

# AGRI IN DATA

JANUARY 2021

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



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# PRESENTATION

I would like to start this edition of Agri in Data wishing you and your families a happy New Year, dear reader! Taking a look at all that we experienced in 2020, it is important to start January with a positive attitude. We have reasons to be optimistic, as you will see in this edition. The agriculture did not stop last year because of COVID-19 pandemic and should continue to be the driving force in our state.

There is an expectation of an excellent 2020/21 crop, great demand, positive results for exports, and other factors. There are also farmers, hardworking, trained and struggling men and women from the countryside. And our motivation is to continue as one of the leader states in agricultural production in the country.

The Government of Goiás has given enormous importance to the agricultural supply chain in the last two years, since when the Secretariat of Agriculture, Livestock and Supply of Goiás State - Seapa was recreated, in January 2019. Now, in this third year of existence, we can see the results of our work to be multiplied, under the leadership of Governor Ronaldo Caiado. We hope to increase investments, create new public policies, improve existing ones and continue to contribute, on a daily basis, to the progress of rural producers in our state and, consequently, development of the 246 cities in Goiás, either directly or indirectly, agriculture in their economy.

The year begins with good prospects ahead: due to the vaccine that will save lives and also contribute to return to normal operations, and consequently, promote the economic stability of the county, driven by the yield crop that is taking place in our state. Thus, Goiás is working to continue providing meals from farm to fork. This is the role of agribusiness, in its essence: to feed and bring better living conditions to people.

The Government of Goiás has accomplished the work and will offer funding opportunities to the supply chain. We hope that farmers will have a bumper crop this new year.

Enjoy your reading!



**ANTÔNIO CARLOS DE SOUZA LIMA NETO**

STATE SECRETARY OF AGRICULTURE, LIVESTOCK AND SUPPLY IN GOIÁS

# INTRODUCTION

In 2020, agribusiness confirms the strength of Brazilian farmers by expanding production, guaranteeing food supplies in the domestic market and attending the growth in international demand. The positive results of agriculture have smoothed the effect of the decline in other supply chains in the country, mainly due to the connection it has with other economic activities, such as storage, transportation, industry, wholesale and food retail.

While the market expectation points to a 4.36% decrease of Brazilian GDP<sup>1</sup> in 2020 (Focus Bulletin released on 01/04/21), the agribusiness GDP, published by CEPEA/CNA, registered an increase of 8.48% year-to-date (January to August), with emphasis in the primary sector of economy - a rise of 23.03%.

The Gross Value of Agricultural Production in Brazil, for 2020, is estimated at R\$ 885.8 billion, an increase of 15.1%, compared to previous year. The products with the largest value share in agriculture are: soybean (R\$ 237.7 billion), beef cattle

(R\$ 124.2 billion), corn (R\$ 94.6 billion), poultry (R\$ 77.2 billion) and sugarcane (R\$ 71.4 billion). It is estimated growth of 17.2% and R\$ 72.2 billion in revenues in Goiás, which 67.6% are from crop production and 32.4% from livestock.

Another statistic that corroborates to the good performance of agriculture is the foreign capital inflow. Until November 2020, the value exported by Brazilian agribusiness is the highest ever: US\$ 93.6 billion. Goiás accounts for 6.4% of this value. The agricultural products exports represent 79.6% of all year-to-date (January to November) exports by the state - amount of US\$ 6.0 billion, 21.3% higher than the previous year. The percentage of other products exported has increased in Goiás, especially coffee, fruits, pork and sugar.

Despite the possibility that weather problems could impact the upcoming



crop, the estimate for the 2020/21 is to increase acreage, production and yield in the country. National weather forecast by INMET<sup>2</sup> indicates the predominance of rains all over the Center-West area until February 2021. In Goiás, according to the Agroclimatic Bulletin, released by IFAG<sup>3</sup>, in December, good weather conditions are forecasted for phytosanitary treatment in most areas of Goiás.

The positive results in agribusiness are reflected in more investments and recovery in the Agribusiness Confidence Index (IC Agro), that registered, at the end of the third quarter of 2020, an increase of 15.3 percentage points,

compared to the previous quarter, with emphasis on farmgate production which increased 17.5% points. According to FIESP<sup>4</sup>, the own business perception has increased as a result of raised prices of agricultural products and the availability of credit in rural areas. For the 2020/21 crop, between July and December 2020, the rural credit volume grew 18% in the country, compared to the previous crop, according to MAPA<sup>5</sup>.

Social indicators concerning agriculture also have excellent results, due to the development of effective public policies: farm advisory, rural credit, land regularization and production marketing programs. Another factor that makes Goiás stand out in the national scenario is the farmers' work and commitment, who have faced the new challenges with self-determination and competence.

1 GDP - Gross Domestic Product

2 INMET - National Institute of Meteorology

3 IFAG - Institute for the Strengthening of Agriculture in Goiás

4 FIESP - Federation of Industries of the State of São Paulo

5 MAPA - Ministry of Agriculture, Livestock and Food Supply

**Source: BACEN / CEPEA / CNA / CONAB / IBGE / IFAG / INMET / FIESP / MAPA / Ministry of Economy.**



## CATTLE/ BEEF

Brazil's beef exports are likely to set record volume in 2020, mainly due to strong demand from China. Year-to-date (January to November), according to data from Comex Stat, 1.8 million tons of this commodity have been shipped, an increase of 9.0% compared to 2019.

In the domestic market, beef consumption continues to fall, as a result of the reduced Brazilian family income and the high retail beef price. Despite the holiday season, according to CEPEA<sup>1</sup>, the meat demand has not risen as expected by the chain.

The average price for the fed cattle CEPEA/B3 points a 7.0% decrease in mid December, compared to November. The prices fell down in the main national markets. According to IFAG<sup>2</sup>, there was also a downward price trend for fed cattle (15kg) in Goiás, which registered an average of R\$ 245.35 on the 3rd week of December.

In spite of the reduced values, the forecast is that the price for fed cattle will remain at a high level, once the international demand is expected to continue strong. Input costs are also on the rise, mainly due to the value of grains and replacement animals, which impacts on profitability of the rancher.



## GOIÁS: CATTLE SLAUGHTER

### 3RD QUARTER OF 2020

**713.4 thousand head**

↑ **2.0%\***

↓ **6.6%\*\***

**196.9 thousand tons**

↑ **7.2%\***

↓ **4.7%\*\***

\*Compared to the 2nd quarter of 2020. \*\* Compared to the 3rd quarter of 2019

## GOIÁS: GROSS VALUE OF BEEF PRODUCTION - 2020

**R\$ 11.6 billion**

↑ **17.0%\***

**4th** highest Gross Value of Production \*\*

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

**49.5%** 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 NOVEMBER)

**US\$ 1.1 billion**

↑ **14.5%\***

**256.5 thousand tons**

↑ **10.4%\***

**3th** largest exporter \*\*

### NOVEMBER 2020

**US\$ 132.8 million**

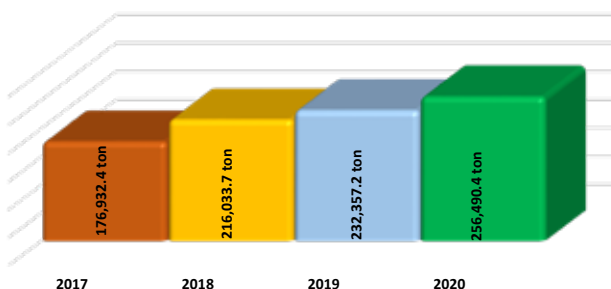
↑ **11.2%\***

**30.0 thousand tons**

↑ **22.6%\***

\* Compared to the previous year

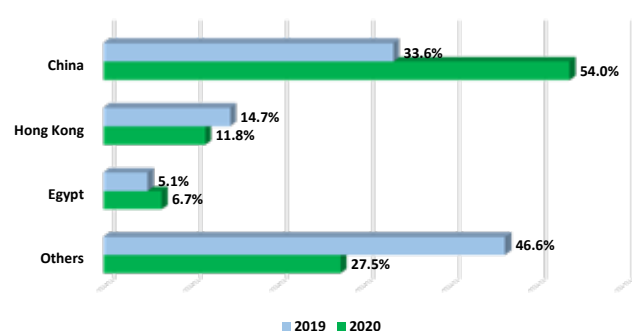
### GOIÁS: BEEF EXPORTS\*



\* Year-to-date (January to November)

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

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



# PORK / PIG PRODUCTION

In the domestic market, the period of high prices for live pig ended in late November and continued to decline in December. This was mainly due to the decrease in demand - an unexpected result for this season, when there is an usual increase for the end of year celebrations. Prices have also changed in Goiás, according to the Bulletin of the 3rd week of December, released by IFAG , the price paid to the rancher for the live pig registered R\$ 7.50/kg. It is worth considering that values are at higher levels than those charged in the same period of 2019. Despite the increase in input costs, the balance of 2020 for the pig farming is positive - leveraged mainly by the booming trade with other countries, as the exchange rate and commodity prices are favorable for the Brazilian exporter.

Brazil's pork exports reached a record in shipments, which amounted to 928.1 thousand tons in volume, US\$ 2.1 billion year-to-date (January to November), according to data released by Comex Stat. The value of exports recorded growth of 45.7%, compared to the previous year. The major importers of Brazilian pork are China, Hong Kong and Singapore.

During the first three quarters of the year, according to data from the Quarterly Survey of Animal Slaughtering, published in December by IBGE , 36.8 million pigs were slaughtered in the country - growth of 6.9%, compared to the previous year. The pig slaughtering in Goiás accounted for 3.8% of the national result - 8th position among the states, year-to-date (January to September).

In the coming months, pig farming in Goiás forecasts to expand, especially due to domestic consumption recovery and adding value to the pork meat, by means of the industries located in the state.





## GOIÁS: PORK SLAUGHTER

### 3RD QUARTER OF 2020

**503.1 thousand head**

**50.5 thousand tons**

**↑ 22.2%\***

**↑ 30.4%\***

**↓ 0.9%\*\***

**↑ 8.5%\*\***

*\*Compared to 2nd quarter of 2020. \*\* Compared to the 3rd quarter of 2019*

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

**R\$ 1.1 billion**

**↑ 18.2%\***

**7th highest Gross Value of Production\*\***

**4.1% of national Gross Value of Pork Production**

**4.8% 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 NOVEMBER

**US\$ 15.2 million**

**↑ 115.4%\***

**10.7 thousand tons**

**↑ 98.1%\***

**7th largest exporter \*\***

### NOVEMBER 2020

**US\$ 2.1 million**

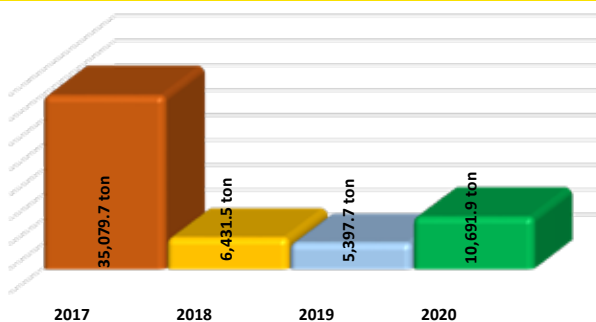
**↑ 34.7%\***

**1.1 thousand tons**

**↓ 5.4%\***

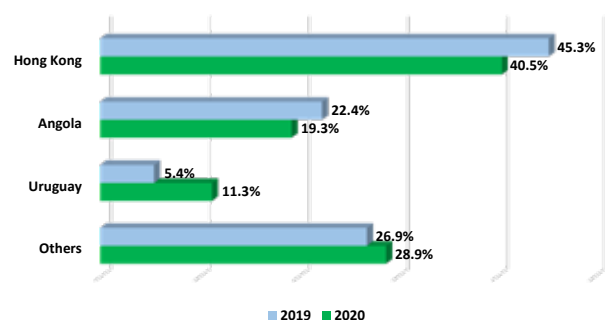
*\* Compared to the previous year. \*\* Among the states and the Federal District*

### GOIÁS: PORK MEAT EXPORTS\*



*\*Year-to-date (January to November)*

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



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

# POULTRY

In the international scenario, in 2020, poultry prices fell down. While the volume of poultry shipped across the country decreased only 1.0%, the revenue drop was 14.1%, year-to-date (January to November), compared to the previous year. In Goiás, there was an increase in the volume exported and the share of the total meat revenue sent to other countries was 21.4%. In this context, the high values of the Dollar against the Real contributed to lessen the impact of the low international prices of this meat.

In relation to prices in the domestic market, in December, there was a decrease of 5.1% in the value of frozen poultry, compared to November, according to CEPEA/ESALQ. The Bulletin released by IFAG reported the price of live poultry at R\$ 4.13/kg in Goiás, on the 3rd week of December.

The support of this productive supply chain, throughout 2020, resulted from the growth of domestic consumption, driven by the Emergency Aid Program and by the competitiveness of poultry meat against beef and pork.

The forecasts of the poultry supply chain for 2021 are challenging, as they reflect the economic conditions and the input cost increases, especially grains.



## GOIÁS: POULTRY SLAUGHTER

### 3RD QUARTER OF 2020

**111.8 million** chickens

**249.9 thousand** tons

↑ **28.4%\***

↑ **31.3%\***

↑ **9.5%\*\***

↑ **6.8%\*\***

\*Compared to 2nd quarter of 2020. \*\* Compared to the 3rd quarter of 2019

## GOIÁS: GROSS VALUE OF POULTRY PRODUCTION - 2020 ESTIMATE

**R\$ 5.1 billion**

↓ **8.2%\***

**6th** highest Gross Value of Production\*\*

**6.5%** of national Gross Value of Poultry Production

**21.6%** of the Gross Value of Livestock Production in Goiás

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

## GOIÁS: POULTRY MEAT EXPORTS

### YEAR-TO-DATE - JANUARY TO NOVEMBER

**US\$ 308.6 million**

↑ **14.4%\***

**194.7 thousand** tons

↑ **35.1%\***

### NOVEMBER 2020

**US\$ 28.7 million**

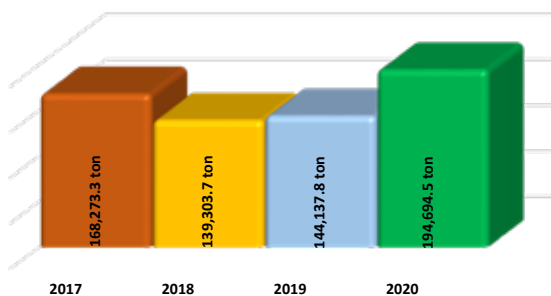
↑ **0.9%\***

**18.5 thousand** tons

↑ **18.3%\***

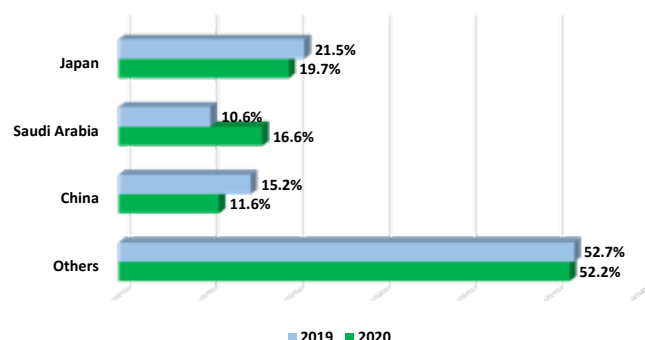
\* Compared to the previous year

### GOIÁS: EXPORTS OF POULTRY MEAT\*



\* Year-to-date (January to November)

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



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

# DAIRY PRODUCTS



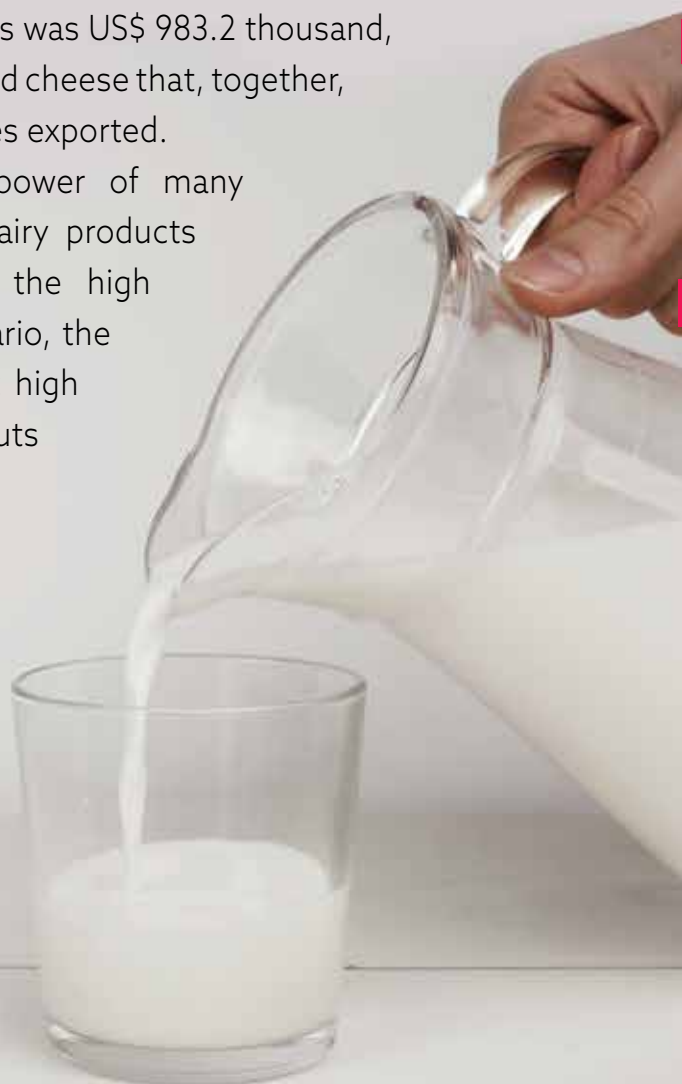
The prices paid to milk ranchers in 2020 had an increase in the country, due to an imbalance supply-demand, which raised the competition among dairy industries for raw material. According to CEPEA<sup>1</sup>, until August, industries could keep high dairy retail prices because of the strong demand; in September, however, they struggled to maintain the values, as dairy prices reached record level.

The volume of milk purchased by industries in the country was 18.7 billion liters in the first three quarters of the year - an increase of 1.9% compared to the previous year. In Goiás, in this period, the amount was 1.8 billion liters - a decrease of 4.4%.

National dairy exports, year-to-date (January to November), reached US\$ 68.6 million, an increase of 30.3%, compared to the previous year. In this period, the value exported by Goiás was US\$ 983.2 thousand, highlighting exports of condensed milk and cheese that, together, accounted for 65.0% of the dairy revenues exported.

The decrease in the purchasing power of many Brazilians and the high prices of the dairy products result in lower consumption, mainly the high value-added products. Even in this scenario, the perspective is that prices will remain at high levels, since the increased price of inputs and replacement cows and also the local weather instability could affect the supply in the coming months.

In the regional market, according to the Bulletin of Dairy Market in Goiás of December, products increased in prices compared to the previous month, except for powdered milk, and the index for dairy products registered a weighted total variation of 5.35%.



## 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)
November	3.00	20.51	24.57	9.01 <sup>(1)</sup>	25.92
December	3.33	20.35	26.21	9.39 <sup>(2)</sup>	27.31
<b>Variance</b>					
December/november	10.81%	-0.79%	6.65%	4.18%	5.38%
<b>Share</b>					
	20%	23%	37%	14%	6%
Dairy Products Variance In December: 5.35%					

(1) Price in October. (2) Price in November.

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

## GOIÁS: VOLUME OF MILK PURCHASED BY INDUSTRY

### 3RD QUARTER OF 2020

**604.7 million** liters of milk ↑ **5.4%\***

\*Compared to 2nd quarter of 2020

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

**R\$ 4.8 billion** - **6th** highest Gross Value of Production\*\* ↑ **10.1%\***

**11.3%** of the national Gross Value of Milk Production

**20.4%** 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 NOVEMBER

**US\$ 983.4 thousand** ↑ **19.1%\***

**449.0 tons** ↓ **1.0%\***

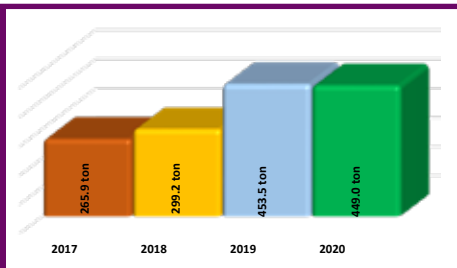
### NOVEMBER 2020

**US\$ 198.2 thousand** ↑ **313.8%\***

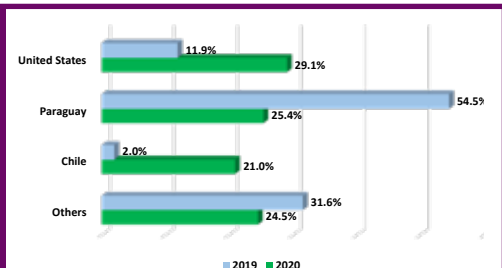
**84.3 tons** ↑ **113.2%\***

\* Compared to the previous year

## GOIÁS: DAIRY EXPORTS\*



## GOIÁS: SHARE OF THE MAIN DESTINATIONS IN THE AMOUNT OF MILK EXPORTS\*



\* Year-to-date (January to November)

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



# SOYBEAN

This year, Brazil's soybean complex set a record for exports. According to data from Comex, year-to-date (January to November), the country shipped 99.9 million tons of soybeans, 15.0% higher than the previous year - increase of 13.0 million tons. Goiás accounts for 9.4% of the total value of national soybean complex exports and it is the 4th largest exporting state of this commodity.

CONAB forecasts a record crop for the 2020/21 year, at 134.4 million tons - an increase of 7.7%, compared to the previous crop. In the regional market, soybean stills as the most representative crop in Goiás agriculture, accounting for 49.2% of all grains in the state.

Production is expected to grow in Goiás driven by increased planted area, however with possible yield reduction caused by weather problems.

Regarding the prices, according to the 3rd week Bulletin of IFAG, there was an appreciation of soybean in Goiás following the risen value on the Chicago Mercantile Exchange. The price of soybeans should remain at high levels, given the strong world demand for the grain, in a scenario of low American stock, a port strike in Argentina - a big player of this commodity - and market concern about the possibility of delayed harvest in some important areas of Brazil.



## GOIÁS: SOYBEAN CROP - 2020/21 ESTIMATE

<b>13.4 million tons</b>	<b>↑ 2.1%*</b>
Share of <b>10.0%</b> of the national production	
	<b>4th largest producer**</b>
<b>3.7 million hectares</b>	<b>↑ 4.2%*</b>
Average yield: <b>3.6 t/ha</b>	<b>↓ 2.0%*</b>

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

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

<b>R\$ 24.1 billion</b>	<b>↑ 52.8%*</b>
<b>3rd highest Gross Value of Production**</b>	
<b>10.1%</b> of the national Gross Value of Soybean Production	
<b>49.4%</b> of the Gross Value of Agricultural Production in Goiás	

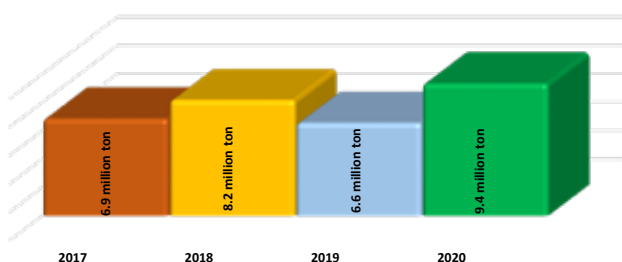
\* Compared to the previous year. \*\* Among the states and the Federal District

## GOIÁS: EXPORTS FROM SOYBEAN COMPLEX

<b>YEAR-TO-DATE (JANUARY TO NOVEMBER)</b>	
<b>US\$ 3.3 billion</b>	<b>↑ 37.8%*</b>
<b>9.4 million tons</b>	<b>↑ 42.4%*</b>
	<b>4th largest exporter**</b>
<b>NOVEMBER 2020</b>	
<b>US\$ 69.7 million</b>	<b>↓ 50.0%*</b>
<b>175.5 thousand tons</b>	<b>↓ 54.8%*</b>

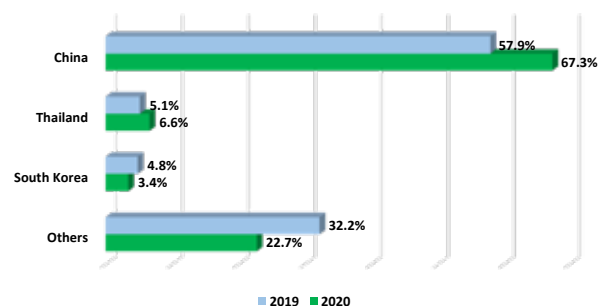
\* Compared to the previous year. \*\* Among the states and the Federal District (volume)

### GOIÁS: EXPORTS OF THE SOYBEAN COMPLEX\*



\*Year-to-date (January to November)

### GOIÁS: SHARE OF THE MAIN DESTINATIONS IN THE AMOUNT OF SOYBEANS EXPORTS\*



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

# CORN

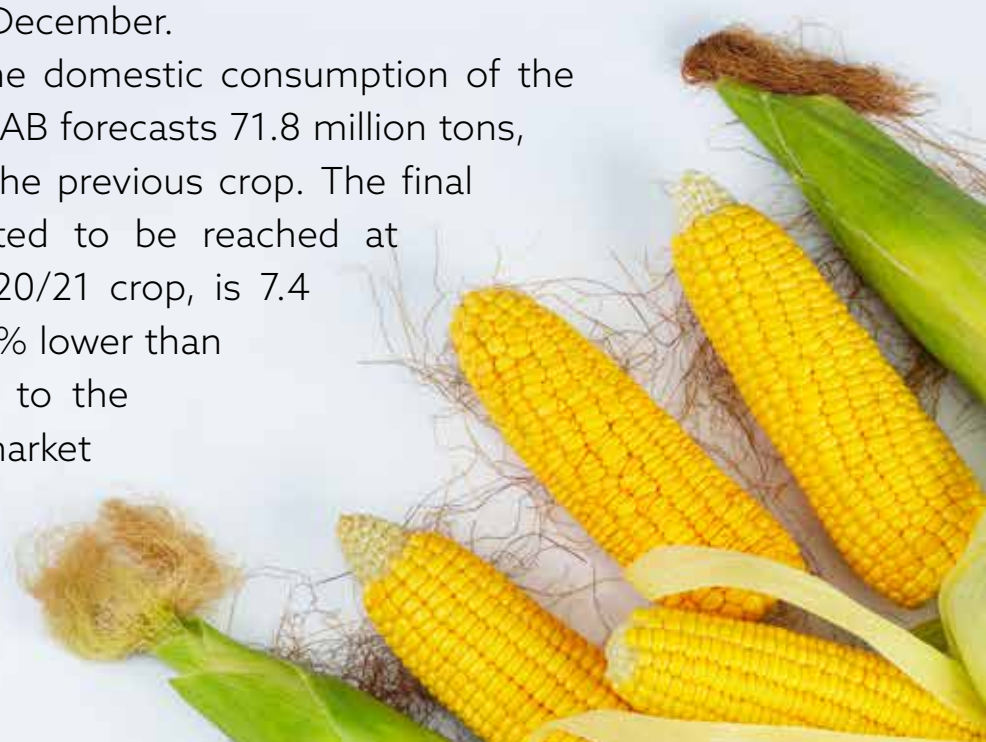


In November, corn shipment stood out in Brazilian agribusiness with 4.9 million tons exported. Despite this result, year-to-date (January to November), there was a decrease of 22.7% compared to the previous year in the volume traded of this commodity in the international market. In the domestic context, the demand for this cereal, throughout the year, remained strong to supply the animal feed industry and the expansion for the ethanol production from corn.

In the regional market, in relation to prices, according to the weekly bulletin of IFAG<sup>1</sup>, the average price of corn (bag of 60 kg), was R\$ 62.78, on 12/18/2020. The low stock of this grain and the weather problems in important areas of the country are factors that can help sustain high prices in the domestic market.

The expectation, for the 2020/21 crop, is to produce 102.6 million tons of corn in the country, according to CONAB . Goiás accounts for 11.6% of this production and, according to data of the sowing area of corn 1st crop, released by the Supply Company, the planting season was already finished in Goiás by the 3rd week of December.

In relation to the domestic consumption of the 2020/21 crop, CONAB forecasts 71.8 million tons, 4.6% higher than the previous crop. The final corn stock, expected to be reached at the end of the 2020/21 crop, is 7.4 million tons, a 30.4% lower than 2019/20 crop, due to the growth in internal market consumption.





## GOIÁS: CORN CROP – 2020/21 ESTIMATE

<b>11.9 million tons</b>	<b>↓ 5.6%*</b>
	<b>3rd largest producer**</b>
<b>1.8 million hectares</b>	<b>↓ 5.0%*</b>
Average yield: <b>6.6 t/ha</b>	<b>↓ 0.6%*</b>

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

## GOIÁS: ETHANOL PRODUCTION FROM CORN - 2020/21 ESTIMATE

Production: <b>511.5 million liters</b>	<b>↑ 73.0%*</b>
Share of <b>16.9%</b> of the national production	

\* Compared to the 2019/20 crop.

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

<b>R\$ 10.1 billion</b>	<b>↑ 36.5%*</b>
<b>3rd highest Gross Value of Production**</b>	
<b>10.7%</b> of the national Gross Value of Corn Production	
<b>20.7%</b> of the Gross Value of Agricultural Production in Goiás	

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

## GOIÁS: CORN EXPORTS

### YEAR-TO-DATE - JANUARY TO NOVEMBER

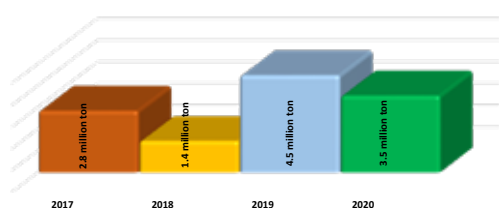
<b>US \$ 587.2 million</b>	<b>↓ 20.5%*</b>
<b>3.5 million tons</b>	<b>↓ 20.8%*</b>
	<b>2nd largest exporter**</b>

### NOVEMBER 2020

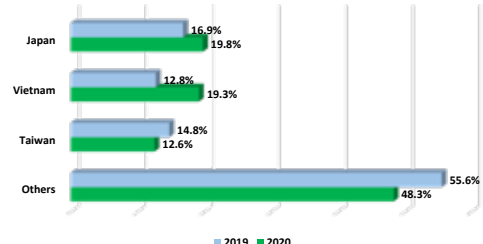
<b>US\$ 101.3 million</b>	<b>↓ 4.2%*</b>
<b>571.9 thousand tons</b>	<b>↓ 10.3%*</b>

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

### GOIÁS: CORN EXPORTS\*



### GOIÁS: SHARE OF THE MAIN DESTINATIONS IN THE AMOUNT OF CORN EXPORTS\*



\* Year-to-date (January to November)

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

# SUGARCANE

The **sugarcane** supply chain had challenging moments in the ethanol producing segment, due to the drop in consumption and price in 2020. In general, Brazilian ethanol plants have chosen to switch the production to sugar, driven by international demand. National exports from the sugar and alcohol complex, from January to November, registered revenues of US\$ 9.0 billion, up 58.4%, compared to the previous year. The sector has the fourth largest share in the amount of the Brazilian agribusiness exports - accounts for 9.7% of the revenues year-to-date (January to November). The regional scenario also presents good results, with a share of 5.6% of the value exported in agribusiness.

According to CONAB, the estimate of national sugarcane production, for the 2020/21 crop, is 665.1 million tons - a volume close to the 2015/16 record crop and an increase of 3.5%, compared to the previous crop. Goiás should reach a share of 11.4% of the national sugarcane production.

Regarding the manufacture of **sugar** from cane, according to data released by CONAB, the country should produce 41.8 million tons, 40.4% more than in the previous year. Goiás should account for 6.1% of this production.

Regarding **ethanol** from sugarcane, the estimate is a reduction of 12.3% of the country's production in the 2020/21 crop. In the international market, however, there is an expansion of ethanol exports: year-to-date (January to November), the country accumulates an amount of US\$ 1.1 billion, 17.3% higher than the previous year.

The production in Goiás is mainly to supply the domestic market and accounts for only 2.8% of the volume of ethyl alcohol shipped by the country, 55.1 thousand tons. The forecast for the coming months is positive for this supply chain, which has great potential for ethanol production in Goiás, an optimistic scenario to consumption of biofuels.



## GOIÁS: SUGARCANE CROP – 2020/21 ESTIMATE

<b>75.8 million tons</b>	<b>↑ 0.7%*</b>
	<b>2nd largest producer**</b>
<b>974.4 thousand hectares</b>	<b>↑ 3.3%*</b>
Average yield: <b>77.8 t/ha</b>	<b>↓ 2.5%*</b>

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

## GOIÁS: GROSS VALUE OF SUGARCANE PRODUCTION - 2020 ESTIMATE

<b>R\$ 7.9 billion</b>	<b>↓ 3.2%**</b>
<b>11.1%</b> of the national Gross Value of Sugarcane Production	
<b>16.3%</b> of the Gross Value of Agricultural Production in Goiás	

\*\* Compared to the previous year

## GOIÁS: SUGAR FROM CANE CROP – 2020/21 ESTIMATE

<b>2.5 million tons</b>	<b>↑ 42.4%*</b>
Share of <b>6.1%</b> of the national production	
Volume of sugarcane used to sugar manufacturing:	
<b>19.0 million tons</b>	<b>↑ 46.0%*</b>

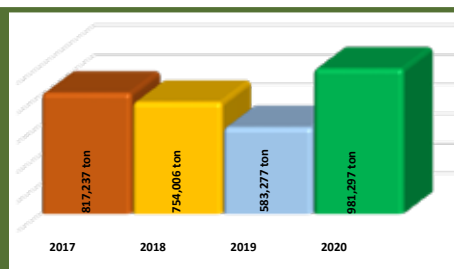
\* Compared to the previous crop

## GOIÁS: SUGAR EXPORTS

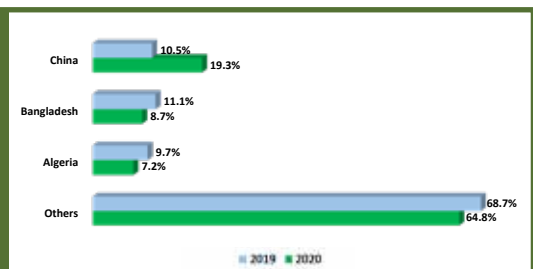
<b>YEAR-TO-DATE - JANUARY TO NOVEMBER</b>	
<b>US\$ 307.3 million</b>	<b>↑ 55.6%*</b>
<b>981.3 thousand tons</b>	<b>↑ 68.2%*</b>
<b>90.9%</b> exports value from the sugar and alcohol complex	
	<b>5th largest exporter**</b>
<b>NOVEMBER 2020</b>	
<b>US\$ 24.7 million</b>	<b>↑ 0.8%*</b>
<b>74.4 thousand tons</b>	<b>↑ 0.7%*</b>

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

### GOIÁS: SUGAR EXPORTS\*



### GOIÁS: SHARE OF THE MAIN DESTINATIONS IN THE AMOUNT OF SUGAR EXPORTS\*



\* Year-to-date (January to November)

# SUGARCANE

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

<b>4.7 billion</b> liters	<b>↓ 11.2%*</b>
Share of <b>15.6%</b> of the national production	
Volume of sugarcane used to produce ethanol:	
<b>56.8 million</b> tons	<b>↓ 8.8%*</b>

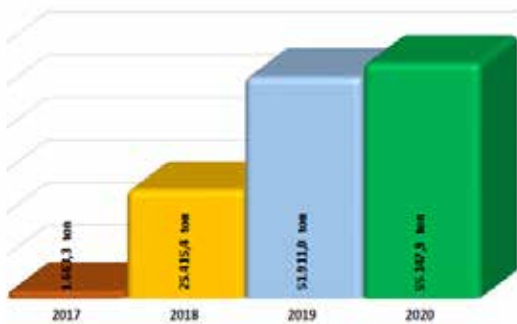
\* Compared to the previous crop

## GOIÁS: ETHYL ALCOHOL EXPORTS

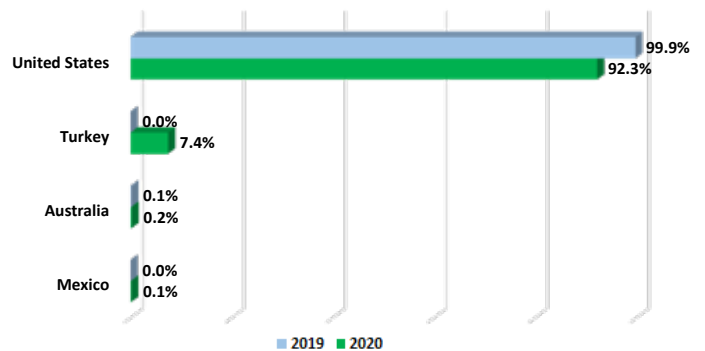
<b>YEAR-TO-DATE - JANUARY TO NOVEMBER</b>	
<b>US\$ 30.9 million</b>	<b>↑ 0.8%*</b>
<b>55.1 thousand</b> tons	<b>↑ 6.2%*</b>
<b>9.1%</b> exports value from the sugar and alcohol complex	
<b>3rd</b> largest exporter **	
<b>NOVEMBER 2020</b>	
<b>US\$ 8.0 million</b>	
<b>14.7 thousand</b> tons	

Note: no values registered in 2019  
\* Compared to the previous year. \*\* Among the states and the Federal District

### GOIÁS: ALCOHOL ETHYL EXPORTS\*



### GOIÁS: SHARE OF THE MAIN DESTINATIONS IN THE AMOUNT OF ALCOHOL ETHYL EXPORTS\*



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

# SEAPA - SECRETARIAT OF AGRICULTURE, LIVESTOCK AND SUPPLY OF GOIÁS STATE

FCO - CONSTITUTIONAL FUND FOR FINANCING IN THE CENTER-WEST REGION

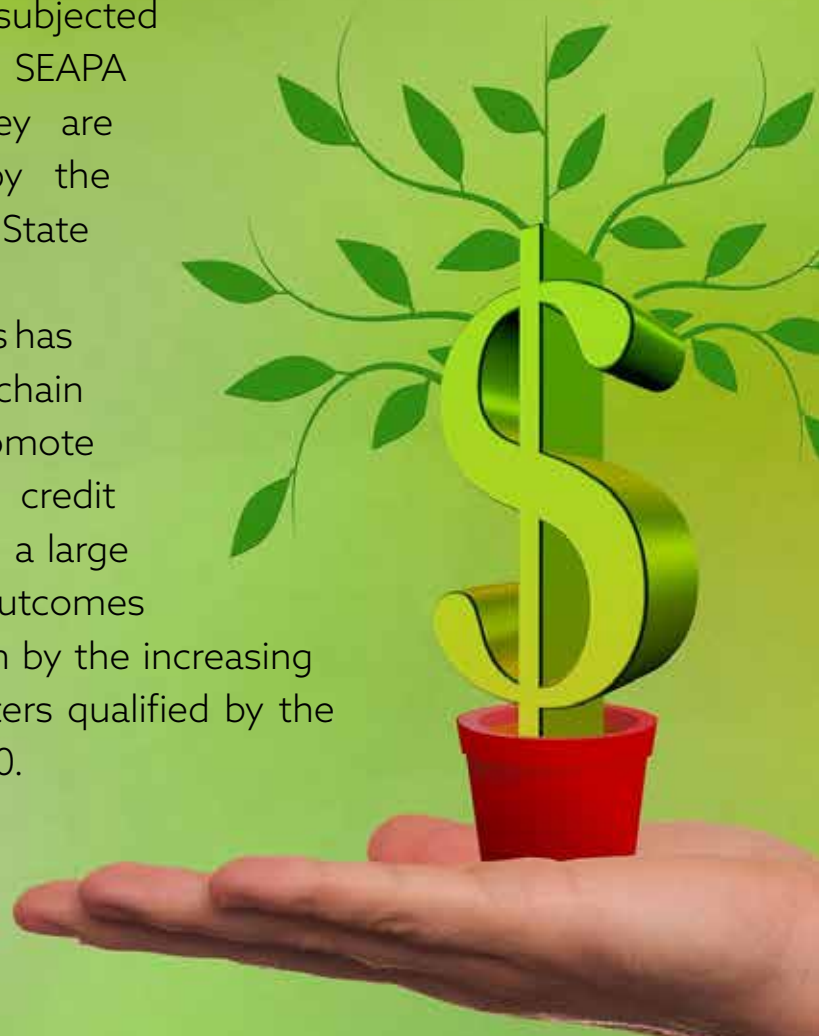
FCO aims at contributing to the economic and social development of Goiás, Mato Grosso, Mato Grosso do Sul and the Federal District, through the execution of financing programs for the productive sectors, mainly to support low and small income rural producers, Individual micro entrepreneurs and micro and small companies.

FCO credit lines are attractive compared to those available in the banks, with different loan rates, payment terms and grace periods, as stated by the activity to be financed, according to the regional development program.

In the state of Goiás, year-to-date (January to November), 4,564 loans were settled with funds from FCO Rural - an amount of R\$ 1.3 billion invested in rural establishments in Goiás.

Rural Loan Applications, which value is equal to or higher than R\$ 500 thousand, are made through forms called "Consultation Letter" and subjected to technical analysis by the SEAPA officers. Subsequently, they are submitted for approval by the Development Council of the State of Goiás (CDE).

The government of Goiás has worked with the productive chain to build policies that promote diversification and loan credit spreading, in order to reach a large number of producers. The outcomes of this program can be seen by the increasing number of consultation letters qualified by the CDE for rural projects in 2020.



# SEAPA - SECRETARIAT OF AGRICULTURE, LIVESTOCK AND SUPPLY OF GOIÁS STATE

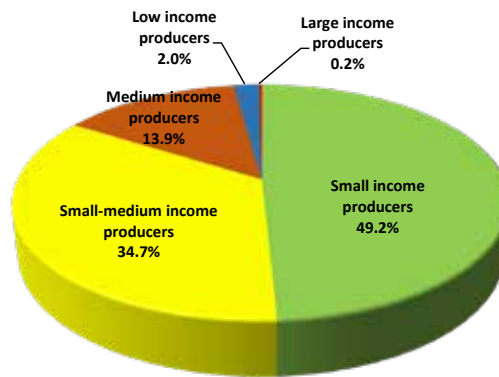
FCO - CONSTITUTIONAL FUND FOR FINANCING IN THE CENTER-WEST REGION

## RURAL FCO IN GOIÁS: CONSULTATION LETTERS ANALYZED BY SEAPA AND QUALIFIED BY CDE - 2020

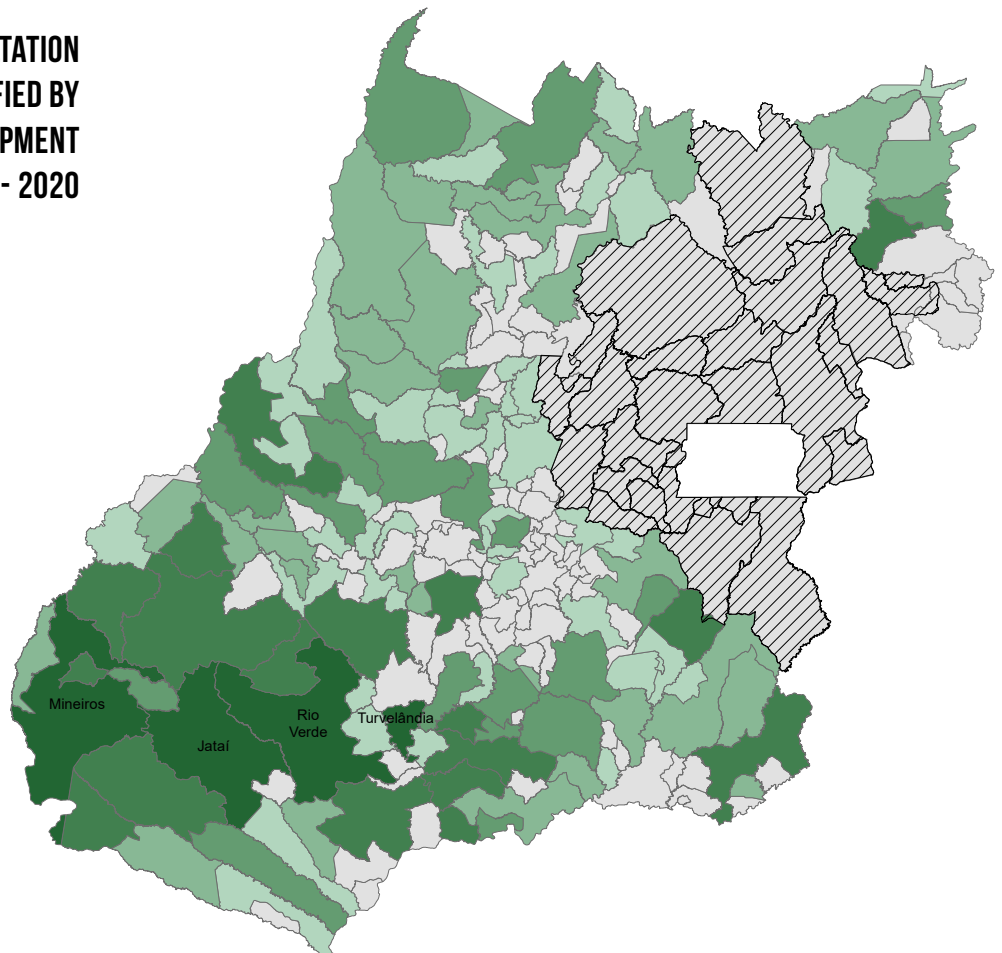
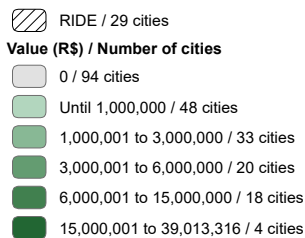
<b>R\$ 467.7 million</b> approved	
<b>461</b> analyzed and qualified applications	<b>↑ 28.1%*</b>
<b>123</b> cities	<b>↑ 16.0%*</b>
Expectation of <b>887</b> direct jobs	

\* Compared to the previous year

### RURAL FCO: CONSULTATION LETTERS BY ANNUAL INCOME RURAL PRODUCER - 2020



### GOIÁS: CONSULTATION LETTERS QUALIFIED BY THE STATE DEVELOPMENT COUNCIL / FCO RURAL - 2020

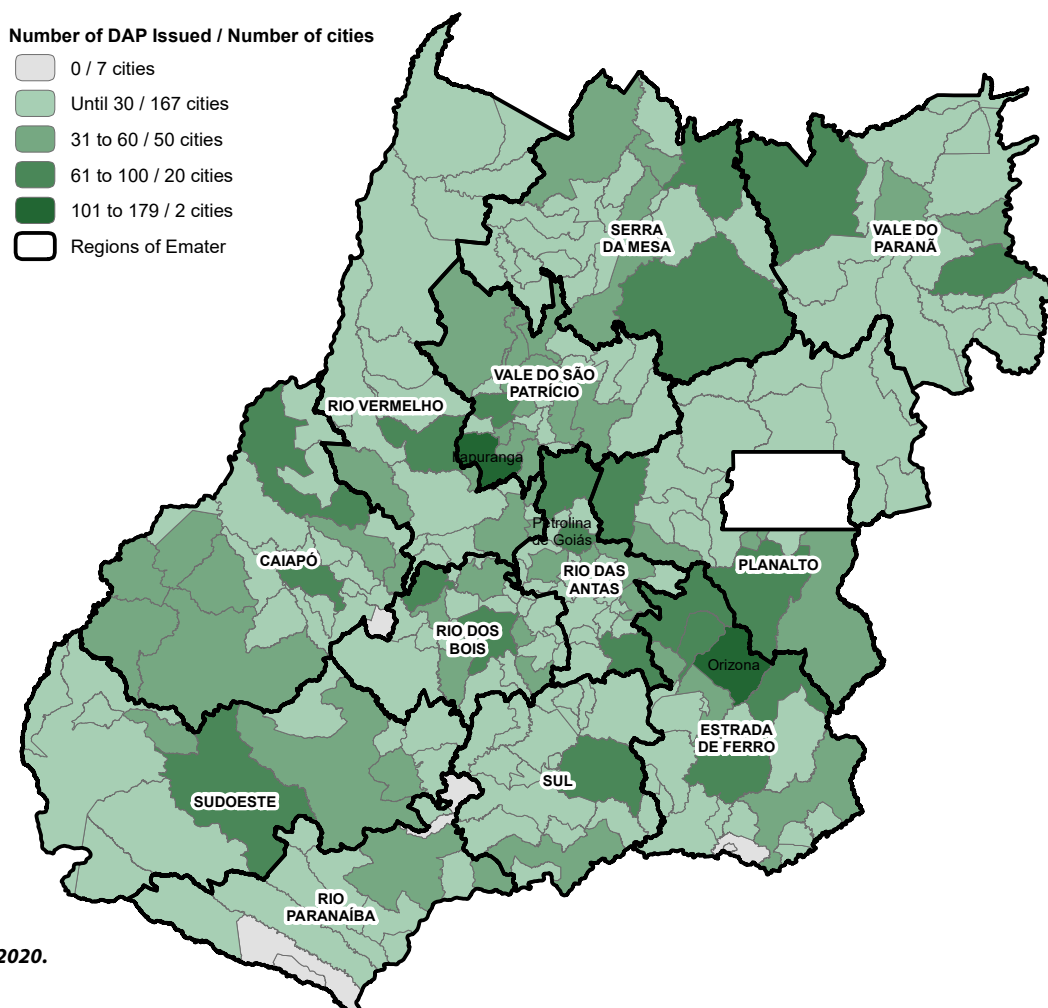


Note: The cities in Goiás that are included in the Development Region of the Federal District and Surroundings (RIDE) are awarded with resources from FCO / DF.

**DECLARATION OF APTITUDE TO PRONAF (DAP)**

DAP is a document of aptitude for small family producers, with data about the farmers and their respective production. This declaration guarantees legal security in loan programs, as well as enabling the producer to take part of the National Program for Strengthening Family Agriculture (Pronaf). In order to assist the small family producer, Emater has local offices in all areas of the state. From January to November 2020, it was issued 6,252 DAPs by the Agency to small family producers in Goiás.

**GOIÁS: DAP ISSUED - YEAR-TO-DATE (JANUARY TO NOVEMBER)**



Source: Emater, 2020.

### State Program for Aquatic Animal Health (PESAA)

#### PURPOSE OF THE PROGRAM:

**PLAN**  
**DEVELOP**  
**CARRY OUT**



actions aimed at sanitary control, through the prevention, control and eradication of infectious and parasitic diseases that affect aquaculture.

#### PESAA REGULATES:

- active and passive surveillance;
- inspectors and agents training;
- supervision and certification of aquaculture establishments.

At this moment, the main health problem in aquaculture in Goiás is the Infectious Spleen And Kidney Necrosis Virus (ISKNV) - an emerging disease that affects tilapia, cichlids, poeciliids and freshwater gouramis with occurrence identified in certain aquaculture establishments in the Paranaíba Basin. This viral disease develops in a high stocking density, with poor Good Production Practices or health management. The Agency has a main role in controlling this disease spreading, in collaboration with the producers of Goiás.

#### AGRODEFESA'S GUIDELINES FOR CARRYING OUT HEALTH MANAGEMENT PRACTICES::

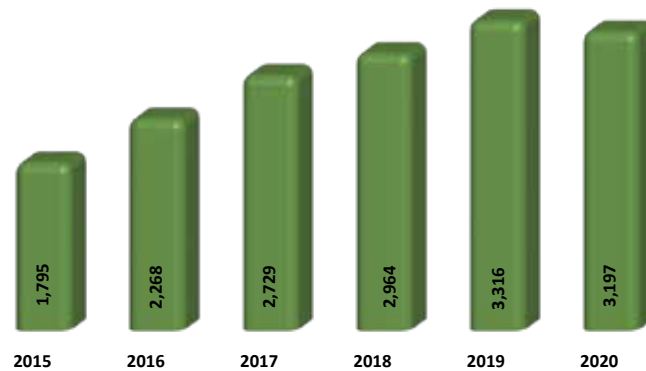
- |  |   |
|--|---|
| ■ cleaning and disinfection of facilities;   | ■ vaccination and other prophylaxis;                                |
| ■ host-free period (minimum of 24 hours after cleaning and disinfecting the facilities); | ■ water treatment;  |
| ■ quarantine;  | ■ technical assistance;   |
|  | ■ laboratory analyzes;  |
|  | ■ notification of disease signs to the official veterinary service. |

The aquaculture supply chain in the state of Goiás is supported by Agrodefesa, which aims at productive development with a focus on improving health status and guaranteeing the quality for animal-origin products. The goal of the government of Goiás, in partnership with the producers, is to attend more demanding markets, with quality and food safety.



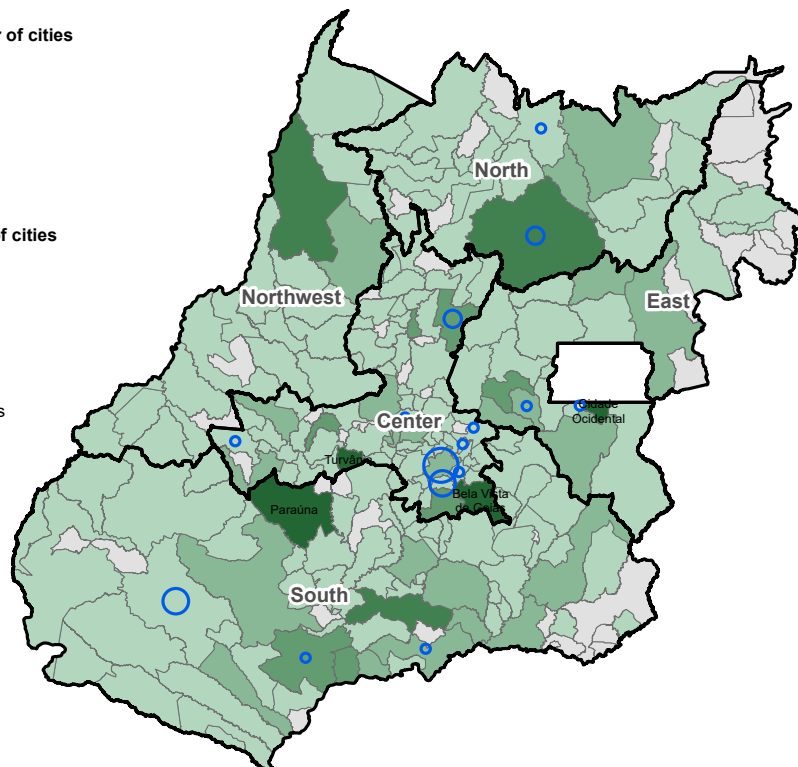
Agrodefesa's outcomes resulted in a 78.1% increase in the number of Animal Movement Permit (GTA) for aquatic animals issued in the state in the last 5 years.

### AGRODEFESA: NUMBER OF GTAS ISSUED FOR AQUATIC ANIMALS



### GOIÁS: AQUACULTURE PRODUCTION AND SLAUGHTERHOUSES

- Number of Slaughterhouses / Number of cities**
- 1 / 10 cities
  - 2 / 2 cities
  - 3 / 2 cities
  - 7 / 1 cities
- Mesoregions of Goiás**
- Mesoregions of Goiás
- Number of Aquatic Animals/Number of cities**
- No Animals / 44 cities
  - Until 500,000 / 165 cities
  - 500,001 to 2,000,000 / 23 cities
  - 2,000,001 to 8,000,000 / 7 cities
  - 8,000,001 to 17,000,000 / 3 cities
  - 17,000,001 to 35,093,214 / 4 cities



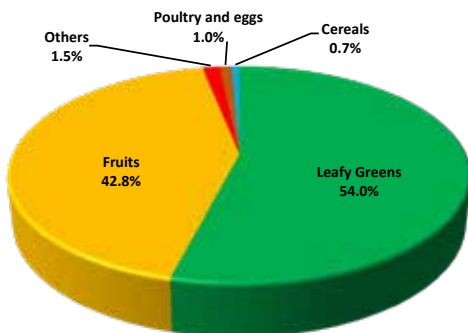
The statistics of Brazilian aquaculture are still underreported and, in the state of Goiás, Agrodefesa strives to regularize and update the records of establishments that have aquatic animals for sale. The Agency's expectation for 2021 is to provide the health certification of aquaculture farms with fry production, promoting biosecurity actions, as well as, proving the properties for fish diseases absence every six months.

Source: Agrodefesa, 2020.

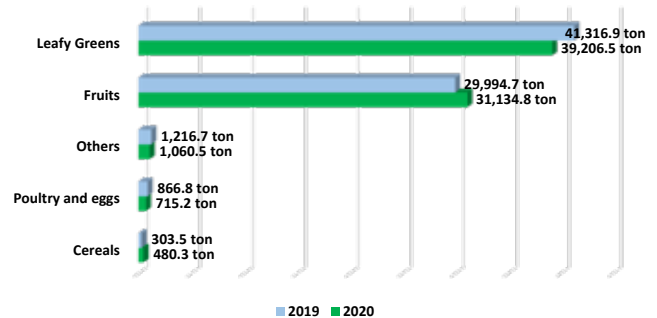
In November, Goiás Supply Center S.A. sold 72.6 thousand tons of fruit and vegetables reaching a financial turnover of R\$ 219.4 million, an increase of 7.5% compared to the previous month, with emphasis on fruits - 9.9% increase. In relation to traded volume, there was a 2.5% drop in November, compared to October.

### CEASA GOIÁS

**SHARE OF TRADED PRODUCTS AMOUNT (%) - NOVEMBER/ 2020**



**COMPARATIVE OF THE TRADED AMOUNT - NOVEMBER 2019 AND 2020**



### CEASA GOIÁS: TRADE VARIATION - NOVEMBER 2020

Group	Variation (%)	
	Value	Volume
Leafy greens	↑ 5.4	↓ 5.6
Fruits	↑ 9.9	↑ 1.7
Poultry and eggs	↓ 12.8	↓ 15.6
Others	↑ 0.1	↓ 9.5
Cereals	↑ 79.9	↑ 73.6
<b>Total</b>	<b>↑ 7.5</b>	<b>↓ 2.5</b>

\* Compared to the previous month

## CEASA GOIÁS: AVERAGE PRICE OF THE MOST CONSUMED PRODUCTS - NOVEMBER / 2020

Fruits	Banana	Orange	Apple	Papaya	Watermelon
<b>Price (R\$/kg)</b>	3.21	1.78	5.48	2.77	1.22
<b>VAR% (Nov/Oct)</b>	↑ 9.9	↓ 1.1	↑ 5.6	↓ 1.4	↓ 3.9

Leafy Greens	Lettuce	Potato	Onion	Carrot	Tomato
<b>Price (R\$/kg)</b>	1.98	3.07	2.24	1.86	3.72
<b>VAR% (Nov/Oct)</b>	↑ 16.5	↑ 40.2	↑ 16.7	↑ 36.8	↑ 17.0

## GRAPE

In Goiás, according to IBGE<sup>1</sup> data, nine cities in Goiás grew grapes in 2019, two more than in 2018. According to the Agricultural Census, there are 48 farms with grape production in the state. Even though the weather conditions are not too favorable for the crop, the use of irrigation technology and climate resilient crop varieties in the Brazilian Cerrado have driven the production increase in Goiás. The cities of Paraúna, Itaberaí and Hidrolândia stand out in grape farming in the state.

The commercialization of grapes in November reached R\$ 4.7 million at Ceasa Goiás, which accounts for 4.7% of the national fruits. The traded volume was 542.8 tons, in which 15.2% of them came from cities in the state, which shows good market opportunity for farmers in Goiás. Regarding the values, the trend is to have higher prices, due to the increase in demand with the end of the year holidays.



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

GOIÁS: GRAPE PRODUCTION

**1.4 thousand tons**

**10th largest producer**

**76 ha planted**

**18.6 t/ha**

**Gross Value of Production → R\$ 5.8 million**

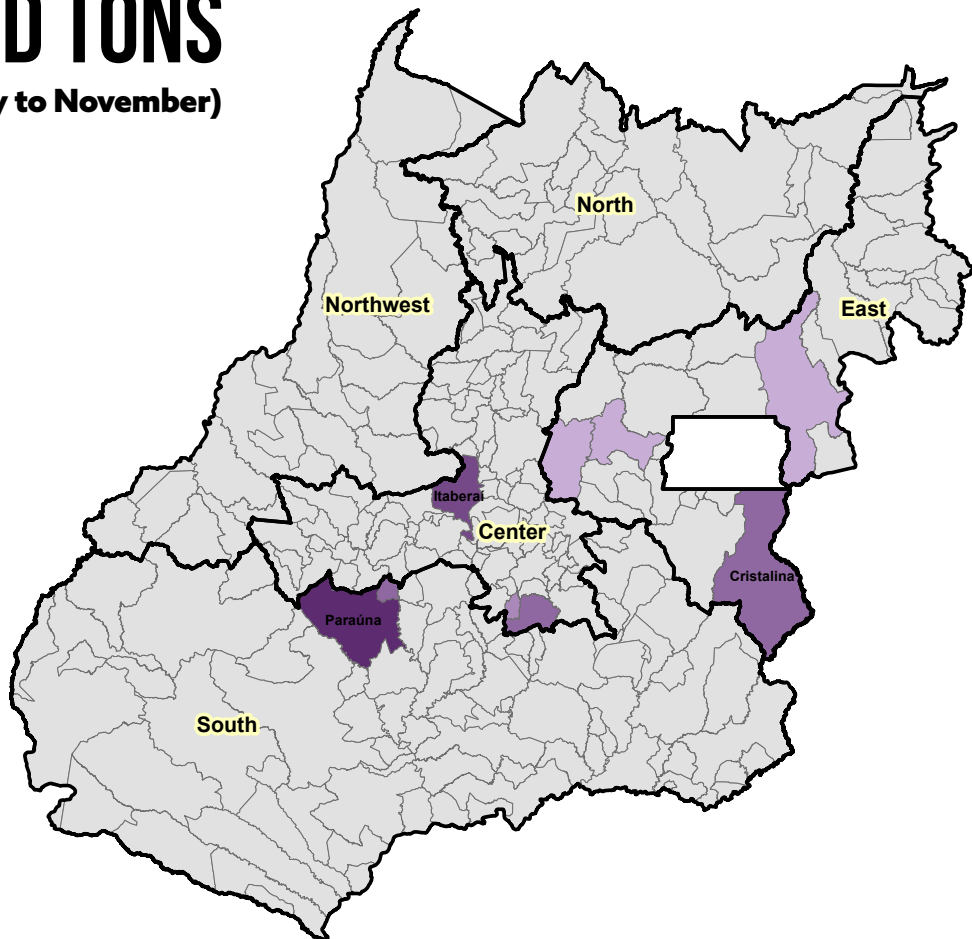
**3.7 THOUSAND TONS**

Year-to-date exports (January to November)

GOIÁS: GRAPE PRODUCTION

TONNES / NUMBER OF CITIES

- No production / 237
- Until 50 / 3
- 51 to 150 / 1
- 151 to 240 / 3
- 241 to 560 / 1
- 561 to 777 / 1
- Mesoregions of Goiás



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



**AGRO  
DEFESA**  
Agência Goiana de Defesa Agropecuária



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



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