

# AGRI IN DATA

SEPTEMBER 2020

SEAPA  
Secretaria de  
Estado de  
Agricultura,  
Pecuária e  
Abastecimento



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# PRESENTATION

We have reached the 12th edition of Agri in Data. It is a reason to celebrate and be proud of knowing that, each month, this publication brings relevant information and provides agricultural knowledge, market analyzes and other content that contribute not only to the farmer work, but also to everyone who is part, directly and indirectly, of the rural productive chains. It is also an opportunity to reflect on everything that happened during that period, considering that from the first edition, in October 2019, to the present moment, several events impacted the agribusiness and the life of the population in different ways. The main one, certainly, is the pandemic of the new coronavirus (Covid-19), which affected since the health area to the world economy. Due to the situation, we had to change plans, isolate ourselves, adopt safety procedures and pay more attention to people.

It was also a moment of realizing the importance that some sectors have in the society. Agriculture, for instance, which made the difference by keeping strong and active, guaranteeing food production and supplying the population. The involvement of the sector has been observed throughout the 12 editions, in which Goiás has become the third largest grain producer in Brazil, increased and reached new markets, the Gross Domestic Product (GDP) of agriculture hit important numbers, pulling the positive GDP of Goiás, besides having the only segment of the economy to register positive employment rate along each month of 2020.

All these impressive results confirm that agriculture will guarantee the economic recovery in the state and throughout Brazil in the post-pandemic. Governor Ronaldo Caiado, with a pioneering, strategic vision and focused on guaranteeing security for the population, created the Secretariat of Resumption. It is the only state to have a specific department aimed at strengthening the economy and the social area, seeking to provide jobs, income and quality of life to people. It is a Secretariat that is working in an integrated manner with other governmental areas, such as agriculture, through Seapa and the institutions under its jurisdiction, Emater, Agrodefesa and Ceasa.

Among the first actions to promote the economic recovery in Goiás, there are initiatives aimed at agribusiness. It goes from the State Food Acquisition Program (PAA), which will benefit more than 100 thousand people in 75 municipalities in Goiás, to the protocol of intention between the Government of Goiás and Ambev Company to strengthen the cassava production chain in our state. This is because a specific brand of beer will be created from the cassava starch, taking advantage of the raw material of small farmers and family farmers in the northeast region of the state.

For all this and considering the information that we bring in the September edition of Agri in Data, with emphasis on dairy and beef cattle, as well as soybean, corn and sugarcane production, we are sure that agriculture will be the central axis in the resumption of the economy, strengthening it more and more and even allowing the development of other sectors such as industry and commerce. It is the Government of Goiás working for the agriculture to make a difference in the countryside and in the cities, whether inside or outside the state's borders.

Enjoy your reading!



**ANTÔNIO CARLOS DE  
SOUZA LIMA NETO**

STATE SECRETARY OF  
AGRICULTURE, LIVESTOCK  
AND SUPPLY IN GOIÁS



# INTRODUCTION

Agribusiness has increasingly ratified its importance in this scenario of the Covid-19 pandemic, whether in food production and industrialization, which has guaranteed the supply of the domestic market, or in the international trade, which has contributed to the generation of foreign exchange to the country. The agribusiness generates income and creates jobs, leading to the economic recovery in Goiás and in the country. All of it has been possible due to the excellent results of the grain crop and also due to the appreciation of commodities.

Considering that the harvest of the 2019/20 grain crop is already in the final stage, the survey released by Conab confirms the estimate of a national production record, with 253.68 million tonnes, a growth rate of 4.8% in relation to the previous crop. Goiás registered an even higher growth rate, 10.30%, and the forecast is to produce 27.18 million tonnes of grains, accounting for 10.72% of the Brazilian production. The good performance in Goiás is a consequence of a series of factors, such as increase in planted area, favorable weather conditions

and investments in technology, which have boosted the gains in productivity. It is also noteworthy to mention the commitment of the rural farmers in Goiás in dealing with their crops.

The good results in production, the strong international demand for grains and meat and also the appreciation of the dollar against the Real continue to have a positive impact on the Gross Value of Production (GVP). Fifth among the Brazilian states, Goiás accounts for 7.96% of the national Gross Value of Agriculture Production, estimated at R\$ 59.08 billion for 2020, an



increase of 9.51% in relation to 2019. The scenario for exports is positive, driven by the favorable exchange rate and by the Chinese demand. From January to July 2020, the country recorded a total of US\$ 120.89 billion in exports, of which 50.61% are from agricultural products. The importance of agribusiness in Goiás is even more significant, 81.07% of Goiás exports were from agribusiness in 2020, accounting for US\$ 3.97 billion, 30.35% more than in the same

period of 2019.

In regard to labor market, the agricultural activity registered a positive rate along the months of 2020. There were 7,064 new formal jobs from January to July 2020 in our state. The other economic sectors, in July, showed improvement of employment indicators - creation of 4,929 new jobs - with emphasis on agribusiness for the food industry.

In this context, agribusiness in Goiás continues to be increasingly competitive

in production and trading. Aligned with the dynamism of the sector, the Government of Goiás continues to work for the expansion of credit, increasing the capillarity of the resources use and reaping the positive outcomes of the rural activity, due to the connection with the other economic sectors, the industrialization and food marketing and also demanding for inputs and technology. We are on the right way - agriculture is the strength for the economy resumption.

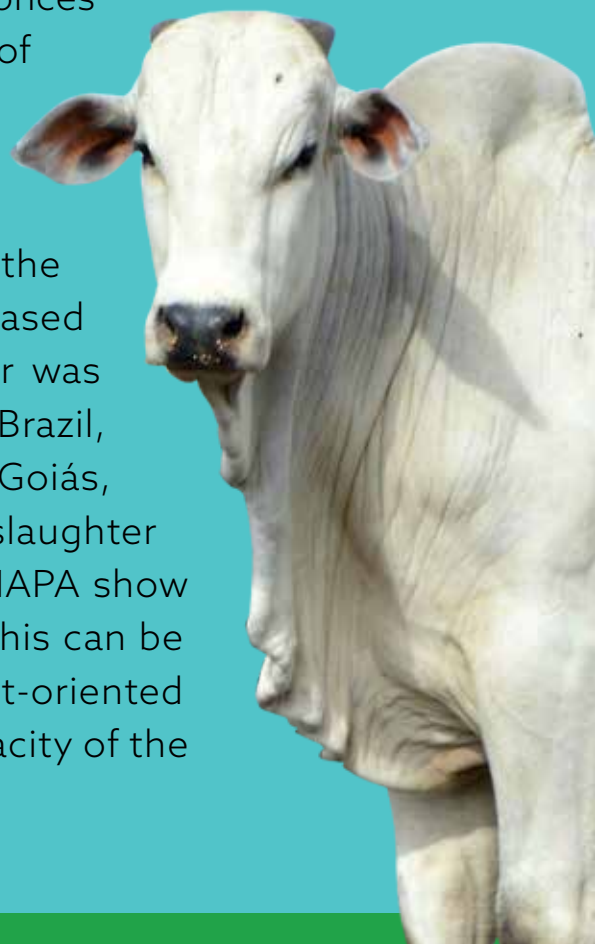




The context of beef farming is marked by rising prices and they are likely to remain high, due to the supply restriction of animals for slaughter and also to the increasing international demand. It is observed a scenario of more expensive inputs and animals for replacement, which has affected the cattle rancher's intention to confine the cattle.

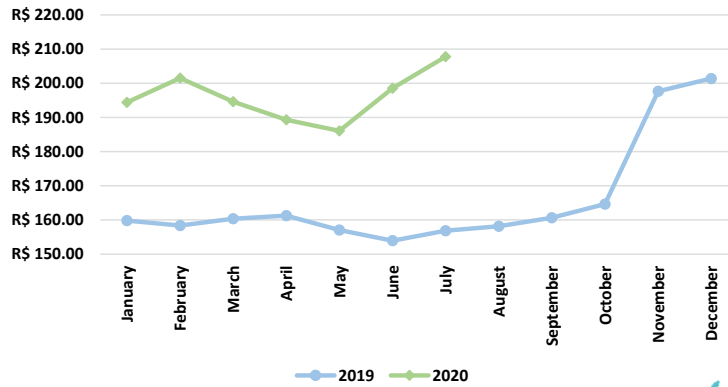
Comparing the first 24 days of August this year and the same period of 2019, using Cepea prices, it is seen that the real average rate for the calf price increased by 44.22%, while that according to the fed cattle prices the growth was of 33.20%. The average rate for corn, on the same basis of comparison, rose 37.38%, registering worsening of the exchange rate relation for the farmer. In addition, the mineral supplements prices are higher, since the supplement industry is an importer of raw materials, which is therefore linked to the dollar value that has been appreciated against the Real. Thus, although the fed cattle prices are increased in the market, the costs of production and animal replacements have risen in greater proportions, which impacts the profitability of the sector.

According to preliminary data from the quarterly survey of animal slaughter, released by IBGE, a 9.7% drop in cattle slaughter was observed in the 2nd quarter of 2020 in Brazil, compared to the same period last year. In Goiás, during the same period, preliminary slaughter data of the Federal Inspection Service/MAPA show that the slaughter rate grew by 0.55%. This can be explained by the presence of large export-oriented slaughterhouses and also due to the capacity of the state in meeting foreign demand.



**GOIÁS: AVERAGE  
PRICE PAID TO THE  
FARMER FOR FED  
CATTLE (15 KG)**

Conab (corrected by  
Brazil's IGP-DI / FGV) -  
adapted by Seapa.



**GROSS VALUE OF BEEF PRODUCTION - ESTIMATE 2020**

**R\$ 9.80 billion**

↑ **12.87% \*\***

**ACCOUNTS FOR:**

**9.16%**

of the national  
Gross Value of Beef  
Production

**49.78%**

of the Gross Value  
of Livestock  
Production in Goiás

**16.58%**

of the Gross Value  
of Agriculture  
Production in Goiás

\*\* in relation to the Gross Value of Beef Production in 2019

**GOIÁS - BEEF EXPORTS**

**YEAR-TO-DATE 2020 (JAN TO JULY):**

**US\$ 660.36 million**

↑ **24.88%\*\*\***

**150.16 thousand tonnes**

↑ **10.06%\*\*\*\***

**ACCOUNTS FOR:**

**75.43%** of the exported value of  
the meat complex in Goiás

**14.05%** of the national  
exported value of beef

**JULY 2020:**

**US\$ 134.63 million**

↑ **74.42%\*\*\***

**32.07 thousand tonnes**

↑ **70.30%\*\*\*\***

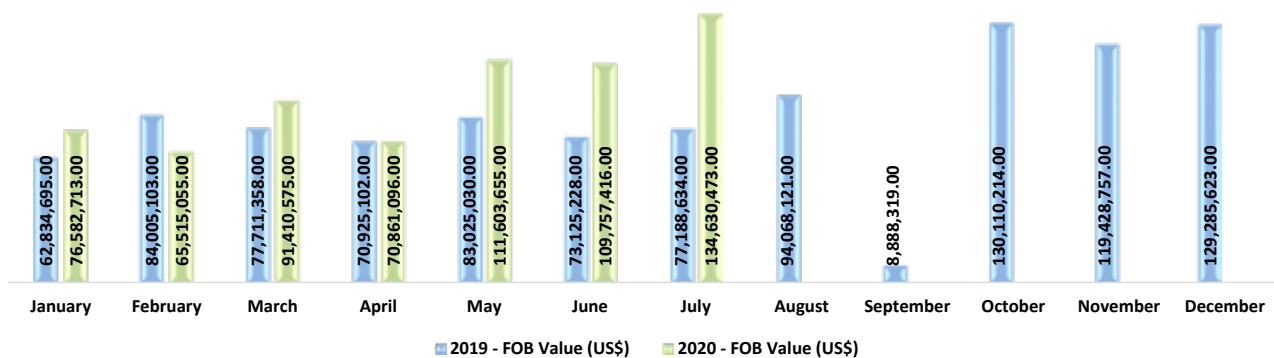
Accounts for **82.41%** of the exported value of the meat complex

\*\*\* In relation to the exported value in the same period of 2019

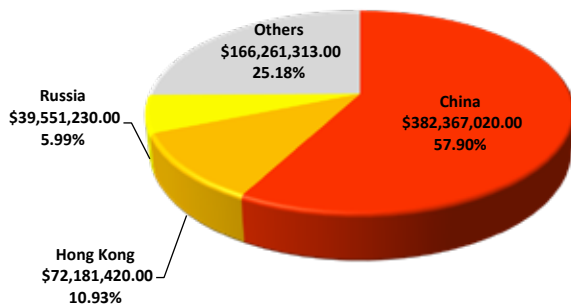
\*\*\*\* In relation to the exported weight in the same period of 2019

# CATTLE / BEEF

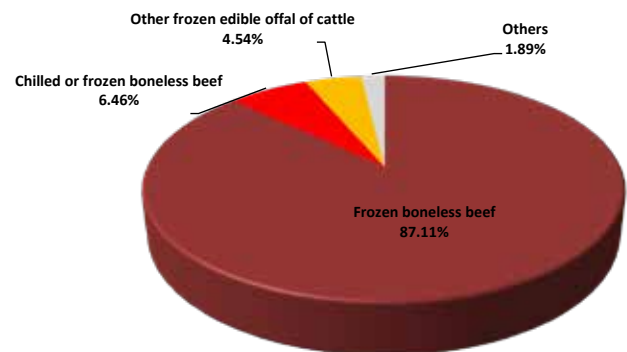
## GOIÁS: BEEF EXPORTS (US\$)



## GOIÁS: MAIN DESTINATIONS FOR BEEF EXPORTS – 2020



## GOIÁS: MAIN EXPORTED BEEF PRODUCTS – 2020



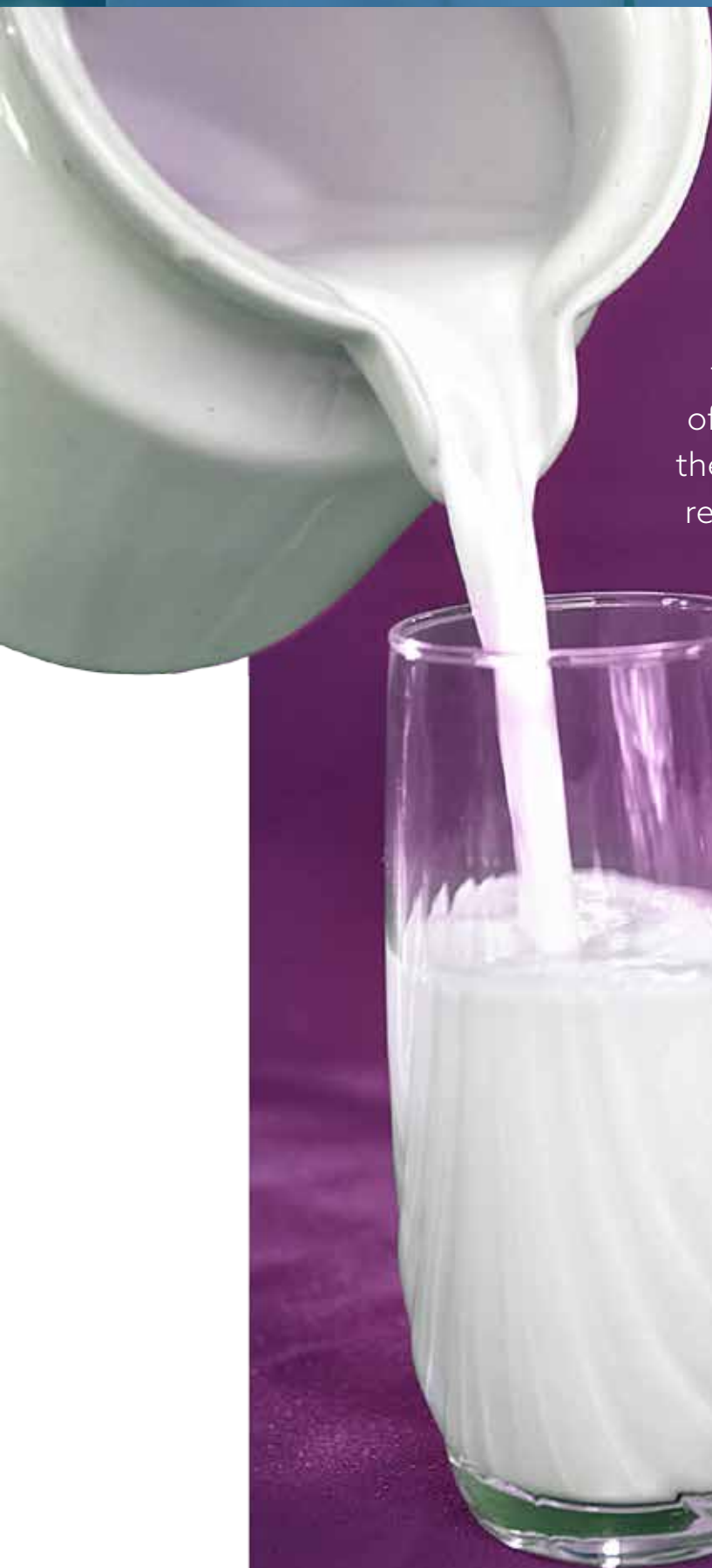
In the domestic market, the forecast is to have a recovery of beef consumption, although at a slow pace, mainly due to the retraction of household income. In the foreign market, the trend is for sales to continue expanding, mainly to meet Asia's demand. In this context, in which the dollar is appreciated against the Real, the export slaughterhouses - which are strong players in this chain - have been in continuous appreciation in this market, taking advantage of the favorable moment, however, they fear that not enough animals might be available to maintain the slaughter scales. For Goiás, the slaughter capacity and health quality contribute to the beef competitiveness in the international market, therefore, the trend is for exports from Goiás to continue growing.

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



# MILK

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The national scenario is marked by increasing domestic demand, driven mainly by the Emergency Aid that contributed to the growth in the consumption of products such as UHT milk. On the supply side, there is a period of restriction due to seasonal issues, which has sustained high prices paid to the farmer. In Goiás, it is observed prices recovery and a tendency they will continue growing, as well as in the main markets in the country.

The Bulletin of Dairy Market in Goiás points to an increase in the average price for all items of the dairy products basket, especially for powdered cream and mozzarella cheese. For the reference month of August, the index for the dairy products basket had a weighted total variation of 8.15%.

# MILK

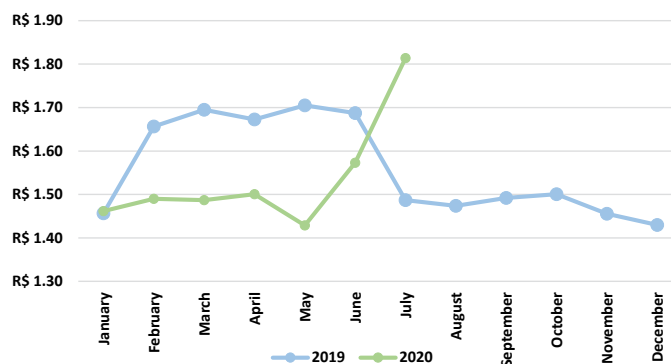
## GOIÁS – NOMINAL WHOLESALE PRICES OF DAIRY PRODUCTS

Reference Month	UHT Whole Milk (R\$/liter)	Powdered Whole Milk (R\$/Kg)	Mozzarella Cheese (R\$/Kg)	Sweetened Condensed Milk (R\$/kg)	Powdered Cream (R\$/kg)
July	3.10	18.31	24.57	7.50 <sup>(1)</sup>	21.03
August	3.33	19.52	27.12	7.84 <sup>(2)</sup>	23.30
<b>Variance</b>					
August/July	7.47%	6.62%	10.40%	4.53%	10.79%

Note: (1) Price in June. (2) Price in July.  
Source: Mauro Borges Institute.

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

Conab/Esalq (corrected by Brazil's IGP-DI / FGV)  
- adapted by Seapa.



## GOIÁS – GROSS VALUE OF MILK PRODUCTION - ESTIMATE 2020

**R\$ 3.79 billion**

↓ **0.28%\*\***

### ACCOUNTS FOR:

**9.18%**

of the national  
Gross Value of  
Milk Production

**19.26%**

of the Gross Value  
of Livestock  
Production in Goiás

**6.42%**

of the Gross Value  
of Agriculture  
Production in Goiás

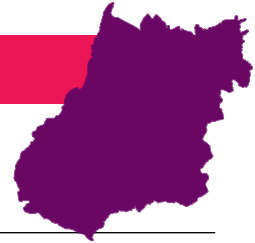
\*\* In relation to the Gross Value of Milk Production in 2019

## GOIÁS: DAIRY EXPORTS

YEAR-TO-DATE 2020 (JAN TO JULY):

**US\$ 566.58 thousand** ↑ **108.58%\*\*\***

**283.97 tonnes** ↑ **20.45%\*\*\*\***



### ACCOUNTS FOR:

**1.40%** of the national value of dairy products exported

JULY OF 2020:

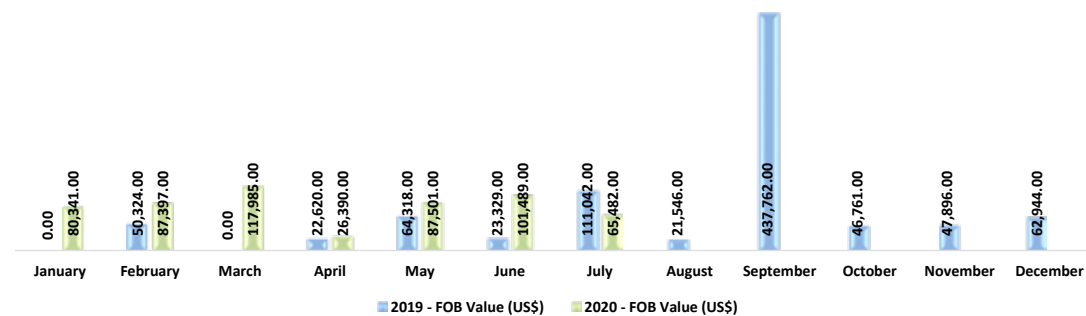
**US\$ 65.48 thousand** ↓ **41.03%\*\*\***

**24.31 tonnes** ↓ **75.05%\*\*\*\***

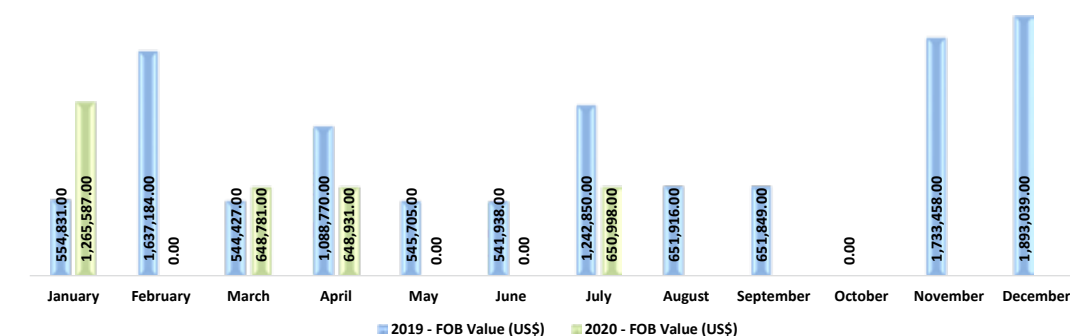
\*\*\* In relation to the exported value in the same period of 2019

\*\*\*\* In relation to the exported weight in the same period of 2019

## GOIÁS: DAIRY EXPORTS (US\$)



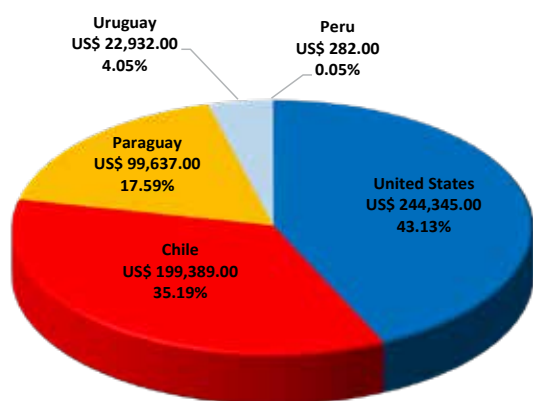
## GOIÁS: DAIRY IMPORTS (US\$)



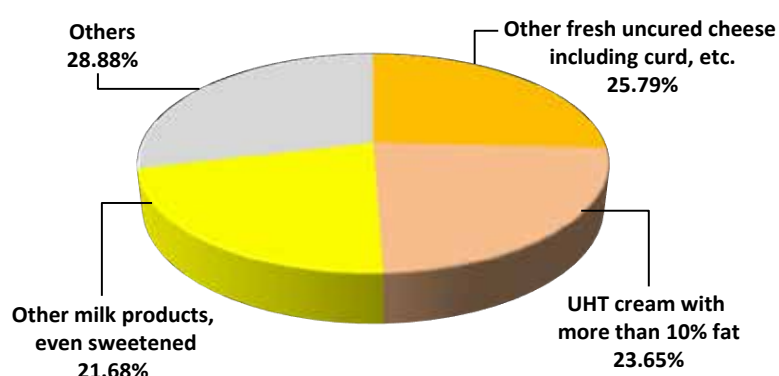


# MILK

## GOIÁS: MAIN DESTINATIONS FOR DAIRY PRODUCTS EXPORTS – 2020



## GOIÁS: MAIN EXPORTED DAIRY PRODUCTS – 2020



In an analysis carried out by Cepea, on the categorization of the price paid per production stratum, showed that farmers who produce less than 200 liters/day receive 7.07% less than the average price paid for a liter of milk in the state. This stands out the importance of improving the productivity of the small farmer's herd, taking into account aspects of genetic improvement, animal health and welfare.

Despite the expectation of growth in national production for the coming months, with a tendency of supply increase as of October, in a complex segment such as dairy chain, it is difficult to make long-term forecasts. Some factors, however, must be on the radar of farmers and dairy industries, as the uncertainty about the continuity and the values of the Emergency Aid provided by the Federal Government, which until then has influenced on the increase in consumption, as well as the competitiveness of imported milk in relation to local production.

It is necessary that the agents in this sector keep aware of factors that can impact the market of production, industrialization and distribution of milk and dairy products in Goiás. It is of great importance to strengthen the links of this productive chain, in favor of development and sustainability of this activity in the state.

# PORK / PIG PRODUCTION

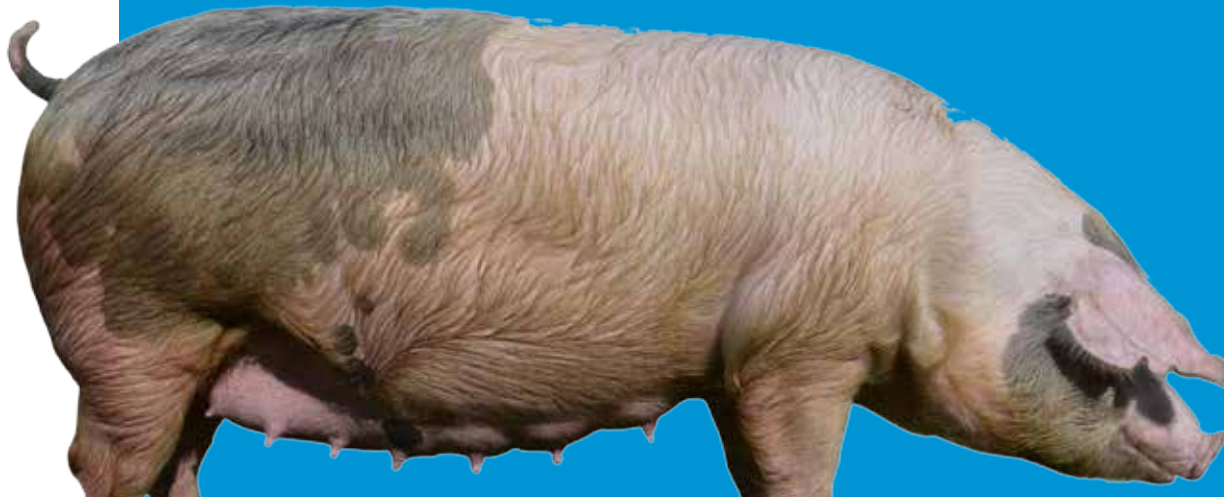
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On the national scenario, the foreign demand to supply China has contributed to driving up the pork prices in the domestic market. The preliminary data from the quarterly survey of animal slaughter, released by IBGE, point out an increase of the number of pig slaughter in the 2nd quarter of 2020, compared to the same period in 2019. However, the preliminary data of slaughter of the Federal Inspection Service/MAPA show that the pig slaughter rate fell 24.75% in Goiás, comparing the same periods, with a sharp drop in the last month of the quarter - June.

Considering the lower buying power of Brazilian families, the consumption of pork decreased in the domestic market. The increase in supply, verified by the growth of animals slaughtered in the country, has been absorbed by the foreign market, especially by Asian countries. This, coupled with the depreciation of the Real against the dollar, has sustained higher prices.

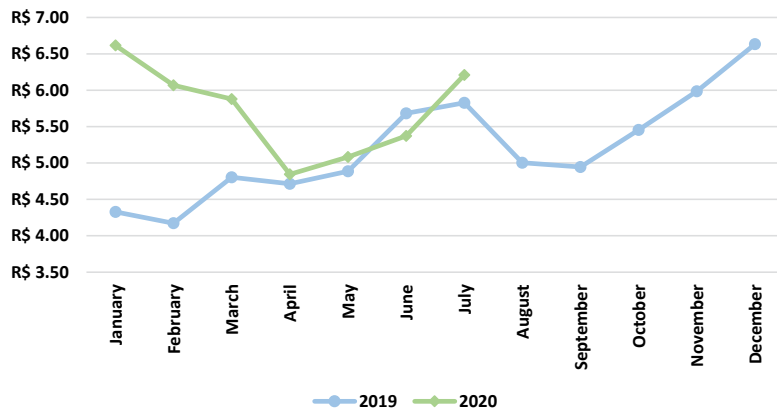
The Brazilian Association of Animal Protein (ABPA) reinforces that, over the next months, considering the gaps left by the African Swine Fever in Asian countries, the international demand for pork will continue strong, as they have a preference for the consumption of this animal protein.



# PORK / PIG PRODUCTION

## GOIÁS: AVERAGE PRICE PER KILO OF LIVE PIG PAID TO THE FARMER

Conab (corrected by Brazil's IGP-DI / FGV) - adapted by Seapa



## GOIÁS - GROSS VALUE OF PORK PRODUCTION - ESTIMATE 2020

**R\$ 881.16 million**

↑ **6.63%\*\***

### ACCOUNTS FOR:

**4.34%**

of the national Gross Value of Pork Production

**4.48%**

of the Gross Value of Livestock Production in Goiás

**1.49 %**

of the Gross Value of Agriculture Production in Goiás

\*\* in relation to the Gross Value of Pork Production in 2019

## GOIÁS - PORK EXPORTS

### YEAR-TO-DATE 2020 (JAN TO JULY):

**US\$ 7.39 million**

↑ **173.84%\*\*\***

**5.65 thousand tonnes**

↑ **205.56%\*\*\*\***

### ACCOUNTS FOR:

**0.84%** of the exported value of the meat complex in Goiás

**0.58%** of the national exported value of pork

### JULY OF 2020:

**US\$ 882.45 thousand**

↓ **28.65%\*\*\***

**674.94 tonnes**

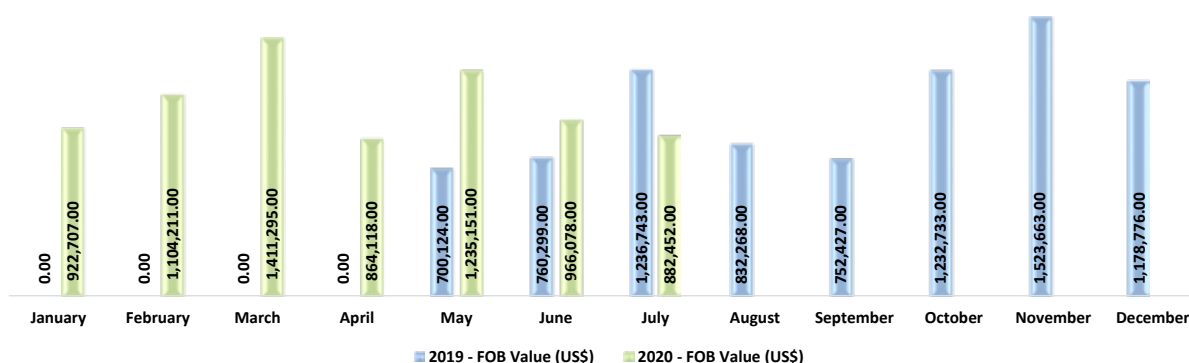
↓ **21.32%\*\*\*\***

\*\*\* In relation to the exported value in the same period of 2019

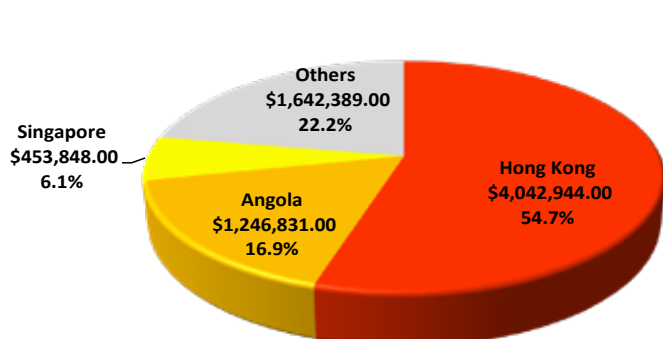
\*\*\*\* In relation to the exported weight in the same period of 2019



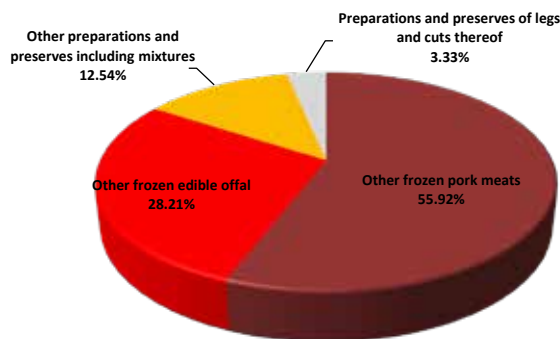
## GOIÁS: PORK EXPORTS (US\$)



## GOIÁS: MAIN DESTINATIONS FOR PORK EXPORTS – 2020



## GOIÁS: MAIN EXPORTED PORK PRODUCTS – 2020



Although the representativeness of pork in Goiás exports is not very significant, the strong foreign demand points to positive perspectives, mainly due to the health credibility of the pig industry in Goiás. However, it seems that the pig production and the capacity of industries in the state need to be expanded, along with the certification of new plants, in order to meet the international demand that continues to grow. Even so, the recovery of the Asian herd must be monitored.

The growth in pork prices is also related to the increase in production expenses, as indicated by the Index of Pork Production Cost (Pork ICP) of Embrapa. Influenced by the rise in grains, spending on nutrition now represents 79.17% of total expenditure of the activity. Thus, the pig farmer in Goiás needs to be aware of the competitiveness of pork in the domestic market. The Gross Value of Pork Production in the state for 2020 is expected to grow, driven mainly by higher prices.

Source: ABPA/CEPEA/ESALQ/CONAB/IBGE/MAPA/Embrapa/Ministry of Economy

# POULTRY

In the national market of poultry, after successive drops in price, the scenario is marked by recovery, driven by the increase in demand for lower-cost animal proteins and the retraction in supply. This dynamic also happens in Goiás, however, the prices are still at lower levels than the same period last year.

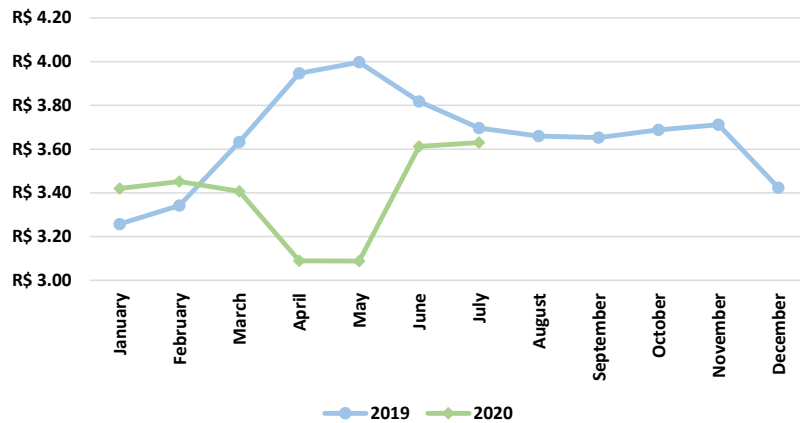
Preliminary data from the quarterly survey of animal slaughter, released by IBGE, at the national level, point to a reduction in chicken slaughter in the second quarter of 2020, both in relation to the previous quarter and the same period in 2019. For Goiás, the preliminary slaughter results of the Federal Inspection Service/MAPA show a decrease in the slaughter rate of 6.10% in the 2nd quarter, compared to the 1st quarter of 2020.

2020



**GOIÁS: AVERAGE  
PRICE PAID TO  
THE FARMER  
FOR LIVE  
CHICKEN (KG)**

Conab (corrected by  
Brazil's IGP-DI / FGV) -  
adapted by Seapa.



**GOIÁS - GROSS VALUE OF POULTRY PRODUCTION - ESTIMATE 2020**

**R\$ 4.35 billion**

**↓ 9.70%\*\*\***

**ACCOUNTS FOR:**

**6.67%**

of the national  
Gross Value of  
Poultry Production

**22.10%**

of the Gross Value  
of Livestock  
Production in Goiás

**7.36%**

of the Gross Value  
of Agriculture  
Production in Goiás

\*\* in relation to the Gross Value of Poultry Production in 2019

**GOIÁS - POULTRY MEAT EXPORTS**

**YEAR-TO-DATE 2020 (JAN TO JULY):**

**US\$ 196.96 million**

**↑ 39.77%\*\*\***

**121.51 thousand tonnes**

**↑ 64.20%\*\*\*\***

**ACCOUNTS FOR:**

**22.50%** of the exported value of the meat complex

**JULY 2020:**

**US\$ 26.32 million**

**↓ 31.07%\*\*\***

**18.19 thousand tonnes**

**↓ 8.20%\*\*\*\***

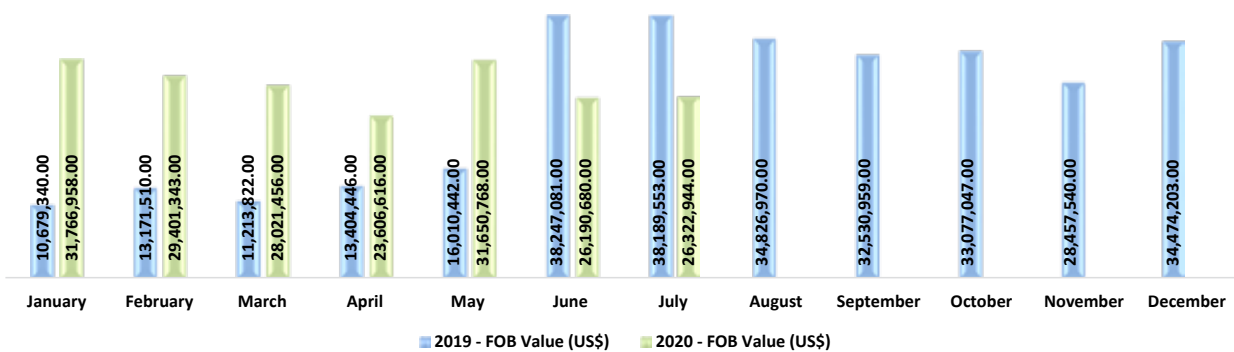
\*\*\* In relation to the exported value in the same period of 2019

\*\*\*\* In relation to the exported weight in the same period of 2019

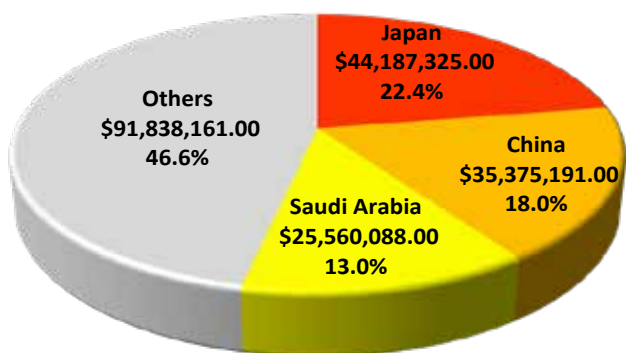


# POULTRY

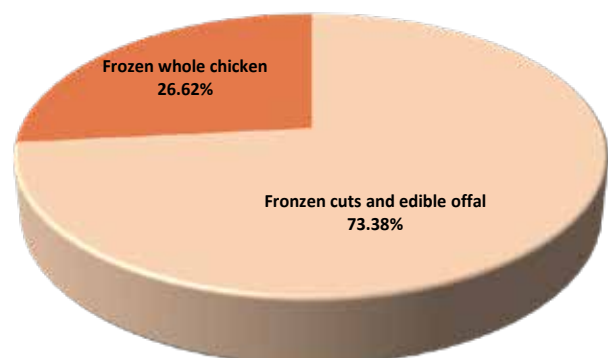
## GOIÁS: POULTRY MEAT EXPORTS (US\$)



## GOIÁS: MAIN DESTINATIONS FOR POULTRY MEAT EXPORTS — 2020



## GOIÁS: MAIN EXPORTED POULTRY PRODUCTS — 2020



As in the other meat complex chains, the farmer must be aware of rising production costs. Corn - which is a predominant component of animal feed - is at high level values, impacting the price formation of this animal protein.

Driven by the demand from Asian and Arab countries, poultry meat from Goiás stands out in international trade during the year-to-date of 2020. Goiás has invested in fundamental points in this moment of public health crisis, encouraging the traceability of production and ensuring the health reliability of farms and industries. In the current situation, the importance of all agents of this productive chain is reinforced for the maintenance of the health credibility of our herds and products.

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

# SOYBEAN

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The demand for soybean remains strong, which has sustained the increased prices of this commodity. According to Cepea, the low soybean stocks, the firm demand from the industries and the trade decrease in the short term have driven up prices, in a way they reached nominal records in July. The high values for the soybean have been pulled, mainly, by the strong Asian demand, in a context of appreciated dollar that favors the export and creates more competitiveness for the Brazilian grain. This has already been reflected in the negotiations for the 2020/2021 crop, which are very advanced, although the upward trend should make the producer to be more aware of this decision making.

This scenario of raised prices added to the increases in soybean production - which is a record in this crop - has led to high growth rate of the estimate for 2020 of the Gross Value of Production of this grain in Goiás.

## SOYBEAN CROP – ESTIMATE 2019/20

GOIÁS

### PRODUCTION:

12.46 thousand tonnes

↑ 9.00%\*

### PLANTED AREA:

3.54 million hectares (ha)

↑ 2.00%\*

### AVERAGE YIELD:

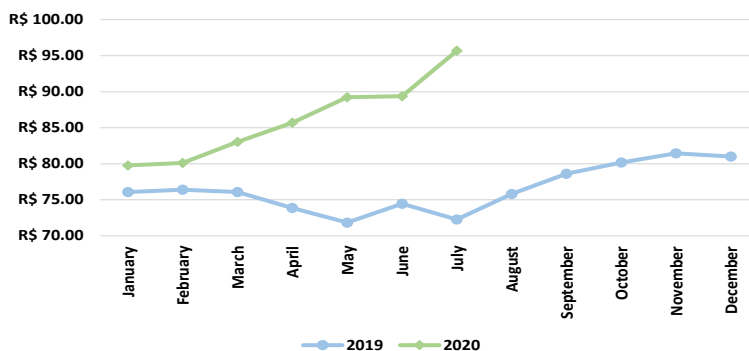
3.52 t/ha

↑ 6.90%\*

\* In relation to 2018/19 crop.

# SOYBEAN

## GOIÁS: AVERAGE PRICE PAID TO THE FARMER FOR THE 60-KG BAG OF SOYBEAN



Conab (corrected by Brazil's IGP-DI / FGV) - adapted by Seapa.

## GOIÁS – GROSS VALUE OF SOYBEAN PRODUCTION - ESTIMATE 2020

**R\$ 18.15 billion**

↑ **31.52 %\*\***

### ACCOUNTS FOR:

**10.00%**

of the national  
Gross Value of  
Soybean Production

**46.06%**

of the Gross  
Value of Crop  
Production in Goiás

**30.72%**

of the Gross  
Value of Agriculture  
Production in Goiás

\*\* in relation to the Gross Value of Soybean Production in 2019

## GOIÁS – SOYBEAN COMPLEX EXPORTS

### YEAR-TO-DATE 2020 (JAN TO JULY):

**US\$ 2.59 billion**

↑ **39.95%\*\*\***

**7.52** million tonnes

↑ **46.05%\*\*\***

### ACCOUNTS FOR:

**65.26%** of the agribusiness  
exports in Goiás

**9.31%** of the exported value of the  
soybean complex in Goiás

### JULY 2020:

**US\$ 357.73 million**

↑ **39.20%\*\*\***

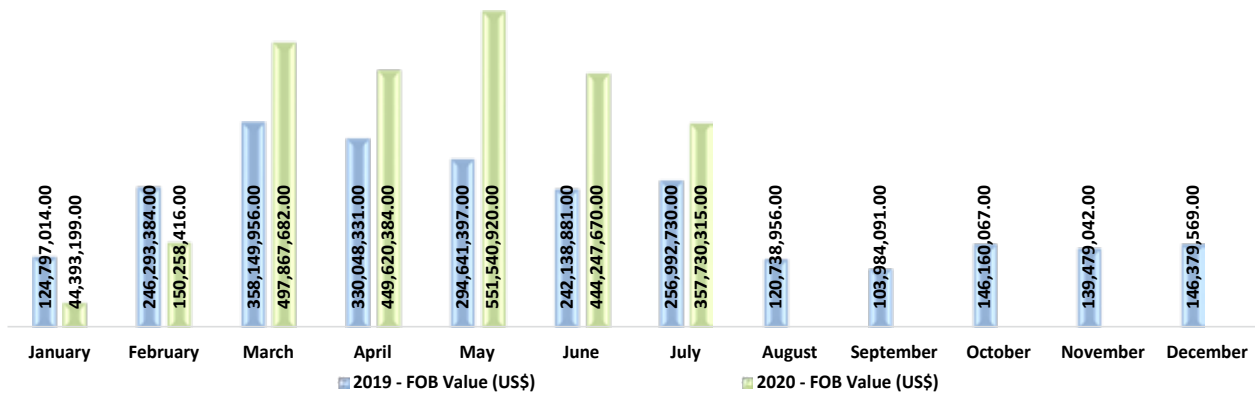
**1.03 million** tonnes

↑ **44.83%\*\*\***

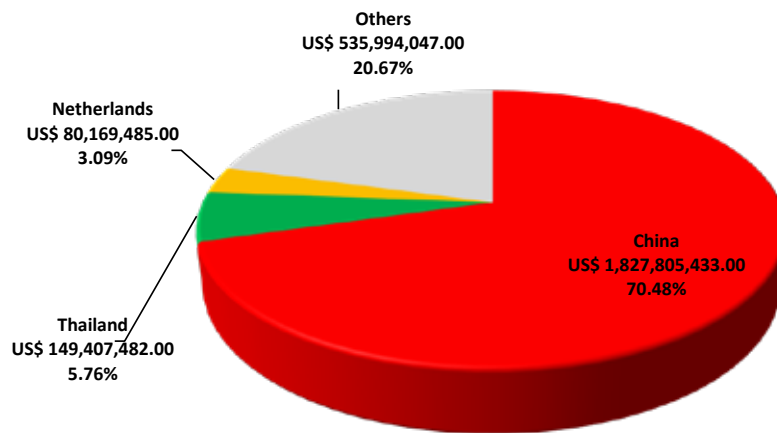
\*\*\* In relation to the exported value in the same period of 2019



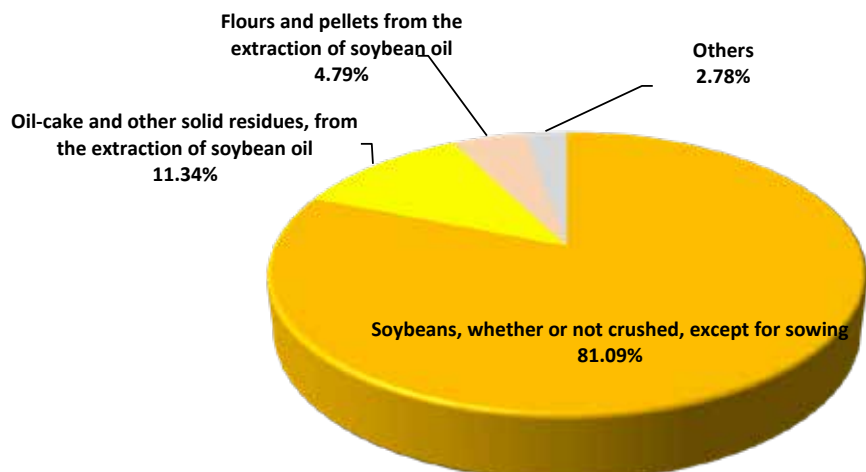
## GOIÁS: SOYBEAN COMPLEX EXPORTS (US\$)



## GOIÁS: MAIN EXPORT DESTINATIONS FOR SOYBEAN, 2020

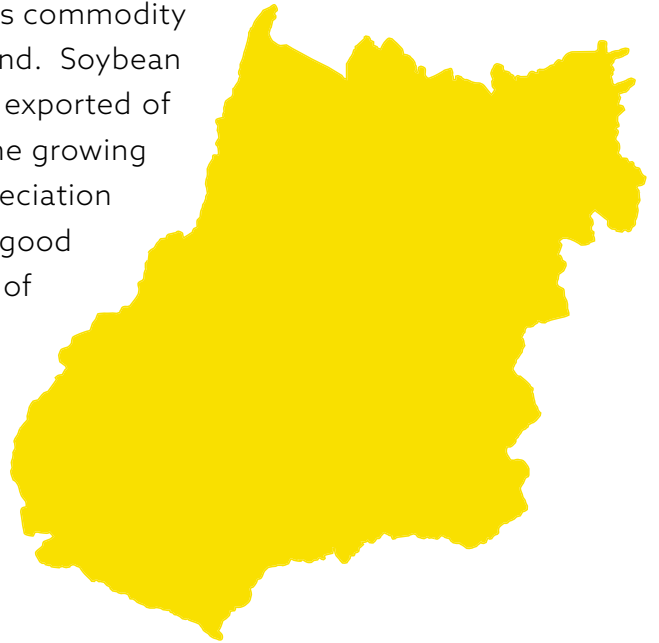


## GOIÁS: SHARE OF THE COMPLEX SOYBEAN PRODUCTS, 2020



# SOYBEAN

In Goiás, the export growth of this commodity has been driven by Chinese demand. Soybean grain continues as the major product exported of the soybean complex in the state. The growing international consumption, the appreciation of the dollar against the Real, the good yield and production performance of the 2019/2020 crop and the signs of recovery in the Asian economy are the main factors that support good perspectives for the soybean producer. This optimism is reflected in the expectations for the 2020/2021 crop, which should imply an increase in the soybean planted area in Brazil. An analysis of the main soybean players in the world, Rabobank says that Brazil has the competitive advantage of area availability, whereas the United States, logistics, and Argentina, the lowest variable costs, but the high rates in Argentine exports should limit the expansion of their production.



Despite this favorable situation in Brazil, it is necessary to monitor the production costs and keep on the daily radar the fragile relationship between the USA and China, given that it might affect the dynamics of international trade.

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

# CORN

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According to Conab, the 2019/2020 Corn Crop is on pace for a record production of 102.14 million tons in the country, a growth rate of 2.10% compared to the previous crop. In relation to stocks, market reports points to the reduction of corn in warehouses. In the latest crop survey released by Conab, the estimate is 10.3 million tons of stored corn, which means, a stock of 10% of the national production.

In the process of concluding the harvest of the safrinha corn in Goiás, the production numbers confirm a record crop, driven by the farmer's investments. The state continues to be the 3rd largest producer of the total corn in the country and it is estimated to have a share of 12.56% of the national production. The yield outcomes, however, were affected by planting outside the best season for safrinha corn, due to the delay in the rains, but the results have exceeded expectations since the beginning of sowing, also as a consequence of the weather conditions that favored the grain maturation phase.

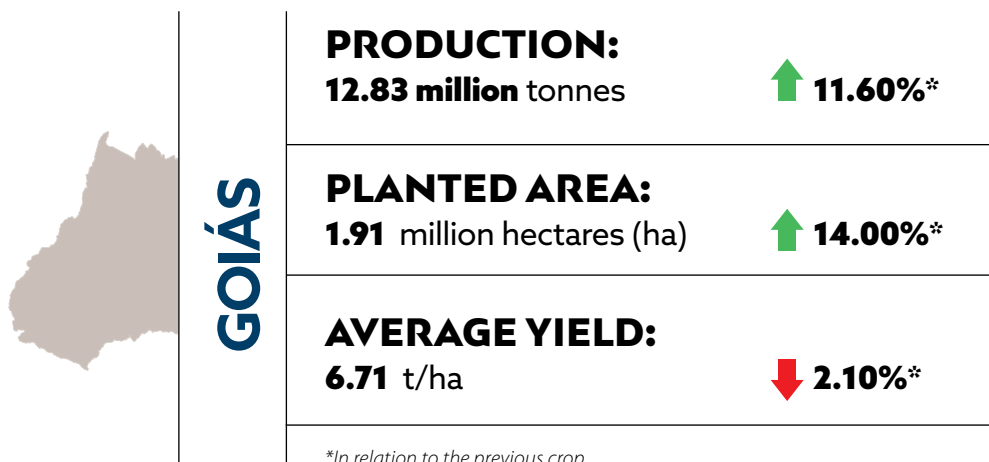
In Goiás, the expansion of ethanol production from corn stands out, in which the state is the second largest producer, behind only Mato Grosso. The expectation is that the production of this biofuel in Goiás will continue to grow, due to the investments made in this source of clean energy, although corn prices are at very high levels.

Regarding the foreign market, shipments in the year-to-date decreased in relation to the same period of 2019, both in the results of the country and in the state. In August, however, shipments in the country are growing, which has contributed to the expectation of high prices.

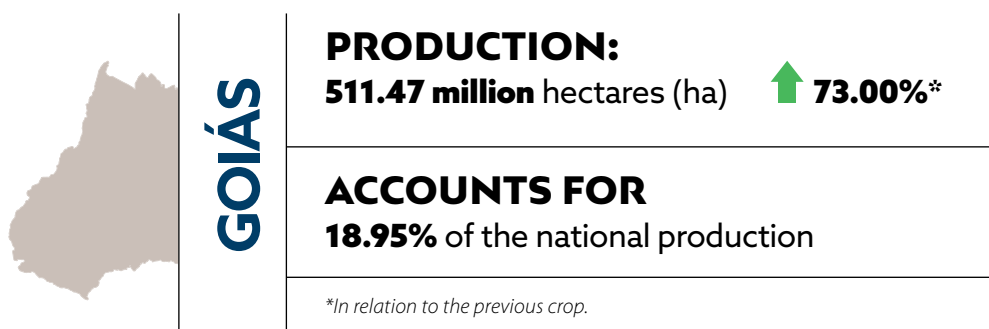


# CORN

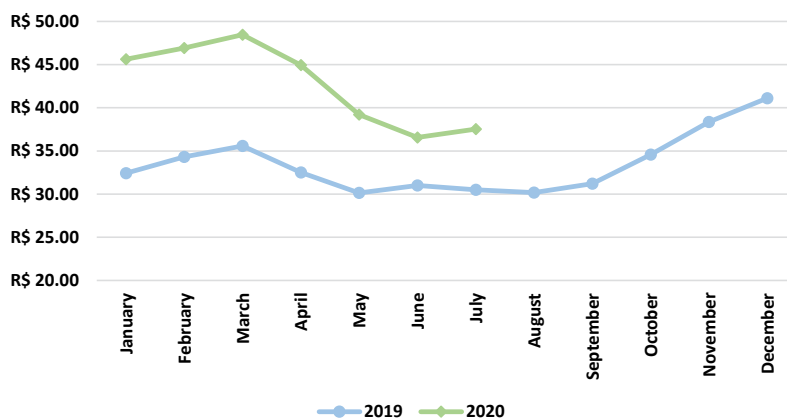
## GOIÁS - CORN CROP 2019/20 - ESTIMATE



## GOIÁS - CORN ETHANOL - ESTIMATE



### GOIÁS: AVERAGE PRICE PAID TO THE FARMER FOR THE 60-KG BAG OF CORN



Source: Conab (corrected by Brazil's IGP-DI / FGV) - adapted by Seapa

## GOIÁS - GROSS VALUE OF CORN PRODUCTION - ESTIMATE 2020

**R\$ 7.91 billion**

**↑ 21.91%\*\***



### ACCOUNTS FOR:

**10.04%**

of the Gross  
Value of  
Corn Production

**20.08%**

of the Gross  
Value of Crop  
Production in Goiás

**13.39%**

of the Gross Value  
of Agriculture  
Production in Goiás

*\*\* in relation to the Gross Value of Corn Production in 2019*

## GOIÁS - CORN EXPORTS

### YEAR-TO-DATE 2020 (JANUARY TO JULY):

**US\$ 91.75 million**

**↓ 46.73%\*\***

**570.33 thousand tonnes**

**↓ 43.99%\*\***



### ACCOUNTS FOR:

**7.45%** of the exported value  
of corn in the country

**2.31%** of the agribusiness  
exports in Goiás

### JULY 2020:

**US\$ 39.29 milhões**

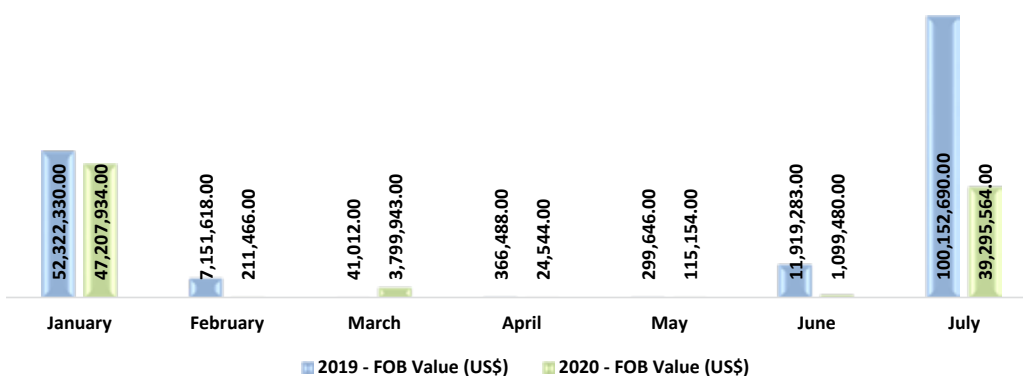
**↓ 60.76%\*\***

**255.90 mil toneladas**

**↓ 57.07%\*\***

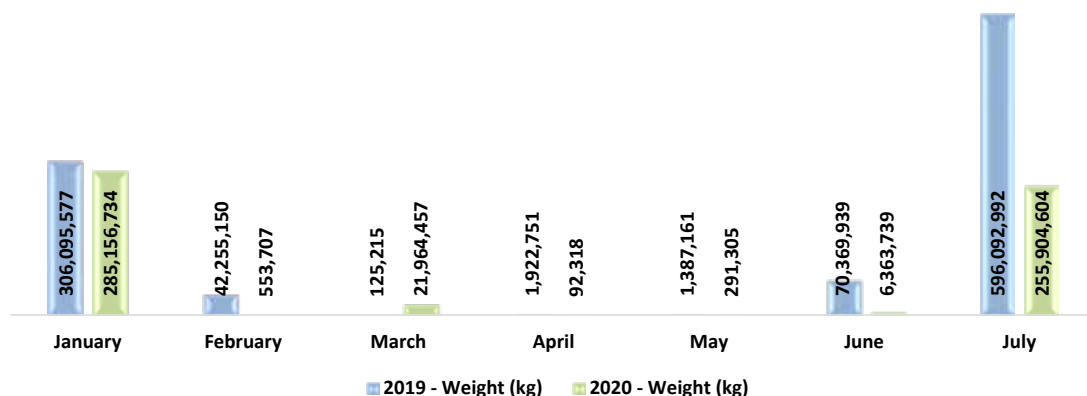
*\*\*\* In relation to the exported value in the same period of 2019*

## GOIÁS - CORN EXPORTS (US\$)

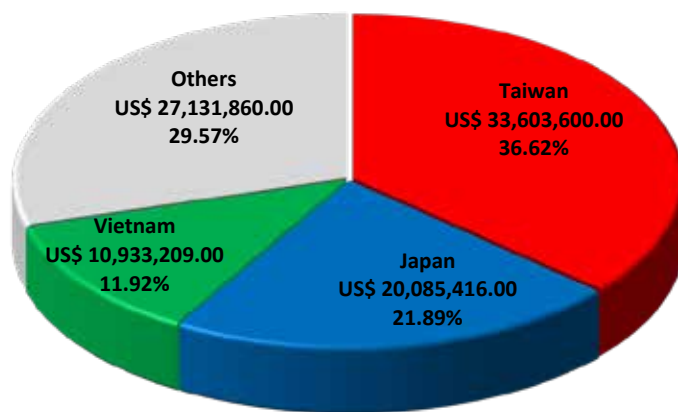


# CORN

## GOIÁS: CORN EXPORTS (KG)



## GOIÁS: MAIN DESTINATIONS FOR CORN EXPORTS – 2020



When analyzing the corn production chain in Brazil and Goiás, it is important to keep an eye on events that influence the production in the United States - a major global player - such as the weather conditions that can affect the American production, for instance. Depending on how these aspects impact their production and yield, the demand for Brazilian corn may be boosted.

Although it is at the end of a record harvest, the trend of rising corn prices has made producers wait for more appreciation. The scenario is one of strong domestic demand and a tendency for foreign trade to grow, which may further raise prices.

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



# SUGARCANE

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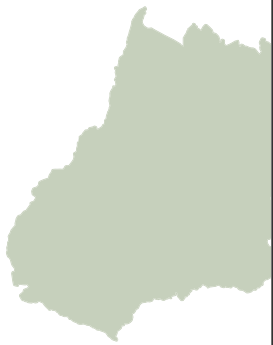
The estimate for the 2020/2021 national sugarcane crop, released by Conab, forecasts steady production with a slight decrease of 0.1% compared to the previous crop. For Goiás, however, it is expected growth both in production and cultivation area, with small yield increase.

Most of the sugarcane in Goiás is used for ethanol production, which in this crop will have its share reduced in response to market dynamics - decrease in ethanol consumption and expansion of international demand for sugar. The processing industry, which in the 2019/20 crop used 82.69% of the state's sugarcane production to ethanol manufacture, for the 2020/21 crop, the forecast is to address 73.81%.



# SUGARCANE

## GOIÁS - SUGARCANE CROP 2020/21 - ESTIMATE



**GOIÁS**

### PRODUCTION:

**77.34** million tonnes

↑ **2.70%\***

### ACCOUNTS FOR:

**12.05%** of the national production

### PLANTED AREA:

**965.94** thousand tonnes

↑ **2.40%\***

### AVERAGE YIELD:

**80.07** t/ha

↑ **0.30%\***

*\*In relation to the 2019/20 crop.*

## GROSS VALUE OF SUGARCANE PRODUCTION - ESTIMATE 2020

**R\$ 7.16 BILLION**

↓ **0.41%\*\***

### ACCOUNTS FOR:

**11.24%** of the national Gross Value of Sugarcane Production

**18.19%** of the Gross Value of Crop Production in Goiás

**12.13%** of the Gross Value of Agriculture Production in Goiás

*\*\* in relation to the Gross Value of Sugarcane Production in 2019*

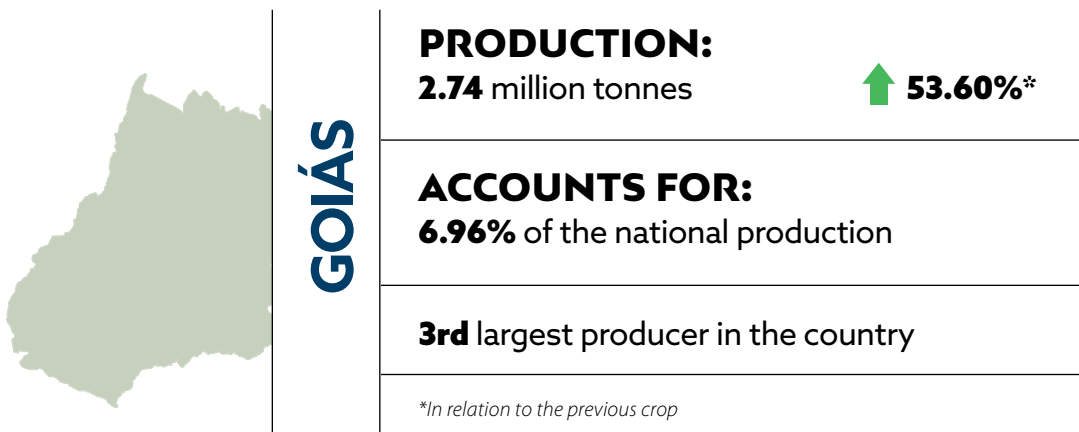




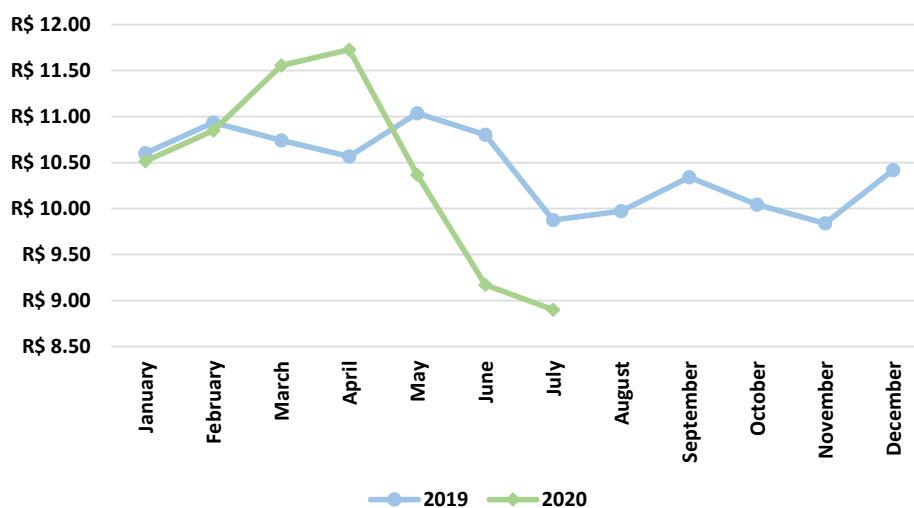
## SUGAR

The high foreign demand and the favorable exchange rate for exports have influenced the good performance of Brazilian sugar in international negotiations. It is estimated that 26.20% of the sugarcane production in Goiás is destined for the sugar manufacture, 20.26 million tons of cane, an increase of 55.50% compared to the previous crop.

### GOIÁS - CROP 2020/21 - ESTIMATE



### GOIÁS: AVERAGE RETAIL PRICE OF CRYSTAL SUGAR (5KG)



Conab (corrected by Brazil's IGP-DI / FGV) - adapted by Seapa.



# SUGARCANE

## GOIÁS - SUGAR EXPORTS

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

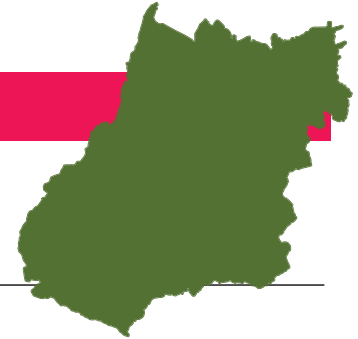
**US\$ 165.51 million** ↑ **62.68%\*\***

**518.03 thousand tonnes** ↑ **78.14%\*\***

JULY 2020:

**US\$ 34.64 million** ↑ **20.44%\*\***

**111.97 thousand tonnes** ↑ **12.58%\*\***

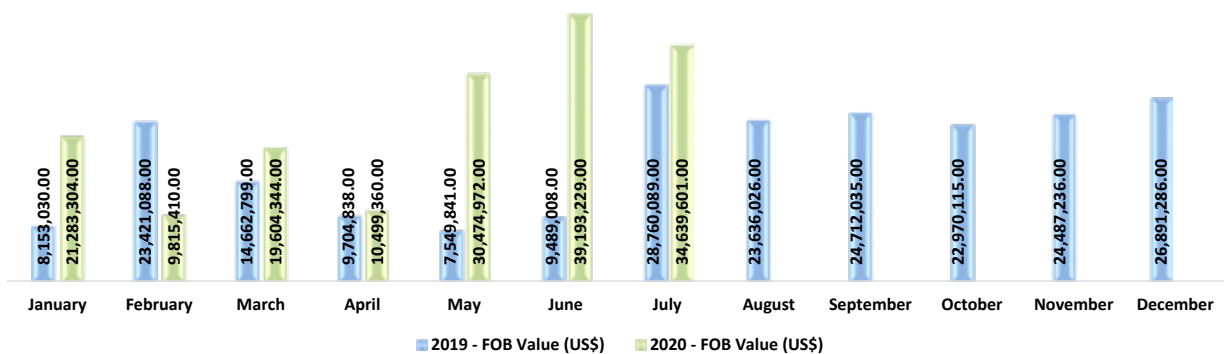


### ACCOUNTS FOR:

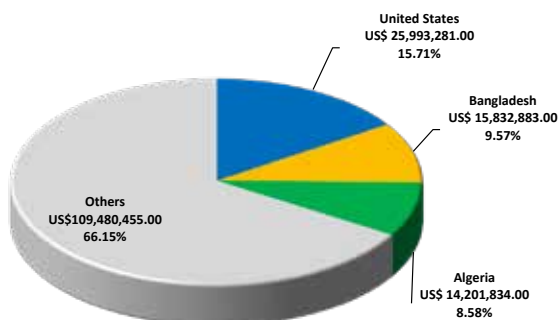
**83.36%** of the exported value of the Sugar and Alcohol Complex

*\*\*In relation to the exported value in the same period of 2019*

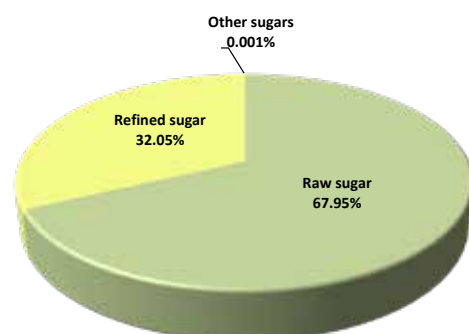
### GOIÁS - SUGAR EXPORTS (US\$)



### GOIÁS: MAIN EXPORT DESTINATIONS FOR SUGAR – 2020



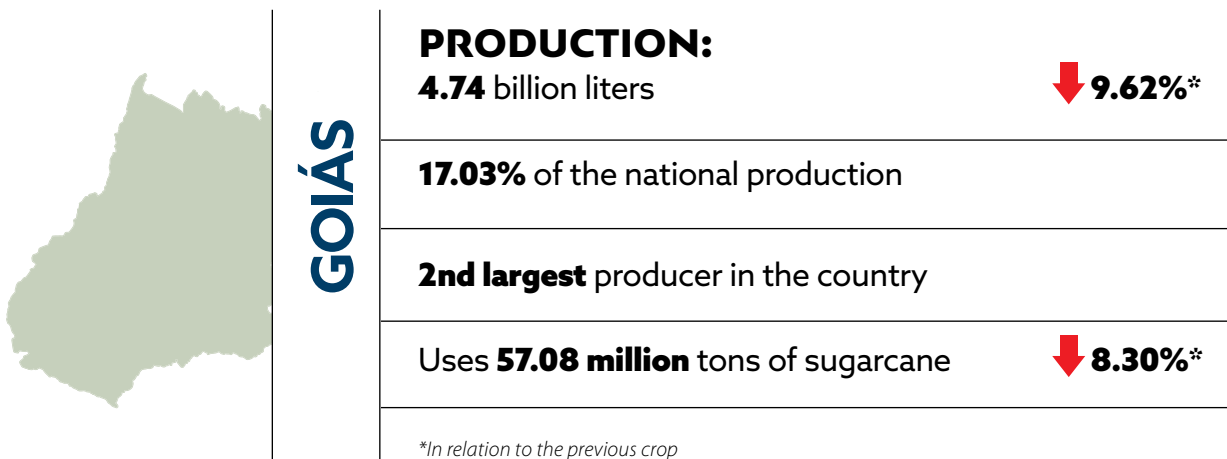
### GOIÁS: MAIN EXPORTED SUGAR PRODUCTS – 2020



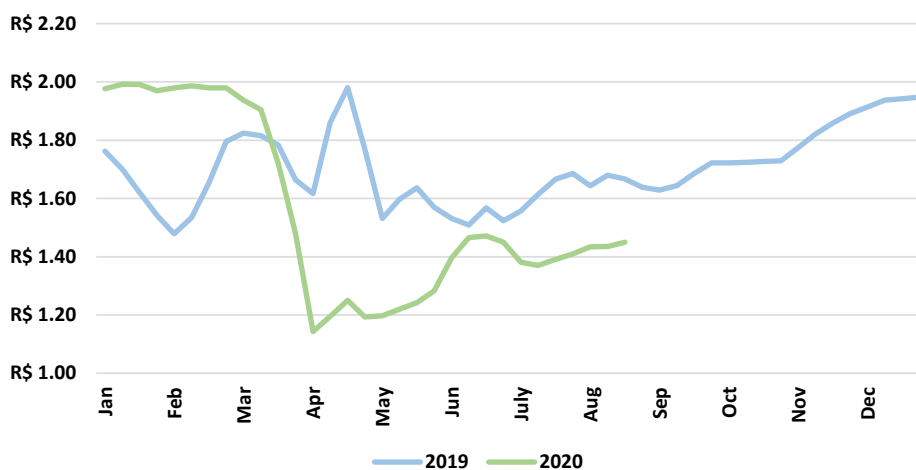
## ETHANOL

As other economic activities are resumed in Goiás, ethanol consumption starts to react, but still at lower levels than the pre-pandemic period.

### GOIÁS - ETHANOL PRODUCTION FROM SUGARCANE - CROP 2020/21 - ESTIMATE



### GOIÁS: AVERAGE WEEKLY PRICE FOR HYDROUS ETHANOL PER LITER



Conab (corrected by Brazil's IGP-DI / FGV) - adapted by Seapa.

# SUGARCANE

## ETHYL ALCOHOL EXPORTS

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

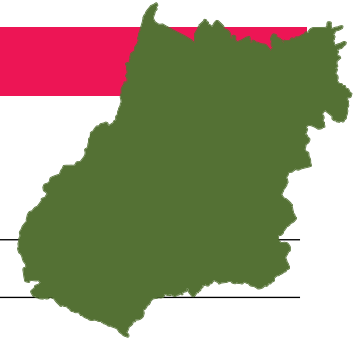
**US\$ 15.41 million** ↑ **10.45%\*\***

**27.35 thousand tonnes** ↑ **18.25%\*\***

JULY 2020:

**US\$ 6.92 million** ↓ **0.11%\*\***

**13.73 thousand tonnes** ↑ **17.61%\*\***

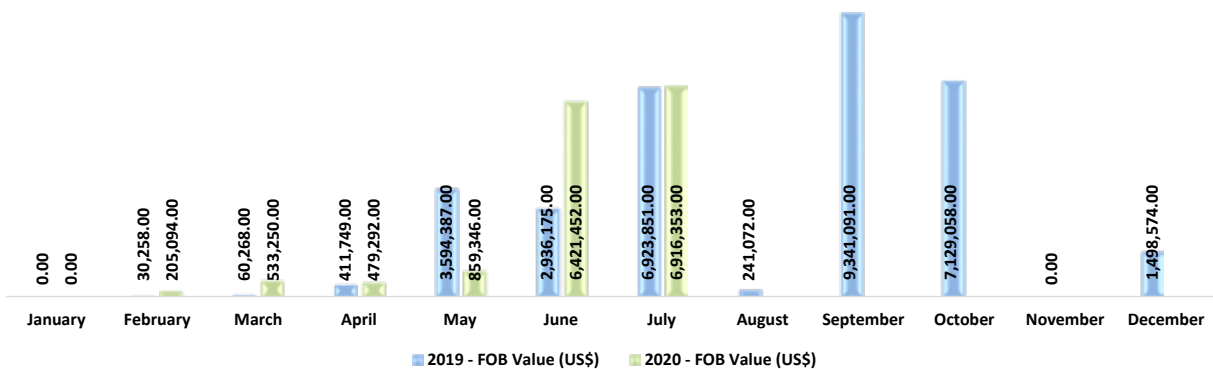


### ACCOUNTS FOR:

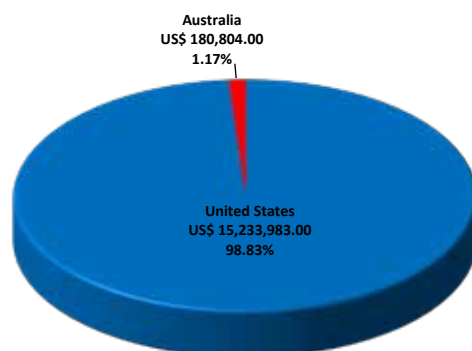
**16.64%** of the exported value of Sugar and Alcohol Complex in Goiás

*\*\*In relation to the exported value in the same period of 2019*

### GOIÁS - ETHANOL EXPORTS (US\$)



### GOIÁS: MAIN EXPORT DESTINATIONS FOR ETHANOL – 2020





Goiás is likely to continue to stand out as a major sugarcane producer in the 2020/21 crop and addressing most part of the production for the ethanol manufacture, due to the fact that many usines are specifically geared to distillery operation. The easing measures of various economic activities and the increase in the price of gasoline - which raise ethanol competitiveness - were not enough to boost the consumption of this fuel at the service stations. The forecast for ethanol price at the pump is that it will remain low, due to the need of some industries to generate cash flow, in addition to the lack of logistics for fuel storage.

Regarding the international sugar market, according to Rabobank, the global consumption of this commodity is expected to resume the growth and the production to increase by almost 5%, considering the recovery of the Indian and North American crops. In this context, Goiás has taken advantage of the strong demand, trading sugar with 52 countries this year. Unlike ethanol, which has concentrated sales to the USA, sugar from Goiás is shipped to several destinations, without the characteristic of concentration. The expectation is that the international demand for sugar remains strong, however, attention must be addressed to the production and negotiation capacity of India, which is a major player in this market.

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

In July, Ceasa registered growth rate of 7.15% in the amount of food trades, in relation to June. Regarding the traded value, however, there was a decrease of 1.28%, compared to the previous month. This situation reflects, mainly, the reduction in vegetables prices, still impacted by the coronavirus crisis.

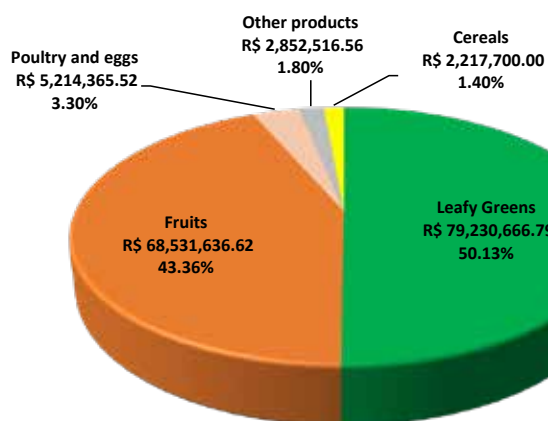
TRADE IN JULY

**VALUE: R\$ 158,046,885.48**

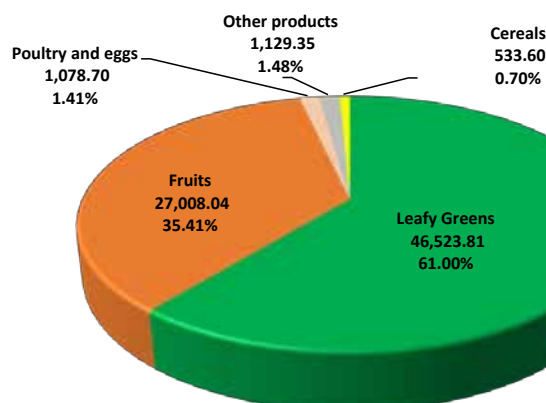
**VOLUME: 76,273.51 TONNES**

GOIÁS: PRODUCTS TRADED AT CEASA GOIÁS IN JULY 2020

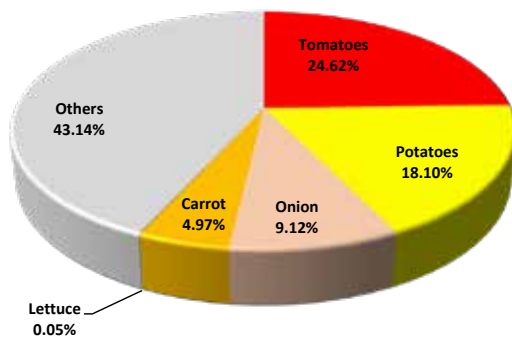
VALUE



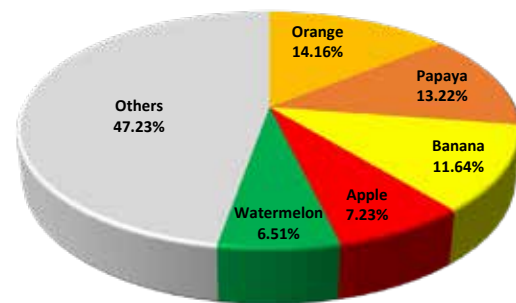
TONNES



### GOIÁS: SHARE OF THE TOP TRADED VEGETABLES - JULY 2020 (VOLUME)



### GOIÁS: SHARE OF THE TOP TRADED FRUITS - JULY 2020 (VOLUME)



ProHort, a publication provided by Conab, highlights the commercialization and price variation of 5 vegetables and 5 fruits of higher consumption, sold at the main Supply Centers in Brazil (São Paulo/SP, Rio de Janeiro/RJ, Vitória/ES, Curitiba/PR, Goiânia/GO, Brasília/DF, Fortaleza/CE and Recife/PE).

### GOIÁS: AVERAGE PRICE IN JULY AND PRICE VARIATION IN RELATION TO THE PREVIOUS MONTH

Vegetable/price (R\$/Kg)	VAR. %
Lettuce: R\$ 1.78	↓ 10.28%
Potato: R\$ 1.62	↓ 44.02%
Onion: R\$ 3.50	↓ 12.98%
Carrot: R\$ 1.04	↓ 21.00%
Tomato: R\$ 1.28	↓ 38.06%

Fruits/price (R\$/kg)	VAR. %
Banana: R\$ 3.08	↑ 12.63%
Orange: R\$ 1.39	↓ 13.62%
Apple: R\$ 4.22	↑ 18.05%
Papaya: R\$ 1.17	↑ 17.00%
Watermelon: R\$ 1.34	↑ 1.15%

Based on the surveys of these main products, it is observed that vegetables, which represent 61% of the volume traded in July, suffered great falls in price in relation to the previous month, mainly potatoes and tomatoes. Vegetables are extremely perishable, forcing farmers to sell their production at reduced prices to minimize the losses caused during the pandemic period, in which there has been a strong decline in demand, especially from bars and restaurants, sectors that have been negatively impacted by the health crisis.

Source: CEASA/PROHORT - CONAB, 2020.

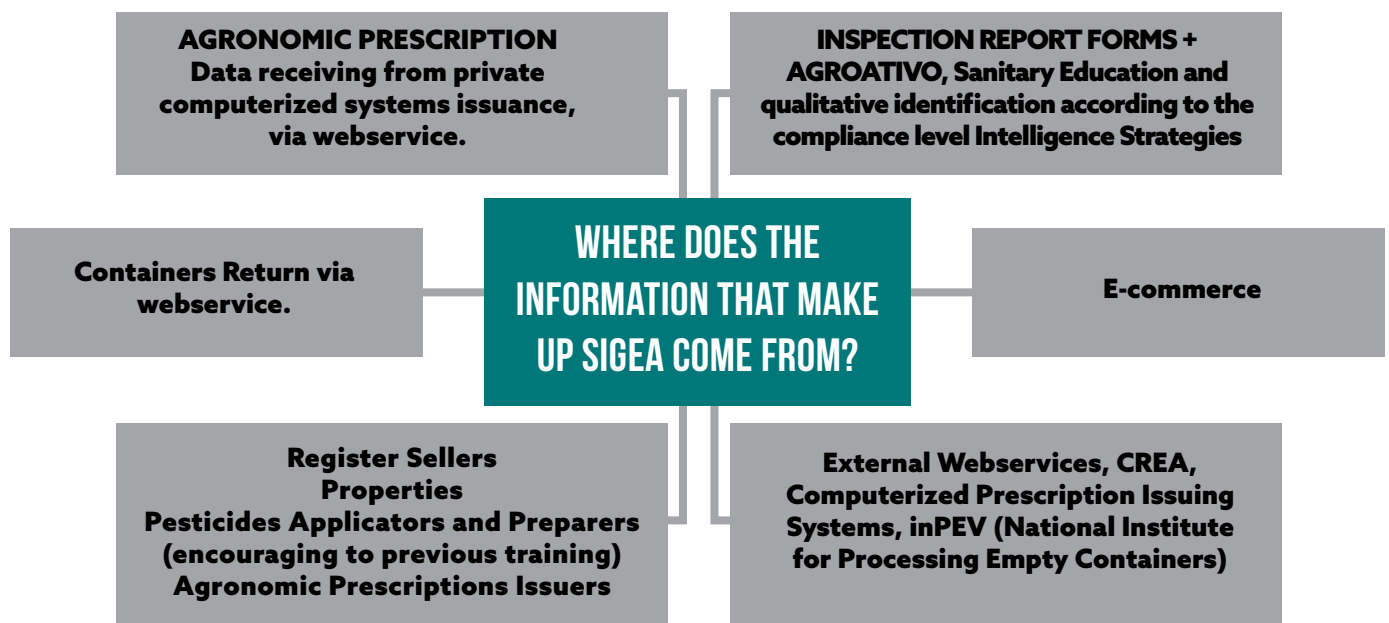
### SYSTEM OF INTELLIGENCE AND PESTICIDE MANAGEMENT IN GOIÁS - SIGEA

#### System of Intelligence and Pesticide Management in Goiás - SIGEA

SIGEA was implemented in 2019 by the Agency for the Agriculture and Livestock Defense in Goiás, supported by the federal and state legislations as well as the Normative Instruction No. 03/2019-Agrodefesa.

It is a system by which Agrodefesa efficiently receives and processes information on pesticides, with emphasis on the control of agronomic prescription, related to the use of pesticides in Goiás. Through this system, Agrodefesa performs the data management that support the inspection and sanitary education actions carried out by the Agency.

“The System of Intelligence and Pesticide Management in Goiás - SIGEA aims to control and monitor the activities carried out by individuals or legal entities, regarding the using, prescription, production, handling, offering, trading, empty containers return and receiving, or containing pesticide residues, and pesticide application and related services in the State of Goiás.” Normative Instruction 03/2019 - Agrodefesa.





## DATA RECEIVING FROM AGRONOMIC PRESCRIPTIONS - RESULTS ACHIEVED YEAR-TO-DATE 2020

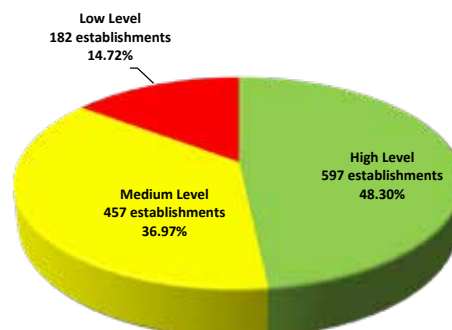
**146,164** AGRONOMIC PRESCRIPTIONS - DIGITAL DATA  
 FOR **28,476** ESTABLISHMENTS  
 IN THE **246** MUNICIPALITIES IN GOIÁS

## AGROATIVO: OPERATIONAL TOOL INSERTED IN SIGEA

- Aims at classifying rural and commercial establishments by means of a checklist assessment, regarding compliance with the pesticide legislation in the legal parameters on acquisition, storage, conditions of use and application, use of PPE, documentation (prescriptions, invoices, receipts of containers return), etc.
- Sanitary education instrument

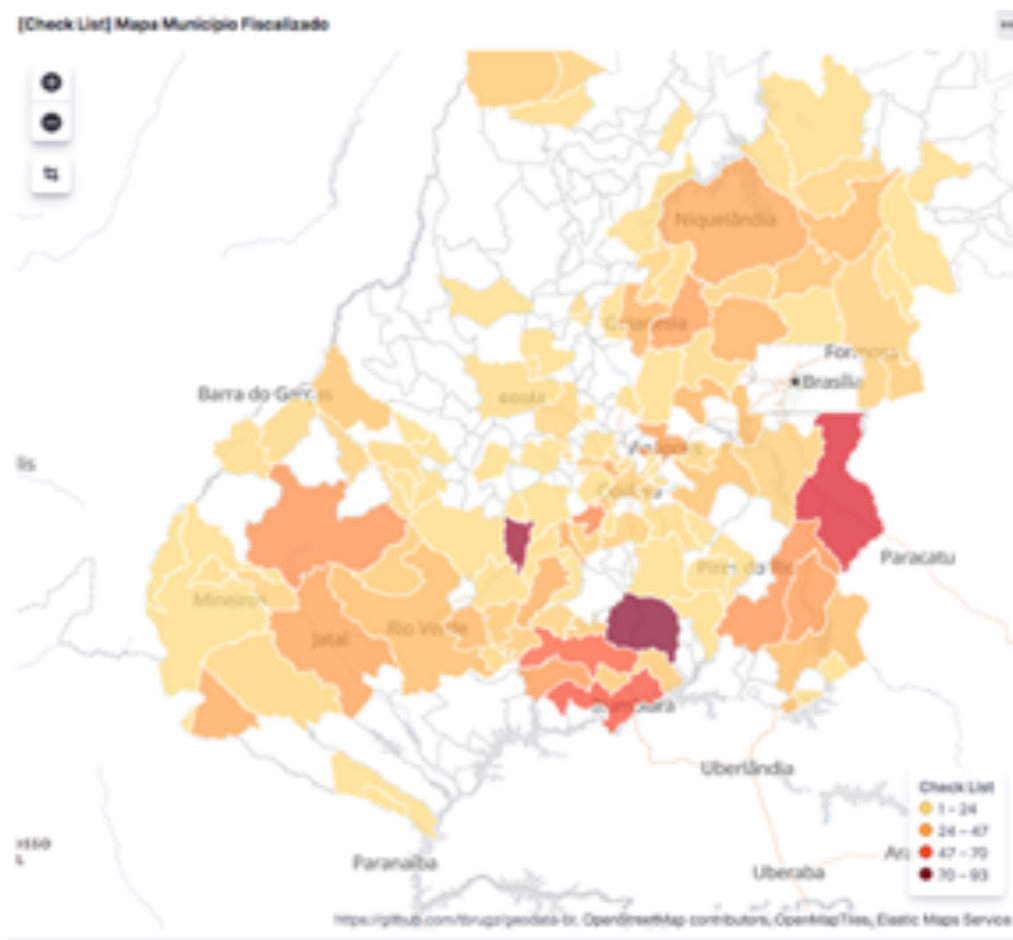
## GOIÁS: LEVEL OF COMPLIANCE WITH THE USE OF PESTICIDES IN RURAL PROPERTIES ASSESSED BY THE CHECKLIST, YEAR-TO-DATE 2020

**1,236** CHECKLISTS  
 CARRIED OUT ON  
**1,084** PROPERTIES IN  
 GOIÁS IN 2020



It was observed an **improvement of the compliance level** in 37.14% of the rural properties which had a second visit with the checklist assessment. This reflects the **commitment** of the rural farmer in doing the good agricultural practices and also the inspection service and sanitary education work carried out by inspectors and inspection agents of Agrodefesa.

### MUNICIPALITIES IN GOIÁS: GEOGRAPHIC DISTRIBUTION OF THE RURAL PROPERTIES ASSESSED BY AGROATIVO CHECKLISTS, YEAR-TO-DATE 2020



Note: Data until August 12, 2020

Tools such as SIGEA has great importance, once they optimize the procedure, previously performed by physical means and, since 2019, by digital means, which makes the inspection and sanitary education work by Agrodefesa even more efficient.

The Agroativo effectiveness is highlighted, since it has good indicators of high compliance with the legal parameters for the use of pesticides in rural properties in Goiás. Finally, the Agroativo activities encourage the safe and effective use of pesticides, with the aim at reducing harmful effects for humans and the environment, as well as contributing to the prevention of accidents arising from their improper use, meeting good agricultural practices and improved production, processing, trading, distribution and safe food consumption.

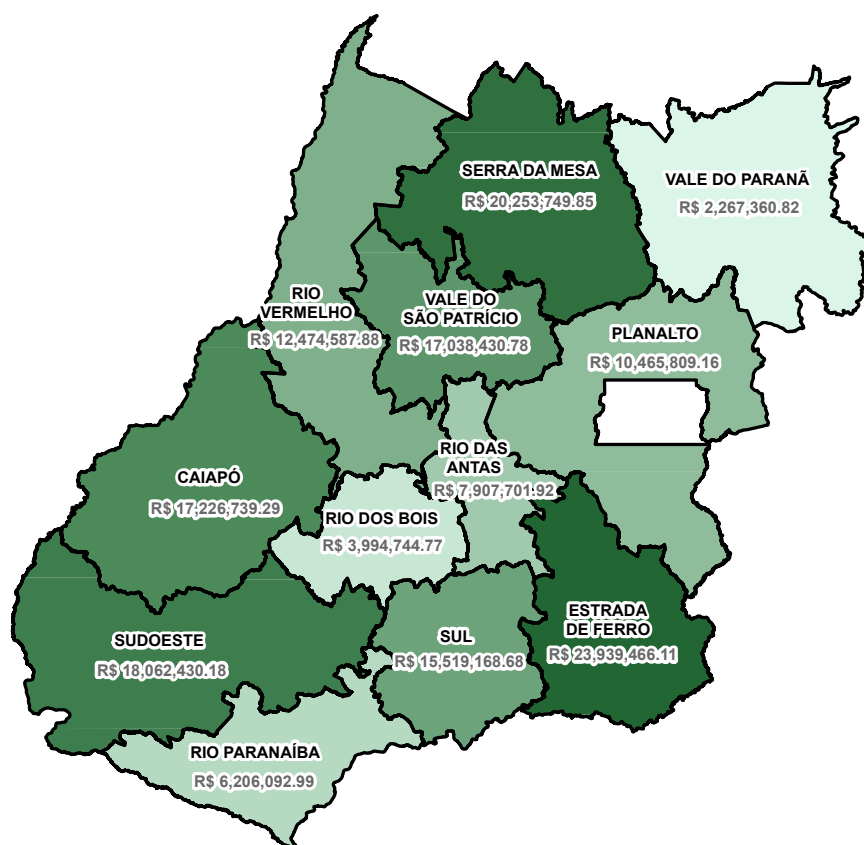
Source: Agrodefesa, 2020

## RURAL CREDIT

The Rural Credit Control and Monitoring System of Emater presents the results of rural credit projects in the 2019/2020 crop (July 1, 2019 to June 30, 2020 - preliminary results), that totaled R\$ 155.35 million. This amount is the result of 2,255 projects designed by Emater professionals in order to assist the small rural farmer. The objective is to contribute to the development of the farmers' activities and the local economy, through the promotion to the credit and technical assistance.

Emater is responsible for offering the farmers and ranchers in Goiás the advisory service for the elaboration of projects that provide access to various types of rural credit with financial agents. The amounts can be used both for funding and for investment in the agricultural area. In order to request this assistance, the rural farmers need to look for the local Emater office in their municipality.

### GOIÁS: VALUE OF RURAL CREDIT PROJECTS BY PLANNING REGION OF EMATER, CROP 2019/2020



GOIÁS: RURAL CREDIT PROJECTS - CONTRACTED VALUE, AVERAGE AND PERCENTAGE  
OF THE RESOURCE DISTRIBUTED BY PLANNING REGION OF EMATER

Planning Region of Emater	Total Amount of Credit Projects (R\$)	Average (R\$)	Percentage of the Resource
Estrada de Ferro	23,939,466.11	69,462.66	15.41%
Serra da Mesa	20,253,749.85	80,333.78	13.04%
Sudoeste	18,062,430.18	54,226.99	11.63%
Caiapó	17,226,739.29	87,863.35	11.09%
Vale do São Patrício	17,038,430.78	92,901.04	10.97%
Sul	15,519,168.68	60,844.05	9.99%
Rio Vermelho	12,474,587.88	75,148.12	8.03%
Planalto	10,465,809.16	55,642.17	6.74%
Rio das Antas	7,907,701.92	144,499.44	5.09%
Rio Paranaíba	6,206,092.99	56,433.34	3.99%
Rio dos Bois	3,994,744.77	33,841.21	2.57%
Vale do Paranã	2,267,360.82	59,994.47	1.46%
Total	155,356,282.43	68,894.14	100.00%

Emater's work meets the farmer needs, with regard to technical guidance, which through rural credit fulfills its function of fostering development in Goiás. The expectation is that the increase in resources for the current crop will further improve results.

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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