

AGRI ^{IN} DATA

AUGUST 2021



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Agro Goiás

Weather problems strongly affected grain production in Goiás and Brazil this year. The Safrinha corn crop was especially damaged. Nevertheless, this new edition of Agri in Data brings a lot of great news. Data on beans present the estimate of growth in production, yield and planted area, compared to the previous crop. The result should promote Goiás from fifth to fourth position in the production ranking in Brazil.

The example of beans shows that the Goiás farmers believe and work hard to conquer new grain markets. They are aware that knowledge and technology make a difference in today's world.

The Government of Goiás does its best to provide assistance in this process: by guiding the producer in setting up projects, increasing credit lines such as FCO, monitoring agriculture data to guide public policies, providing technical and economic feasibility studies, mapping and organizing supply chains, promoting lectures and products and working on road maintenance.

The goal is to be present in the days of all producers, from small to large ones. To mention an example, in just two months, from July to August, we trained 230 people in social vulnerability situations to carry out vegetable, poultry and fish farming activities. The Goiás Social Program lectures were in eight cities in Goiás, in partnership with the National Rural Learning Service (Senar) and coordinated by the Department of Social Policies (GPS).

It is also worth mentioning that, by means of Seapa, the Government of Goiás has already delivered more than 560 machines and equipment to cities in Goiás under the Mecaniza Campo Program. The machinery will be used for infrastructure services, such as the maintenance of local roads. The resources come from the Superintendence for the Development of the Midwest Region (Sudeco) and the Ministry of Agriculture, Livestock and Food Supply (Mapa), destined by amendments from the Goiás political basis in the National Congress.

All these actions are possible because they involve governments, entities, companies and producers. Goiás Agriculture is strong, and this strength is supported by the unity and work of everyone.



TIAGO MENDONÇA
STATE SECRETARY
OF AGRICULTURE,
LIVESTOCK AND
SUPPLY IN GOIÁS

#ÉPorVocêQueAGenteFaz #OAgroédeTodos #SomosTodosGoiás

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INTRODUCTION

Several historical factors have been conducting Brazil as a great agricultural potentiality. The creation of Embrapa, the development of technologies to increase yield, access to rural credit and the commercial opening led the country, which was a food importer, to become one of the world's major producers, assuming the role of a large food exporter.

In the first half of this year, national agricultural exports reached US\$ 61.4 billion, an increase of 20.7% compared to the first half of last year, and Goiás shared 6.4% of this amount. In the same period, the international sales of Goiás agricultural products accounted for US\$ 3.9 billion. The soybean and meat complexes are the highlights of the foreign sales made by Goiás which represent, respectively, 9.6% and 6.3% of the total volume exported by the country, year-to-date (January to June)(COMEXSTAT).

Brazil's grain crop, despite the weather problems faced in the 2020/21 season, should grow 1.5% in volume, compared to the previous season, and reach 260.8 million tons (CONAB). In Goiás, however,



grain production should decline in the current season. Corn second crop, which is highly representative, was severely affected by these climate adversities, which negatively impacted the production performance of this crop. The Company's projection for the grain crop in the state is 24.7 million tons, a drop of 10.3% compared to last crop.

On the other hand, the state stands out in the cassava and orange culture, with a production increase of 10.9% and 12.4%, respectively, 187.1 thousand tons and 155.5 thousand tons (IBGE).

MAPA estimates that, in 2021, the Gross Value of Agricultural Production (VBP) in the country will reach R\$ 1.1 trillion - growth of 10.5%, compared to last year. For national crop production, it is projected R\$ 753.2 billion - an increase of 13.8% compared to 2020 - highlighting the VBP for soybean, R\$ 362.4 billion - growth of 30.2%, year over year. In Goiás, the VBP should be over R\$ 92 billion in 2021 - estimated growth of 10.5% - and shares of 8.4% of the national VBP. The VBP in Goiás crop

production was estimated at R\$ 62.4 billion and livestock at R\$ 29.9 billion - an increase of 11.8% and 8.4%, respectively, compared to 2020.

This increase in farmgate resources contributes to more rural employment. In the first half of 2021, a positive balance of over 152 thousand jobs was observed in Brazilian agriculture (CAGED). In this same period, in Goiás, the agriculture balance was 8,524 new jobs, 46.0% were hired in activities related to temporary crops.

The adoption of technology production has driven the development of agriculture. The use of bio-inputs, for example, points to a paradigm shift, integrating the environmental and economic system. In this sense, the State Program of Bio-inputs, created by SEAPA, encourages the use of this technology for pests and diseases control in crops, soil improvement and conservation, and environmental preservation. Such innovation, together with precision agriculture, connectivity and crop-livestock-forest integration have contributed to the advancement of sustainable food

Source: CAGED/ CONAB/ IBGE/ MAPA/ Ministry of Economy





The scenario in national beef cattle continues to be supported by constant foreign demand, especially from China, which absorbed 45.7% of the **beef** exported by the country in the first half of this year. In all, Brazil's international sales of bovine protein increased by 4.3%, compared to the first half of 2020, amounting to US\$ 4.1 billion. Prices remained high during July, driven by the low supply of animals for slaughter and high production costs. According to Cepea/B3 fed cattle index, the arroba¹ reached R\$ 319.90 in July, while in the regional market, IFAG² recorded an average price of R\$ 299.16 in Goiás, in the last week of July - positive variation of 1.0%, compared to the previous week.



Despite the increase in the production costs, mainly with animal feed cost, and the strong foreign demand for **pork**, the prices paid to the producer decreased in the main markets in July/21. The CEPEA/ESALQ Live Swine Index for July, in São Paulo, pointed the price at R\$ 6.80/kg - a decrease of 4.4% compared to the previous month - while in Goiás, the average was R\$ 7.00/kg, according to the July last week bulletin of IFAG. In the international market, Brazilian pork meat shipments, in the first half of this year, grew 17.3%, compared to the same period in 2020, amounting 554.1 thousand tons. Considering the outbreak of African Swine Fever (ASF) in the American continent, the supply chain agents must intensify the biosafety measures in the production to prevent spread through Brazil.





In the first half of 2021, revenue from domestic **poultry** exports grew 10.0%, compared to the same period of last year - amounting to US\$ 3.4 billion. Poultry prices reached nominal record levels, supported by higher production cost and meat liquidity (CEPEA³). In São Paulo, the average price of live chicken in July was R\$ 5.76/kg - an increase of 5.2% compared to the previous month. In Goiás, the IFAG Bulletin, published in the last week of July, live poultry was sold at R\$ 6.00/kg - an increase of 15.4%, compared to the first day of July. Even with the appreciation of poultry, it remains more competitive than other proteins - pork and beef.



In the country, the average value of a liter of **milk** paid to the producers (R\$ 2.31) in July/21 reached its maximum price, according to data from the CEPEA historical series. The price reflects the lower supply in the country due to high production costs. The restricted Brazilian families income continues to challenge the dairy supply chain in the current days. The average price of the basket of dairy products in Goiás presented a total weighted variation of -2.91% in July, compared to June, according to the Bulletin of Dairy Market in Goiás. The exchange rate favorable to exports contributed to the domestic sales of dairy products volume, which grew 45.6% in the first half of 2021, compared to the same period in 2020. Among the items traded, powdered milk continues as the main product sold to Algeria and Uruguay. On the import side, the purchase of dairy products reached 72.3 thousand tons, an increase of 39.0%, mainly from Argentina and Uruguay.

1. Arroba - a 15-kilo unit of weight that is a commonly used as a benchmark for cattle prices in Brazil
2. IFAG - Institute for the Strengthening of Agriculture in Goiás
3. CEPEA - Center of Advanced Studies on Applied Economics

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



CATTLE/BEEF

Goiás: Gross Value of Beef Production

Estimate 2021

R\$ 15.4 BILLION  **13.0%***

4th HIGHEST GROSS VALUE OF PRODUCTION**



10.0% OF THE NATIONAL GROSS VALUE OF BEEF PRODUCTION



51.6% 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 June)

US\$ 564.7 MILLION  **8.6%***

3rd LARGEST EXPORTER**

118.8 THOUSAND TONS  **0.6%***

June 2021

US\$ 119.5 MILLION  **8.9%***

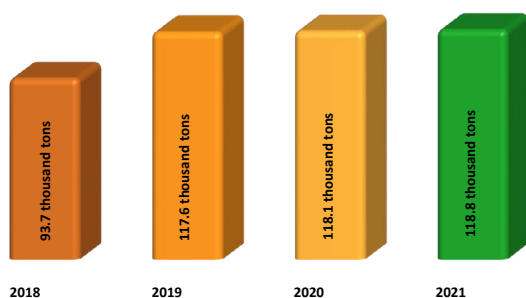
22.6 THOUSAND TONS  **9.9%***

* Compared to the same period of the previous year

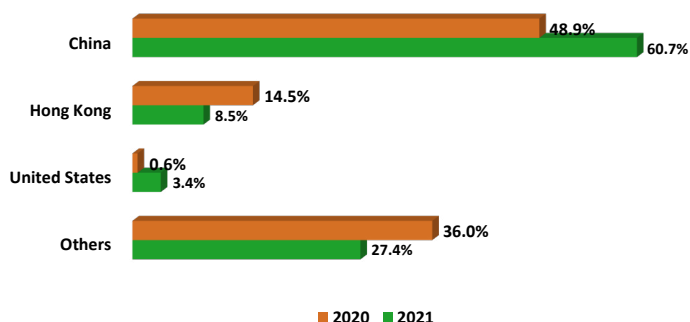
** Among the states and the Federal District

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

YEAR-TO-DATE



MAIN DESTINATIONS



Source: CONAB/IFAG/MAPA/Ministry of Economy.

PORK/HOGS

Goiás: Gross Value of Pork Production

Estimate 2021

R\$ 1.2 BILLION

↓ **6.1%***

8th HIGHEST GROSS VALUE OF PRODUCTION**



4.1% OF THE NATIONAL GROSS VALUE OF PORK PRODUCTION



4.1% OF THE GROSS VALUE OF LIVESTOCK PRODUCTION IN GOIÁS

* Compared to the previous year

** Among the states and the Federal District

Goiás: Pork Exports

Year-to-date (January to June)

US\$ 9.7 MILLION

↑ **49.7%***

7th LARGEST EXPORTER**

5.8 THOUSAND TONS ↑ **17.5%***

June 2021

US\$ 929.1 THOUSAND

↓ **3.8%***

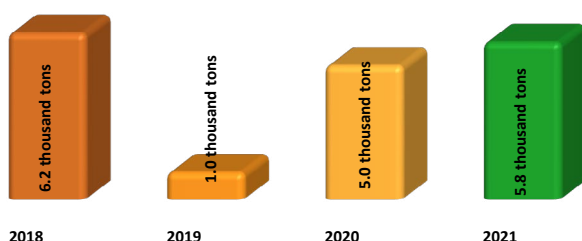
604.8 TONS ↓ **22.9%***

* Compared to the same period of the previous year

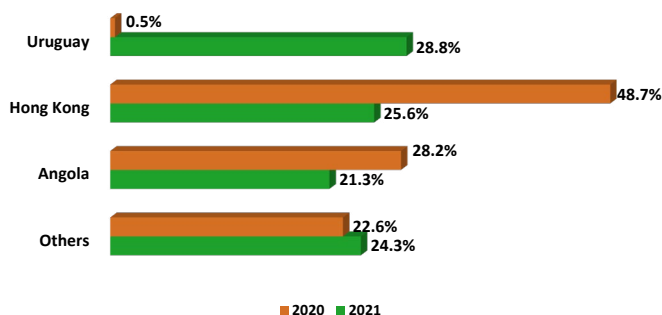
** Among the states and the Federal District

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

YEAR-TO-DATE



MAIN DESTINATIONS



Source: CONAB/IFAG/MAPA/Ministry of Economy

POULTRY



Goias: Gross Value of Poultry Production

Estimate 2021

R\$ 6.8 BILLION

↑ 11.0%*

6th HIGHEST GROSS VALUE OF PRODUCTION**



7.1% OF THE NATIONAL GROSS VALUE OF POULTRY PRODUCTION



22.8% OF THE GROSS VALUE OF LIVESTOCK PRODUCTION IN GOIÁS

* Compared to the previous year

** Among the states and the Federal District

Goias: Poultry Meat Exports

Year-to-date (January to June)

US\$ 192.3 MILLION

↑ 12.8%*

4th LARGEST EXPORTER**

106.7 THOUSAND TONS ↑ **3.3%***

June 2021

US\$ 36.6 MILLION

↑ 40.0%*

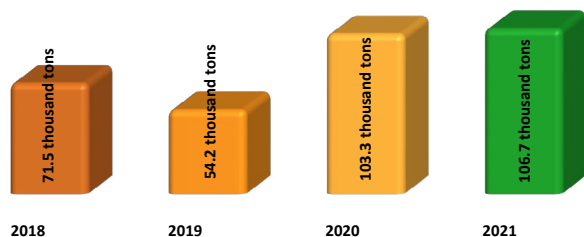
20.0 THOUSAND TONS ↑ **6.1%***

* Compared to the same period of the previous year

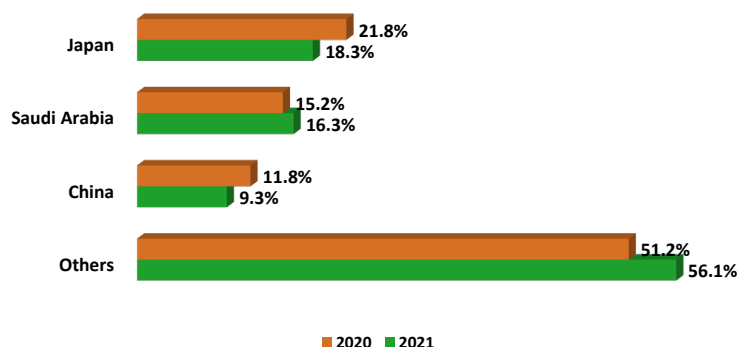
** Among the states and the Federal District

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

YEAR-TO-DATE



MAIN DESTINATIONS



Source: CONAB/IFAG/MAPA/Ministry of Economy

DAIRY



Goiás: Gross Value of Milk Production

Estimate 2021

R\$ 5.4 BILLION

↓ **1.7%***

6th

HIGHEST GROSS VALUE OF PRODUCTION**



11.0% OF THE NATIONAL GROSS VALUE OF MILK PRODUCTION



18.0% 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 June)

US\$ 474.4 THOUSAND

↓ **5.3%***

8th

LARGEST EXPORTER**

197.0 TONS ↓ **24.1%***

June 2021

US\$ 50.4 THOUSAND

↓ **50.3%***

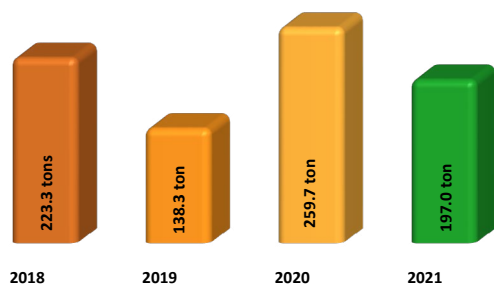
18.8 TONS ↓ **47.8%***

* Compared to the same period of the previous year

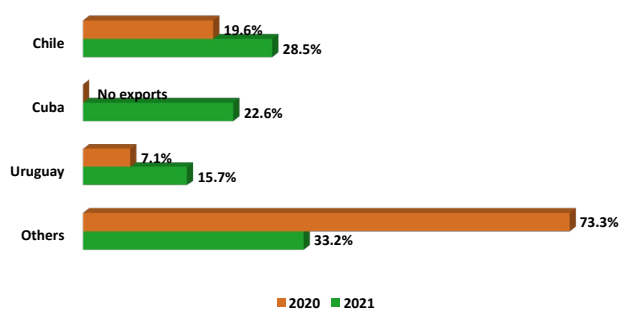
** Among the states and the Federal District

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

YEAR-TO-DATE



MAIN DESTINATIONS



Source: CONAB/IFAG/MAPA/Ministry of Economy



The 2020/21 record crop in national **soybean** production has been accompanied by significant increases in market prices. In international trade, in the first half of this year, although there was a 2.3% decrease in the volume of Brazilian soybean complex exports, the value was up 24.9%, compared to the same period in 2020, and accounted for US\$ 29.2 billion in foreign sales. Demand for the oilseed, both domestically and internationally, must stand at high levels, which has supported the elevated trading prices. Even with the appreciation, producers have been aware of their position in stock exchange operations for the 2021/22 crop, strong volatility market and exchange rate. The average value in ESALQ/BM&FBOVESPA Index was R\$168.05 (60 kg bag) on July 30, with a monthly variation of 6.3%. In Goiás, according to the IFAG¹, the average price was R\$ 168.17 in the last week of July/21, a significant increase of R\$ 11.82, compared to the previous week.



CONAB² estimates the final stock **corn** in the country, for the 2020/21 crop, at 5.5 million tons, a decrease of 48.4% compared to the volume registered in the previous crop. This reduction is due to the strong demand for the grain and the lower Brazilian production in the current crop, which should reach 93.4 million tons - a 9.0% decrease, compared to the 2019/20 crop. The water available, during the safrinha development, in most of the producing areas, added to the cold front in the South and Mid-South regions of the country, negatively impacted the production and the yield in this crop. Furthermore, according to CONAB, on 07/31/2021, 52.0% of the safrinha corn was harvested in Goiás, against 67.0% in the same period in 2020. Low grain stock levels, in a strong domestic demand scenario reflected in the growth of imports, which increased 102.0% in the volume imported by the country, in the first half of 2021, compared to the same period in 2020. According to the CEPEA/ESALQ/BM&FBOVESPA index prices remained below R\$ 100.00/

1. IFAG - Institute for the Strengthening of Agriculture in Goiás
2. CONAB - National Food Supply Company

bag throughout July, however, they closed at R\$ 101.40 on 07/30. In the regional market, the average price in the IFAG Bulletin in Goiás was R\$ 86.67/bag.



The short production cycle of **beans** allows the crop to be planted at three different periods of the year, which provides a constant supply of the grain. The choice of the cultivar to be planted must be very well evaluated, as well as the market demand, due to the grain sizes, qualities and colors. This season, due to weather problems, a drop in bean production in key regions was observed. The grain crop in the country should be 3.0 million tons, 6.6% decrease compared to the past crop, while acreage should reach 2.9 million hectares (CONAB). The state of Goiás has already started the third crop harvest and stands out for its irrigated production, which presents high levels of yield. CONAB projects 177.9 thousand tons for the third beans crop in Goiás, an increase of 4.2% compared to the previous season, with an average yield of 3.0 tons/ha. The national production of beans is, almost entirely, absorbed by the domestic consumers. In 2021, dried and prepared or preserved beans exports grew 25.4% in the year-to-date (January to June), compared to the same period of 2020. Grain prices increased in the second half of July and registered an average of R\$ 300.62/60 kg in the amount paid to the producer in São Paulo, in the second week of August. In Goiás, the average price for a bag of 60 kg, according to IFAG Bulletin, was R\$ 278.83.

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



SOYBEAN



Goiás: Soybean Crop - 2020/21

Estimate

13.7 MILLION TONS ↑ **4.3%***

4th LARGEST PRODUCER**



SHARE OF **10.1%** OF THE NATIONAL PRODUCTION

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

Estimate 2021

R\$ 35.1 BILLION ↑ **25.0%***

4th HIGHEST GROSS VALUE OF PRODUCTION**



9.7% OF THE NATIONAL GROSS VALUE OF SOYBEAN PRODUCTION



56.3% 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 June)

US\$ 2.7 BILLION ↑ **15.3%***

4th LARGEST EXPORTER**

6.1 MILLION TONS ↓ **8.2%***

June 2021

US\$ 480.8 MILLION ↓ **12.0%***

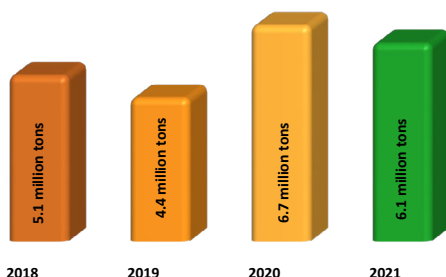
1.0 MILLION TONS ↓ **36.6%***

* Compared to the same period of the previous year

** Among the states and the Federal District

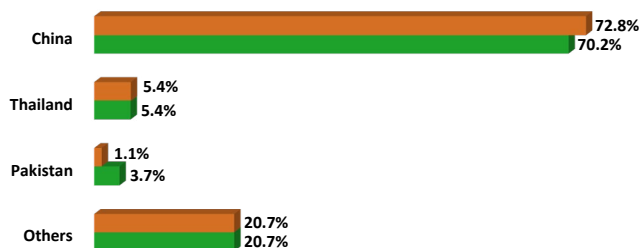
GOIÁS: SOYBEAN COMPLEX EXPORTS - YEAR-TO-DATE (JANUARY TO JUNE)

YEAR-TO-DATE



Source: CONAB/MAPA/Ministry of Economy.

MAIN DESTINATIONS



■ 2020 ■ 2021

CORN



Goiás: Total Corn Crop - 2020/21

Estimate

9.1 MILLION TONS

↓ **28.2%***

3rd LARGEST PRODUCER**



SHARE OF **9.7%** OF THE NATIONAL PRODUCTION

1.8 MILLION HECTARES

↓ **3.8%***

AVERAGE YIELD:
4.9 TON/HA

↓ **25.3%***

* Compared to the previous crop

** Among the states and the Federal District

Goiás: Gross Value of Corn Production

Estimate 2021

R\$ 12.2 BILLION

↑ **2.6%***

4th HIGHEST GROSS VALUE OF PRODUCTION **



9.3% OF THE NATIONAL GROSS VALUE OF CORN PRODUCTION



19.6% 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 June)

US\$ 45.0 MILLION

↓ **14.3%***

5th LARGEST EXPORTER**

225.4 THOUSAND TONS ↓ **28.3%***

NOTE:

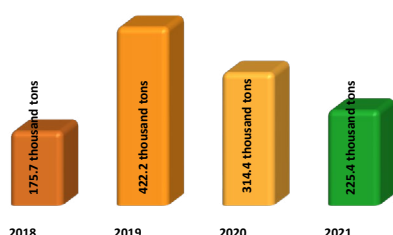
THERE WAS NO CORN EXPORTS BY GOIÁS IN JUNE 2021

* Compared to the same period of the previous year

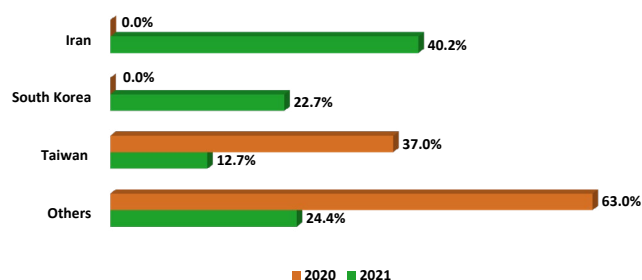
** Among the states and the Federal District

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

YEAR-TO-DATE



MAIN DESTINATIONS



Source: CONAB/MAPA/Ministry of Economy.

BEANS



Goiás: Beans Crop - 2020/21

Estimate

353.9 THOUSAND TONS ↑ **6.3%***

4th LARGEST PRODUCER **



SHARE OF **11.8%** OF THE NATIONAL PRODUCTION

144.5 THOUSAND HECTARES ↑ **4.1%***

AVERAGE YIELD: **2.4 TON/HA** ↑ **2.1%***

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

Goiás Gross Value of Beans Production

Estimate 2021

R\$ 1.5 BILLION ↓ **5.0%***

3rd HIGHEST GROSS VALUE OF PRODUCTION**



11.1% OF THE NATIONAL GROSS VALUE OF BEANS PRODUCTION



2.4% OF THE GROSS VALUE OF BEANS PRODUCTION IN GOIÁS

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

Goiás: Prepared or preserved Beans exports

Year-to-date (January to June)

US\$ 593.00 ↓ **33.2%***

432.0 KG ↓ **47.8%***

DESTINATION: JAPAN

* Compared to the same period of the previous year

Goiás: Dried Beans Exports

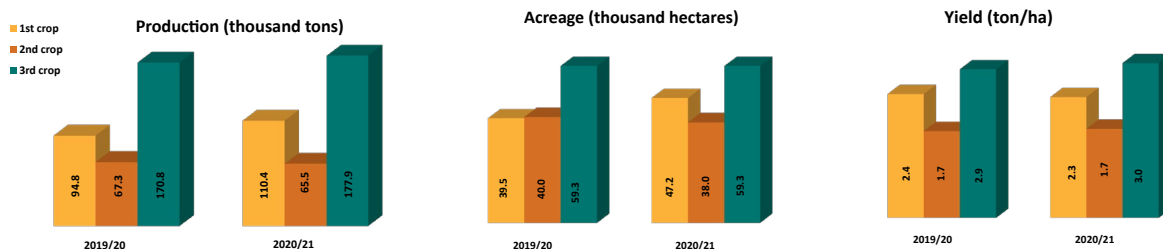
Year-to-Date (January to June)

US\$ 811.5 THOUSAND

822.9 TONS

MAIN DESTINATION: INDIA (59.1%)

GOIÁS: BEANS CROP



Source: CONAB / MAPA / Ministry of Economy

RURAL CREDIT

Emater, by means of the Rural Credit Control and Monitoring System, is responsible for offering credit for small family farmers in Goiás. The Agency offers to the producers in Goiás the advisory service for credit development projects with financial agents.

The values can be used by producers both for funding and for investments in the agricultural supply chains. In partnership with technical services, the Rural Credit aims at collaborating with the development of rural activities and promoting the local economy.

Rural producers, individuals or legal entities, from small to large producers, rural producer cooperatives and family farmers, including land tenure and land credit settlers, may be beneficiaries. The latter mentioned must have the Declaration of Aptitude (DAP) to the National Program for Strengthening Family Agriculture (Pronaf).



Results for the first half of 2021:

746

Projects prepared by Emater professionals in **70 cities**.

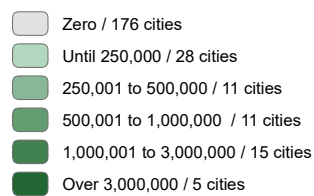
Amount of :

R\$ 60.3 million

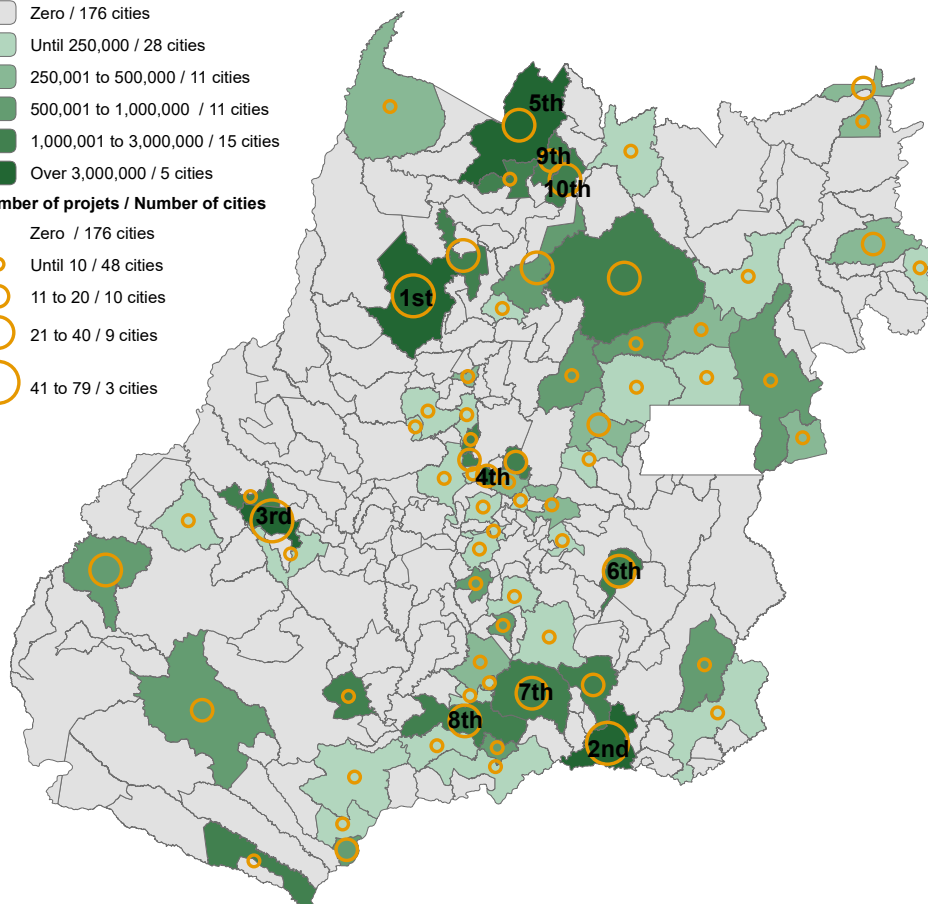
 on loans contracted

Goiás cities: Rural credit contracted using Emater services - 1st semester of 2021

Rural Credit (1st semester of 2021)
Value Contracted (R\$) / Number of cities



Number of projects / Number of cities



Goiás Highlights

Cities with the highest value of rural credit contracted - 1st semester 2021

Ranking	Cities	N. of projects	Contracted Value	%
1	CRIXÁS	79	R\$ 5,598,883.36	9.28
2	CORUMBAÍBA	49	R\$ 5,172,561.34	8.57
3	IPORÁ	45	R\$ 5,033,932.18	8.35
4	SANTA ROSA DE GOIÁS	20	R\$ 3,153,691.00	5.23
5	PORANGATU	33	R\$ 3,117,501.53	5.17
6	VIANÓPOLIS	30	R\$ 2,582,242.82	4.28
7	MORRINHOS	29	R\$ 2,523,510.59	4.18
8	GOIATUBA	27	R\$ 2,174,639.58	3.61
9	SANTA TEREZA DE GOIÁS	20	R\$ 2,004,408.17	3.32
10	FORMOSO	25	R\$ 1,972,269.60	3.27
	OTHER CITIES	389	R\$ 26,987,961.17	44.74
	TOTAL	746	R\$ 60,321,601.34	100.00

Source: Emater

SEAPA
Secretaria de
Estado de
Agricultura,
Pecuária e
Abastecimento



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