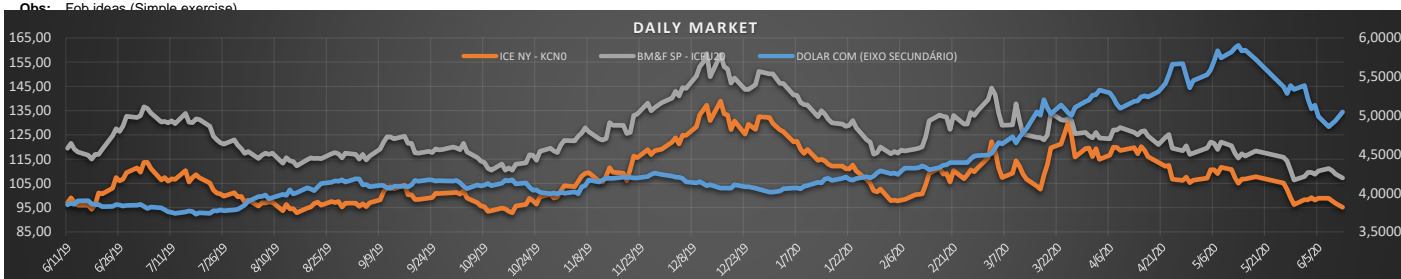
Fonte: iandmsmith.com

MARKET	PRICE IDEAS FROM BUYERS	
	PADRÃO 0 - CEREJA	R\$ 560,00
	PADRÃO 1A - FC CERRADO	R\$ 480,00
	PADRÃO 1B - FC SOUTH OF MINAS	R\$ 470,00
	PADRÃO 2 - GOOD CUP DURO	R\$ 450,00
	PADRÃO 3 - GOOD CUP 2 RIADAS	R\$ 425,00
	PADRÃO 4 - DURO RIADO RIO (7/2/1)	R\$ 400,00
	PADRÃO 5 - RIO	R\$ 375,00
	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	July/September
NET SELLER NY 2/3 17/18 FC CERRADO	-3
NY 2/3 15/16 FC CERRADO	-6
NY 2/3 14/16 FC CERRADO	-9
NY 2/3 17/18 FC SOUTH OF MINAS	-5
NY 2/3 14/16 FC SOUTH OF MINAS	-11
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	-14
NY 3/4 14/16 GOOD CUP 2 RIOY CUPS	-20
NY 5/6 13UP 300 DEF COB GRINDERS	-31
NY 5/6 12UP 350 DEF COB GRINDERS	-34
NY 3 17/18 RM (US\$ / 50 KGS)	82
NY 4 15/16 RM (US\$ / 50 KGS)	78
NY 4 14/16 RM (US\$ / 50 KGS)	75

Obs: Fob ideas (Simple exercise)



COLABORADORES

CRISTIANE DAMASCENO
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

ADMINISTRATIVO
QUALIDADE
RECEPÇÃO
CONTABIL
DIRETOR/QUALIDADE/COMERCIAL
CERTIFICAÇÕES
DIRETOR/ADMINISTRATIVO/FINANCEIRO
QUALIDADE
ASSISTENTE ADM/FINANCEIRO

SKYPE

mcc.fiscal
-
live:secretaria_4359
contabil_1738
mangajoao
kelly-ferreira1
lss_82
mcc_adrielle

E-MAIL

fiscal@mangacoffee.com.br
-
secretaria@mangacoffee.com.br
contabil@mangacoffee.com.br
manga@mangacoffee.com.br
certificacao@mangacoffee.com.br
leonardo@mangacoffee.com.br
-
adm@mangacoffee.com.br

CEL. / WHATSAPP

+55 35 9 8810 5347
+55 35 9 8806 3771
+55 35 9 9800 1785
+55 35 9 8818 1347
+55 35 9 8433 3280
+55 35 9 8817 3837
+55 35 9 8893 9033
+55 35 9 8899 7790
+55 35 9 9237 6798

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+55 35 9 8721 5876
-
+55 35 9 8879 9169
-
+55 35 9 8722 3328
-
+55 35 9 9813 7640