

AGRI IN DATA

APRIL 2021



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PRESENTATION

At this time, there is a critical moment in transmission of Covid-19, and as the number of cases increases, the country has experienced another problem, food insecurity. It is difficult to imagine a scenario like this in such a wealthy country, in which agribusiness numbers reported in this edition, points out the crop volume and a busy market season. This scene is a sad reality and it needs to be changed.

It is necessary to emphasize here, in this Agri in Data Bulletin, that the agricultural sector has a fundamental role to play. In one hand, agriculture has not stopped generating wealth, employment and income, on the other hand, it is necessary to highlight its work as a social agent. In this sense, Governor Ronaldo Caiado and the First Lady Gracinha Caiado have been at the forefront looking for actions to help these people in social vulnerability. In this battle, our protagonist is agriculture.

The State Secretariat of Agriculture, Livestock and Supply (Seapa) has taken notable actions as the Food Acquisition Program (PAA/GO), which starts an important stage this month. The funds raised by Seapa from the Ministry of Citizenship, and working in partnership with the Agency for Technical Assistance, Rural Extension and Agricultural Research in Goiás (Emater), food purchased from small farming producers begins to be donated to social entities identified and registered in the cities by the Organization of Volunteers of Goiás (OVG) and the Department of Social Policies (GPS). This donation comes at an essential time.

The Government of Goiás has worked extensively on this social issue and there are many examples, in addition to this PAA, in which agribusiness is responsible. Food security is a social issue and depends on public policies like these, announced by Governor Ronaldo Caiado, to better transform the reality of the needy families in Goiás.

We do celebrate a record crop, guaranteed production, exports that balance our economy, among many other aspects of the market. But we celebrate even more each donation that starts to be delivered this month, because here the agricultural sector also saves lives.



ANTÔNIO CARLOS DE SOUZA LIMA NETO

STATE SECRETARY OF AGRICULTURE, LIVESTOCK AND SUPPLY IN GOIÁS

INTRODUCTION

Brazil's agricultural sector has favored declining economic impacts from the Covid-19 pandemic crisis. According to CNA¹ and CEPEA², in 2020, the agribusiness GDP increased 24.3%, compared to 2019, a share of 26.6% of the Brazilian GDP.


The agricultural economic performance contributes to the creation of jobs in the sector and along the chains, in 2020, 58,277 new hires were reported in the country. According to CAGED³, in February 2021, 23,055 new jobs were created in Brazilian agriculture. In Goiás, February pointed to 1,453 new formal jobs, especially for temporary crops (801 jobs) and activities to support agriculture and livestock (578 jobs).

The increase in world demand and the high valued dollar boosted prices in the domestic market and impacted the growth in the Gross Value of Agricultural

Production (GVP). The Ministry of Agriculture estimates, for 2021, that the country's GVP exceeds the amount of R\$ 1.0 trillion, a value 12.1% higher than in 2020. In this scenario, Goiás stands out in the 6th position among the states, being responsible for 8.4% of the national GVP. The Gross Value of Agricultural Production in Goiás is estimated for 2021 at R\$ 87.1 billion, up 13.6% compared to 2020, with emphasis on agriculture - an increase of 16.1% compared to 2020, amount of R\$ 59.9 billion.

As for the Brazilian animal products and meat production, data from the Quarterly Slaughter Survey carried out by IBGE⁴, for 2020, point to an increase in the pork slaughter (6.4%), poultry (3.3%) and egg production (3.0%), compared to 2019. However, beef and leather production decreased 8.5% and 9.4%, respectively, due to the low supply of animals for slaughter.





CONAB⁵ projects a new record for national grain production in the 2020/21 season, with 272.3 million tons, up 6.0% compared to the previous crop. In Goiás, the estimated growth is 1.6%, compared to the previous crop, and may reach 28.0 million tons of grains, a share of 10.3% of the national volume. The Systematic Survey of Agricultural Production (LSPA), released by IBGE for 2021, points to an increase in production compared to 2020, with emphasis on tomatoes (6.8%), orange (12.3%) and grapes (11.0%).

Brazilian agribusiness exported US\$ 6.5 billion in February 2021, an increase of 2.8% compared to the same month in 2020. In Goiás, 66.6% of the total traded in the same period this year were agribusiness products, which amounted US\$ 242.32 million, highlighted by the meat complex that obtained the largest share, 45.7% of the total exported by the agribusiness.

Regarding the weather, according to INMET⁶, in the Center-West region, irregular rainfall occurred in March, with more consistency in the north of Mato Grosso, west of Goiás and the Federal District. In these areas, according to CONAB, the producing regions have satisfactory soil water and favored soybean crops

in grain filling and also corn second-crop. The forecast for Center-West Region in the coming months indicates that the rains are expected to occur above average over most of the areas except for northwest and south of Mato Grosso, south of Goiás and Mato Grosso do Sul, in addition to the west of Goiás, where the forecast indicates rainfall below average. Relevant temperature forecast above average should come during the following months. It is estimated dry weather returns in the Center-West region in the months of April and May/2021.

The results of the crop production and livestock in the state come from partnerships among rural producers and the state government, that focus on improving yield and strengthening all links in the productive chain, guaranteeing quality supply to people in Goiás.

1 CNA - National Confederation of Agriculture of Brazil

2 CEPEA - Center of Advanced Studies on Applied Economics

3 CAGED - General Register of Employed and Unemployed Persons

4 IBGE - Brazilian Institute of Geography and Statistics

5 CONAB - National Food Supply Company

6 INMET - Brazilian National Institute of Meteorology

CATTLE/BEEF

The fed cattle index CEPEA¹/B3 closed at R\$ 314.45, on 03/26/2021, an increase of 3.7% in the month. Despite a constant arroba² appreciation, increases in feed costs and animal replacement impact the farm sector profitability. In the Goiás market, according to the fourth bulletin of IFAG³ released in March, the average price of live cattle was R\$ 289.48 per arroba, an increase of 0.4% compared to the previous week.

In the First two months of 2021, according to data from the Ministry of Economy, Brazilian cattle exports amounted to US\$ 1.1 billion, a decrease of 6.7% compared to the same period of last year. Beef sales accounted for 9.1% of the total agribusiness exports in Brazil in this two-month period and expects demand to increase in 2021. In this same period, the international sales in Goiás are projected to rise, driven by Chinese demand.

In the national and regional scenario, the number of head slaughtered remains restricted, which supports the high prices levels. In 2020, 29.7 million head of cattle were slaughtered in the country - an 8.5% drop, compared to 2019. The increased price paid by consumers contrasts with the low purchasing power, which supports local beef availability.

The record prices of replacement animals and grains built the cost of production and impacted the rancher's profitability. In this context, success in the activity comes from technified farms, management efficiency and investments.

1 CEPEA - Center of Advanced Studies on Applied Economics

2 Arroba - a 15-kilo unit of weight that is a commonly used as a benchmark for cattle prices in Brazil

3 IFAG - Institute for the Strengthening of Agriculture in Goiás

GOIÁS: CATTLE SLAUGHTER IN 2020

2.8 million head	↓ 7.3%*	
750.1 thousand tons carcass	↓ 4.3%*	4th largest producer**
3.0 million units of tanned leather	↓ 2.0%*	4th largest producer**

* Compared to the previous year. ** Among the states and the Federal District

GOIÁS: GROSS VALUE OF BEEF PRODUCTION - 2021 ESTIMATE

R\$ 14.1 billion	↑ 13.7%*	4th highest Gross Value of Production **
9.6% of the national Gross Value of Beef Production		
52.0% of the Gross Value of Livestock Production in Goiás		

* Compared to the previous year. ** Among the states and the Federal District

GOIÁS: BEEF EXPORTS

YEAR-TO-DATE (JANUARY TO FEBRUARY)

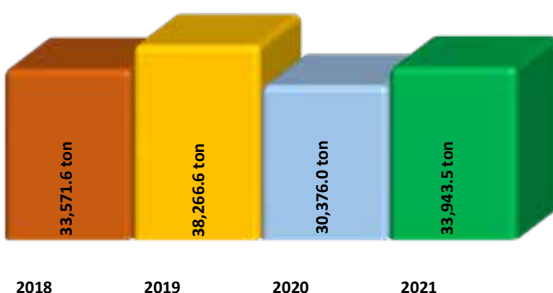
US\$ 153.2 million	↑ 11.9%*	
33.9 thousand tons	↑ 11.7%*	
3rd largest exporter **		

FEBRUARY 2021

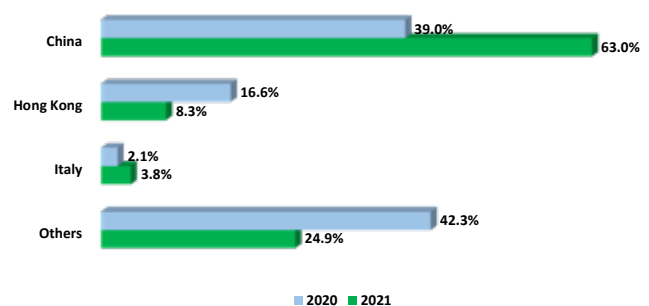
US\$ 80.0 million	↑ 26.6%*	
17.7 thousand tons	↑ 19.7%*	

* Compared to the same period of the previous year. ** Among the states and the Federal District

GOIÁS: BEEF EXPORTS - YEAR-TO-DATE (JANUARY TO FEBRUARY)



GOIÁS: SHARE OF THE MAIN DESTINATIONS IN THE AMOUNT OF BEEF EXPORTS *



* Year-to-date (January to February)

PORK/HOGS

The prices of live swine have had negative variances in important markets in the country. In the regional market, according to the IFAG Bulletin, average prices remained stable in the fourth week of March, R\$ 6.50/kg.

In the international scenario, pork shipments increased in the country. According to the Ministry of Economy, in February 2021, exports reached 79.9 thousand tons, up 20.0% compared to the same period of 2020 - an amount of US\$ 184.3 million.

China was the world's largest importer of pork in 2020, and Brazil stood out as a supplier in this market due to African Swine Fever. For 2021, forecasts are affected by the uncertainties about the herd rebuilding in the Asian country and the possibility of new outbreaks.

The increase of Chinese and domestic demand drove to the growth of hog slaughter in the country. According to IBGE¹ data, in 2020, 49.3 million heads were slaughtered, an increase of 6.4% compared to 2019, which produced 4.5 million tons of pork.

The rise in grain prices directly impacts producing costs, making it difficult for pig farmers to maintain profitability. According to the Swine Production Cost Index, released by Embrapa² In February 2021, animal feed costs accounted for 82.2% of the total production value, an increase of 43.3% in the last 12 months.

¹ IBGE – Brazilian Institute of Geography and Statistics

² EMBRAPA - Brazilian Agricultural Research Corporation



GOIÁS: HOG SLAUGHTER IN 2020

1.9 million head	↓ 1.8%*	
183.5 thousand tons carcass	↑ 2.9%*	8th largest producer **

* Compared to the previous year. ** Among the states and the Federal District

GOIÁS: GROSS VALUE OF PORK PRODUCTION - 2021 ESTIMATE

R\$ 1.2 billion	↓ 2.6%*	8th highest Gross Value of Production**
4.1% of the national Gross Value of Pork Production		
4.3% of the Gross Value of Livestock Production in Goiás		

GOIÁS: PORK EXPORTS

YEAR-TO-DATE (JANUARY TO FEBRUARY)

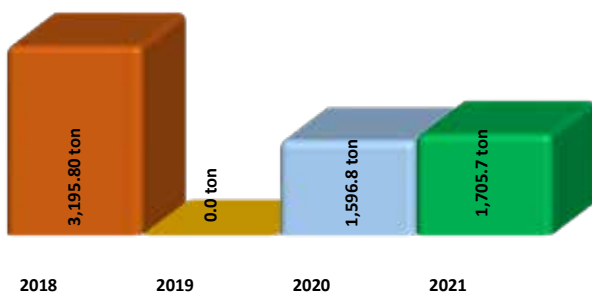
US\$ 2.9 million	↑ 42.7%*
1.7 thousand tons	↑ 6.8%*
7th largest exporter **	

FEBRUARY 2021

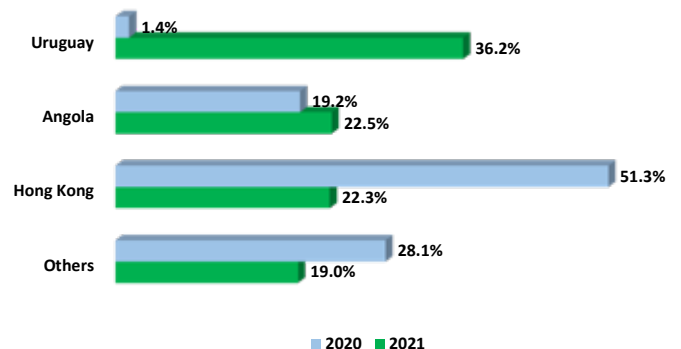
US\$ 1.7 million	↑ 50.7%*
1.0 thousand tons	↑ 24.5%*

* Compared to the same period of the previous year. ** Among the states and the Federal District

GOIÁS: PORK MEAT EXPORTS - YEAR-TO-DATE (JANUARY TO FEBRUARY)



GOIÁS: SHARE OF THE MAIN DESTINATIONS IN THE AMOUNT OF PORK MEAT EXPORTS *



* Year-to-date (January to February)

POULTRY/EGGS



The 2020 poultry and egg production was increased and stands out in the national scenario, mainly for the competitiveness against other animal proteins. According to IBGE¹, 6.0 billion head were slaughtered in the country in 2020, a rise of 3.3% compared to the last year - the highest level since being recorded by the current series which started with 1997 statistics. The Brazilian egg production was 4.0 billion dozen in 2020, a 3.0% surge compared to 2019. This number is supported by a growing domestic demand for lower animal protein prices, led by the economic crisis of COVID-19 pandemic.

In the first two months of 2021, according to the Ministry of Economy, poultry national exports reached 622.6 thousand tons, a decrease of 5.6% from 2020 - amount of US\$ 934.7 million. Goiás holds a share of 4.8% in the total volume and exported to 52 countries in this period.

As for 2020, exports of eggs and yolks totaled 15.1 thousand tons, an amount of US\$ 47.9 million. Goiás egg production is fully to the domestic market. In the country, as reported by the Quarterly Survey of IBGE for 2020, the purpose of egg production was 80.2% for consumption and 19.8% for incubation.

According to the Poultry Production Cost Index (ICP Frango/Embrapa) of February 2021, the animal feed costs - which account for 77.7% of the total production values - increased 44.4% in the last 12 months.

Prices of the dozen eggs closed at R\$ 3.48 (average price paid to the producer) in March, 6.3% up from February, and price of live poultry was R\$ 4.50/Kg, according to IFAG.

The challenges for this supply chain are related to the growth in production costs, so that producers need to develop strategies, evaluate investments and be aware of the market conditions. It is expected to boost poultry exports and competitiveness against other meats in the regional trade.

¹ IBGE – Brazilian Institute of Geography and Statistics



GOIÁS: POULTRY SLAUGHTER IN 2020

415.1 million head	↑ 2.1%*	
931.6 thousand tons	↑ 0.9%*	6th largest producer **

* Compared to the previous year. ** Among the states and the Federal District

GOIÁS: EGG PRODUCTION IN 2020

212.4 million dozen	↓ 3.1%*	8th largest producer **
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* Compared to the previous year. ** Among the states and the Federal District

GOIÁS: GROSS VALUE OF POULTRY PRODUCTION - 2021 ESTIMATE

R\$ 5.5 billion	↑ 2.4%*	
		6th highest Gross Value of Production**
6.5% of the national Gross Value of Poultry Production		
20.3% of the Gross Value of Livestock Production in Goiás		

* Compared to the previous year. ** Among the states and the Federal District

GOIÁS: GROSS VALUE OF EGG PRODUCTION - 2021 ESTIMATE

R\$ 943.6 million	↑ 3.4%*	
		6th highest Gross Value of Production**
5.9% of the national Gross Value of Egg Production		
3.5% of the Gross Value of Livestock Production in Goiás		

* Compared to the previous year. ** Among the states and the Federal District

POULTRY/EGGS

GOIÁS: POULTRY MEAT EXPORTS

YEAR-TO-DATE (JANUARY TO FEBRUARY)

US\$ 54.2 million

↓ **11.4%***

29.7 thousand tons

↓ **10.9%***

4th largest exporter**

FEBRUARY 2021

US\$ 28.5 million

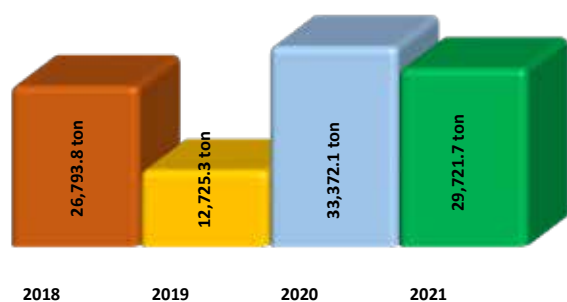
↓ **3.2%***

15.5 thousand tons

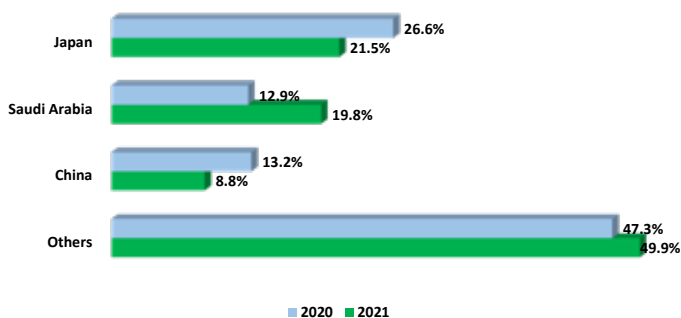
↓ **6.3%***

* Compared to the same period of the previous year. ** Among the states and the Federal District

GOIÁS: POULTRY MEAT EXPORTS - YEAR-TO-DATE (JANUARY TO FEBRUARY)



GOIÁS: SHARE OF THE MAIN DESTINATIONS IN THE AMOUNT OF POULTRY MEAT EXPORTS*



* Year-to-date (January to February)

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

In 2020, The volume of milk purchased by industries in the country is up 2.1% from the previous year, driven by UHT milk domestic demand and dairy exports. The rising trend in prices paid to milk producers since January finished and started to decrease. In addition, a surge in production costs was noticed, which pushed the profitability of dairy farming and can reduce investment in the chain.

According to the March Bulletin of Dairy Market in Goiás, compared to February, a decrease in the average prices is observed for mozzarella cheese and condensed milk. Price forecasts have been raised for powdered milk, powdered cream and UHT whole milk, resulting in 1.14% down in the index for dairy products in March.

Dairy exports have been reduced in the first two months of 2021, according to the Ministry of Economy, 7.8% lower in value, compared to the same period in 2020. Although unfavorable exchange rate, powdered milk imports increased in this period, 96.5% higher in volume from the same period of last year, pushing prices in the domestic market.

Among other factors, the worsening of dairy farmer's profitability impacts investments and supplies to the market. January to February, according to the Milk Production Cepea index, purchasing of milk in the country reduced 4.5%. In February of this year, milk producers needed an average of 42.2 liters of milk to buy a 60 kg/bag of corn, 2.4% more than in January and 15.7% more than in the same period last year.

In the farmgate scenario, the producer continues to lose purchasing power and competitiveness with the price of milk. However, if domestic demand recovers in the coming months and availability is still low, the price of milk paid to the producer is likely to rise. The rancher must keep aware of market dynamics, monitor costs, prices, demand and international production, in order to make the best decision.



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)
February	2.83	19.95	19.96	9.11 ⁽¹⁾	27.63
March	2.84	20.7	19.04	8.43 ⁽²⁾	27.77
Variance					
March/February	0.37%	3.78%	-4.59%	-2.98%	0.52%
Share	20%	23%	37%	14%	6%
Dairy Products Variance in March: -1.14%					

(1) Price in January. (2) Price in February.

Source: MilkPoint Mercado. Provided by: Secretary of Economy in Goiás

DAIRY

GOIÁS: MILK PRODUCTION IN 2020

2.5 billion liters	↓ 5.2%*
	6th largest producer**
Share of 9.8% of the national production	

* Compared to the previous year. ** Among the states and the Federal District

GOIÁS: GROSS VALUE OF MILK PRODUCTION - 2021 ESTIMATE

R\$ 5.4 billion	↑ 5.5%*	6th highest Gross Value of Production**
11.4% of the national Gross Value of Milk Production		
20.0% of the Gross Value of Livestock Production in Goiás		

* Compared to the previous year. ** Among the states and the Federal District

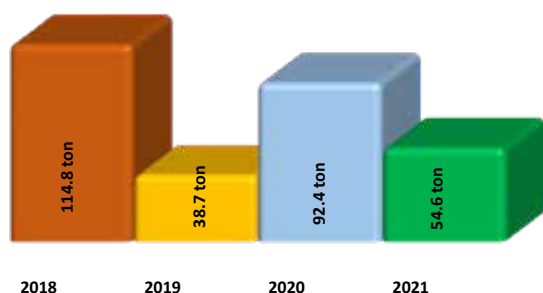
GOIÁS: DAIRY EXPORTS

YEAR-TO-DATE (JANUARY TO FEBRUARY)

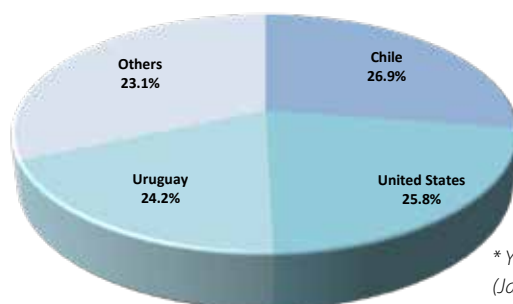
US\$ 114.1 thousand	↓ 32.0%*
54.6 tons	↓ 40.8%*
	8th largest exporter**
FEBRUARY 2021	
US\$ 73.4 thousand	↓ 16.0%*
28.2 tons	↓ 29.6%*

* Compared to the same period of the previous year. ** Among the states and the Federal District

GOIÁS: DAIRY EXPORTS - YEAR-TO-DATE (JANUARY TO FEBRUARY)



GOIÁS: SHARE OF THE MAIN DESTINATIONS IN THE AMOUNT OF DAIRY EXPORTS *



* Year-to-date (January to February)

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

SOYBEAN

SEAPA
Secretaria de
Estado de
Agricultura,
Pecuária e
Abastecimento



A delayed soybean harvest in large producing regions impacted Brazil grain market, particularly in availability and exported volume. In the first two months of 2021, a decline of 36.9% in volume of soybean products shipped was reported, relative to 2020, according to data from the Ministry of Economy.

Regarding the 2020/21 soybean crop in the country, CONAB¹ estimated that 69.8% of the planted area was harvested, at the same date last year, this number was 78.7%. In Goiás, according to CONAB on March 26, 94.0% of the total estimated area for this season was harvested, while at the same date last year, it was 98.0% - a slight decrease.

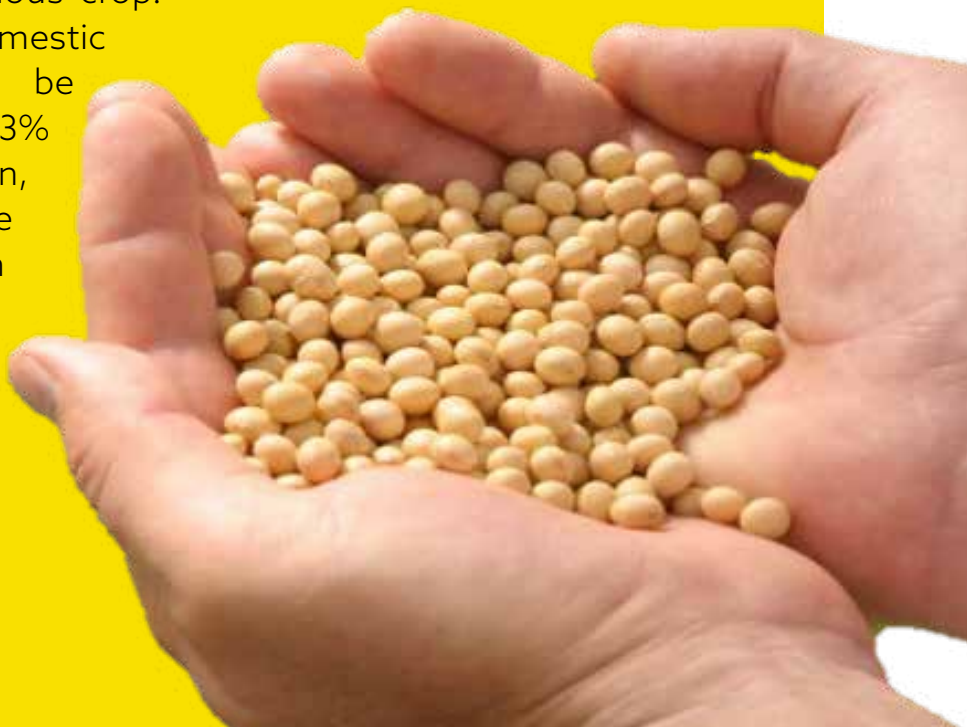
The commodity prices are expected to remain at high levels, supported by the dollar exchange rate, strong international demand, low stock in the USA and a decrease in Argentine production. The Soybean Index ESALQ/BM&FBOVESPA-PARANAGUÁ registered an average of R\$ 179.30/bag on 03/09/2021, the highest level since being recorded by the current series which started with 2006 statistics. In the regional scenario, according to IFAG², in Goiás, the average price of soybeans was R\$ 158.31/bag, on 3/26/21.

Brazilian 2020/21 production is projected to set a new record, 135.1 million tons of soybeans - an increase of 8.2% in production, 4.0% in yield and 4.1% in the acreage, compared to the previous crop.

CONAB estimates domestic consumption to be between 33.3% to 36.3% of the 2020/21 season, especially used for the production of soybean crush and the animal's feed to supply the meat chain.

¹ CONAB – National Food Supply Company

² IFAG - Institute for the Strengthening of Agriculture in Goiás



SOYBEAN

GOIÁS: SOYBEAN CROP - 2020/21 ESTIMATE

13.7 million tons	↑ 4.3%*
10.2% of national production	4th largest producer**
3.7 million hectares	↑ 4.2%*
Average yield: 3.7 ton/ha	↑ 0.1%*

* Compared to the previous crop. ** Among the states and the Federal District

GOIÁS: GROSS VALUE OF SOYBEAN PRODUCTION - 2021 ESTIMATE

R\$ 31.5 billion	↑ 21.5%*
4th highest Gross Value of Production **	
9.4% of the national Gross Value of Soybean Production	
52.6% of the Gross Value of Crop Production in Goiás	

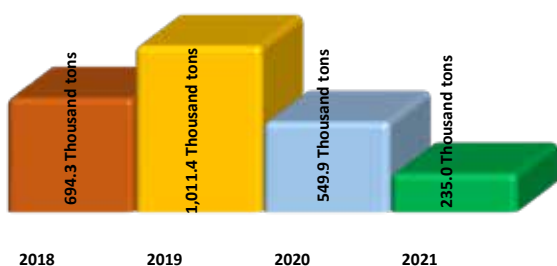
* Compared to the previous year. ** Among the states and the Federal District

GOIÁS: SOYBEAN COMPLEX EXPORTS

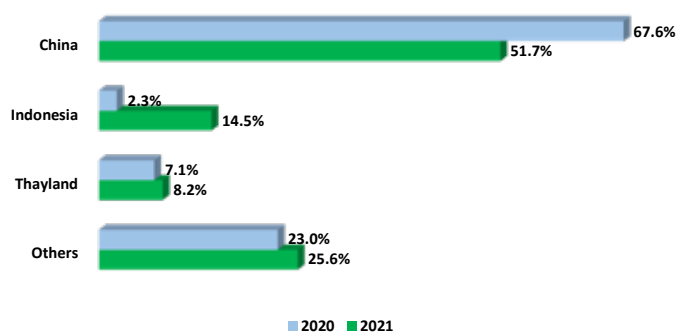
YEAR-TO-DATE (JANUARY TO FEBRUARY 2021)	
US\$ 99.1 million	↓ 49.1%*
235.0 thousand tons	↓ 57.3%*
	4th largest exporter**
FEBRUARY 2021	
US\$ 70.4 million	↓ 53.2%*
166.0 thousand tons	↓ 60.9%*

* Compared to the same period of the previous year. ** Among the states and the Federal District (volume)

GOIÁS: SOYBEAN COMPLEX EXPORTS - YEAR-TO-DATE (JANUARY TO FEBRUARY)



GOIÁS: SHARE OF THE MAIN DESTINATIONS IN THE AMOUNT OF SOYBEANS EXPORTS (JANUARY TO FEBRUARY 2021)



CORN

SEAPA
Secretaria de
Estado de
Agricultura,
Pesquisa e
Abastecimento



É POR
VOCÊ
QUE A
CENTE
FAZ

It is estimated that corn production, in the 2020/21 season, responds for 39.7% of the country's grain crop - total of 108.1 million tons, up 5.4% from the 2019/20 crop, according to the 6th CONAB¹ survey. Most of the cereal is produced in the second-crop and harvesting delays of soybean, due to adverse weather conditions in large producing regions, have impacted the progress of the safrinha planting in the country.

For Goiás corn crop, CONAB projected a delay in planting in the state. On 03/26/2021, farmers planted only 75.0% of the estimated area, while on 03/20/2020, planting was already finalized. Therefore, the farmers need to be aware of the climatic changes that can affect the development of crops, mainly, because planting outside of the ideal weather window carries the risk of lower yields.

Regarding corn exports, national shipments in the first two months of 2021, according to data from the Ministry of Economy, totaled 3.2 million tons, an increase of 32.9%, compared to the same period in 2020. In Goiás, although exports have grown in February 2021, compared to February 2020, there was a decrease in year-to-date results.

As for prices, the Corn Index ESALQ/BM&FBovespa, on 03/29/2021, registered a new daily real record at R\$ 94.40/bag. In the regional market, according to the Bulletin of IFAG², released on 03/26/2021, the weekly average price of corn (bag of 60 kg) was R\$ 78.38. Data indicate prices at high levels, mainly due to strong demand, the appreciation of the dollar, low world stocks, market concerns about late planting of the safrinha crop and the high transportation costs.

¹ CONAB – National Food Supply Company

² IFAG - Institute for the Strengthening of Agriculture in Goiás



CORN

GOIÁS: TOTAL CORN CROP - 2020/21 ESTIMATE

12.1 million tons	↓ 3.9%*
Share of 11.2% of the national production	3rd largest producer**
1.8 million hectares	↓ 3.8%*
Average yield: 6.6 ton/ha	↓ 0.1%*

* Compared to the previous crop. ** Among the states and the Federal District

GOIÁS: GROSS VALUE OF CORN PRODUCTION - 2021 ESTIMATE

R\$ 13.7 billion	↑ 24.5%*
3rd highest Gross Value of Production**	
10.7% of the national Gross Value of Corn Production	
22.9% of the Gross Value of Crop Production in Goiás	

* Compared to the previous year. ** Among the states and the Federal District

GOIÁS: CORN EXPORTS

YEAR-TO-DATE (JANUARY TO FEBRUARY 2021)

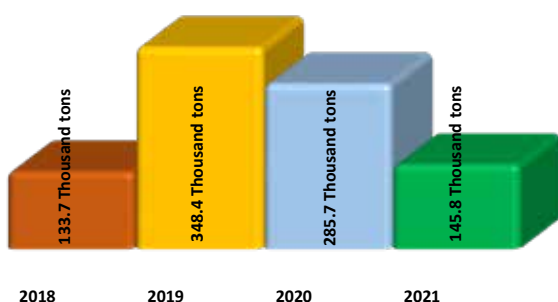
US\$ 28.1 million	↓ 40.8%*
145.8 thousand tons	↓ 49.0%*
	4th largest exporter**

FEBRUARY 2021

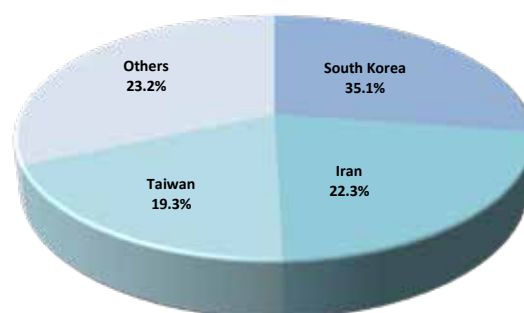
US\$ 7.6 million	↑ 3,477.7%*
35.5 thousand tons	↑ 6,305.7%*

* Compared to the same period of the previous year. ** Among the states and the Federal District

GOIÁS: CORN EXPORTS - YEAR-TO-DATE (JANUARY TO FEBRUARY)



GOIÁS: SHARE OF THE MAIN DESTINATIONS IN THE AMOUNT OF CORN EXPORTS (JANUARY TO FEBRUARY 2021)



BANANA

SEAPA
Secretaria de
Estado de
Agricultura,
Pecuária e
Abastecimento



Banana is a tropical fruit grown in nearly all national areas. Planting is recommended for horizontal fields or slightly surface inclination areas, which facilitates management, mechanization and harvesting, and is also established in slope areas up 30% elevations, provided that erosion control measures are taken. It develops between temperatures of 15° to 35° C, under this reference, the plant can suffer physiological disturbances that may lead to quality reduction. The banana tree needs high and continuous water and, due to its morphology, the best productive results are with a 1,900 mm total annual rainfall fairly constant.

Banana production in Brazil is basically destined to the domestic market consumption. In 2020, exports of bananas reached 84.3 thousand tons, Uruguay and Argentina as main destinations. Goiás did not export in 2020. According to 2021 IBGE¹ estimates, 6.9 million tons should be produced in the country, an increase of 3.3%, compared to 2020 - Goiás holds a share of 2.9% of this total. The planted area in 2021 is estimated at 473.3 thousand hectares and the banana stands out in the national fruit production as the second largest fruit planted area in the country, the first one is orange. The states of São Paulo, Bahia, Minas Gerais and Santa Catarina are the main producers, accounting for 50.7% of the national banana production.

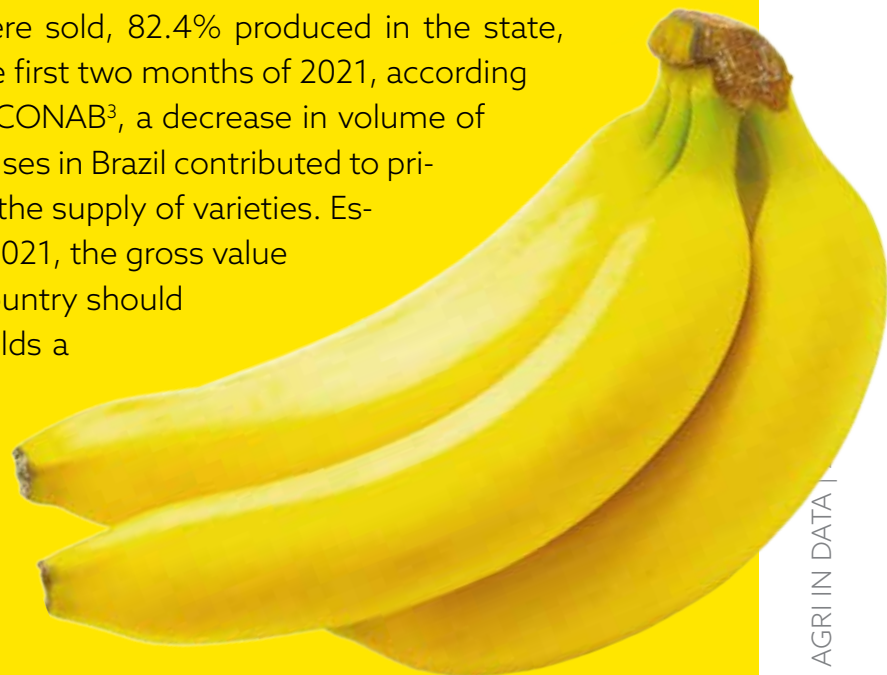
Regarding commercialization in Goiás, by means of CEASA², 25.4 thousand tons of bananas were sold, 82.4% produced in the state, amount of R\$ 80 million. In the first two months of 2021, according to the 3rd ProHort Bulletin of CONAB³, a decrease in volume of bananas traded in the warehouses in Brazil contributed to price fluctuations, mainly due to the supply of varieties. Estimated data from MAPA⁴ for 2021, the gross value of banana production in the country should reach R\$ 13.7 billion, Goiás holds a share of 3.0% of this value.

¹ IBGE – Brazilian Institute of Geography and Statistics

² CEASA - Goiás Supply Center S.A

³ CONAB – National Food Supply Company

⁴ MAPA – Ministry of Agriculture, Livestock and Food Supply



BANANA

GOIÁS: BANANA CROP - 2020/21 ESTIMATE

202.9 thousand tons	↓ 1.3%*
	10th largest producer**
13.0 thousand hectares	↑ 1.4%*
15.6 tons/ha	↓ 2.6%*
2,544 producing farms	109 producing cities

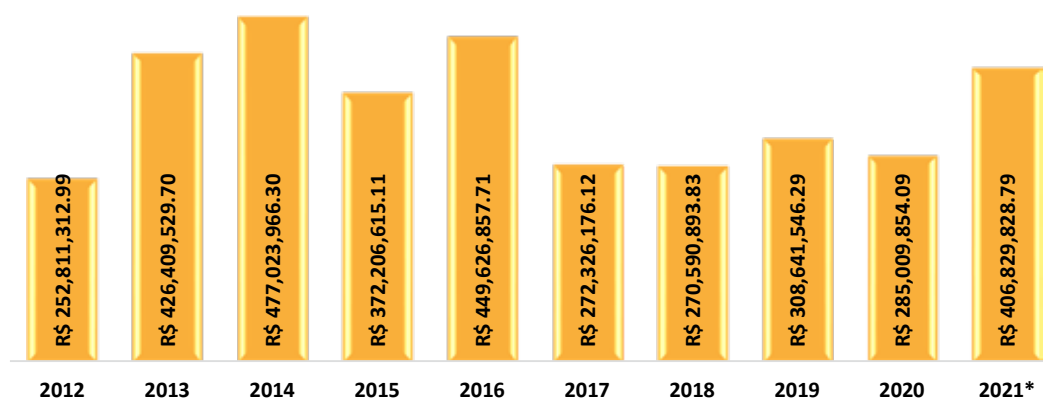
* Compared to the previous crop. ** Among the states and the Federal District

GOIÁS: GROSS VALUE OF BANANA PRODUCTION - 2021 ESTIMATE

R\$ 406.8 million	↑ 42.7%*
11th highest Gross Value of Production**	
0.7% of the Gross Value of Crop Production in Goiás	

* Compared to the previous year. ** Among the states and the Federal District

GOIÁS: GROSS VALUE OF BANANA PRODUCTION - HISTORICAL STATISTICS



*Reference data: March/2021

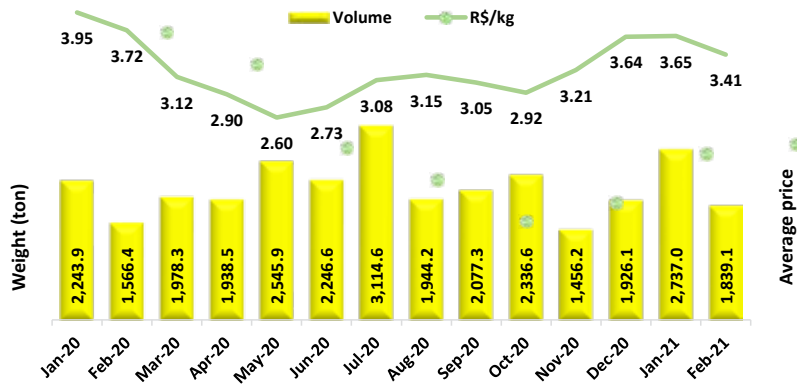
GOIÁS: TRADE AT CEASA

FEBRUARY 2021

1.8 thousand tons

77.9% produced in Goiás

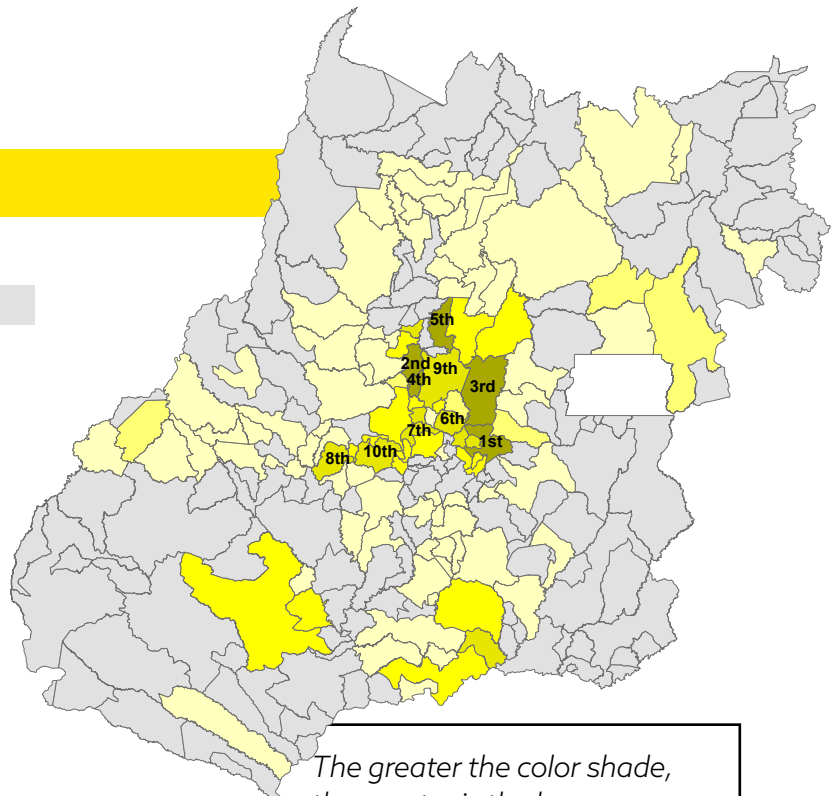
Fruit-banana respond to **60.9%**
of the varieties sold at Ceasa



CITIES WITH BANANA PRODUCTION*

TOP TEN PRODUCING CITIES

Position	City
1st	Anápolis
2nd	Uruana
3rd	Pirenópolis
4th	Itaguara
5th	Santa Isabel
6th	Petrolina de Goiás
7th	Itaçu
8th	São Luís de Montes Belos
9th	Jaraguá
10th	Anicuns



The greater the color shade,
the greater is the banana
production in the city.

BANANA PESTS CONTROL AND PREVENTION PROGRAM

The Banana Plant Protection Program of Agrodefesa uses measures to control and prevent banana pests and provides guidelines to growers in order to ensure the plant health. It emphasizes the use of certified banana seedlings in Goiás, resulting in phytosanitary planting quality. As a consequence, a better production performance is expected, offering excellent quality fruit to consumers in Goiás and to reach new markets, especially for the apple banana variety.

MAIN GOALS:

- To prevent the introduction or dissemination of quarantine pests;
- To maintain phytosanitary and epidemiological surveillance service, aiming at preventing and managing plant pests;
- To take actions to monitor, supervise and audit methods.

PROGRAM STRATEGIES:

- Phytosanitary education;
- Phytosanitary survey;
- Prohibition against transit of bananas in clusters;
- Prohibition against transit of fruits with leaves or parts of the plant;
- Registration and re-registration of producing properties;

2021 REGISTRATION FEE

0 to 10 ha
R\$ 35.76

10.1 to 50 ha
R\$ 53.63

over 50 ha
R\$ 71.49

Note: Registration is mandatory and important for farmers to access crop pest monitoring, collect sample and laboratory analysis, when there are suspect quarantine pests.

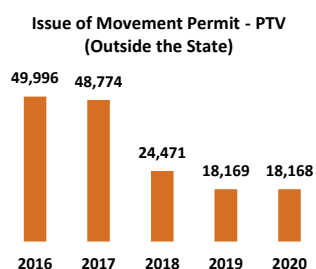
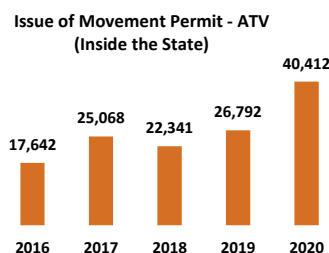
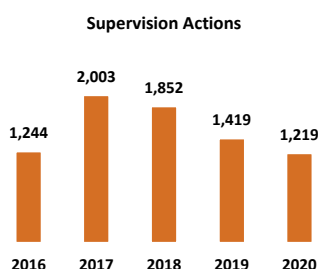
- The entire crop acreage is destroyed in case of infested or abandoned banana trees;
- Recommendation for certified seedlings use, which are micropropagated plants, free from pests and produced in laboratories, biofactories or nurseries orchards;
- Authorization for Seedlings Acquisition (AAM) produced out of the State, which must be requested on the Agrodefesa website (www.agrodefesa.go.gov.br).
- Transit inspection:
 - Fruit transportation covered by the Plant Transit Authorization (ATV) within the State;
 - Plant Movement Permit (PTV) for transit among States.
 - Use of boxes:
 - new or returnable plastic ones under sanitization procedures;
 - disposable cardboard boxes;
 - new non-returnable wooden packaging material for first use.

**WHERE ARE THE PLASTIC BOX
SANITIZING COMPANIES IN GOIÁS?**

City	Number
Anápolis	2
Buriti Alegre	1
Goiânia	2
Itaguaru	1

Note: Normative Instruction (MAPA) n° 17, of May 31, 2005 / Normative Instruction (Agrodefesa) n° 12, of December 17, 2018.

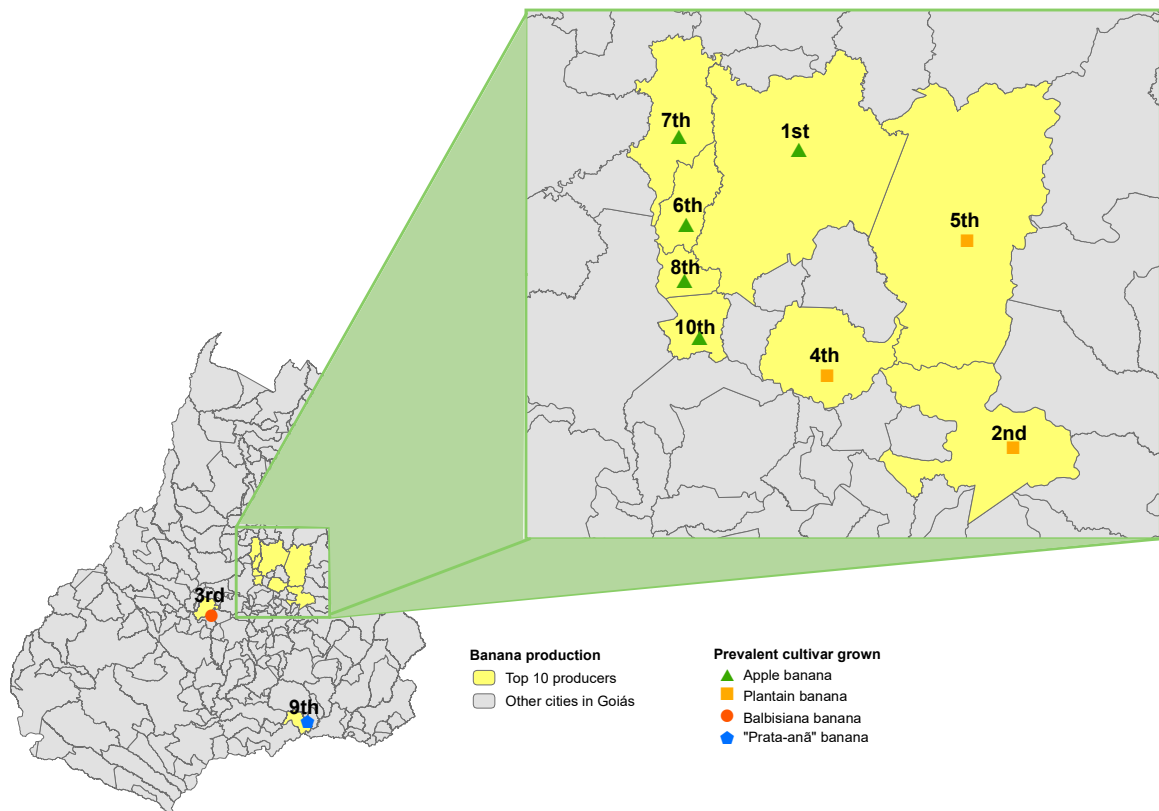
**AGRODEFESA GOIÁS: NUMBER OF ACTIONS TAKEN UNDER
THE BANANA PEST PREVENTION AND CONTROL PROGRAM**



MAIN QUARANTINE PESTS:

- Quarantine alert: *Fusarium oxysporum* f. sp. Cuban, race 4 Tropical;
- Sigatoka Negra (*Mycosphaerella fijiensis* Morelet): Goiás is a Free Area of Sigatoka Negra, except for cities in IN nº 44/2018;
- Moko (*Ralstonia solanacearum*), race 2.

CITIES THAT STAND OUT IN THE BANANA PRODUCTION AND MAIN CULTIVARS



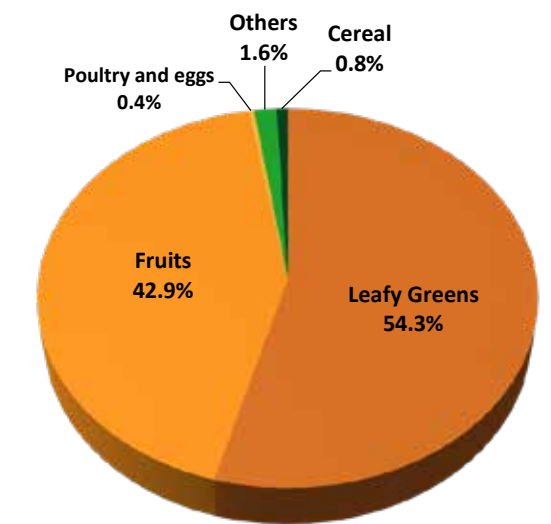
Agrodefesa seeks by means of the Banana Pests Control and Prevention Program to prevent the introduction or dissemination of pests that have economic impact on banana production in Goiás. The success of this work occurs through the commitment and involvement of the rural producer in complying with the current legislation. As a result, banana production in our state continues to be a promising and income-generating culture in many cities of Goiás.

Source: Agrodefesa

The abundant rains in the first months of the year affected fruits and vegetables production and, consequently, impacted the quality and supply of products. In addition, the pandemic worsening, restrictive measures and decreased purchasing power caused contractions in both retail and wholesale horticultural markets.

At Ceasa-GO, in February, R\$ 186.6 million were traded - a decrease of 25.3%, compared to the previous month. This result stems from decreased prices in the vegetables and fruits volume. The main reductions were in the cucumber colonião (29.4%), apple banana (28.3%) and fruit-banana (19.9%), observed in February, compared to last month.

SHARE OF TRADED PRODUCTS AMOUNT (%) - DECEMBER/2021



CEASA: TRADE VARIATION JANUARY/2021				
Group	Volume (ton)	Volume Variation%	Value (R\$ million)	Value Variation%
Leafy Greens	37,645.6	↓ 7.5	82.6	↓ 24.5
Fruits	29,761.1	↓ 3.6	97.1	↓ 25.0
Poultry and eggs	262.6	↓ 79.2	1.4	↓ 80.8
Others	1,096.6	↑ 20.9	3, 1	↑ 20.7
Cereals	551.8	↑ 95.7	2.5	↑ 84.9
Total	69,317.7	↓ 6.3	186.7	↓ 25.3

Source: Ceasa-GO

CORN SEED PRODUCTION

Since the 1980s, Emater has been assisting family farmers with guidance and support for the acquisition of corn seeds with a high standard of physical, physiological and sanitary quality.

The Agency sells these seeds to low-income producers, who are economically unable to acquire from large supplier companies, due to the high cost. Emater trades the seeds below market pricing and, thus, promotes seed production technology, accomplishing its role with society, increasing yield and income to Goiás producers.

Three cultivars are available: AL Bandeirante, Emgopa 501 and BRS 4103. Recommended for grain production and corn silage, AL Bandeirante corn is a synthetic variety of randomly crossed cultivar. Its planting is suitable for any region of Brazil, without restrictions, with the first crop between September and December and the second one between January and February.

The Emgopa 501 corn variety is recommended just for the State of Goiás, with crops from September to December, according to agricultural zoning. It was developed by Emater, essentially recommended for silage production, because of its forage yield.

The most indicated corn variety for grain production is BRS 4103. It was launched by the Brazilian Agricultural Research Corporation (Embrapa). It presents an early cycle, low plant height, low percentage of broken corn plants, grain moisture content and well stuffed and healthy corn cobs.

For the 2020/2021 crop, Emater provided seed supplies to **11 of the 12** planning regions in the state.

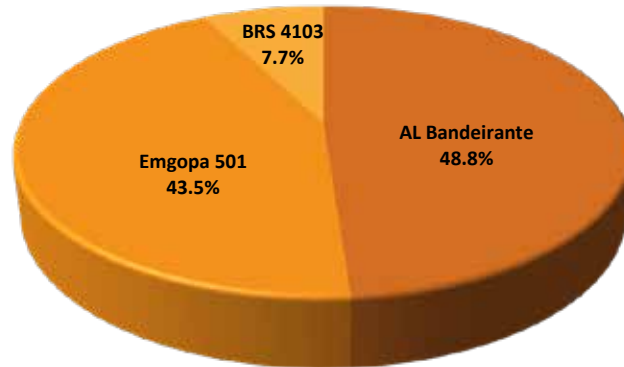
3,506
bags sold

3,506
hectares of
planted area

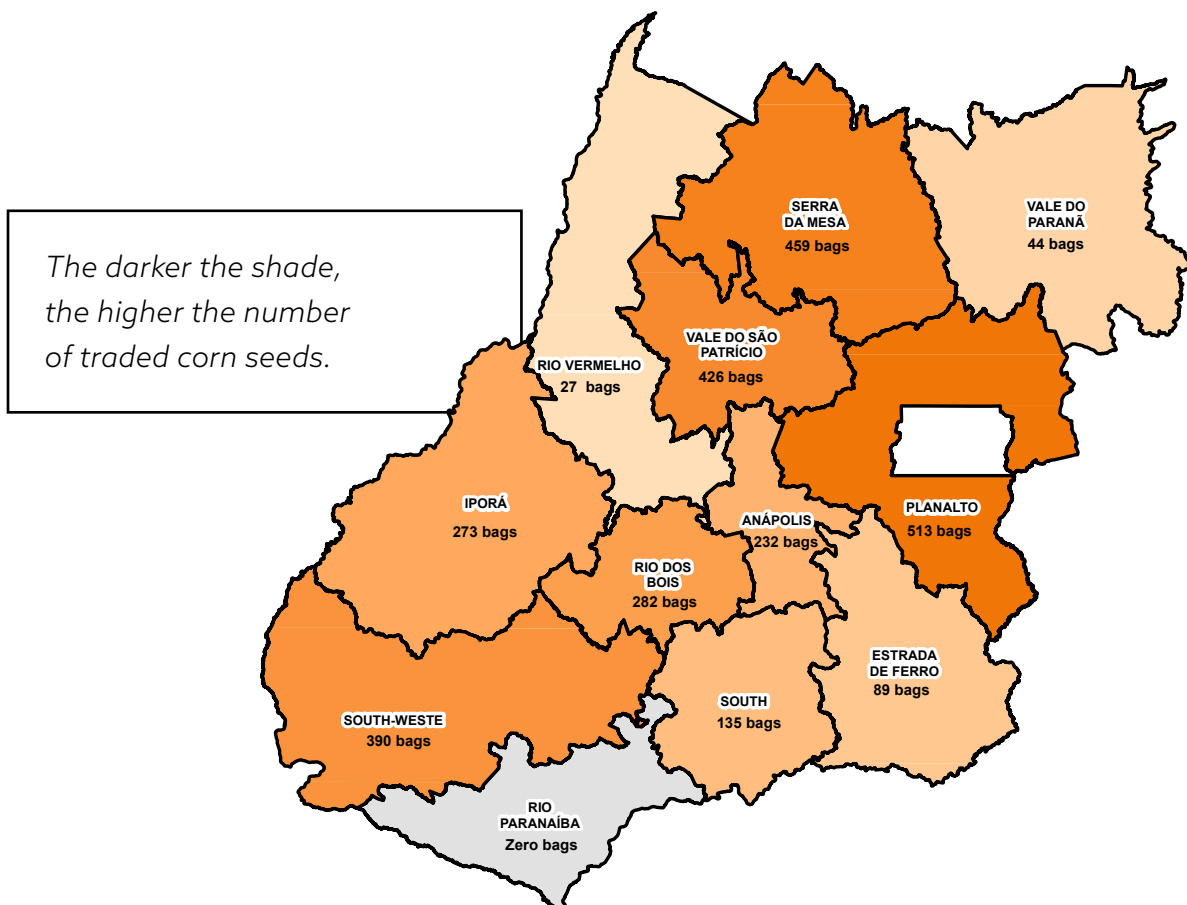
527
producers

132
cities

EMATER: PERCENTAGE OF SEED BAGS SOLD PER CORN CULTIVAR



EMATER: SEED BAGS IN THE PLANNING REGIONS



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**AGRO
DEFESA**
Agência Goiana de Defesa Agropecuária



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



W W W . A G R I C U L T U R A . G O . G O V . B R

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