

# AGRI IN DATA

NOVEMBER 2020

**SEAPA**  
Secretaria de  
Estado de  
Agricultura,  
Pecuária e  
Abastecimento



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# PRESENTATION

We are heading towards the end of 2020. We have reached November after going through difficult months, due to the pandemic of new coronavirus, which have affected the whole world in both ways, social and economic structures. Agriculture has accomplished the work of providing food for people. We faced, of course, hard moments like everyone else, but the sector in comment was one of the key elements to make it through, while difficulties were imposed on industry and services. So much so that many indicators of agriculture brought positive data checked throughout this year, as can be observed in this edition of Agri in Data, which includes information recently presented by the Brazilian Institute of Geography and Statistics (IBGE), the Municipal Livestock Survey (PPM) and Municipal Agricultural Production (PAM), and the Ministry of Economy, on the Annual Social Information Report (RAIS).

These indicators, which show agriculture as a supporter for the economy, need to be recognized as one of the key pillars to start over economic recovery after this pandemic moment. As science advances in the discovery of a vaccine, the Government of Goiás has worked on several fronts to maintain the welfare of persons, and this involves agriculture. All government sectors are together to take care of people.

Examples of this are the actions of Goiás Government that we developed in October. The State Secretariat of Agriculture, Livestock and Supply (Seapa) was in charge of important projects that guarantee family livelihood around the state, such as ongoing actions like register for the Food Acquisition Program (PAA), investments in fish farming in Minaçu city, the partnership with Ambev for the creation of cassava beer and irrigation projects in the north and northeast of the state, especially in regions of Vão do Paranã and Luiz Alves.

All these projects were developed by many people, under the leadership of Governor Ronaldo Caiado and the first lady Gracinha Caiado, with whom we have been together several times in last days. We stand together for agriculture, our farmers and the people of Goiás state. We cannot fail to mention the partnership with other institutions such as the Secretariat of Resumption, the Organization of Volunteers of Goiás (OVG) and the Department of Social Policies (GPS), among others, in addition to the institutions under our jurisdiction, Emater, Agrodefesa and Ceasa. It is the state that maintains a cohesive and harmonic group that aims at improving the data we will bring here in this newsletter. Not only by the numbers, which represent a lot, but specially by significant impacts in the state with more job creation, income generation for people.

Enjoy your reading!



**ANTÔNIO CARLOS DE SOUZA LIMA NETO**

STATE SECRETARY OF AGRICULTURE, LIVESTOCK AND SUPPLY IN GOIÁS



# INTRODUCTION

The record grain crop and the commodities appreciation are determining factors to increase the agricultural Gross Domestic Product (GDP) in the country, with emphasis on growth within the farm gate. According to statistics released by CNA<sup>1</sup> and CEPEA<sup>2</sup>, comparing the first seven months of 2019 to 2020, an increase of 18.5% was observed in primary sector of the economy and a growth of 6.7% in Gross Value of Agribusiness Production.

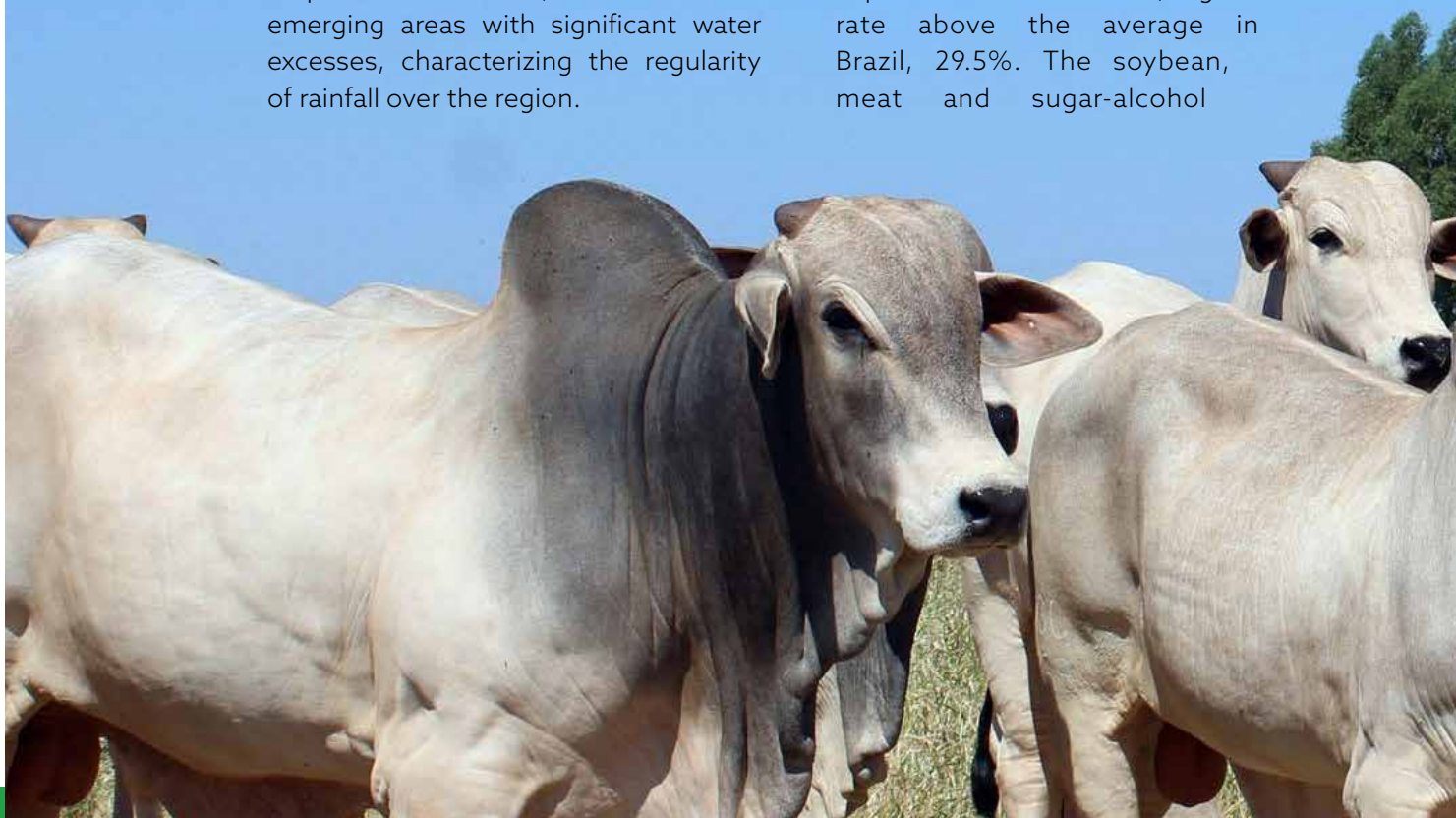
This good performance positively impacts the job market in agriculture. According to the Annual Social Information Ratio (RAIS), in December 2019, there were almost 1.5 million formal work positions in agricultural activities. From January to September 2020, according to data from General Register of Employees and Unemployed (CAGED), nationally, 102.5 thousand new formal jobs were created in the sector, 6.6 thousand of them in Goiás.

The performance of agriculture is impacted by the weather conditions, so it is essential to follow the guidelines of Agricultural Zoning of Climatic Risk (ZARC) as well as the National Institute of Meteorology (INMET) information, in order to address the investments to the farms. According to the INMET Bulletin, the rains were irregular in some areas of the Center-West region in October, which made it difficult to seed summer crops. For November, INMET forecast emerging areas with significant water excesses, characterizing the regularity of rainfall over the region.

For the 2020/21 grain crop, the 1st survey released by CONAB<sup>3</sup> estimated a new record production, with 268.7 million tons of grain in the country - a 4.2% growth compared to the previous crop. The good moment of prices for soybean and corn influences the perspective of increasing investments and the area to be cultivated. For the state of Goiás, the production is expected to be 27.4 million tons of grain, which represents 10.2% of national production.

The national Gross Value of Production (GVP) for 2020 is estimated at R\$ 806.6 billion - an increase of 11.5% compared to 2019, in which the GVP of crop production accounts for 67.3% and 32.7% of livestock. In Goiás, the GVP of agriculture for 2020 is forecast at R\$ 64.9 billion, an increase of 12.1% compared to 2019. The share of the GVP of crop production and livestock in Goiás is 66.9% and 33.1%, respectively. The increase in GVP, at the national and state levels, is mainly due to the good results of soybean, corn and beef.

In the first nine months of 2020, the national agribusiness exports reached US\$ 77.9 billion, an increase of 7.5% compared to the same period in 2019. In Goiás, during this period, the amount of agribusiness exports is US\$ 5.1 billion, a growth rate above the average in Brazil, 29.5%. The soybean, meat and sugar-alcohol





complexes are the ones that have the highest share in exports from Goiás. In this same comparison basis, we highlight sectors that do not have great representativeness, but are potentiality in expansion in 2020, such as: coffee with 9.2 thousand tons exported, an increase of 415.9%; fruits with 7.1 thousand tons exported, an increase of 40.2%; beverages with 2.3 thousand tons exported, an increase of 480.4%; and juices with 4.0 tons exported, an increase of 2,027.0%. There is space and potential for diversification of products exported by Goiás, due to the quality of production and the possibility of adding value to the products of these productive chains.

The forecast of a new record in the 2020/21 grain crop, tied to the good moment of agribusiness exports and the drop on the tax interest, bring optimism to farmers and agroindustries to expand their investments. According to data from the Central Bank, the credit contracted in the current Plano Safra (2020/21), which began in July, was intensified in the first four months, hitting R\$ 92.5 billion in contracted

values, 20.9% higher than the same period in 2019. It is emphasized that the demand for credit for the acquisition of machinery and equipment, materials and utensils for agricultural and livestock activity is 83.5% higher than the same period of 2019. The Inovagro Program also recorded growth in credit amount in this period of 53.6%.

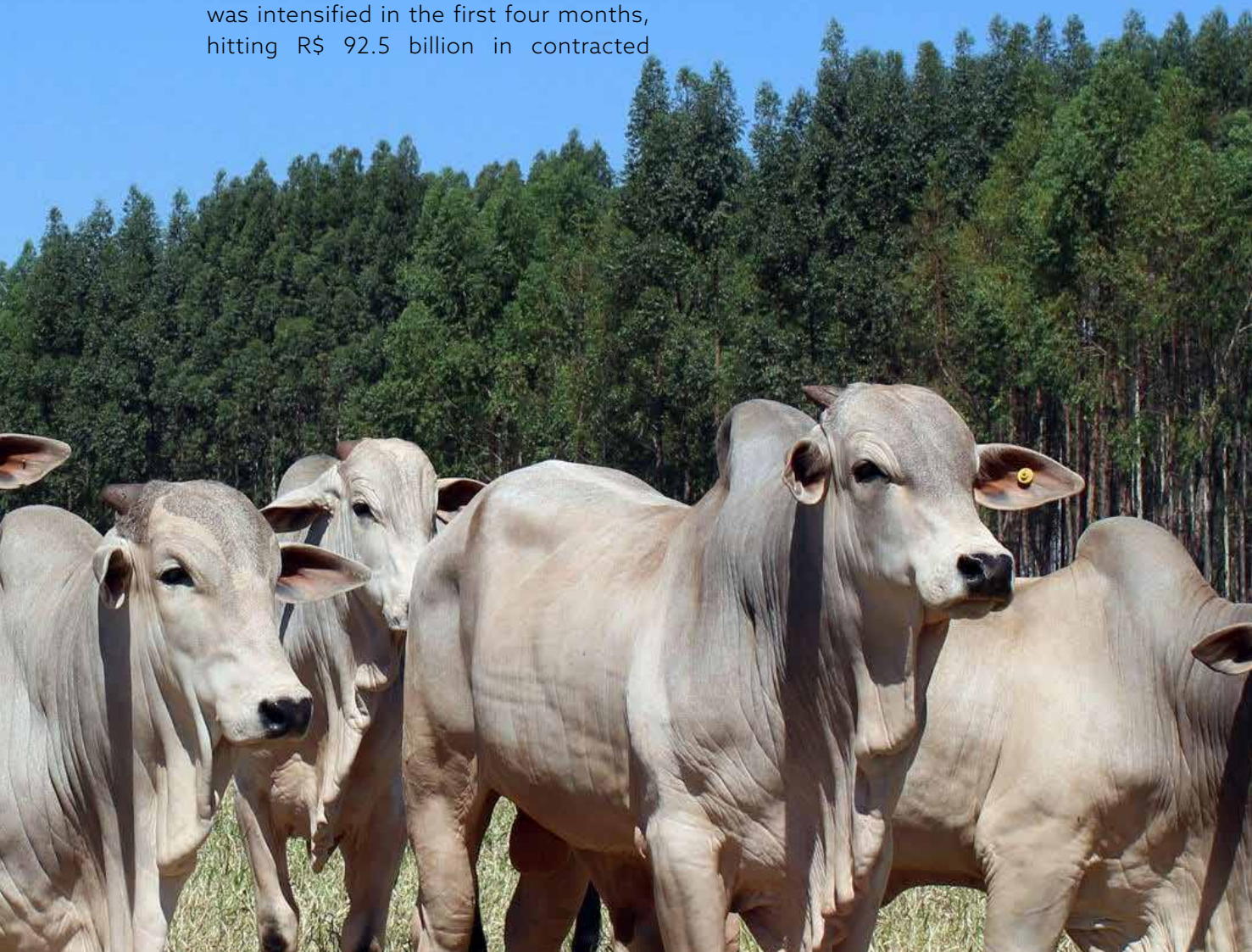
In Goiás, the government keep working to expand credit to farmers and also to diversify investments to develop the productive potential of the state. Goiás has a vocation and competence for agribusiness, and grows above averages, through the strengthening of productive chains and the appreciation of farmers. The state government has a strong link to attract investments, job creation and income generation for people of Goiás.

*1 CNA - National Confederation of Agriculture of Brazil*

*2 CEPEA - Center of Advanced Studies on Applied Economics*

*3 CONAB - National Food Supply Company*

**Source: CONAB / MAPA / CNA / CEPEA / ESALQ / CAGED / INMET / BACEN / Embrapa / Ministry of Economy**



## CATTLE/ BEEF

Brazil is a reference in the world beef market, both due to the large volume of production and the excellent quality and health aspects. Between January and September 2020, the country exported 1.5 million tons of beef to 151 countries - a volume 11.0% higher than the same period a year earlier - an amount of US\$ 6.1 billion. China continues to boost this increase, added to the expanded demand from other markets for Brazilian beef, strengthening Brazil as a major world player.

The data released in October by IBGE - Municipal Livestock Survey 2019 - show an increase of 0.5% in national cattle herd, in relation to the previous year, the country's herd totaled 214.9 million head.

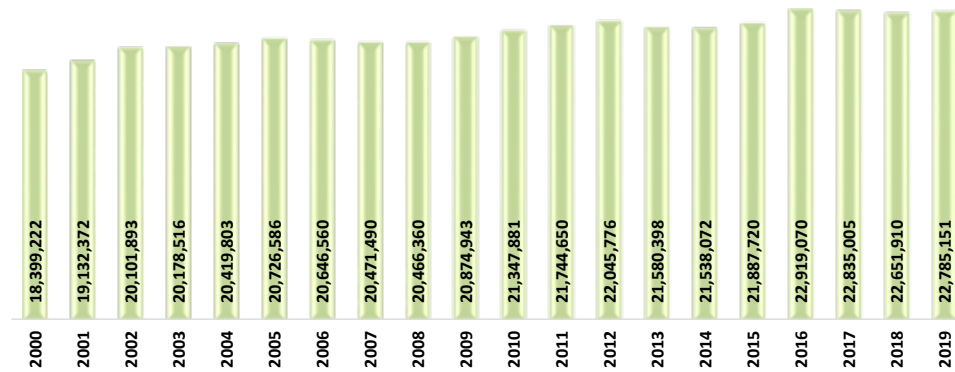
The state of Goiás stands out as the 2nd largest cattle herd in the country, with 22.8 million head - an increase of 0.6%. This growth was mainly driven by the retention of breeding female cows. The share of female cows in slaughtering was dropped by 5.8% in Goiás, between 2018 to 2019, according to IBGE, suggesting a transition from the low cycle to the high one in the cattle production - which is when the farmer started retaining female cows due to good market prices.

Regarding beef prices, the market remains high throughout the chain, especially the calf prices. In regional market, according to IFAG, the price for fed cattle (15kg), on the 3rd week of October, registered R\$ 249.79, an increase of 2.9% relative to the earlier week.





## GOIÁS: CATTLE HERD



## GOIÁS: GROSS VALUE OF BEEF PRODUCTION

**R\$ 10.7 BILLION\***

**↑ 15.2%\*\***

**16.5%** of the Gross Value of Beef Production in Goiás

**50.0%** of the Gross Value of Livestock Production in Goiás

**9.3%** of the national Gross Value of Beef Production

\* Estimate from October 2020

\*\* Over the same period of 2019

## GOIÁS: BEEF EXPORTS

**YEAR-TO-DATE (JANUARY TO SEPTEMBER 2020):**

**US\$ 837.9 million**

**↑ 17.7%\***

**196.0 thousand tons**

**↑ 8.8%\***

**SEPTEMBER 2020:**

**US\$ 79.5 million**

**↓ 10.6%\***

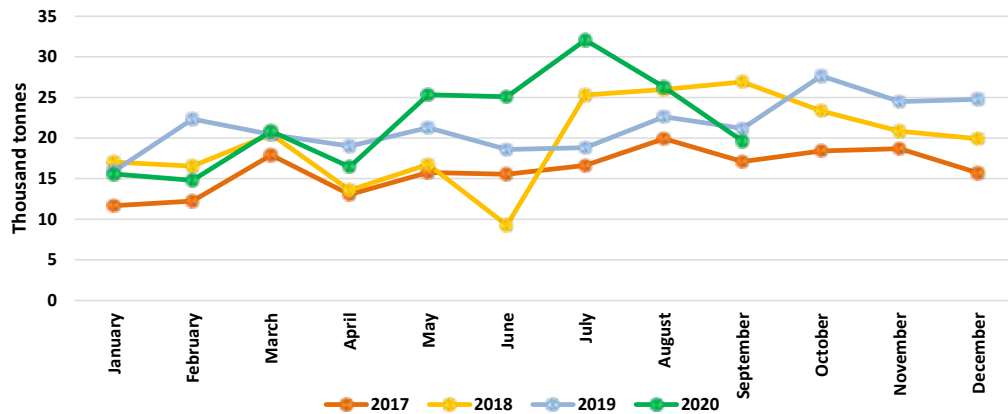
**19.6 thousand tons**

**↓ 7.4%\***

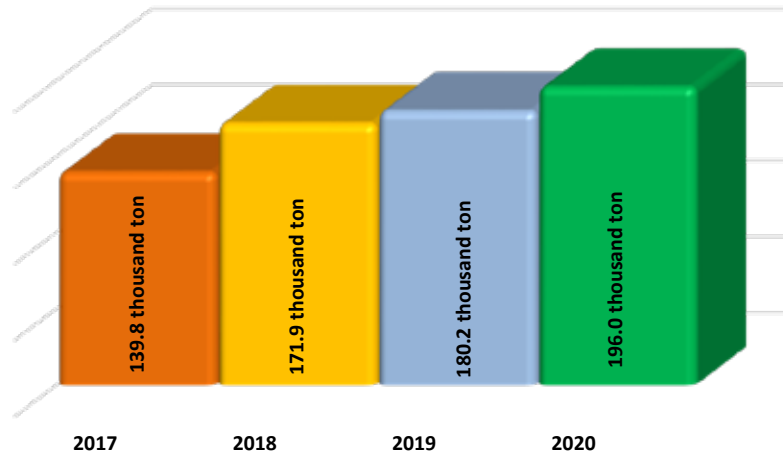
\* Compared to 2019

# CATTLE/ BEEF

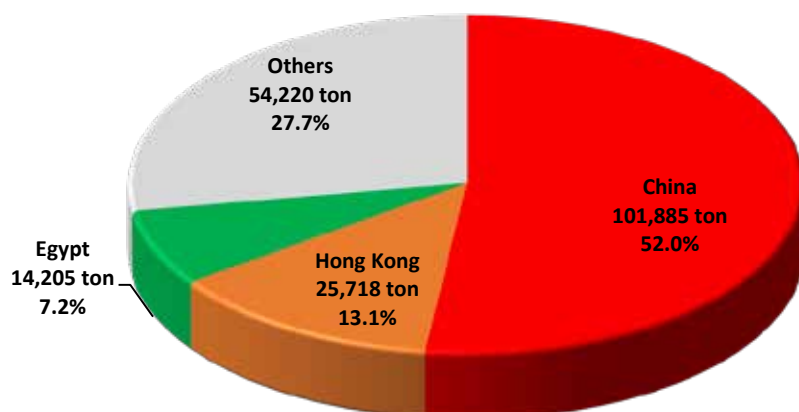
## GOIÁS: BEEF EXPORTS



## GOIÁS: BEEF EXPORTS – YEAR-TO-DATE (JANUARY TO SEPTEMBER)



## GOIÁS: MAIN DESTINATIONS FOR BEEF EXPORTS IN 2020







The strong demand in the international market, added to low supply of fed cattle for slaughter, continues to boost the fed cattle index CEPEA/B3, which reached R\$ 270.00/15kg. Beef exports in Goiás increased more in value than in volume, confirming the appreciation of this commodity in the world market and the beef competitiveness in Goiás.

In this scenario, different from the first half of 2020, ranchers are more likely to have their animals in feedlots. The dry season and continuous rise in beef prices made intensive systems good strategies again. Thus, the forecast is to have more fed cattle supply in feedlot system in the 2nd half of 2020.

Despite the increase in cattle herd number, the restriction of fed cattle supplies for slaughter and also the strong international demand keeps pushing up the prices of the beef cattle chain products. The cattle cycle production - from birth to slaughter - takes from 2 to 4 years depending on the management, so this growth in herd number, informed by IBGE in 2019, does not reflect on the present moment of fed cattle supply.

Although record prices for fed cattle were reached, the increase in feed costs and the high prices for animal replacements have a negative impact on the farmer's purchasing power. According to CEPEA<sup>1</sup>, in the mid of October this year, the farmer in São Paulo needed around 8.9 arrobas<sup>2</sup> to buy a calf, against 8.7 arrobas in October 2019 - a 2.5% drop in purchasing power.

The expectation is that international market demand will continue to expand, with rising prices, stimulating the country's beef exports. In this context, Goiás continues to stand out with a 13.4% share of all beef exported by the country in 2020, as a result of the recognition of the beef quality produced in the state.

<sup>1</sup> CEPEA - Center of Advanced Studies on Applied Economics

<sup>2</sup> A measure equivalent to 15 kilograms

**Source: CEPEA / ESALQ / CONAB / IBGE / IFAG / MAPA / Ministry of Economy.**

# PORK / PIG PRODUCTION

The pork exports by the country continue to show good results, driven by strong demand of the international market, mainly from Asia, which accounts for 79.9% of all pork shipped this year. In 2020, Brazil sold 754.4 thousand tons, totaling US\$1.7 billion, an amount that exceeds the value sold throughout 2019. It is worth noting the pork share increase in the meat complex exports in 2020, accounting for 13.2% of all exported meat, while in 2019 it was 9.4%.

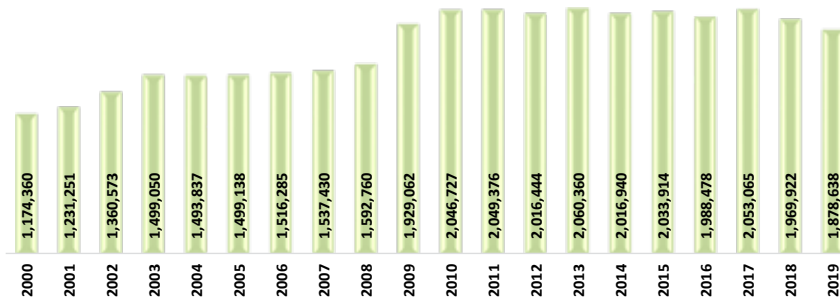
In relation to the swine herd in the country, data from Municipal Livestock Survey 2019 show a 1.6% reduction in relation to the previous year. Brazil has 40.6 million pig head, which 11.8% are sows. The state of Goiás has 1.9 million pigs, participating with 4.6% of the national herd and registered a reduction of 4.6% in its herd, compared to 2018 and 2019. The state has the 6th largest swine herd in the country and 13.4% of the herd are sows. In Goiás, Rio Verde city stands out in national scenario, having the 2nd largest swine herd among Brazilian cities and 37.3% of the pigs in the state, totaling 700 thousand heads. In addition, the pork industry in this city stands out, adding value to this production chain in the state.

Regarding the price of pigs, according to IFAG, October closed its 4th week without changes compared to the previous week, maintaining the highest weekly average of the year, reaching R\$ 9.50/kg of live weight. According to the institute, the scarcity of animals finished for slaughter, the strengthened global demand, the input costs rose and the recovery of domestic demand reflected the high price.

The forecast is the prices to continue up due to scarcity of animals finished for slaughter and increases in feeding costs.



## GOIÁS: NUMBER OF PIG



## GOIÁS: GROSS VALUE OF PORK PRODUCTION

**R\$ 983.6 million\***

**↑ 10.9%\*\***

**4.6%** of the Gross Value of Livestock Production in Goiás

**4.2%** of national Gross Value of Pork Production

\* Estimate released in October 2020

\*\*In relation to the same period in 2019

## GOIÁS: PORK EXPORTS

**YEAR-TO-DATE (JANUARY TO SEPTEMBER 2020):**

**\$11.3 million**

**↑ 163.1%\***

**8.4 thousand** tones

**↑ 169.4%\***

**SEPTEMBER 2020:**

**US\$ 2.0 million**

**↑ 161.8%\***

**1.4 thousand** tones

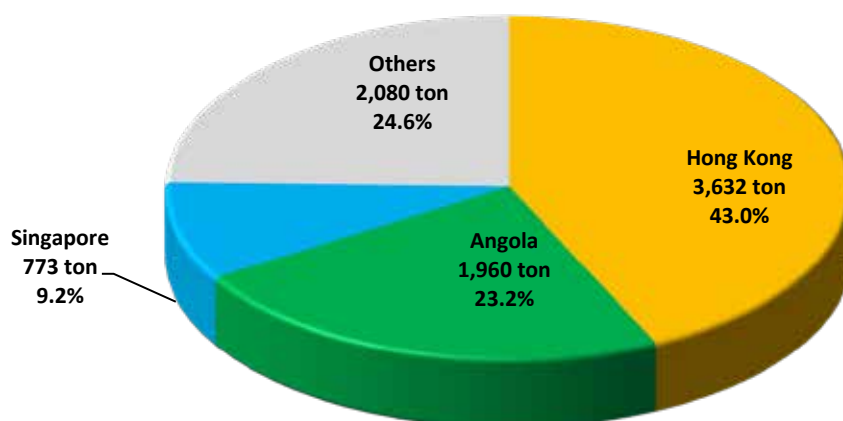
**↑ 115.7%\***

\*In relation to the same period in 2019



# PORK / PIG PRODUCTION

## GOIÁS: MAIN DESTINATIONS FOR PORK EXPORTS IN 2020



China is the main destination for Brazilian pork shipments - almost 50% of exports in 2020. The production return in that country will affect the market dynamics in next years, consisting a point of attention for the agents of the productive chain.

Goiás does not have a representative share in the global sales of pork, but has expanded its exports. In 2020, the state commercialized with 22 countries, ensuring its performance in the international market.

In the local context, the supply of pigs finished for slaughter in Goiás continues to decline, due to the increased costs of grain prices used in herd feeding. This factor has impacted pig prices in the local market, pushing up the price of live weight in the state, therefore, prices are expected to increase.

**Source: CEPEA/ESALQ/ CONAB/ IBGE/ IFAG/ MAPA/ Ministry of Economy.**

# POULTRY

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In recent world production, the high reached price of beef and pork meat contributes to increased competitiveness of poultry meat in the domestic market. The strengthening of demand sustained higher prices of broilers in main markets in the country. For the farmer, however, increased input costs, especially on feeding animals, cause a negative effect on profitability of the activity.

In the international market, the year-to-date (January to September) exports of poultry meat in the country are unchanged, in relation to the same period of 2019, with 3.1 million tons shipped - a slight decrease of 0.5%. Income, however, showed a reduction of 13.5%, on the same basis of comparison, with an amount of US\$ 4.5 billion, pointing to a devaluation of this commodity in the world market.

In October, according to the Municipal Livestock Survey 2019 released by IBGE<sup>1</sup>, the national number of gallinaceous birds (broilers, pullets, roosters, chickens and chicks) in 2019 is 1.5 billion head - a small growth of average rate of 0.1%, compared to the previous year. Goiás stands out in this scenario, with a 6.1% growth, totaling 95.9 million head, which represents 6.5% of the national herd, the 6th largest herd among the Brazilian states. The cities of Goiás - Itaberaí and Rio Verde - stand out among the largest poultry producers - holding the 4th and 5th place in national ranking, respectively. Industrialization is powerful in these cities, strengthening the productive chain in the state of Goiás.

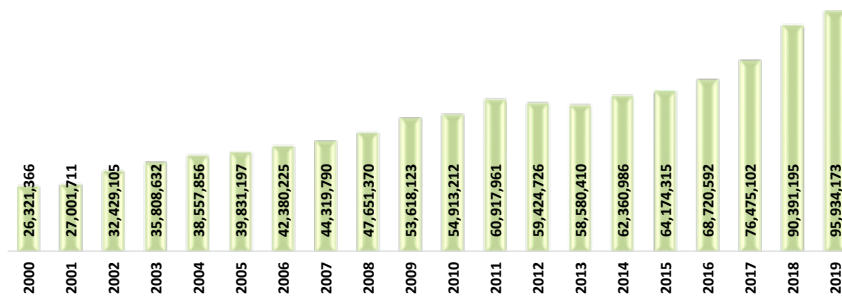
In the domestic market, according to the numbers published by IFAG<sup>2</sup>, the average price of poultry meat on the 4th week of October closed at R\$ 3.94, highest value in recent months.

<sup>1</sup> IBGE – Brazilian Institute of Geography and Statistics

<sup>2</sup> IFAG – Institute for the Strengthening of Agriculture in Goiás

# POULTRY

## GOIÁS: NUMBER OF CHICKEN



## GOIÁS: GROSS VALUE OF POULTRY PRODUCTION

**R\$ 4.5 billion\***

**↓ 12.3%\*\***

**22.1%** of the Gross Value of Livestock Production in Goiás

**6.4%** of the national Gross Value of Poultry Production

\* Estimate released in October 2020

\*\* In relation to the same period of 2019

## GOIÁS: POULTRY MEAT EXPORTS

**YEAR-TO-DATE (JANUARY TO SEPTEMBER 2020):**

**US\$ 252.9 million**

**↑ 21.4%\***

**158.3 thousand tons**

**↑ 43.0%\***

**SEPTEMBER 2020:**

**US\$ 26.5 million**

**↓ 18.5%\***

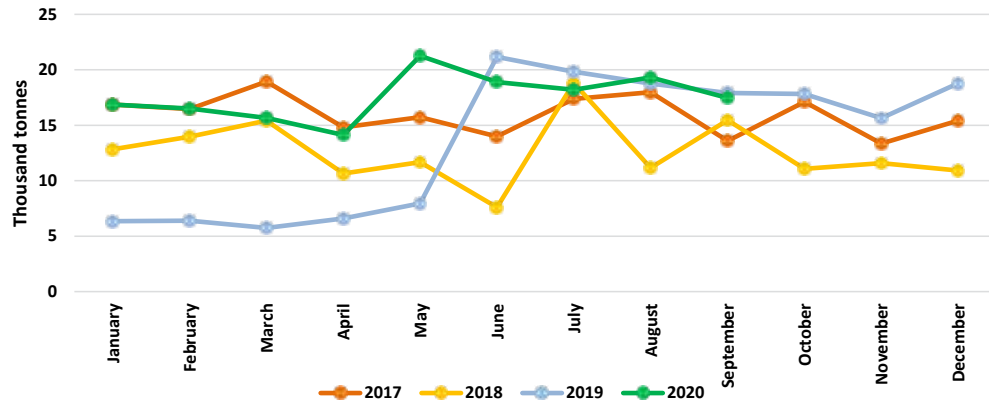
**17.5 thousand tons**

**↓ 2.5%\***

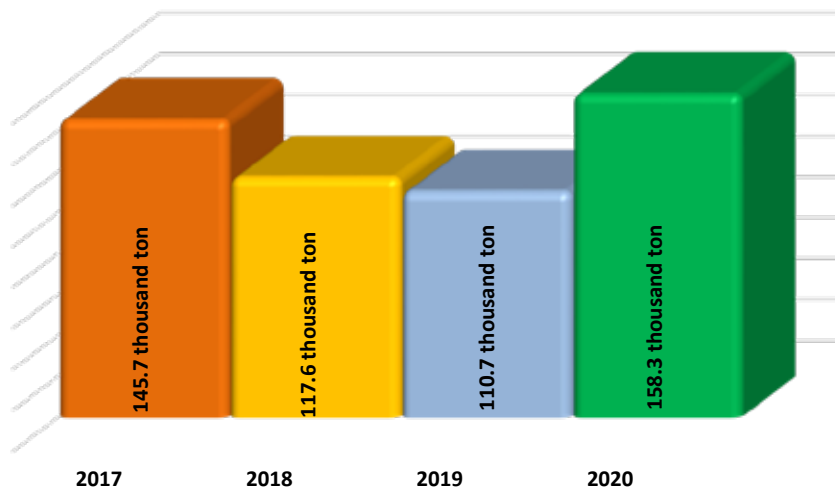
\* Compared to the same period in 2019



## GOIÁS: POULTRY MEAT EXPORTS

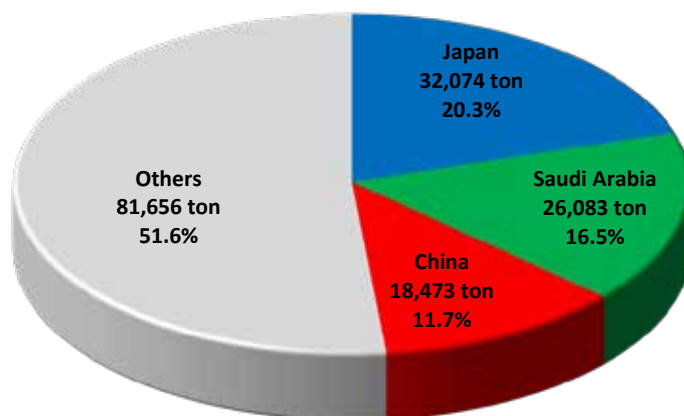


## GOIÁS: YEAR-TO-DATE POULTRY EXPORTS - JANUARY TO SEPTEMBER



# POULTRY

## GOIÁS: MAIN DESTINATIONS FOR POULTRY MEAT IN 2020



Goiás recorded an increased amount of poultry meat exported in the year-to-date, although it was sold at lower values, compared to the same period in 2019, pointing to a devaluation of this product in the world scenario. The low price of this animal protein in the international market has been offset by the volume sold and US dollar appreciation against Real.

After a sharp drop in live chicken's price in the main markets of the country, at the beginning of the pandemic, there was a recovery trend, driven mainly by the increase in domestic demand. The expansion of consumption of this animal protein in recent months is explained by increased competitiveness of poultry meat, since, according to CEPEA<sup>1</sup>, the real price differences between poultry protein, pork and cattle beef is the largest one in the historical series that has started in 2004. In this scenario, the expectation is the expanding search for poultry meat in the country, motivated by the increase in domestic market demand.

<sup>1</sup> CEPEA - Center of Advanced Studies on Applied Economics

**Source: CEPEA / ESALQ / CONAB / IBGE / IFAG / MAPA / Ministry of Economy.**

During the pandemic in the country, the demand for dairy products increased, which reduced inventories and raised the competition among dairy industries for raw material acquisition. Added to that, the reduced supply in this period, raised up the prices paid to dairy farmers. In October, however, this scenario changed, as a result of the demand reduction for dairy products and the production increase due to seasonal factors. Another aspect that is also observed is that, although the dollar is at a high level, there has been, in recent months, an expansion of powdered milk imports by the industry - increasing the product's availability in the country. In this situation, it is likely that, in short-term, prices paid to farmers will fall in the main markets in the country.

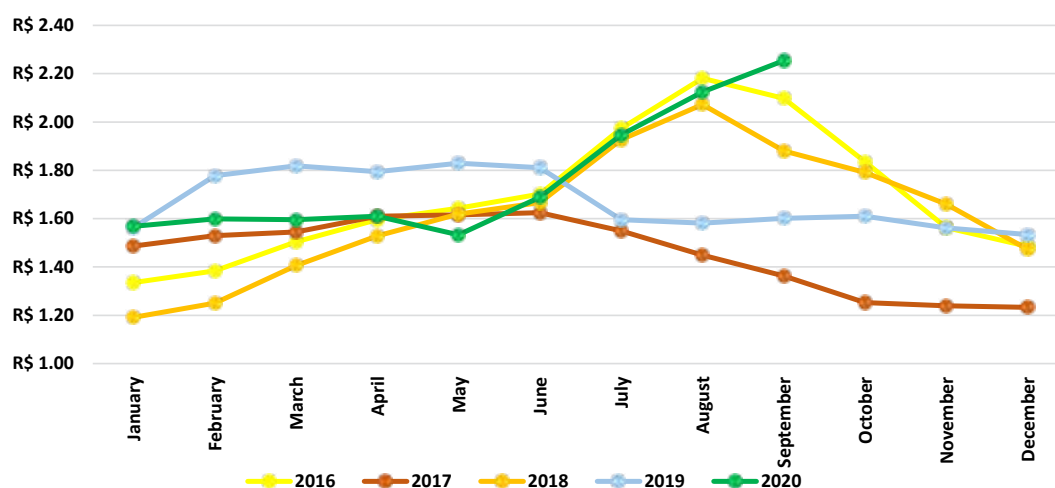
According to the October Bulletin of the Dairy Market in Goiás, compared to September, the index of dairy derivatives basket had a weighted total variation of - 4.4%. The forecast is the retraction in prices paid to milk farmers in the state. In this sense, CEPEA's analysis also points to a drop in the prices of milk collected in October and paid to farmers in November, mainly due to weakening of milk products sales that occurred in the previous month.





# MILK

## GOIÁS: AVERAGE PRICE PAID TO THE FARMER FOR THE LITER OF MILK



Cepea (corrected by IGP-DI / FGV) - adapted by Seapa.

## GOIÁS: NOMINAL WHOLESALE PRICES FOR DAIRY PRODUCTS

Reference Month	UHT Whole Milk (R\$/liter)	Powdered Whole Milk (R\$/Kg)	Mozzarella Cheese (R\$/Kg)	Seetened Condensed Milk (R\$/Kg)	Powdered Cream (R\$/kg)
September	3.62	21.86	29.72	9.57	24.67
October	3.30	21.84	27.56	9.63	24.75
<b>Variance</b>					
October/September	-8.99%	-0.06%	-7.29%	0.66%	0.32%

## GOIÁS: GROSS VALUE OF MILK PRODUCTION

**R\$ 4.3 billion\***

**↑ 6.2%\***

**20.2%** of the Gross Value of Livestock Production in Goiás

**11.2%** of the national Gross Value of Milk Production

\* Estimate released in October 2020

\*\* In relation to the same period of 2019

## GOIÁS: DAIRY EXPORTS YEAR-TO-DATE

(JANUARY TO SEPTEMBER 2020):

**US\$ 738.1 thousand**

**↑ 1.0%\***

**345.3 tons**

**↓ 3.2%\***

SEPTEMBER 2020:

**US\$ 61.9 thousand**

**↓ 85.9%\***

**31.0 tons**

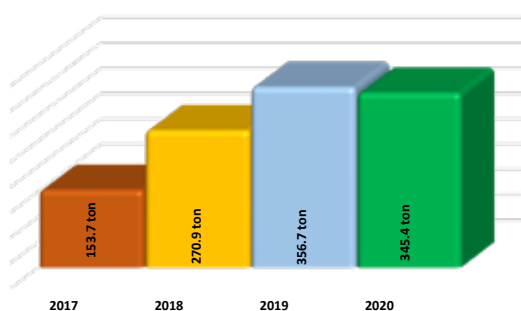
**↓ 72.1%\***

\* In relation to the same period in 2019

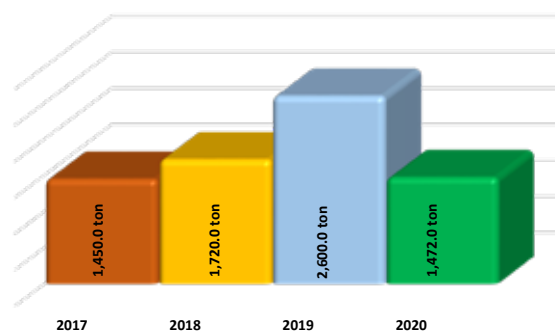
# MILK

## GOIÁS: YEAR-TO-DATE MILK EXPORTS AND IMPORTS (JANUARY TO SEPTEMBER)

### EXPORTS



### IMPORTS



In global markets, Goiás has no representative share in the total milk products shipped by the country - only 1.4% of the year-to-date revenue in 2020. According to data from the Ministry of Economy, it is observed a reduction of 43.4% in volume of dairy products imported by Goiás in 2020 (January to September), compared to the same period last year. In recent months, however, dairy purchases have been increasing in Goiás and in other states, although the exchange rate devaluation for imports, it has been an attempt to contain restrictions of domestic supply. In September, specifically, 272 tons of dairy products were imported into Goiás, 36.0% above that bought in August/20 and 36.0% more than in September/19. It is observed that the industries are looking for alternatives in foreign market to supply their stocks and guarantee production. In Goiás, the imports of powdered milk are from Uruguay.

For next months, considering the establishment of the rainy season, it is expected the recovery of pastures, with a consequent increase in production and a reduction in the feed costs and animal supplementation. In this way, the increase in milk supply will result in lower prices paid to farmers. It is necessary, therefore, that farmers carry out good investment planning to adapt to market dynamics.

**Source:** CEPEA / ESALQ / IBGE / IMB / MAPA / Ministry of Economy.



# SOYBEAN

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The high global demand for the products of Brazilian soybean complex, the high levels of dollar values against the Real and the reduced rate stock of grain in the country have contributed to increase the prices in domestic market. According to CEPEA, the small amount available in the spot market is being disputed by industries that start to offer prices higher than exports values - an exceptional situation in the country's trade dynamics. The CEPEA/ESALQ points that the prices offered in domestic market and Brazilian ports are similar - CEPEA/ESALQ Paraná reached R\$ 164.78/bag, on 10/26/2020 and ESALQ/BM&FBOVSPA, R\$ 164.73. The attractive prices have driven the commercialization of 2020/21 crop, which continues at an advanced pace.

In regional market, there was an appreciation of oilseeds, in which the average price of soybeans (bag of 60 Kg) was R\$ 160/bag, with businesses occurring between R\$ 154/bag to R\$ 170/bag, according to the weekly bulletin of IFAG, released on 10/26/20.

In order to contain the upward trend in domestic market, with repercussions on supermarkets, the Federal Government, through the Chamber of Foreign Trade, on 10/16/2020, announced the suspension of the import tariffs on soybeans, soybean meal, and soybean oil until 01/15/2021. In relation to soybean production, the national estimate for 2020/21 cycle is 133.7 million tons, according to CONAB's 1st grain survey - a record that keeps Brazil as the largest oilseed producer in the world. The expectation for the country is an expansion of 2.5% in the planted area, 4.4% in average yield and 7.1% in production, compared to the previous crop.

For Goiás, a favorable scenario for grain production and the price on the rise, ratify the growth in 2020 of the Gross Value of Soybean Production in the state - an estimated increase of 39.8% compared to 2019.

# SOYBEAN

## GOIÁS: SOYBEAN CROP - 2020/21

**13.4 million** tons

↑ **1.8%\***

**3.7 million** hectares planted

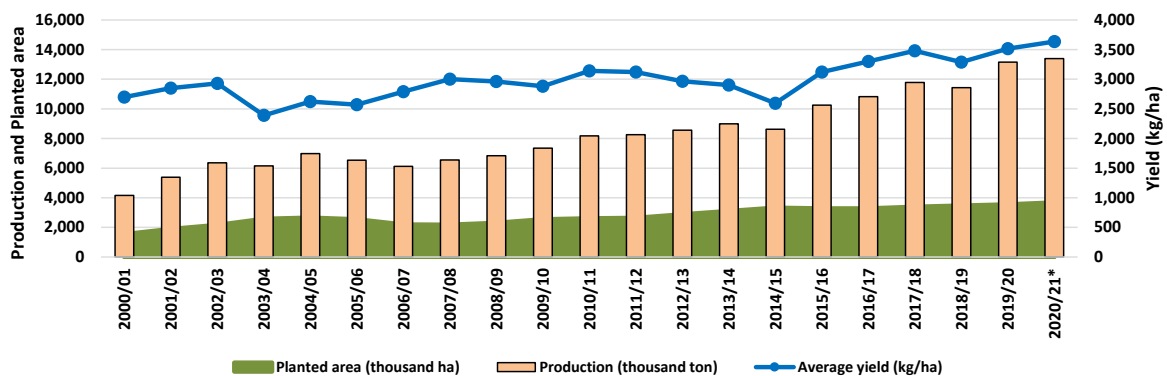
↑ **3.9%\***

**3.6 ton/ha** of yield

↓ **2.0%\***

\* Compared to the previous crop

### GOIÁS: SOYBEAN CROPS



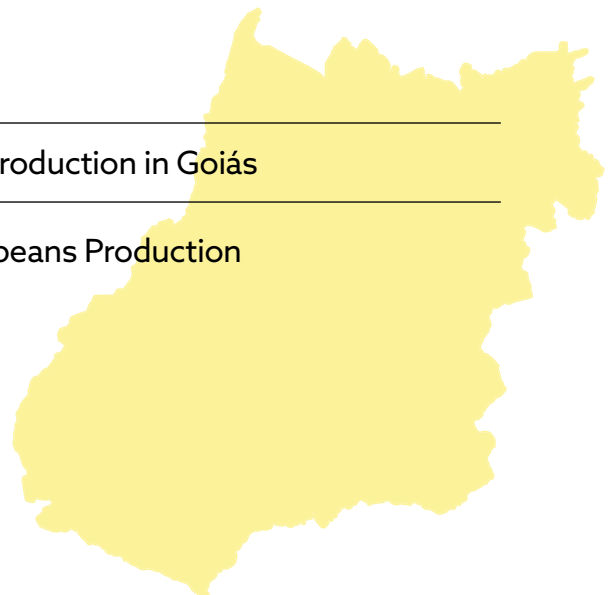
## GOIÁS: GROSS VALUE OF SOYBEAN PRODUCTION

**R\$ 20.7 billion \***

**31.9%** of the Gross Value of Agriculture Production in Goiás

**10.0%** of the national Gross Value of Soybeans Production

\* Estimate released in October 2020



## GOIÁS: SOYBEAN EXPORTS

YEAR-TO-DATE (JANUARY TO SEPTEMBER 2020):

**US\$ 3.1 billion**

↑ **49.6%\***

**9.0 million tons**

↑ **55.3%\***

SEPTEMBER 2020:

**US\$ 145.5 million**

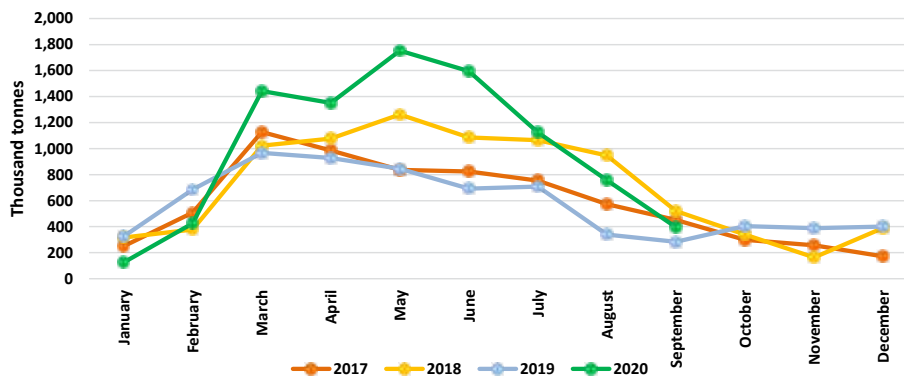
↑ **39.9%\***

**395.9 thousand tons**

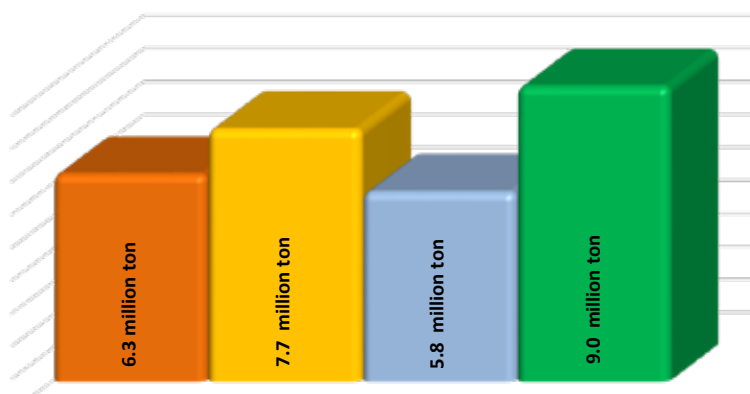
↑ **39.5%\***

*\*For the same period in 2019*

## GOIÁS: EXPORTS OF SOYBEAN COMPLEX



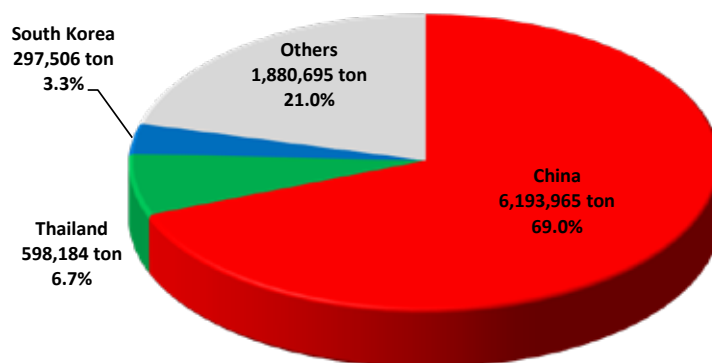
## GOIÁS: EXPORTS OF SOYBEAN COMPLEX – YEAR-TO-DATE (JANUARY TO SEPTEMBER)





# SOYBEAN

## GOIÁS: MAIN DESTINATION FOR SOYBEAN COMPLEX IN 2020



It is worth to stand out that China is the largest importer of oilseeds in the world and their demand is likely to remain strong, driven by a quick recovery of the local pig herd. According to Reuters, China imported 9.8 million tons of soybeans in September, mainly from Brazil. After reaching the highest level of shipments of this Brazilian commodity - based on seasonality - the forecast is to reduce soybean exports. U.S. shipments are expected to increase in the coming months, also explained by the production cycle, which is in the harvest period in the USA.

However, attention should be paid to the negotiations between the Chinese and the USA, since, still according to Reuters, China has intensified purchases of the American agricultural products, although the levels are below expectations - such as soybeans and corn - in parts to comply with the trade deal between the two countries.

The good performance of the last crop and the competitiveness of Brazilian soybeans boost the expansion of the planting area in the country. In relation to price, the expectation of the market is that soybeans will continue to rise, which also encourages the expansion of cultivation. However, it is verified that sowing is late in several regions due to the delay in the beginning of the rainy season, which may compromise indicators of yield growth and production in some states. For Goiás, the stabilization of rains is bringing more safety for the producer to continue the planting and the forecast is for increased investments for soybean production in the state.

*Source: CEPEA/ESALQ /CONAB/IBGE/MAPA/Ministry of Economy/Reuters*

# CORN

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The favorable international trade and the expanding domestic consumption, to supply the production of animal protein in the country, have contributed to the appreciation of Brazilian corn prices. This attractive scenario has boosted investments in this culture and, consequently, the yield results. The first 2020/21 crop survey, released by Conab, estimated an expansion of corn production by 2.6% compared to the previous one, harvesting 105.2 million tons with an average yield of 5.7 t/ha, an estimated increase of 2.8%.

For Goiás, the first crop of corn production is expected to be reduced, since that producers are likely to choose to increase the soybean planting area. The climate conditions may affect estimates of the first survey for Safrinha corn, so whether monitoring will be essential for the producer's decision at the time of planting. According to Conab, the expectation is for a slight increase in the production of Safrinha corn in Goiás.

The ESALQ/BM&FBovespa corn indicator (Campinas-SP) continues to record consecutive highs throughout October and, on 10/28/2020, reached R\$ 82.67/bag - a real record of the historical series of CEPEA, which began in August 2004. According to CEPEA researchers, this is explained by the high prices practiced in ports, because of the international appreciation of commodities and the dollar. In addition, domestic and foreign demands keep strong, while the availability of these cereals is low in the internal market - which has contributed to the high prices of the cereal. In the regional market of Goiás, corn values continue to appreciate, according to data collected by IFAG, the average price of a 60-kg bag of corn in Goiás, on 10/23, was at R\$ 64.34.



# CORN

## GOIÁS: CORN CROP - 2020/21 | ESTIMATE

**12.0 million tons**

↓ **4.6%\***

**1.8 million hectares**

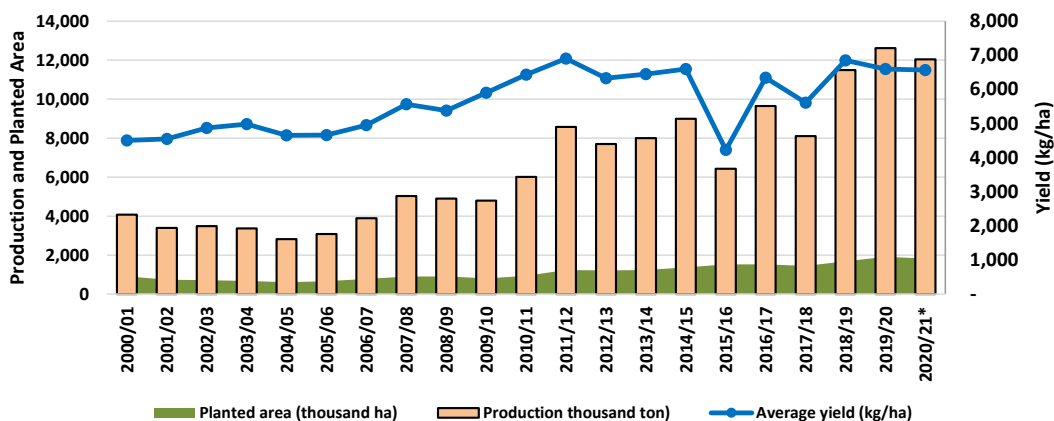
↓ **4.2%\***

**6.6 ton/ha yield**

↓ **0.4%\***

\* Compared to the previous crop

### GOIÁS: CORN CROPS



\* Estimate released in October 2020

## GOIÁS: GROSS VALUE OF CORN PRODUCTION

**R\$ 8.9 billion\***

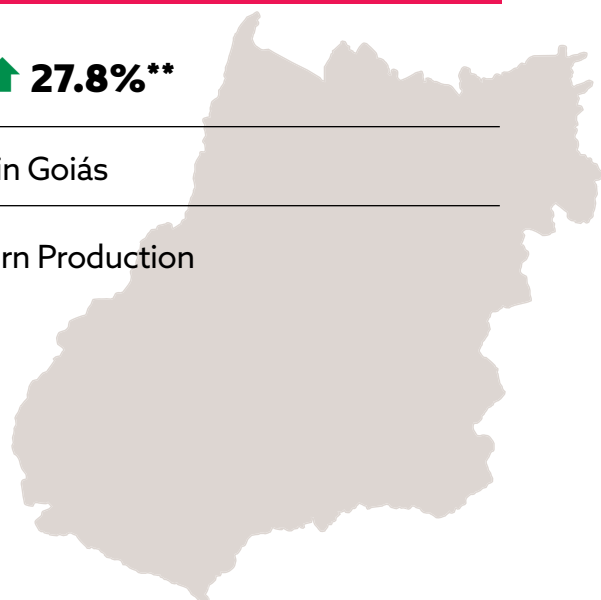
↑ **27.8%\*\***

**13.7%** of the Gross Value of Production in Goiás

**10.4%** of the national Gross Value of Corn Production

\* Estimate released in October 2020

\*\*For the same period in 2019





## GOIÁS: CORN EXPORTS

YEAR-TO-YEAR (JANUARY TO SEPTEMBER 2020):

**US\$ 365.9 million** ↓ **26.6%\***

**2.2 million tons** ↓ **24.8%\***

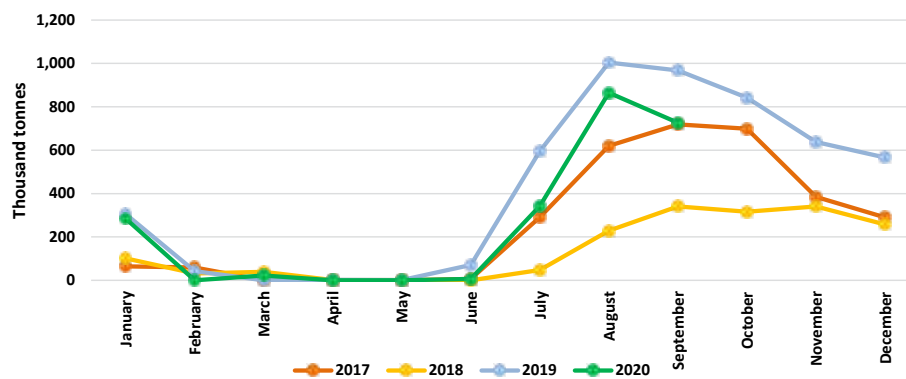
SEPTEMBER 2020:

**US\$ 123.1 million** ↓ **21.9%\***

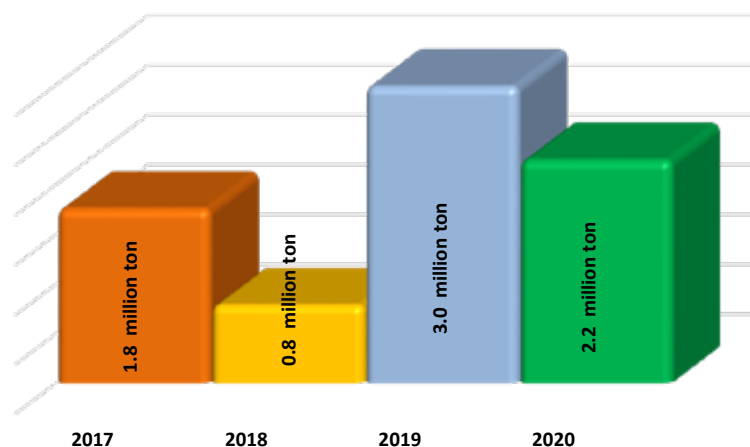
**726.9 thousand tons** ↓ **24.9%\***

*\*For the same period in 2019*

### GOIÁS: CORN EXPORTS

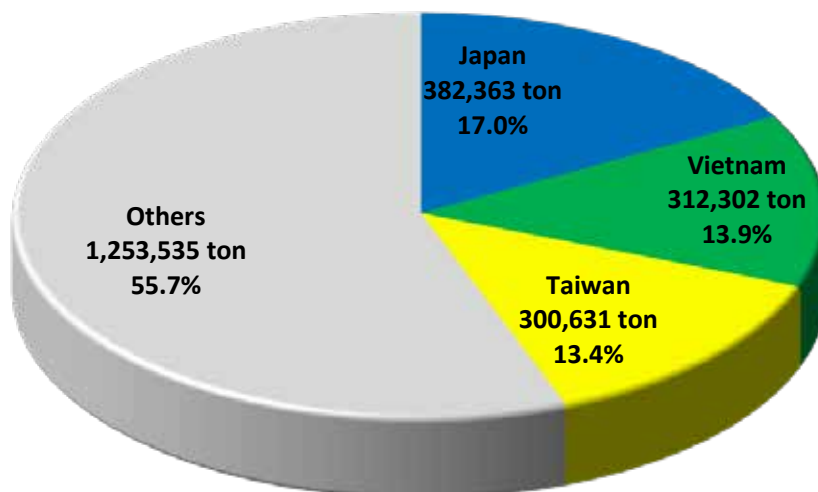


### GOIÁS: CORN EXPORTS – YEAR-TO-DATE (JANUARY TO SEPTEMBER)



# CORN

## GOIÁS: MAIN DESTINATIONS FOR CORN EXPORTS



The market forecast is the corn prices will keep high, supported by the expansion of domestic consumption and the competitiveness of Brazilian corn in the international context. Besides, Asian demand, mainly from China, is increasing due to the recovery of their pig production.

Conab's estimates confirm the forecast of a decline for 2020/21 crop of corn production in the state, compared to the previous one. Also, according to the Company, in the southwest region, the planting area of summer corn is expected to shrink, and corn planting in irrigated areas can be seen in the east of the state, mainly, sweet corn.

Due to the low stock of grain in the country, the Federal Government, through the Chamber of Foreign Trade, on 10/16/2020, announced that the import tariffs would be suspended until 03/31/2021. The objective is to ensure the supply and dampen the trend of grain appreciation in the domestic market. The depreciation of the exchange rate, however, has been an obstacle to reduce prices in domestic market.

*Source: CEPEA/ESALQ/CONAB/IBGE/MAPA/Ministry of Economy.*



# COFFEE

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Brazil, the largest producer and exporter of coffee in the world, has an estimated growth of its production of 25.0%, according to the 3rd survey for coffee crop 2020, released by Conab. This excellent result follows mainly from two factors: favorable weather and a positive biennial year - that is, in one crop it presents a higher yield and in the following the productivity is lower, due to the need for plant recovery.

In the international market, in 2020, exports of Brazilian coffee exceeded 1.7 million tons, totaling more than US\$ 3.8 billion, accounting for 4.9% of the agriculture exports. In 2020, Brazilian coffee had as main destinations the United States, Germany, Belgium and Italy, which together demanded 52.1% of the volume exported this year.

In relation to regional production, the largest coffee producer in the country is the state of Minas Gerais. Goiás stands out as the state with highest average yield in the country, with a high-tech production system and planting in irrigated areas - which explains the excellent productive performance. The gains in productivity coming out from good weather conditions and irrigation practice in Goiás, contributed to reduce the impact of the low production pushed by the planted area decrease.



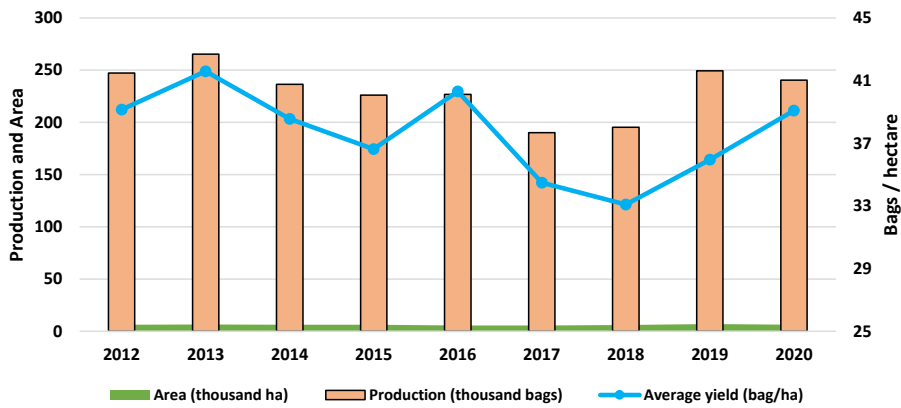


# COFFEE

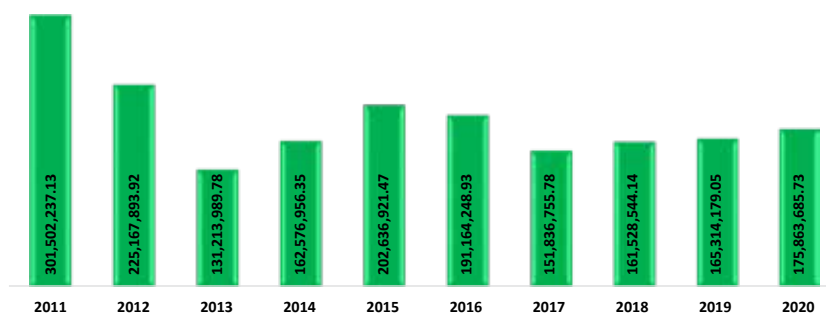
## GOIÁS: COFFEE CROP - 2020

<b>240.5 thousand</b> bags of industrialized coffee	<b>↓ 3.5%*</b>
<b>24.1 million</b> trees	
<b>100%</b> harvested	
<b>6,1 thousand</b> hectares	<b>↓ 11.3%*</b>
<b>39.1</b> bag/hectare yield	<b>↑ 8.7%*</b>
<b>Highest</b> average of arabica coffee yield in Brazil	
<small>* Compared to the previous crop</small>	

### GOIÁS: ARABICA COFFEE CROP



### GOIÁS: GROSS VALUE OF COFFEE PRODUCTION



## GOIÁS: GROSS VALUE OF COFFEE PRODUCTION

**R\$ 175.9 million\***

**↑ 6.4%\*\***

**0.3%** of Gross Value of Production in Goiás

**0.7%** of the national Gross Value of Coffee Production

*\* Estimate released in October 2020*

*\*\* For the same period in 2019*

## GOIÁS: COFFEE EXPORTS

**YEAR-TO-YEAR (JANUARY TO SEPTEMBER 2020):**

**US\$ 20.6 million**

**↑ 447.4%\***

**9.2 thousand tons**

**↑ 415.9%\***

**SEPTEMBER 2020:**

**US\$ 676.2 thousand**

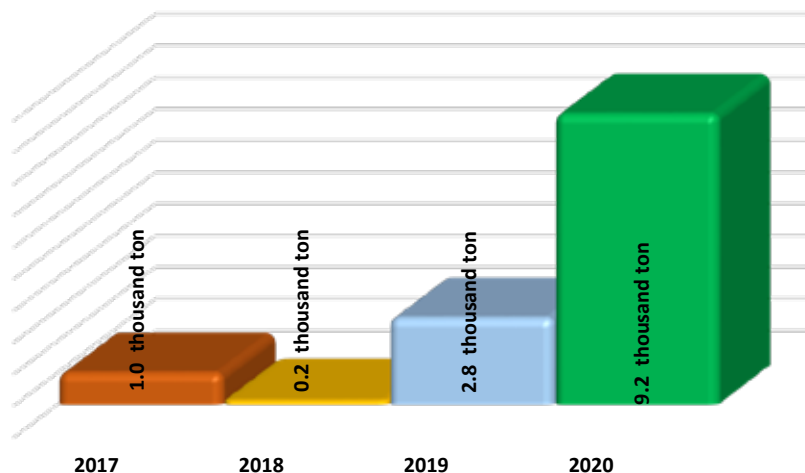
**↓ 37.9%\***

**264.0 tons**

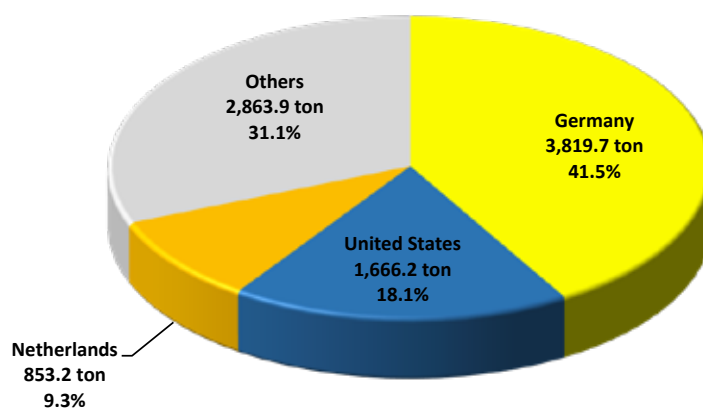
**↓ 47.3%\***

*\* For the same period in 2019*

## GOIÁS: COFFEE EXPORTS YEAR-TO-DATE (JANUARY TO SEPTEMBER 2020)



## GOIÁS: MAIN DESTINATION FOR COFFEE EXPORTS IN 2020



Despite the good performance of coffee culture in Goiás, the share of the sector is relatively small in relation to other crops in the state. Goiás shows potential and technology to reach excellent productivity results and, as a consequence, the production areas is expected to expand and new growers may take advantage of the opportunities of this chain in the coming years. For the next crop, the forecast is for production growth in the state, since, according to Conab, the coffee areas in formation reach 1.6 thousand hectares, an increase of 26.5%, compared to 2019.

In Goiás, it is possible to observe the potential of this production chain and space for development of coffee production. According to Agrostat, green coffee accounts for 99.8% the coffee exported in Goiás, which has an average remuneration 50.0% lower than roasted coffee, which reveals the possibility for producers to invest in coffee processing and obtain added value in the international market.

**Source:** CEPEA/ESALQ /CONAB/IBGE/MAPA/Ministry of Economy.



## STATE PROGRAM FOR THE CONTROL AND ERADICATION OF BRUCELLOSIS AND TUBERCULOSIS IN CATTLE AND BUFFALOES

Agrodefesa is in charge of developing actions for the eradication and control of bacterial diseases, such as brucellosis and tuberculosis. Brucellosis affects mainly cattle and buffaloes, the infection is caused by a group of bacteria that is located usually in the uterus, placenta and/or udder and in the testicles. Tuberculosis is a highly contagious disease that affects many organs and tissues, such as lungs, liver, spleen and even animal carcasses. Both are infectious and contagious diseases, which cause reproductive problems and impair the zootechnical performance of animals - as decrease in milk and meat yield.

*Both diseases can be transmitted from animals to people.*

*Agrodefesa has an important role in the control of these diseases, seeking to ensure food safety of the meat produced for people in Goiás and the exported one.*

Regarding **Brucellosis**, Agrodefesa is committed to raise awareness of breeders, inspecting the vaccination activities carried out by registered veterinarians, in order to promote effective immunization and increase vaccine rates. Vaccination should be prioritized in the farm, as the larger number of immunized females is, the lower incidence of the disease. For the control of **Tuberculosis**, the Agency has intensified the health inspection in slaughterhouse, as well as in rural properties, with animal transportation control.

Annually, Agrodefesa carries out an inspection on the testing rooms used by qualified veterinarians to make Brucellosis and Tuberculosis tests, in order to obtain effective control of the diseases diagnosis.

### BRUCELLOSIS VACCINES

- Vaccination against brucellosis is regulated by Normative Instruction No. 03/2018 of AGRODEFESA, which establishes the guidelines and the technical regulation of the program.
- Vaccination is compulsory for all cattle and buffalo female calves, aged 3 to 8 months.
- The vaccination activity must be carried out by a private veterinarian, registered in Official Veterinary Service of the State - there are 2,730 veterinarians registered in Goiás.

#### 1ST SEMESTER OF 2020:

**1,193,983**

vaccinated cattle and buffalo females

**61,244**

rural establishments

### EPIDEMIOLOGICAL REPORT

### ON BRUCELLOSIS AND TUBERCULOSIS

- Number of investigations

#### 1ST SEMESTER OF 2020:

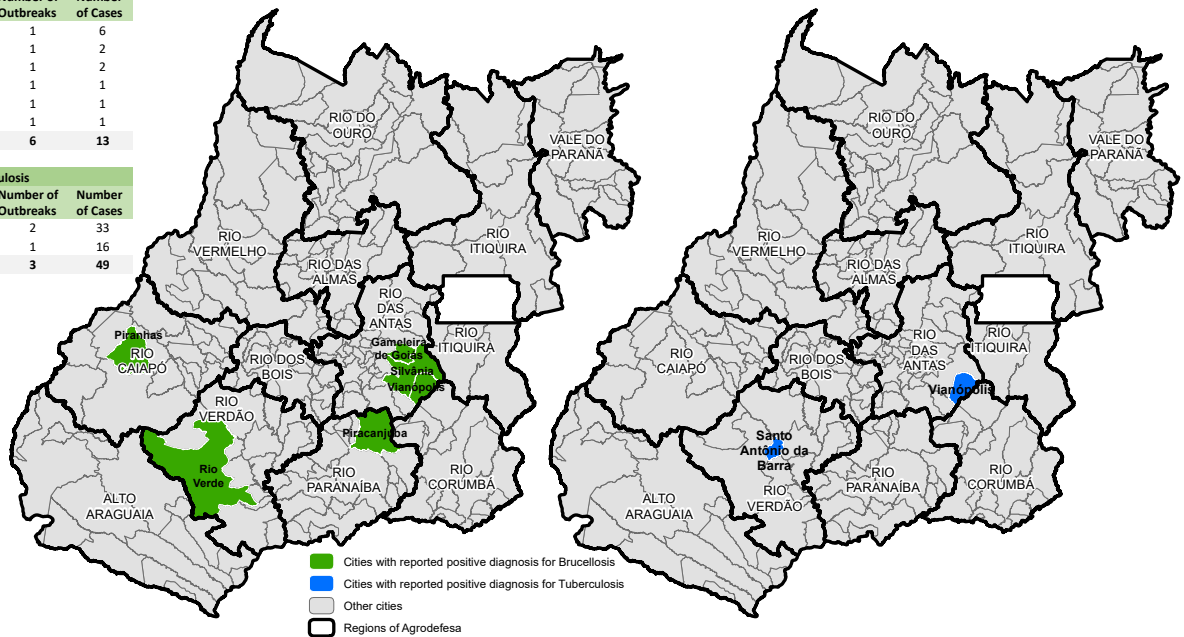
Brucellosis	21,016 cattle	459 establishments
Tuberculosis	27,866 cattle	474 establishments



## GOIÁS: REPORT OF POSITIVE DIAGNOSIS FOR BRUCELLOSIS AND TUBERCULOSIS IN THE 1ST SEMESTER OF 2020

Brucellosis		
Cities	Number of Outbreaks	Number of Cases
Rio Verde	1	6
Piracanjuba	1	2
Piranhas	1	2
Gameleira de Goiás	1	1
Silvânia	1	1
Vianópolis	1	1
<b>Total</b>	<b>6</b>	<b>13</b>

Tuberculosis		
Cities	Number of Outbreaks	Number of Cases
Vianópolis	2	33
Santo Antônio da Barra	1	16
<b>Total</b>	<b>3</b>	<b>49</b>



Agrodéfesa has been working with innovation tools, in order to reach greater effectiveness in their actions, resulting in low diseases incidence in our state. Since September, an Information System for the State Program for the Control and Eradication of Brucellosis and Tuberculosis in Cattle and Buffaloes has been available, which develops more efficient control strategies of vaccination monitoring and laboratory diagnosis for brucellosis and tuberculosis, supporting the program actions, as well as the health status of the properties in Goiás. The government continues to work to guarantee the health security of herds and the excellent quality of the meat produced in our state.

Source: Agrodéfesa, 2020

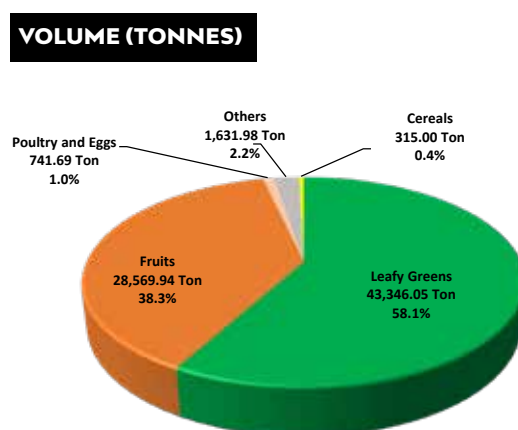
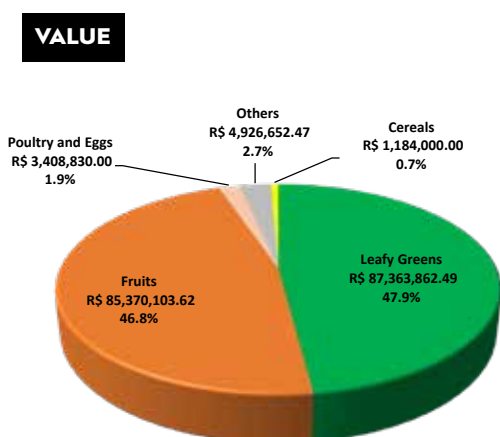


Ceasa-GO is increasingly important for maintaining the activities related to food supply in the state. In September, sales reached R\$ 182.3 million and 74.6 thousand tons. The highlight, due to their representativeness, is the growth in the amount of fruit sold.

### GOIÁS: VARIANCE OF SALES - SEPTEMBER IN RELATION AUGUST 2020

Group	Value Variance (%)	Weight Variance (%)
Leafy Greens	↓ 11.2	↓ 15.8
Fruits	↑ 1.6	↑ 7.1
Poultry and eggs	↓ 35.1	↓ 34.0
Others	↑ 88.2	↑ 59.0
Cereals	↓ 17.0	↓ 23.7
<b>Total</b>	<b>↓ 4.9</b>	<b>↓ 7.6</b>

### GOIÁS: TRADE IN SEPTEMBER 2020



## GOIÁS: AVERAGE PRICE OF THE MOST CONSUMED PRODUCTS – CEASA/GOIÂNIA

<b>Fruits</b>	<b>Banana</b>	<b>Orange</b>	<b>Apple</b>	<b>Papaya</b>	<b>Watermelon</b>
<b>Price (R\$/kg)</b>	3.05	1.39	5.12	1.82	1.31
<b>VAR % (set/ago)</b>	↓ 3.2	↑ 0.02	↑ 12.3	↓ 12.9	↓ 23.8

<b>Leafy Greens</b>	<b>Lettuce</b>	<b>Potato</b>	<b>Onion</b>	<b>Carrot</b>	<b>Tomato</b>
<b>Price (R\$/kg)</b>	1.67	1.35	2.46	1.74	2.10
<b>VAR % (set/ago)</b>	0.0	↓ 15.6	↑ 0.8	↑ 3.0	↑ 10.0

Regarding the price variance (September compared to August) of products sold at Ceasa, according to the ProHort Bulletin of Conab, the orange price increased in all markets followed by the Company, the lowest was in Goiânia. The watermelon price, on the other terms, had a sharp drop in all areas. Banana and papaya prices showed positive and negative variations in different Supply Centers, and both had a drop in prices in Goiânia.

The potato was the only one to show price decrease in all the areas analyzed by the Bulletin. Price rise occurred in Curitiba and Goiânia for onions. There was an expansion of lettuce demand, but prices remain at low levels, with no record of raises in the main Supply Centers. Tomatoes showed a new high, after successive price declines, signaling recovery in the market. For the second consecutive month, the carrot price registered increases in all Centers monitored by Conab.

The price dynamics in Supply Centers is very sensitive to the current economic crisis, but Ceasa-GO has recorded good performance and the Government of Goiás continues to work to strengthen food supply, with safety, in our state.

*Source: Ceasa and Conab, 2020.*

**PROGRAM FOR SMALL WATERSHEDS CONSERVATION**

In order to develop sustainable rural production in our state, Emater offers technical services to rural producers, with emphasis on the Program for Small Watersheds Conservation, which seeks environmental and productive recovery in Goiás.

**MAIN PROGRAM ACTIONS:**

- Fencing off water sources;
- Planting seedlings in degraded areas;
- Building catchment basins and rainwater storage tanks;
- Promotion of Environmental educational practices;
- Workshops and Field Days;
- Demonstrative Unit of Soil and Water Management at the Experimental Station of Emater - Araçu / GO.
- Contour farming marking for recovery of rural side roads.

**COVERAGE:****409**

farmers

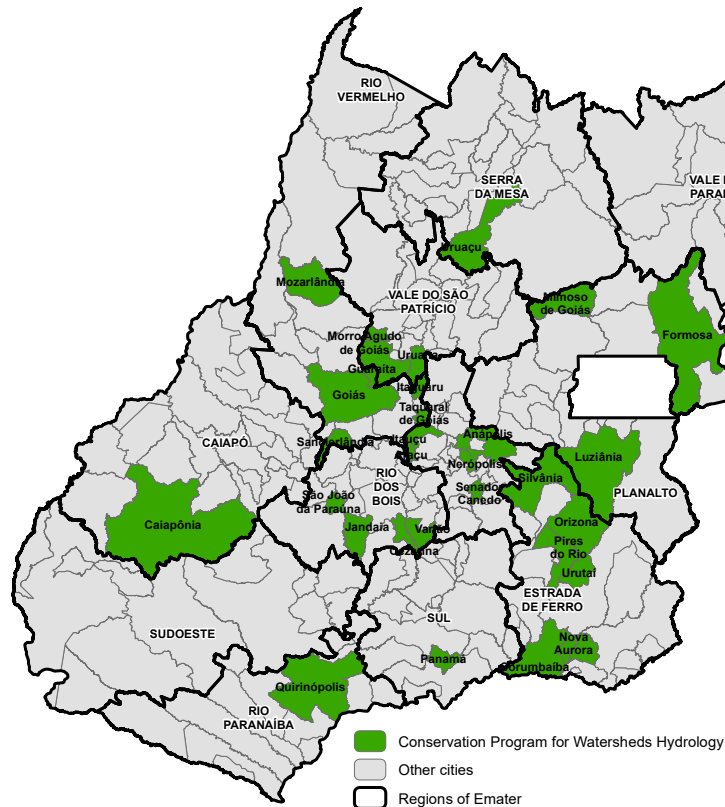
**34**

cities

**Institutions involved:** Emater, Public Prosecution Service/GO, Saneago<sup>2</sup>, Embrapa<sup>3</sup> and City Halls



## GOIÁS: CITIES COVERED BY THE PROGRAM FOR SMALL WATERSHEDS CONSERVATION



Note: Data from October 15, 2020, possible data updating.

Within this program, the Project **"Ser Natureza"** stands out, created by the Public Prosecution Service of Goiás (MP-GO), in which Emater is one of the partners in the actions. The main role of the Agency is to provide technical supervision and develop actions to prevent the degradation of small watersheds.

The results reached by Emater: **205 rural producers attended in 16 cities in Goiás.**

One of the goals of Emater in Goiás is to offer technical services on soil conservation and sources preservation practices in rural properties in our state. The expectation is that with specialized technical assistance, the environmental adjustments in farmers will make them even more productive and ecologically oriented.

1 Conab - National Food Supply Company  
2 Saneago - State Water and Sanitation Company in Goiás  
3 Embrapa - Brazilian Agricultural Research Corporation

Source: Emater, 2020.

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**AGRO  
DEFESA**  
Agência Goiana de Defesa Agropecuária



**EMATER**  
AGÊNCIA GOIANA DE ASSISTÊNCIA TÉCNICA,  
EXTENSÃO RURAL E PESQUISA AGROPECUÁRIA



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