







SEAPA retaria de Estado de Agricultura, Pecuária e Abastecimento



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A common saying originating from Brazilian television says that "agriculture is about technology, agriculture is about popularity, agriculture is about everything". In Goiás, agriculture is also about everyone. This democratization aspect has grown under the management of Governor Ronaldo Caiado.

One of his first decisions as a leader of the Goiás Government was to recreate the Secretariat of Agriculture, Livestock and Supply - the Seapa. A sector that accounts for almost 80% of the exports in the state did not have an exclusive institution to represent agriculture at the governmental level in Goiás. Caiado changed this situation and brought respect to the rural producers. In order to have increasingly articulated and participatory management, it was also created the Thematic Chamber on Strategy, Competitiveness and Public Policies for Agribusiness in the State of Goiás – Agriculture is for Everyone.

The group brings together more than 40 governmental institutions and works as an agriculture consulting council. Participants meet periodically to discuss strategic topics and prepare proposals for strengthening the agricultural sector in Goiás. It is a democratic moment, where each segment has the opportunity of interacting directly with public managers, leaders, farmers and other supply chain agents.

This December, the Thematic Chamber "O Agro é de Todos" has a special meeting. The agenda of the event is on north of Goiás development. An overview of the north area of Goiás will be presented, which includes the northwest and northeast regions, from the Araguaia Valley to the Vão do Paranã, and discuss investment opportunities that may represent a historical advancement for Goiás state. A study provided by the Market Intelligence Management of Seapa, which is linked to the Superintendence of Sustainable Rural Production, worked in cooperation with the Institute for the Strengthening of Agriculture in Goiás (IFAG), shows that the region has 4.6 million hectares potentially able to be used for sustainable agricultural production, without deforestating areas of Cerrado Bioma.

Finally, it is a great time for the northern region of Goiás! Providing sustainable development to that area is a determination of Governor Ronaldo Caiado. A great action will be made which will bring leaders, farmers, investors and public managers together, with the purpose to boost the northern region in Goiás and change people's lives. In Goiás, agriculture is about technology, agriculture is about popularity, but, above all, agriculture is about everyone!

#ÉPorVocêQueAGenteFaz #OAgroédeTodos #SomosTodosGoiás



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



In the international market, although volume shipped of Brazilian the agribusiness products has declined over the last few months, the value amount increased by 19.5% in the year-to-date (January to October), compared to the same period in 2020, and reached US\$ 102.4 billion. In Goiás, international sales from January to October this year were 11.6% higher than the value recorded in the same period in 2020 and hit US\$ 6.2 billion, which accounts for 78.6% of the total exported by the state.

As for the crop production performance, the volume of rains that



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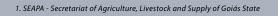
#### CEASA-GO 18



have occurred since the beginning of October has contributed to the advance of the first crops planting in the 2021/22 season. The national grain production is expected to grow by 14.7% compared to the 2020/21 crop, reaching 289.8 million tons (CONAB). Also compared to the previous season, yield should increase by 10.8%, with an estimate of hitting 4.0 ton/ha. In Goiás, a production growth of 21.3% is also expected for this crop, compared to the previous one, which should reach 28.8 million tons of grains. Likewise, the acreage in the state can increase by 4.4% and yield should go up by 16.2%.

As a consequence of the favorable production performance and the appreciation of agricultural products, the Gross Value of Production (VBP) should rise by 9.9%, compared to 2020, and reach R\$ 1.1 trillion in Brazil (MAPA). Most of this amount comes from agriculture, 67.6%, especially from soybean and corn production. In Goiás, VBP is also expected to grow (11.4%), compared to the last year, which could reach R\$ 95.0 billion. The positive data are supported both by the efficiency of agriculture and livestock in Goiás, which can increase by 10.4% and 13.3%, respectively.

In line with these results, the Market Intelligence Management of SEAPA<sup>1</sup> has made efforts to ensure that agribusiness statistics reach farmers, managers and investors in the production chains in the state and also in the country. The 27th edition of Agri in Data - the last publication of this year - brings the agribusiness index and reinforces the commitment of the Goiás government to provide tools for decision-making in the countryside, in agro-industries and in governmental institutions.







After strong price declines in September and October, it was observed fed **cattle** appreciation in early November. CEPEA<sup>1</sup> Index pointed out the arroba<sup>2</sup> price, on November 23, at R\$ 316.90 - positive monthly variation of 23.3%. In the regional market, the arroba average value of fed cattle, in the last week of November, was at R\$ 284.68 - variation of 9.8% in the weekly comparison (IFAG<sup>3</sup>).

In exports, the Chinese trade restrictions have impacted the Brazilian market. In October, 8.2 thousand tons of beef were shipped to China, a decrease of 90.3% compared to October 2020. However, as for year-to-date results (January to October), there was an increase of 4.6% in the amount traded with the Asian country, compared to the same period last year, totaling 716.4 thousand tons.

The **pork** and live animal prices remained strong during November. The Live Swine Index CEPEA/ESALQ-São Paulo, on November 23, closed at R\$ 7.73/Kg - monthly variation of 15.0%, compared to the previous month. In Goiás, the average recorded by IFAG in the last week of November was R\$ 7.50/kg - variation of 3.5% in the weekly comparison.

In the international scenario, pork continues to be appreciated. Brazilian foreign sales grew by 21.2% in the year-to-date (January to October) and totaled US\$ 2.3 billion. Exports reached over 950 thousand tons, mainly to China and Hong Kong. Goiás shipped pork to more than 20 countries this year (January to October), and had the international sales increased - see these data in the highlights.



Afterfive-month consecutive price increases, which hit a record in September, the average price of **poultry** meat decreased in October and November. Frozen chicken was sold at R\$ 7.18 on November 23 - a negative monthly variation of 7.8% (CEPEA/São Paulo). In Goias, live chicken had an average price of R\$ 5.00/ kg in the last week of November - a negative variation of 4.8% in the weekly comparison (IFAG).

In the international market, poultry meat sales continue showing good results. The Brazilian shipments of this animal protein totaled US\$ 6.2 billion in the year-to-date (January to October), an increase of 24.5% compared to the same period in 2020. Goiás followed the same pace as the national exports - see the indicators in highlights.

The **milk** production chain continues facing a challenging scenario, with high production costs, decline in prices paid to producers and weakened demand. The Brazilian average of Effective Operating Cost/CEPEA increased by 1.8% between September and October of this year, driven by price raises verified in the groups of fertilizers and fuels. The increase of the raw material supply - usually seen at this time of year due to the rains - reflects in the reduction of the value paid to the producer. The national average price of the milk liter paid to the producer, in October, was R\$ 2.33, and in Goiás, R\$ 2.35 (CEPEA).

The demand for dairy derivatives remains weak, which pushes the prices. The Bulletin of Dairy Market in Goiás pointed out a drop of 7.21% in the average values of the dairy products basket, reference month of November. Compared to the previous month, a decrease was observed in the average price of UHT milk, mozzarella cheese, sweetened condensed milk and powdered milk while an average price increase was verified for the powdered cream.

In the international market, Brazilian foreign sales of dairy products have been decreasing since July of this year, however, a growth of 22.8% was recorded in the quantity of dairy products shipped across the country in the year-to-date (January to October), compared to the same period in 2020. In total, 32.9 thousand tons of dairy products were exported, which accounted for US\$ 83.8 million. As for imports, in October, an increase of 15.4% was observed in the guantity of dairy products purchased from other countries, compared to the previous month. However, the volume imported by Brazil decreased by 10.6% year-to-date (January to October), compared to the same period last year. The international sales in Goiás had a different behavior to the national one - check the highlights for the dairy chain.

1. CEPEA - Center of Advanced Studies on Applied Economics

Arroba - a 15-kilo unit of weight that is a commonly used as a benchmark for cattle prices in Brazil IFAG - Institute for the Strengthening of Agriculture in Goiás





## BEEF/CATTLE

#### **Goiás: Gross Value of Beef Production**

Estimate 2021

# R\$ 15.9 BILLION14.1%\*Image: Construction of the state of the s

**Goiás: Beef Exports** Year-To-Date (January to October)



229.0 THOUSAND tons

**↑** 1.1%\*

↓ 50.6%\*

October 2021

**US\$75.1 MILLION** 



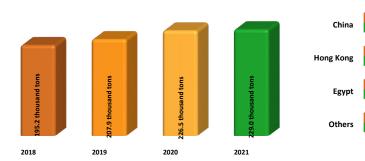
22.0%\*

**15.0 THOUSAND** tons

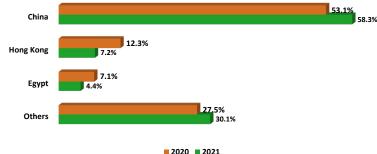
\*Compared to the same period of the previous year \*\* Among the states and the Federal District

YEAR-TO-DATE

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



MAIN DESTINATIONS



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



# PORK/HOGS 🐨

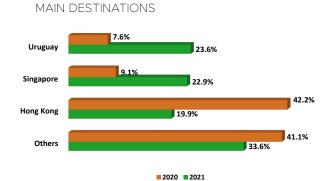
#### **Goiás: Gross Value of Pork Production**

Estimate 2021



#### GOIÁS: PORK EXPORTS - YEAR-TO-DATE (JANUARY TO OCTOBER)

YEAR-TO-DATE



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





#### **Goiás: Gross Value of Poultry Production**

Estimate 2021

# R\$ 8.0 BILLION 1 28.0%\*



**7.5%** OF THE NATIONAL GROSS VALUE OF POULTRY PRODUCTION



HIGHEST GROSS VALUE OF PRODUCTION\*\*

**25.1%** OF THE GROSS VALUE OF LIVESTOCK PRODUCTION IN GOIÁS

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

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MAIN DESTINATIONS

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

Japan Saudi Arabia 2018 2019 2020 2021 Others

### Japan 20.1% Saudi Arabia 16.7% China 9.7% Others 51.7%

2020 2021

Source: Conab / IFAG / MAP / Ministry of Economy.

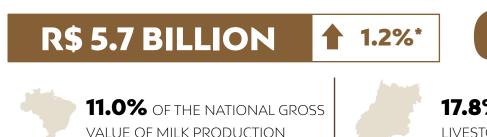
YFAR-TO-DATE





#### **Goiás: Gross Value of Milk Production**

Estimate 2021



**17.8%** OF THE GROSS VALUE OF LIVESTOCK PRODUCTION IN GOIÁS

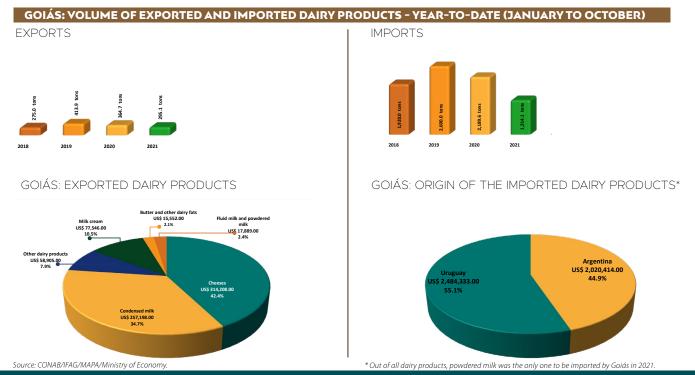
HIGHEST GROSS VALUE

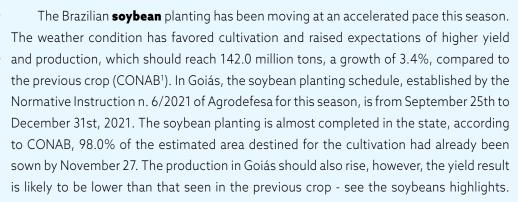
**OF PRODUCTION \*\*** 

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

#### Goiás: Dairy International Trade







The costs of fertilizers, pesticides and seeds have been a major concern for producers, considering the price increases observed for these products during this season. Soybean prices had been oscillated throughout November. On November 11, the Index ESALQ/BM&FBovespa-Paranaguá recorded R\$ 158.88/60-kg bag - lowest value since July this year - and on November 23, the price for the bag closed at R\$ 172.05 - a level observed at the beginning of the month. In the regional market, price oscillation was also observed and, on November 23, the soybeans was recorded at R\$ 155.55/ 60-kg bag (IFAG<sup>2</sup>).

The 1st **corn** crop sowing has advanced in the main producing regions of the country during this 2021/22 season. CONAB points out that more than 70% of the area destined for the cultivation of the cereal had been planted by November 20. By the same date, in Goiás, planting progress had already reached 95%. Considering the negative impacts on the corn cultivation in the previous season, especially for the 2nd crop, due to weather problems, the grain production in the country this season is expected to grow 34.1% and reach 116.7 million tons cultivated in 20.9 million hectares. Goiás should also have increases in both production and yield - see the data in the corn highlights

Corn prices continued to fall and recorded a negative monthly variation of 4.6%, pointed out on November 22 by the ESALQ/BM&FBovespa-Paranaguá Index, which closed at R\$ 82.81/60kg-bag. In the state of Goiás, a reduction in the average price of the cereal was also observed and, on the same date, it was sold at R\$ 70.66/bag (60 kg).

1.CONAB – National Food Supply Company 2. IFAG - Institute for the Strengthening of Agriculture in Goiás The international grain market continues at a slow pace, from January to October, the country shipped 14.6 million tons, 41.2% less than the same period last year. In Goiás, the same behavior was observed - data in the corn highlights.



The **cassava** (Manihot esculenta Crantz) is considered one of the main sources of food energy, especially in developing countries. It is originated in South America and cultivated in over 100 countries. Brazil is the second largest producer in the world and accounts for 10.0% of global production (Embrapa<sup>3</sup>).

Due to the plant's good adaptability, the cultivation of cassava is present in all Brazilian states and, for the 2021 crop, the national production of cassava root is estimated at 18.6 million tons - a decrease of 2.0% compared to the previous crop. In Goiás, on the other hand, despite the acreage reduction, it is estimated a growth in production results (LSPA/IBGE<sup>4</sup>) - see the data in the highlights.

The lower offer of the root in the national market has been reflected in price raises - behavior observed in all regions monitored by CEPEA<sup>5</sup>. In Goiás, the cassava root was sold at R\$ 1,200.00/ton wholesale in November (CONAB). In the cassava starch market - a by-product of the root - there was a decline in sales and an increase in the stocks in the factories, even with the industries operating below their capacities (CONAB).

Despite the slowdown in the sale of cassava derivatives (flour, starch and modified starches) in the domestic market, international demand for cassava starch remains strong. From January to October of this year, the country hit a record with the exports of 28.9 thousand tons of this derivative, 179.6% more than in the same period in 2020. The main buyers, in quantity, of Brazilian cassava starch in that period were the United States, South Africa, Bolivia and Paraguay.

Goiás has no representative share in cassava exports, since their production is fully absorbed by the domestic market - both the fresh and processed product. It is noteworthy that part of the production in Goiás is destined for the manufacture of cassava beer, which, throughout this year, absorbed almost 2.0 thousand tons of the raw material produced by family farms in the state - see the data in the highlights.

3.EMBRAPA - Brazilian Agricultural Research Corporation 4. IBGE – Brazilian Institute of Geography and Statistics 5. CEPEA - Center of Advanced Studies on Applied Economics





2.5%

AVERAGE YIELD:

**3.6 ton/ha** 

SHARE OF 9.9% OF THE NATIONAL PRODUCTION

# 3.9 MILLION 15.6%\*

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

#### **Goiás: Gross Value of Soybean Production**

Estimate 2021

Estimate 2021						
<b>R\$ 35.0 BILLION</b>	<b>1</b> 21.9%*	HIGHEST GROSS VALUE OF PRODUCTION**				
9.6% OF THE NATIONAL GROSS VALUE OF SOYBEAN PRODUCTION CROP PRODUCTION IN GOIÁS						
* Compared to the previous year ** Among the states and the Federal District	· ·					
Goiás: Soybean Complex E	xports					
Year-to-date (January to October)						
<b>US\$ 3.8 BILLION</b>	<b>19.8%</b> *	1				
8.6 MILLION tons 4 5.8%*		LARGEST EXPORTER**				
October 2021						
US\$ 135.1 MILLION	<b>1</b> 82.1%*					
254.9 THOUSAND tons 132.5%	•					

\* Compared to the same period last year \*\* Amona the states and the Federal Distric



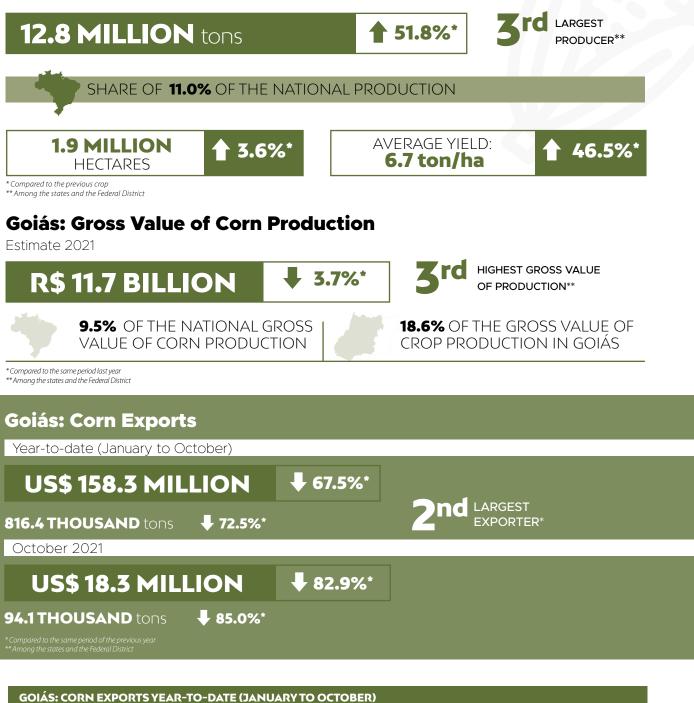
2020 2021

Source: CONAB/MAPA/Ministry of Economy.



#### Goiás: Corn Crop - 2021/22

Estimate

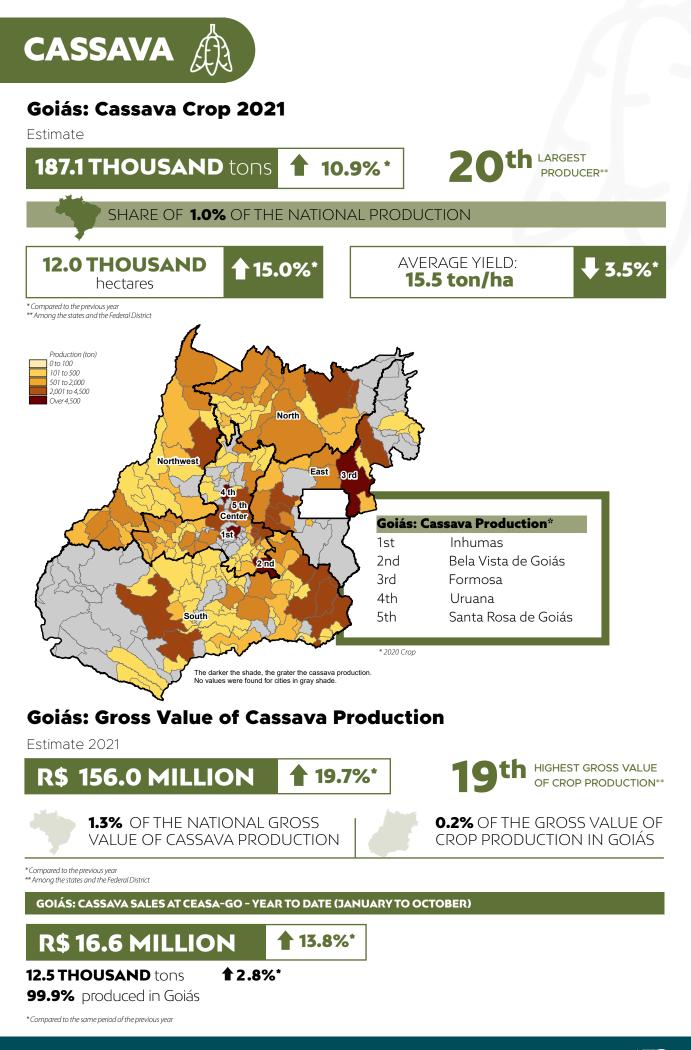




2020 2021

Source: CONAB/MAPA/Ministry of Economy.







#### **Production of Cassava Beer**

The Cassava Beer Project aims at creating new marketing opportunities for small farmers and promoting the appreciation of regional culture. The action is articulated by the government of Goiás with beer industries in Goiás and involves Seapa and Emater.

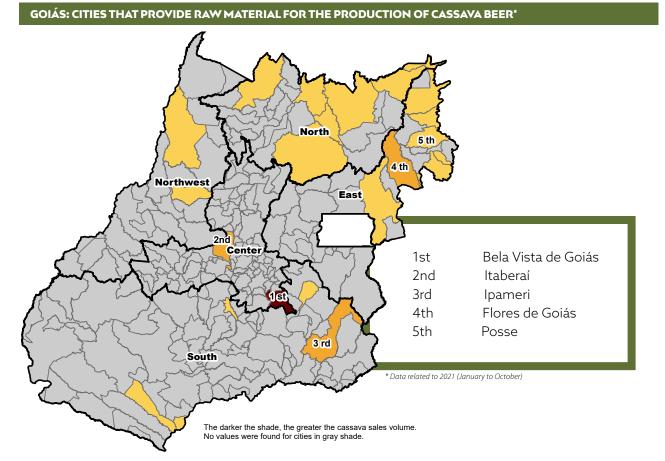
Besides, it has contributed to the strengthening of the cassava production chain, which has technical assistance, research oriented to a more productive and profitable cassava, as well as rural credit lines available for investments in this crop.

#### **Goiás: Production of Cassava Beer**

Year-to-date (January to October)

**1.9** THOUSAND TONS OF CASSAVA

23 SUPPLIER CITIES



Source: CEASA/ CONAB/ EMATER/ IBGE/ MAPA

#### **CEASA - GOIÁS SUPPLY CENTER S.A**

The market of fruit and leafy greens is highly influenced by weather conditions and the period of rains directly impacts the trade of these products in Goiás.

The rainfall levels observed since early October have contributed to increase the supply and quality of fruit and vegetables, which favors sales at the Supply Centers. The greater availability of these foods could normally imply price reduction, however, the expectation of demand growth for the end-of-year festivities may reflect in higher values.

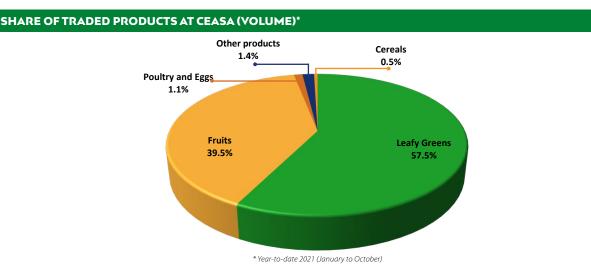
Throughout the year (January to October), a drop in the volume sold of almost all food groups was observed at Ceasa-GO, especially cereals, poultry and eggs, compared to the same period in 2020. In terms of value, however, increases were seen, which shows the product's price appreciation.



#### R\$ 2.0 BILLION 13.2%\*

**CEASA-GO** 

729,952.69 tons



#### CEASA-GO: TRADED PRODUCTS - VOLUME, VALUE AND VARIATION YEAR-TO-DATE 2021 (JANUARY TO OCTOBER)

Group	Volume	Variation**	Value	Variation**
Leafy Greens	419,376.7 tons	<b>↓</b> 5.2%	R\$ 977.6 million	<b>↓</b> 0.9%
Fruit	288,400.6 tons	♠ 0.6%	R\$ 928.9 million	<b>↑</b> 7.2%
Poultry and eggs	7,985.0 tons	<b>↓</b> 18.2%	R\$ 47.6 million	<b>1</b> 3.4% €
Other products	10,877.5 tons	<b>↓</b> 0.4%	R\$ 32.9 million	<b>1</b> 2.3% <b>1</b> 2.3%
Cereals	3,312.9 tons	<b>↓</b> 10.6%	R\$ 15.3 million	♠ 22.6%

Comparea to the same period in 2

Source: DIVTEC/CEASA, 2021.

3.1%

SEAPA Secretaria de Estado de Agricultura, Pecuária e Abastecimento

























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