

AGRI IN DATA

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SEAPA
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Abastecimento



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SECRETARIA DE AGRICULTURA DE GOIÁS

PRESENTATION

The agriculture continues to resist and has been the mainstay of the economy in Goiás and Brazil, despite the hard times experienced due to the pandemic of the new coronavirus (Covid-19). We need to keep a strong economy and, in this sense, both food production and sales - basic items for the population - contribute to keep exporting and moving on the economy, with jobs creation and income increasing in the municipalities. In Goiás, the agricultural sector is the main activity in 77 municipalities, and if we take into consideration the cities in which the agriculture is the second and third most important activities, this number rises to 183 of the 246 municipalities in the state.

All of this explain the results we have reached and that we keep seeking to raise. After all, it is necessary to account to the society the reason that the Government has invested in the agricultural sector. The agriculture supports whole families and, besides that, it is the basis for agro-industries and the raw material for large sectors, mainly related to human and animal food.

In this Agri in Data, we can notice some agribusiness outcomes expressed in numbers. These data explain the reason for having an amount of R\$ 236 billion in "Plano Safra" 2020/2021, of which R\$ 18 billion will be destined to our farmers to make investments in production. The Governor Ronaldo Caiado was at the forefront, dealing with the Federal Congress, seeking for investments addressed to Goiás. We need to continue producing in order to have solidity in our economic base.

During the launch event of *Plano Safra 2020/2021* in Goiás, on June 24th, Caiado pointed out that the agriculture production has guaranteed the food and the business conditions for negotiating abroad to generate income so that the state can take care of people's lives, especially in the social aspect. It is necessary to show that this investment is cyclical and it turns into benefits to the society. The agriculture keeps producing, feeding and saving lives.

Enjoy your reading!



**ANTÔNIO CARLOS DE
SOUZA LIMA NETO**

STATE SECRETARY OF
AGRICULTURE, LIVESTOCK
AND SUPPLY IN GOIÁS

#OAgroédeTodos #SomosTodosGoiás

INTRODUCTION

The Covid 19 pandemic has caused turbulences across the country and the world. It is important to emphasize that the actions taken to face the coronavirus are not the cause of the adverse economic moment, but the damaging potential of this disease and all the uncertainties brought by it. Thus, there is no dichotomy between economy and health, since the consequences of this crisis are serious and affect everyone. It is a pandemic and, therefore, as long as the health system is not in balance, the economic measures will only lessen the negative impact of this moment. Therefore, solving the situation will necessarily depend on the outcomes got from the health actions taken. Meanwhile, specific studies, plans and policies must be designed for the economic recovery in the state.

Considering the social protection side, in May, the Emergency Aid policy reached 38.7% of Brazilian households and 39.9% of Goiás households, according to the data from the National Survey of Household Sample - PNAD COVID19 from IBGE, which contributed to the money circulation in the local economy. Furthermore, the social work to protect the most vulnerable people has been extended to all municipalities in Goiás, by providing basic food baskets to underprivileged students of the state public school system, among others, enrolled in the Food Aid Program. On the productive sector side, substantial work has

been done to expand credit to entrepreneurs and rural producers.

For the rural farmer, the "Plano Safra" 2020/2021, which started this July, has now higher volume of resources, 6.1% more, and lower interest rates in all credit lines, in relation to the previous one. There are R\$ 236 billion, of which R\$ 33 billion is allocated to PRONAF (National Program for Strengthening Family Farming), a credit line destined to family farming. Other important aspects of the current policy are sustainability and innovation, with an emphasis on the bioeconomy, low carbon agriculture, irrigation, technology and storage. Thus, it is sought the investments to be addressed to an increasingly sustainable agriculture in the economic, environmental and social pillars. In Goiás, the statistics of the Central Bank on rural credit, from July/2019 to May/2020, point to more than 50 thousand contracts, totaling R\$ 15.8 billion. For the current "Plano Safra", the forecast is that R\$ 18 billion will be destined to farmers from Goiás.

Another available resource to entrepreneurs and rural farmers in Goiás is the FCO, Constitutional Fund for Financing in the Center-West region, which provides specific lines to rural producers. From January to May 2020, more than 1,800 contracts have already been signed, reaching the amount of R\$ 623 million invested with quality and covering the largest number of farmers and all regions of the state.



Thus, rural credit, one of the pillars of agribusiness development in Goiás, goes beyond a crop of billions of dollars or thousands of tons, or positive results of the trade balance, as it means maintaining and jobs creation, income generation and investments in the 246 municipalities of Goiás.

Agribusiness is the industry that is closely linked to the clothing and food production. It is also the industry of technological inputs and equipment; it is the scientific development in each vaccine or genetic improvement. Also, it is linked to the Services sector that is strongly demanded by the agriculture. All this movement is the result of the agribusiness. And the country's agricultural policy necessarily involves the management of business risks, for both small, medium and large farmer, each of them with different challenges, depending on the specificities of their size. Accessing to credit with lower administrative and tax costs is the challenge to be overcome, especially at this time, when agriculture has shown its importance for the economy in each municipality in Goiás.

In the case of the small farmer, Goiás Fomento in partnership with Emater will provide these producers to access the rural credit.

In the country, the quarterly indicators of the industrial activity and services already reflect decreases in several segments. One of the most important macroeconomic statistics, Brazilian Gross Domestic Product (GDP), points to a 0.3% decline in the first quarter of 2020 compared to the same quarter of 2019, reaching

only the beginning of the pandemic in the country in mid-March. The forecast for 2020, provided by the last Focus Bulletin, reveals a 6.54% drop in GDP in Brazil. The crisis has more negative impact on sectors that have had their market dynamics interrupted and also on segments that are more sensitive to the reduction in the income of families that had their consumer buying power weakened.

In Goiás, the statistics released by Mauro Borges Institute - IMB estimate growth of 3.4% in the first quarter of 2020, compared to the same period in 2019. This growth was driven by the 18.0% increase in agriculture. The strength of the agricultural sector allows the state to be positioned as a major competitive producer, the mainstay of the economy in Goiás, in which the GDP results for the first quarter may confirm that. In addition, Goiás has reached the position as a reliable trade partner, especially considering the very important aspect of meeting the demands on animal and plant health, by means of the state institution Agrodefesa, and also the expectation of having a herd free of Foot and Mouth Disease without vaccination next year.

Thus, although this is a challenging time, the strength of the agriculture in Goiás contributes so that the impacts of this crisis are lower than in other states and also for the resumption of growth in other sectors. The forecast is the agriculture to continue to growing and strengthening the agro-industries in the state and, as a consequence, create more jobs and generate income for people in Goiás.

BEEF / CATTLE

The beef cattle farming in Brazil has been marked by a scenario of supply restriction and strong international demand, holding steady prices for beef and, however, facing decreases in the domestic demand, due to the income decline.

On the demand side, it is expected that the international trade will continue to expand due to the opening of new markets and more demanding consumers will emerge concerning food origin information and food safety. The beef consumption has been reduced in domestic market, as consequence of the decrease in household incomes caused by the crisis that the country has faced since mid-March this year. In this context, in which the beef price is higher, the demand migrates to lower priced animal proteins. On the supply side, the decrease in the number of animals for slaughtering is likely to continue, which in addition to the increase in international demand is causing prices to keep high.

SLAUGHTERING

1st QUARTER OF 2020

BRAZIL

7,254,854 HEADS

↓ **8.5%** in relation to the first quarter of 2019

1,837,648.47 TONS OF CARCASS

↓ **5.8%** in relation to the first quarter of 2019

Goiás, which represents 10.6% of the country's herd, is the fifth largest state in terms of number of cattle slaughtered in the first quarter of 2020.

GOIÁS

617,357 HEADS

↓ **20.3%** in relation to the first quarter of 2019

157,292.26 TONS OF CARCASS

↓ **17.7%** in relation to the first quarter of 2019

A sharp drop is expected in the number of cattle in feedlots and, besides, the forecast is of decrease in the amount of animals for 2020. This is mainly due to the increase in the prices of inputs and animals for replacement. In addition, the uncertainties in the market, as a result of the global crisis due to the pandemic, has led many farmers to restrict their cattle offer.

GROSS VALUE OF PRODUCTION (GVP) 2020 ESTIMATE

BRAZIL

R\$ 101,931,151,200.21

GOIÁS

R\$ 9,289,679,375.73

Accounts for **9.1%** of the national Gross Value of Beef Production

Accounts for **49.5%** of the Gross Value of the Livestock Production in Goiás

The high prices for the live cattle have pushed up the growth estimates of the Gross Value of Beef Production for 2020. The expectation is that in 2020, compared to 2019, the increase will be of 11.6% in the country and of 11.3% in Goiás. For our state, the importance of cattle production for the economy is enormous and the forecast is that the Gross Value of Beef Production will account for 16.3% of the Gross Value of the Agricultural Production in Goiás this year.

BEEF / CATTLE

In June (up to 06/24), the fed cattle indicator - Cepea/B3 registered an increase of 7% in prices, closing at R\$ 218.95. The dynamic of prices has shown some fluctuations on the sales in Goiás. The average monthly price paid to the farmer for live cattle (15kg) in the state registered a raise from January to February this year, but in the following months there was a small decrease. The prices forecast for June, however, is to continue raising, since it was registered the average of R\$ 182.25 in the first week and R\$184.67 in the second.

GOIÁS: AVERAGE MONTHLY PRICE PAID TO THE FARMER FOR THE LIVE CATTLE (15 KG)

Month	Average Price (R\$)	VAR (%) over the previous month
January	181.88	-
February	188.54	3.66
March	185.10	-1.82
April	180.12	-2.69
May	178.96	-0.64

Conab, 2020.

Accessed on June 18, 2020.

Considering the international demand increasing, beef export statistics grew by 22.7% in the country and by 10.5% in Goiás, in the first five months of 2020, compared to the same period in 2019.

BEEF

BRAZIL

YEAR-TO-DATE EXPORTS (JANUARY TO MAY/2020):

US\$ 3,186,448,201.00¹

Accounts for **46.2%** of the meat complex

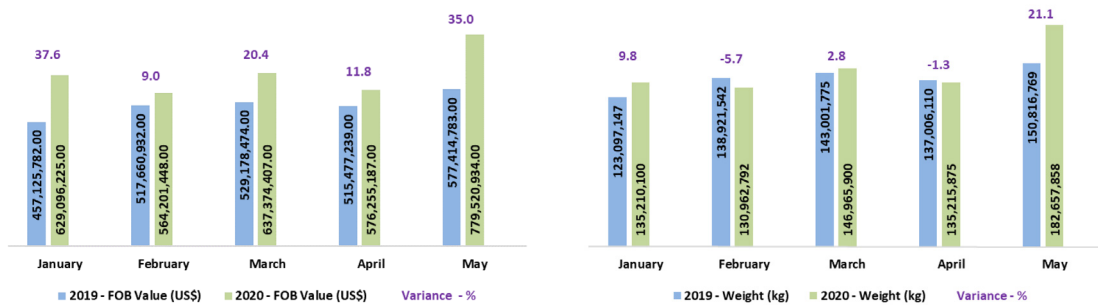
EXPORTS IN MAY OF 2020:

US\$ 779,520,934.00

 **35.0%**, in relation to May of 2019

¹ FOB Value

BRAZIL: BEEF EXPORTS



Agrostat / MAPA, 2020.
Accessed in June, 2020.

GOIÁS

YEAR-TO-DATE EXPORTS (JANUARY TO MAY/2020):

US\$ 418,130,122.00

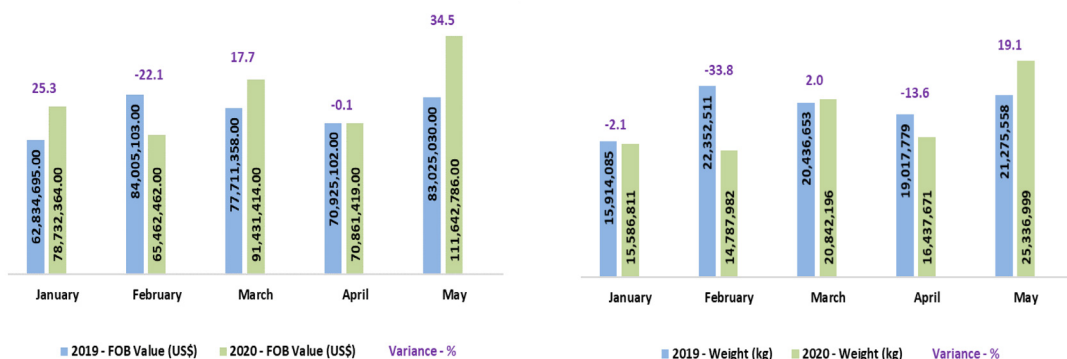
Accounts for **72.7%** of the meat complex

EXPORTS IN MAY OF 2020:

US\$ 111,642,786.00

↑ **34.5%**, in relation to May of 2019

GOIÁS: BEEF EXPORTS



Agrostat / MAPA, 2020.
Accessed in June, 2020.

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

MILK

Despite the uncertainties caused by the pandemic, the demand for dairy products in May relative to April was steady, according to Cepea, which favored the trade negotiations and led to increases in prices. Another factor that contributed to prices raising in May was the drop in the volume of milk production in the country, due to the seasonality of the activity in many regions.

The Bulletin of Dairy Market in Goiás, provided by Mauro Borges Institute-IMB, presents the results of the price index for dairy derivatives, as stated by the Technical and Conciliation Chamber of the Dairy Chain in Goiás.

In June, according to the Bulletin, the average prices for dairy products in Goiás raised in relation to the previous month. The increase in average prices was observed in all derivatives that make up the basket, especially for mozzarella cheese (31.94%), UHT milk (18.34%) and sour cream (16.01%).

WHOLESALE PRICES OF DAIRY DERIVATIVES

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)
May	2.66	16.26	15.84	6.48 (1)	16.55
June	3.15	17.06	20.90	6.74 (2)	19.20
Variance					
June/May	18.34%	4.94%	31.94%	4.01%	16.01%
Share	20%	23%	37%	14%	6%

Dairy Products Variance in June **18.14%**

(1) Price in April. (2) Price in May

MilkPoint Mercado. Provided by: Mauro Borges Institute / Secretary of Economy in Goiás.

The Brazilian dairy trade balance is in deficit, but in the current scenario, in which our exchange rate is depreciated, the volume of this deficit has been decreasing. Thus, the imports of dairy products continue to fall, while exports, although are not representative, continue to grow.

DAIRY

BRAZIL



YEAR-TO-DATE EXPORTS (JANUARY TO MAY OF 2020):

US\$ 28,139,813.00

↑ **14.8%** over the same period in 2019

YEAR-TO-DATE IMPORTS (JANUARY TO MAY OF 2020):

US\$ 146,156,838.00

↓ **29.5%** over the same period in 2019

EXPORTS IN MAY OF 2020:

US\$ 5,061,586.00

↑ **2.6%** compared to May 2019

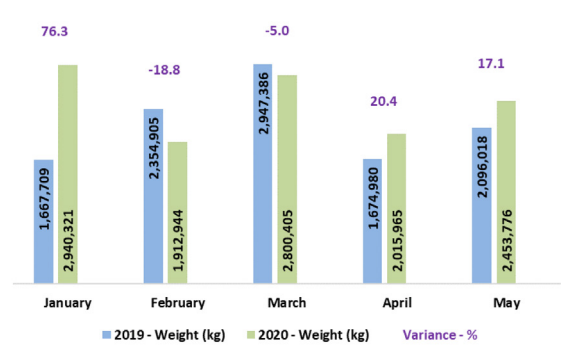
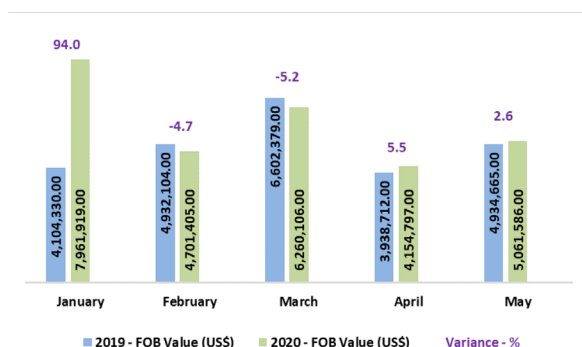
IMPORTS IN MAY OF 2020:

US\$ 24,260,599.00

↓ **44.2%** over the same period in 2019

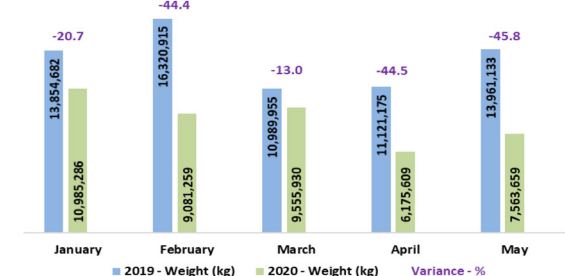
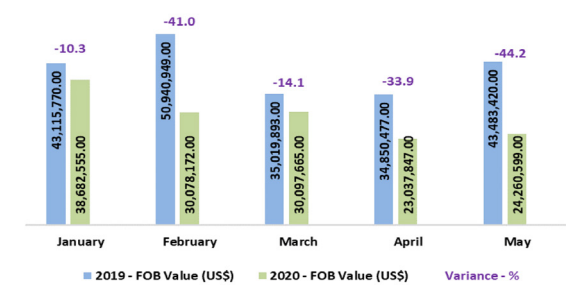
MILK

BRAZIL: DAIRY EXPORTS



Agrostat / MAPA, 2020.
Accessed in June, 2020.

BRAZIL: DAIRY IMPORTS



Agrostat / MAPA, 2020.
Accessed in June, 2020.

Goiás does not take significant participation in the dynamics of the international dairy trade. In 2020, the share was 1.4% and 1.8% of the country's total dairy exports and imports, respectively. And as in the Brazilian result, we also have a trade balance deficit in the dairy chain.

GOIÁS

YEAR-TO-DATE EXPORTS (JANUARY TO MAY OF 2020):

US\$ 399,614.00

↑ **191.1%** than the same period in 2019

YEAR-TO-DATE IMPORTS (JANUARY TO MAY OF 2020):

US\$ 2,563,299.00

↓ **41.4%** than the same period in 2019

EXPORTS IN MAY OF 2020:

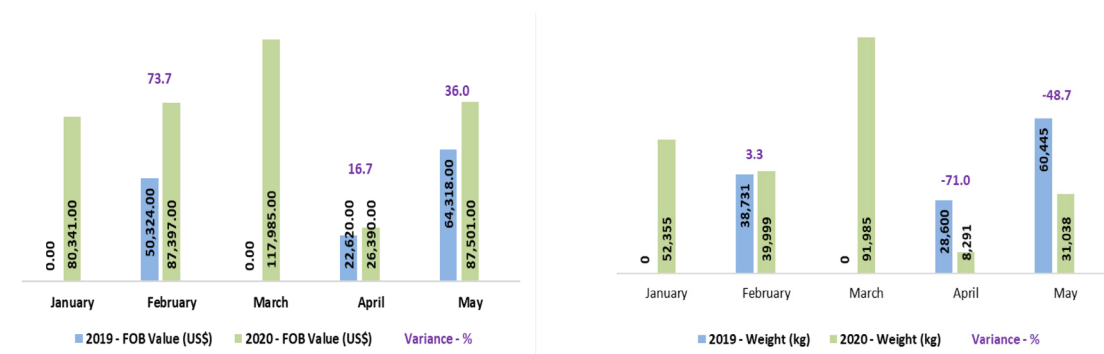
US\$ 87,501.00

↑ **30.6%** over May 2019

NOTE: IN MAY 2020, THERE WERE NO IMPORTS
OF DAIRY PRODUCTS FROM GOIÁS.

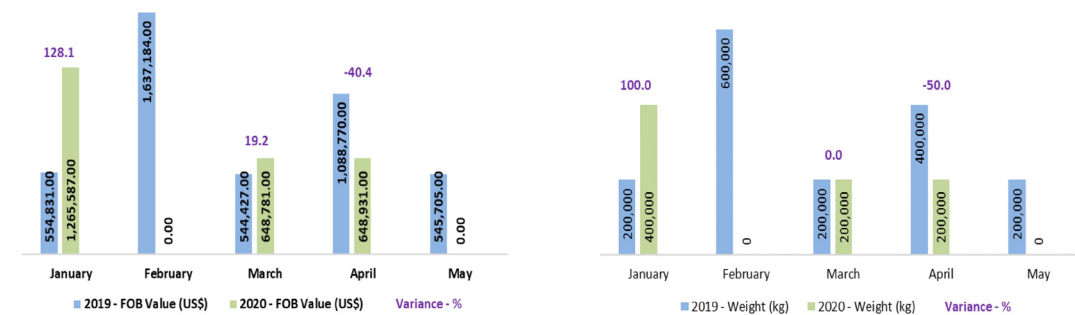
MILK

GOIÁS: DAIRY EXPORTS



Agrostat / MAPA, 2020.
Accessed in June, 2020.

GOIÁS: DAIRY IMPORTS



Agrostat / MAPA, 2020.
Accessed in June, 2020.

The industrialization of milk had a slight growth in Brazil in the first quarter of the year, however, it decreased in Goiás. Regarding the Gross Value of Milk Production, the forecast is to have a drop both in the country and in the state in 2020.

PRODUCTION OF RAW MILK, COOLED OR NOT, PURCHASED FROM RURAL PROPERTIES - 1ST QUARTER OF 2020



BRAZIL

6,303,702 THOUSAND LITERS

↑ **1.8%** compared to the 1st quarter of 2019



GOIÁS

650,429 THOUSAND LITERS

6th largest producer in the period

↓ **4.2%** compared to the 1st quarter of 2019

GROSS VALUE OF PRODUCTION 2020 ESTIMATE



BRAZIL

R\$ 35,109,928,296.70

↓ **0.5%** lower than 2019



GOIÁS

R\$ 3,553,304,944.56

↓ **2.8%** lower than in 2019

Accounts for **10.1%** of the national Gross Value of Milk Production

Accounts for **18.9%** of the Gross Value of the Livestock Production in Goiás

Accounts for **6.2%** of the total Gross Value of Milk Production in Goiás

By analyzing the estimate for the Gross Value of Milk Production in relation to the Gross Value of Livestock Production in Goiás, we see the importance of this activity for our state. Goiás holds the fourth largest dairy production in the country, and the State Government has addressed policies aimed at value-adding and also at the dialogue among the economic agents of this chain, through the Technical and Conciliation Chamber of the Dairy Chain in Goiás. Thus, despite the fragility of dairy farming in the face of the current scenario, it is expected positive results for the development of dairy production in the state.

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

PORK / PIG PRODUCTION

Pork meat is the most consumed animal protein in the world. In the Brazilian people's preference, however, it comes in third place, with an average consumption of around 15.9 kg per capita a year, according to Conab. Efforts and investments in technology of production, animal health, nutrition and animal handling have added more quality to pork meat in both domestic and international markets. In the current scenario, in which animal health becomes even more relevant, the demand for Brazilian pork has increased, as a result of the achievements of new markets, larger shipments to important destinations, such as China, and also due to the eligible slaughterhouses recently approved for exporting to Vietnam. The increase in the number of animals slaughtered in the country, in the first quarter of 2020, compared to the same period in 2019, was mainly driven by the growth of the international market.

SLAUGHTERING: 1st QUARTER OF 2020

BRAZIL

11,882,515 HEADS

↑ **5.2%** in relation to the 1st quarter of 2019

1,066,185.31 TONS OF CARCASS

↑ **7.6%** in relation to the 1st quarter of 2019



These results keep the country in the fourth position in the world production of pork and although pork exports are expanding in the state, it is not representative yet. However, the domestic market of pork has positive performance, confirmed by the slaughter statistics, that point out to increases in the number of animals slaughtered in Goiás.

GOIÁS

485,873 HEADS

↑ **6.6%** compared to the 1st quarter of 2019

45,555.23 TONS OF CARCASS

↑ **9.8%** compared to the first quarter of last year

The Gross Value of Pork Production (Pork GVP) also confirms the good performance of the pork production chain, which shows growth forecasts both in the country and in Goiás. In the estimate for 2020, the Pork GVP in Goiás accounts for 4.3% of the national Pork GVP, indicating higher increase in the state than the country's average growth, compared to 2019.

GROSS VALUE OF PRODUCTION

2020 ESTIMATE

BRAZIL

R\$ 19,863,856,270.57

↑ **8.0%** compared to 2019

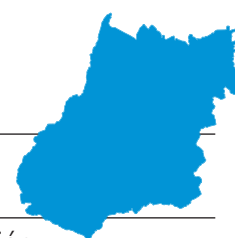


GOIÁS

R\$ 861,804,973.96

↑ **8.4%** compared to 2019

Accounts for **4.6%** of the Gross Value of the Livestock in Goiás



PORK / PIG PRODUCTION

After a sharp drop of pig prices in April, a growth was recorded in May. However, the prices were still much lower than those seen in January. In June, sales continued to increase, which has sustained higher prices in the first half of the year. In Goiás, in the second week of June, the price was R\$ 5.30. In the medium term, if the price continues to rise, pork may lose competitiveness compared to other animal protein substitutes.

GOIÁS: AVERAGE MONTHLY PRICE PAID TO THE FARMER PER KILOGRAM OF LIVE PIG

Month	Average Price (R\$)	VAR (%) over the previous month
January	6.19	-
February	5.68	-8.24
March	5.59	-1.58
April	4.61	-17.53
May	4.89	6.07

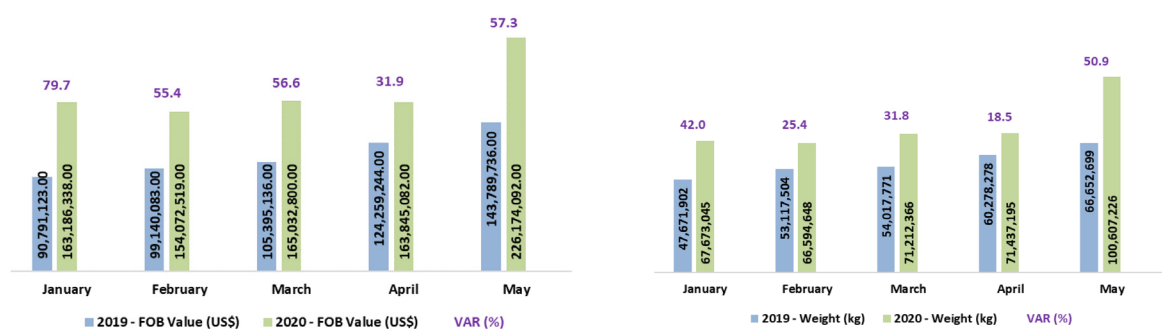
Conab, 2020.

Accessed in June, 2020.

In the coming months, the expectation is that international demand will continue to expand, driven mainly by Asian demand and, according to Cepea, the presence of African Swine Fever (ASF) guarantees favorable position for Brazil, since America is the only continent free of ASF.

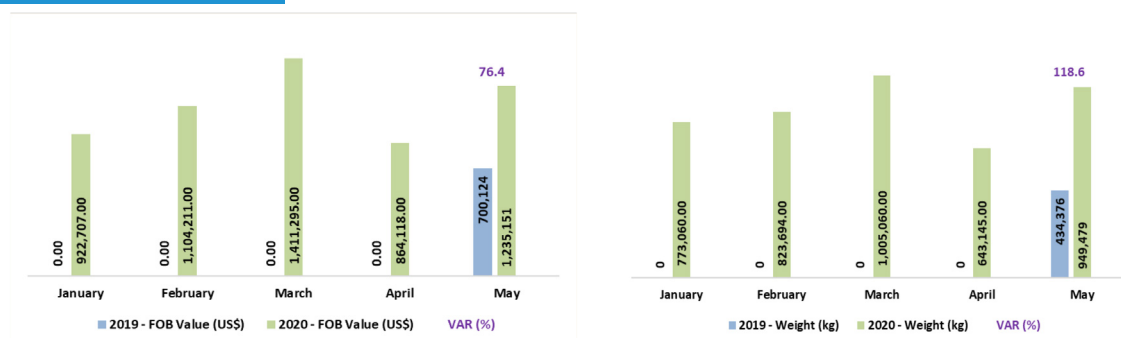
In Goiás, the exported value of pork in May increased by 76.4%, compared to May 2019, registering almost 1,000 tons shipped to countries such as Hong Kong and Angola, mainly. Although exports are growing in Goiás, it still has a small share in the dynamics of the international pork trade.

BRAZIL: PORK MEAT EXPORTS



Agrostat / MAPA, 2020.
Accessed in June, 2020.

GOIÁS: PORK EXPORTS



Agrostat / MAPA, 2020.
Accessed in June, 2020.

The positive outcomes reached in this production chain are the results of studies and investments in essential elements such as environment, animal health, nutrition, good practices on farms and the managerial improvement of farmers.

In Goiás, the quality of pork that reaches the consumer is a consequence of efforts in several aspects of the production chain, in which the farmer is the main foundation. Another important point, is the animal health control carried out by the Agency for Animal Defense in Goiás - Agrodefesa, responsible for the surveillance and defense actions in pig farming establishments that perform activities related to the production and processing of animal origin products, in order to prevent the introduction of diseases, as well as controlling and eradicating the existing ones.

POULTRY

In Brazil, the number of chickens is over 1.46 billion heads. In Goiás, there are 90.39 million heads, representing 6.2% of the national number. In the first quarter of 2020, the number of animals slaughtered decreased in Goiás, while in the country it has raised. The expectation is that the Gross Value of Poultry Production for both the country and the state will drop in 2020. In the current scenario, until May, the fall in prices for this animal protein has contributed to the decrease in the Gross Value of Production.

POULTRY SLAUGHTERING: 1st QUARTER OF 2020

BRAZIL

1,510,835,646 CHICKENS

↑ **5.0%** compared to the 1st quarter of 2019

3,476,000.73 TONS OF CARCASS

↑ **4.0%** compared to the 1st quarter of 2019

GOIÁS

98,830,327 CHICKENS

6th largest producer in the country

Accounts for **6.5%** of the national slaughter in the 1st quarter of 2020

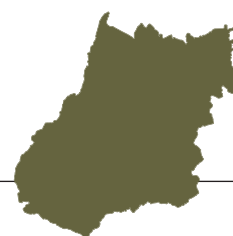
↓ **4.0%** compared to the 1st quarter of 2019

219,775.58 TONS OF CARCASS

↓ **5.5%** compared to the 1st quarter of 2019

GROSS VALUE OF PRODUCTION

2020 ESTIMATE

BRAZIL**R\$ 62,898,711,028.47** **7.2%** compared to 2019**GOIÁS****R\$ 4,195,977,937.40** **9.4%** compared to 2019Accounts for **6.7%** of the national Gross Value of Poultry ProductionAccounts for **22.4%** of the Gross Value of the Livestock Production in Goiás

The average monthly price paid to the farmer for live chicken (kg) in Goiás fell 7.2% between January and May 2020, registering in April the lowest value of this year, when there was a decrease of 9.26% compared to March. However, in the beginning of June, it was observed prices recovering, reaching R\$ 3.40 and R\$ 3.50 in the first and second weeks of June of this year, respectively. This increase is driven by the strong demand for cheaper animal proteins in June, due to the reduction of household income. In the medium term, though, high prices may turn into loss of competitiveness of the poultry meat when compared to the other types of meat.

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

Month	Average Price (R\$)	VAR (%) over the previous month
January	3.20	-
February	3.23	0.94
March	3.24	0.31
April	2.94	-9.26
May	2.97	1.02

Conab, 2020.

Acesso em 18 de junho de 2020.

POULTRY

Although there was a significant decline in the value of poultry meat exports in May in the country, the exported volume has increased, indicating a drop in the prices for this animal protein in the international dynamics, just as it was observed in the domestic market. China remains as the major destination for Brazilian poultry meat.

In June, according to shipping statistics registered until the third week, exports continue to fall, showing decreases both in volume and in value, compared to the same period in 2019.

The year-to-date statistics for 2020 show that China is no longer the main destination for poultry meat originating in Goiás. Japan becomes the main partner of the state in the international trade of this animal protein, which accounts for 10.8% of the total shipments to that country in 2020. During this period, there was also an expansion of exports to Saudi Arabia, the United Arab Emirates, Qatar, Yemen, Libya, among others, showing that poultry meat exports have had expressive growth in the state.

POULTRY MEAT

BRAZIL

YEAR-TO-DATE EXPORTS (JANUARY TO MAY 2020):

US\$ 2,657,144,330.00

↓ **4.0%** compared to the same period in 2019

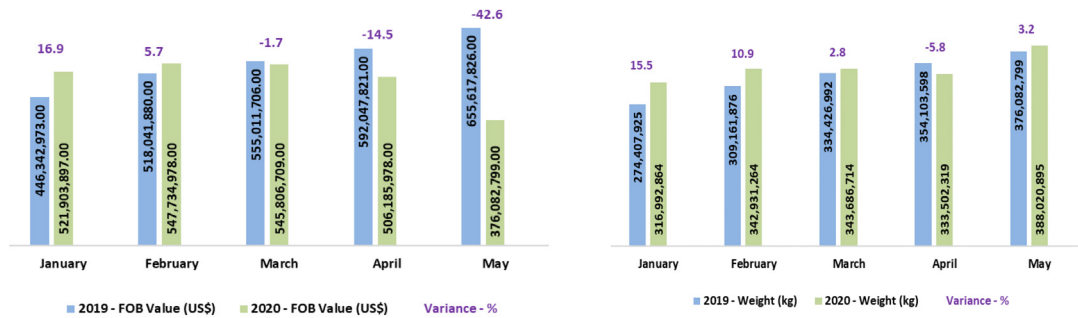
Accounts for **38.5%** of the Meat Complex in the country

EXPORTS IN MAY 2020:

US\$ 535,512,768.00

↓ **18.3%** compared to May 2019

BRAZIL: POULTRY MEAT EXPORTS



Agrostat / MAPA, 2020.
Accessed in June, 2020.

GOIÁS

YEAR-TO-DATE EXPORTS (JANUARY TO MAY 2020):

US\$ 144,491,733.00

↑ **124.1%** over the same period in 2019

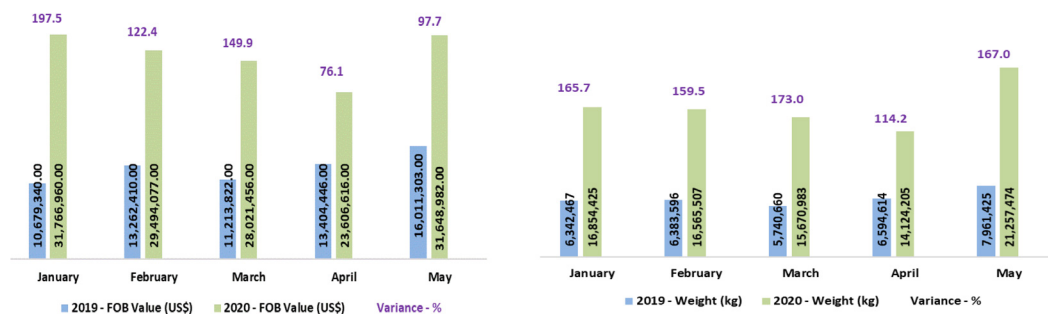
Accounts for **25.1%** of the Meat Complex in Goiás

EXPORTS IN MAY 2020:

US\$ 31,648,982.00

↑ **97.7%** compared to May 2019

GOIÁS: POULTRY MEAT EXPORTS



Agrostat / MAPA, 2020.
Accessed in June, 2020.

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

CHICKEN EGGS

The egg is a lower-priced animal protein, and in times of economic crisis, its consumption tends to increase, as a result of the retraction of household income. In Goiás, there are 81,851 egg-producing farms. In the first quarter of 2020, the production forecast was 51.5 thousand dozen of chicken eggs, most of which was for hatching eggs. Thus, the production characteristic in the state is different from the average in the country. In Goiás it is more addressed to hatching eggs, broilers or laying, while in Brazil, the egg production is more intended for consumption.

PRODUCTION OF CHICKEN EGGS: 1st QUARTER OF 2020

BRAZIL

965,106 THOUSAND DOZEN

↑ **3.9%** compared to the 1st quarter of 2019

80.7% are for consumption and **19.3%** for incubation

GOIÁS

51,505 THOUSAND DOZEN

8th largest among states

↓ **7.8%** compared to the 1st quarter of 2019

46.9% are for consumption and **53.1%** for hatching eggs

GROSS VALUE OF PRODUCTION: 2020 ESTIMATE



BRAZIL

R\$ 14,192,306,358.48

↑ **14.8%** compared to 2019



GOIÁS

R\$ 861,740,721.60

↑ **19.7%** compared to 2019

Accounts for **6.1%** of the national Gross Value of Egg Production

Accounts for **4.6%** of the Gross Value of the Livestock Production in Goiás

In May, the average monthly price paid to the farmer for 30 dozen chicken eggs (large and white) in Goiás increased by 22.8%, compared to January of this year. In April, it was registered the highest monthly price average at R\$ 128.82, variation of 33.5% compared to January. This increase in prices is a result of the strong demand for lower-priced animal protein, as consequence of the reduced income caused by the health crisis that is still going on at the moment. The wholesale price registered a smaller variation of 11.1% between January and May, whereas between January and April it was of 55.7%, when the higher price for chicken eggs, until then, was registered.

GOIÁS: AVERAGE MONTHLY PRICE PAID TO THE FARMER AND WHOLESALE IN 30 DOZEN CHICKEN EGGS

Month	Ave. Price (R\$) – farmer	VAR (%) over the previous month	Ave. Price (R\$) – wholesale	VAR (%) over the previous month
January	96.52	-	107.32	-
February	120.75	25.10	135.87	25.10
March	127.82	5.86	155.71	5.86
April	128.82	0.78	167.08	0.78
May	118.52	-8.00	119.18	-8.00

Conab, 2020.

Accessed on June 18, 2020.

The expectation is that the demand for this animal protein will continue steady, and it may even increase, until the consumer buying power is restored.

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

SOYBEAN

The soybean market remains strong and with good expectations. On the supply side, the forecast is to reap a crop record, with preliminary statistics of harvesting 12.4 million tons in Goiás, which means an increase of 9% over the previous one. The production problem faced in Rio Grande do Sul led Goiás to become the third largest soybean producer in the country. The share of the state in the national soybean production points to growth of 0.5 percentage points, that registered 9.9% in the previous crop and reached 10.4% in the current one. The growth in international demand has supported the prices and the expectation is that exports, especially to China, will continue to increase. The export tax measures and also the fall in the crop production that happened in Argentina have favored the Brazilian soybean sales.

CROP 2019/2020 ESTIMATE



BRAZIL

120,424 THOUSAND TONS

↑ **4.7%** compared to the previous crop

36,843.6 thousand hectares planted

↑ **2.7%** compared to the previous crop

Yield of **3,269** kg/ha

↑ **1.9%** compared to the previous crop



GOIÁS

12,464.6 THOUSAND TONS

Accounts for **10.4%** of national production

3,545.1 thousand hectares planted

↑ **2.0%** compared to the previous crop

Yield of **3,516** kg / ha

↑ **6.9%** in relation to the previous crop

The good performance of soybean production and yield in Goiás is reflected on the growth rate of the Gross Value of Soybean Production, which is superior to the average of the country. This is the result of the use of technology and favorable weather conditions that contributed to this notable increase, expressing the competitiveness of the State of Goiás in the production and commercialization of this commodity.

GROSS VALUE OF PRODUCTION 2020 ESTIMATE

**BRAZIL****R\$ 167,677,340,730.93** **17.6%** compared to 2019**GOIÁS****R\$ 16,910,492,149.70** **27.4%** compared to 2019**10.1%** of national Gross Value of Soybean Production**44.3%** of the Gross Value of the Crop Production in Goiás**29.7%** of the Gross Value of Production in Goiás

According to Cepea, soybean prices registered new raises in some regions of Brazil, reaching over R\$ 110.00/60-kg bag in June, driven by the demand from the foreign market.

The average monthly price for the soybean 60-kg bag paid to the farmer in Goiás is likely to increase.

GOIÁS: AVERAGE MONTHLY PRICE PAID TO THE FARMER IN THE 60-KG BAG OF SOYBEANS

Month	Average Price (R\$)	VAR (%) over the previous month
January	74.63	-
February	74.97	0.46
March	78.97	5.34
April	81.54	3.25
May	85.82	5.25

Conab, 2020.
Accessed on June 17, 2020.

SOYBEAN

The international trade for Brazilian soybean have been advancing and will likely set records in the volume of shipments. In May, when it is generally registered the peak of soybean complex exports in the country, the growth in volume was of 48.4% compared to the same period in 2019.

The soybean complex accounted for 57.2% of the total value exported by the state and 50.4% in the year-to-date. In May, there was an increase of 64.9% in the volume traded, compared to May 2019, having China and Spain as the main destinations. Furthermore, the sales growth of this commodity has contributed for generating foreign exchange to the State of Goiás.

SOYBEAN COMPLEX

BRAZIL

YEAR-TO-DATE EXPORTS (JANUARY TO MAY 2020):

US\$ 18,996,305,870.00

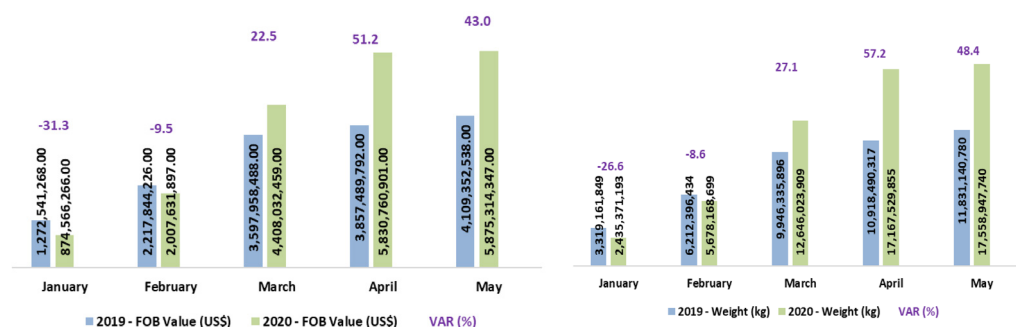
↑ **26.2%** over the same period in 2019

EXPORTS IN MAY 2020:

US\$ 5,875,314,347.00

↑ **43.0%** in relation to May 2019

BRAZIL: EXPORTS OF THE SOYBEAN COMPLEX



Agrostat/MAPA, 2020.
Accessed in June, 2020.

GOIÁS

YEAR-TO-DATE EXPORTS (JANUARY TO MAY 2020):

US\$ 1,567,411,477.00

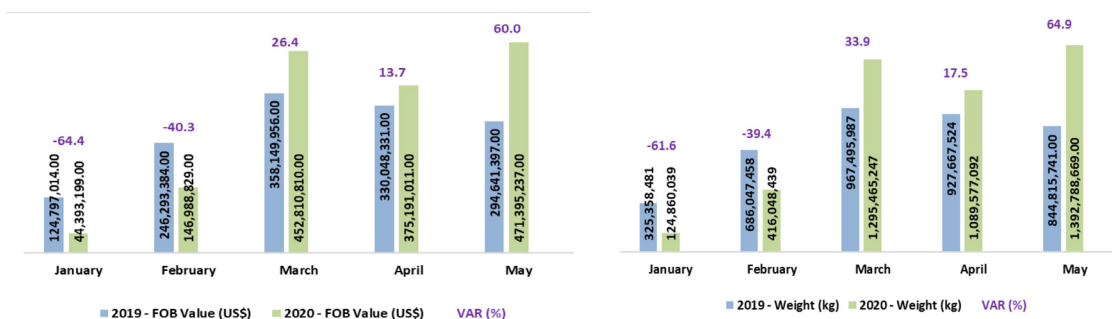
↑ **15.8%** over the same period in 2019

EXPORTS IN MAY 2020:

US\$ 471,395,237.00

↑ **60.0%** compared to May 2019

GOIÁS: EXPORTS OF THE SOYBEANS COMPLEX



Agrostat/MAPA, 2020.
Accessed in June, 2020.

The forecast for the soybean sector in the country is very positive, although, in the medium and long term, it is necessary to be very attentive to the relations between China and the United States.

For Goiás, the end of the soybean harvest confirms the good performance of the production in the state. In addition, the increasing foreign market has contributed to sustaining high prices in the trade negotiations. In this context, the growth estimate for the Gross Value of the Soybeans Production in the state is of 27.4%, in relation to the year of 2019. That corroborates the importance of this grain for the agriculture in the state and in the country.

CORN

Goiás is the third largest corn producer in the country, behind only Mato Grosso and Paraná, and the forecast production points to increases, mainly for Brazil's second-crop "safrinha" corn, which is responsible for 81.9% of the corn production in the state.

Among the summer crops, the safrinha corn production is undoubtedly a major highlight of the agriculture in Goiás and for the 2019/2020 crop it is estimated growth of 5.9%, compared to the previous crop.

Despite the delay in planting the safrinha corn in the state, in which most part was carried out during a period of greater climate risk, the planted area was increased by 13.0% compared to the 2018/2019 crop. This growth offset the drop in productivity caused by planting outside of the ideal window.

CROP 2019/2020 ESTIMATE

TOTAL CORN



BRAZIL

100,992.9 THOUSAND TONS

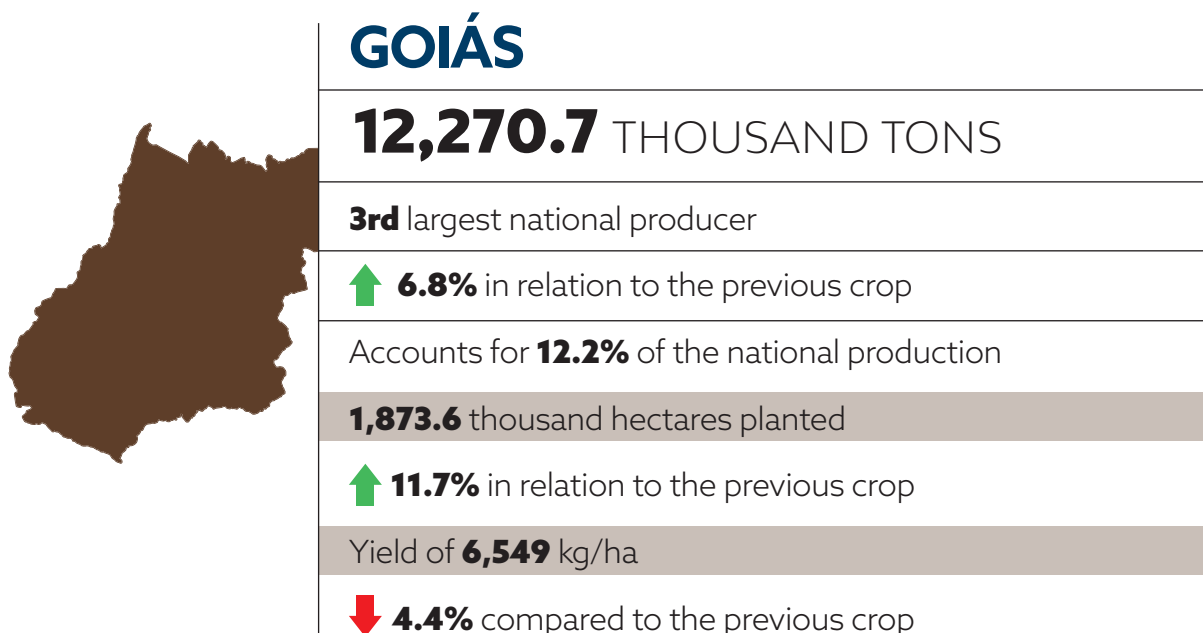
↑ **0.9%** in relation to the previous crop

18,475.0 thousand hectares planted

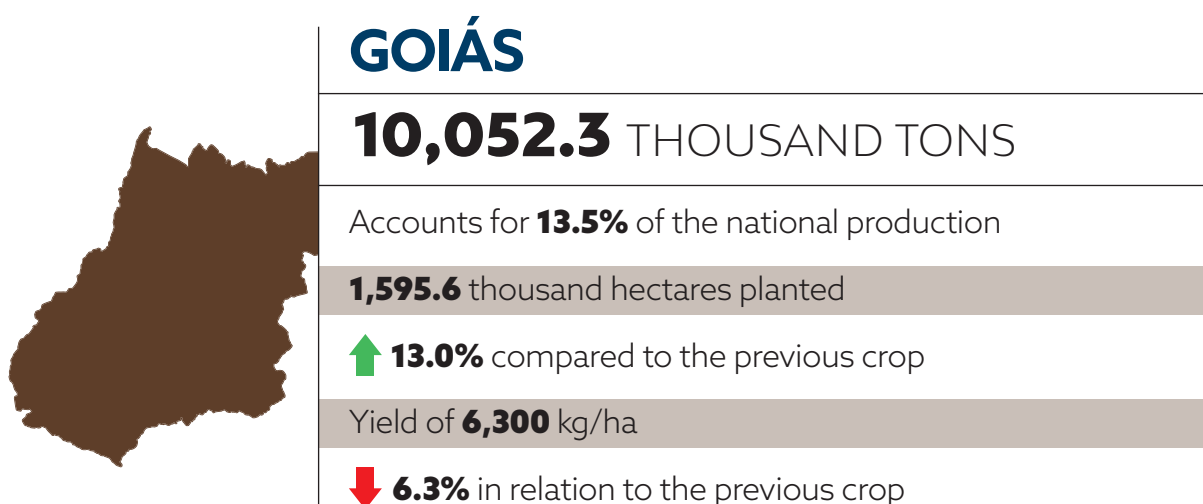
↑ **5.6%** in relation to the previous crop

Yield of **5,466** kg/ha

↓ **4.4%** compared to the previous crop



SAFRINHA CORN



The increase in production and the high prices contributed to raise the estimate of the Gross Value of Corn Production in 2020, reaching the growth rate of 15.1% and 23.3% for the country and for Goiás, respectively, in relation to 2019.

CORN

GROSS PRODUCTION VALUE

2020 ESTIMATE



BRAZIL

R\$ 75,847,406,979.71

↑ **15.1%** compared to 2019



GOIÁS

R\$ 7,694,580,171.73

↑ **23.3%** compared to 2019

10.1% of the national Gross Value of Corn Production

20.1% of the Gross Value of the Crop Production in Goiás

13.5% of the Gross Value of Production in Goiás

The average monthly price of the 60-kg bag paid to the farmer in Goiás has registered falls, reaching R\$ 37.70 in May, and the highest price in March. The variation in the price paid to the producer decreased by 11.6%, between January and May. The same price dynamics was also observed for the wholesale sector, in which the peak was reached in March, with an average price of R\$ 51.01.

GOIÁS: AVERAGE MONTHLY PRICE PAID TO THE FARMER AND ON THE WHOLESALE FOR THE 60-KG BAG OF CORN

Month	Ave. Price (R\$) - farmer	VAR (%) over the previous month	Ave. Price (R\$) - wholesale	VAR (%) over the previous month
January	42.67	-	47.44	-
February	43.91	2.91	48.48	2.91
March	49.09	11.80	51.01	11.80
April	42.76	-12.89	47.24	-12.89
May	37.70	-11.83	42.67	-11.83

Conab, 2020.
Accessed on June 17, 2020.

In the international scenario, the consequences of the crises affected negatively the Brazilian corn exports. After a significant increase in prices driven by the competitive prices provided by the exchange rate, this commodity has lost share in the international trade. The main destination of the Brazilian corn is Taiwan, year-to-date, with 26.2% of the total corn shipped. However, there was no shipments in May to this country, which negatively impacted the volume traded of this commodity, compared to May 2019. Taiwan is also the largest trading partner of the corn from Goiás, accounting for 35.7% of the total corn exported, therefore, the lack of shipments strongly affected the results in Goiás.

The year-to-date drop was of 60.1% in the country, in volume, compared to the same period in 2019, while in Goiás it was of 12.4%.

CORN

BRAZIL

YEAR-TO-DATE EXPORTS (JANUARY TO MAY 2020):

US\$ 527,251,440.00

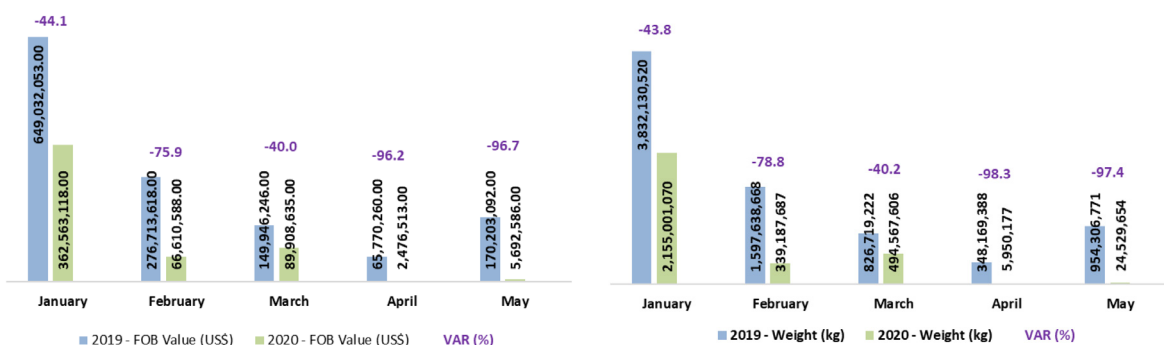
↓ **59.8%** over the same period in 2019

EXPORTS IN MAY 2020:

US\$ 5,692,586.00

↓ **96.7%** compared to May 2019

BRAZIL: CORN EXPORTS



Agrostat/MAPA, 2020.
Accessed on June, 2020.

CORN

GOIÁS

YEAR-TO-DATE EXPORTS (JANUARY TO MAY 2020):

US\$ 51,354,258.00

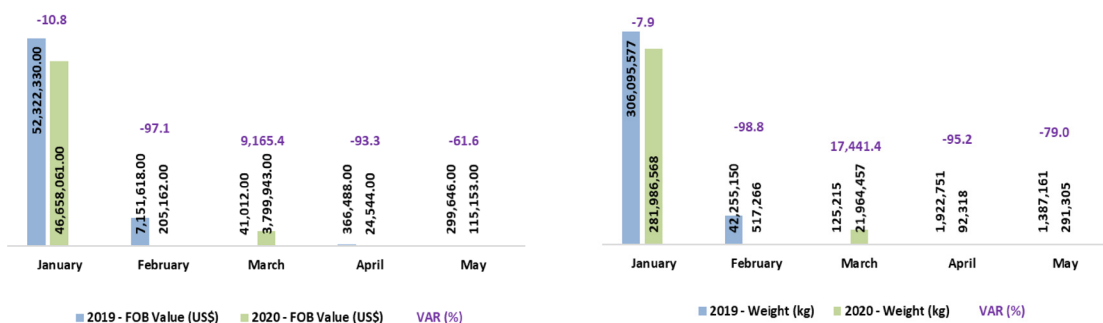
↓ **14.7%** over the same period in 2019

EXPORTS IN MAY 2020:

US\$ 115,153.00

↓ **61.6%** compared to May 2019

GOIÁS: CORN EXPORTS



Agrostat/MAPA, 2020.
Accessed in June, 2020.

The corn market expectations in the medium and long term will depend on the exchange rate, American production, domestic demand and the consequences of the crisis, among other factors. Although there are many uncertainties, in the short term, the forecast is prices to fall, driven by the growth in supply resulting from the harvest of the second crop and also by the decrease in the international demand for Brazilian corn. However, in the medium and long terms, domestic demand from the food and feed industries may steady the prices.

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

SUGAR CANE

SEAPA
Secretaria de
Estado de
Agricultura,
Pecuária e
Abastecimento



The sugarcane production chain has been greatly impacted by the economic adversities resulting from the Covid-19 pandemic, since the need for isolation time causes reduction in the consumption of ethanol, the main destination of this culture.

As a consequence of this scenario, the forecast for the Brazilian 2020/2021 harvest is a decrease of 1.9% for the cane crop and changes on its using, increasing the share of sugar production by 7.5 percentage points to the detriment of the ethanol production. This change is in line with the growth of the international demand for sugar, followed by better prices in the sales of this commodity.

Given the low demand for ethanol, the perspective is that it will be necessary to increase the storage capacity in the industries and, in order to make it possible, the government has approved a credit line to finance projects for this purpose.

The estimate is that the Gross Value of Sugarcane Production will grow by 1.4% in the country and 2.1% in Goiás, compared to 2019.

GROSS VALUE OF PRODUCTION

2020 ESTIMATE

BRAZIL

R\$ 61,910,858,353.36

↑ **1.4%** compared to 2019



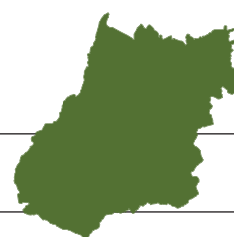
GOIÁS

R\$ 7,061,761,691.31

↑ **2.1%** compared to 2019

11.4% of national Gross Value of Sugarcane Production

18.5% of the Gross Value of Crop Production in Goiás



SUGAR CANE

At the end of the first half of March this year, the average weekly price paid to the producer for a liter of hydrous ethanol (fuel) was R\$ 1.81 in Goiás and, since then, the price has been decreasing. At the end of the first half of May, the average weekly price reached R\$ 1.17, when there was a decrease of 35.2% compared to the end of the first half of March.

At the gas station pumps in Goiás, in January, the average monthly price paid per liter of hydrous ethanol by the consumer was R\$ 3.37, registering a drop of 6.3% in March, when the price reached R\$ 3.16¹ a liter.

Gasoline, which is a substitute for ethanol, had a drop of 4.4% in the price for the liter paid by the consumers in Goiás in March (R\$ 4.55) compared to January (R\$ 4.76) this year. The forecast is the prices will only recover when economic activities return to normal operation, increasing the demand for fuel. Another factor that will probably contribute to the recovery in gasoline prices is the improvement in its quality announced by refineries, planned for the second half of 2020.

EXPORTS

ALCOHOL

Year-to-date, the national alcohol exports were destined to 63 countries. The main buyers were South Korea (40.4%), the United States (37.1%) and the Netherlands (10.2%), which together account for 87.7% of the exported volume.

BRAZIL

YEAR-TO-DATE EXPORTS (JANUARY TO MAY 2020):

US\$ 274,922,546.00

↑ **6.2%** compared to the same period in 2019

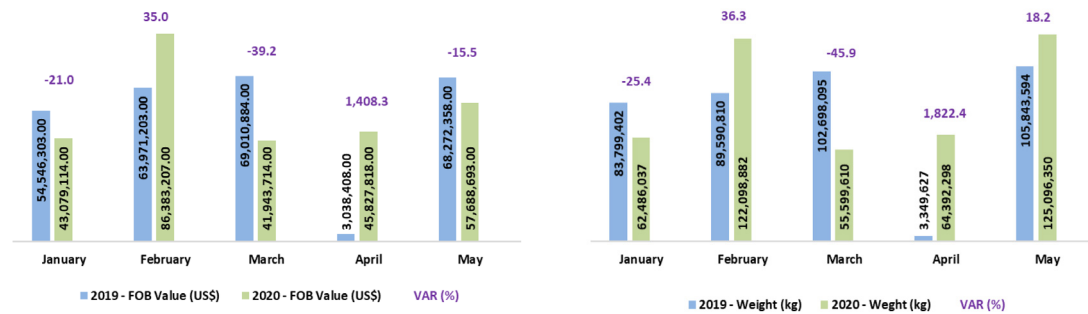
EXPORTS IN MAY 2020:

US\$ 57,688,693.00

↓ **15.5%** compared to May 2019



BRAZIL: ALCOHOL EXPORTS



Agrostat/MAPA, 2020.
Accessed on June 30, 2020.

The share of alcohol exports in Goiás is still very small. This year, the international sales were addressed to only two countries, the United States (93.3%) and Australia (6.7%).

GOIÁS

YEAR-TO-DATE EXPORTS (JANUARY TO MAY 2020):

US\$ 2,076,982.00

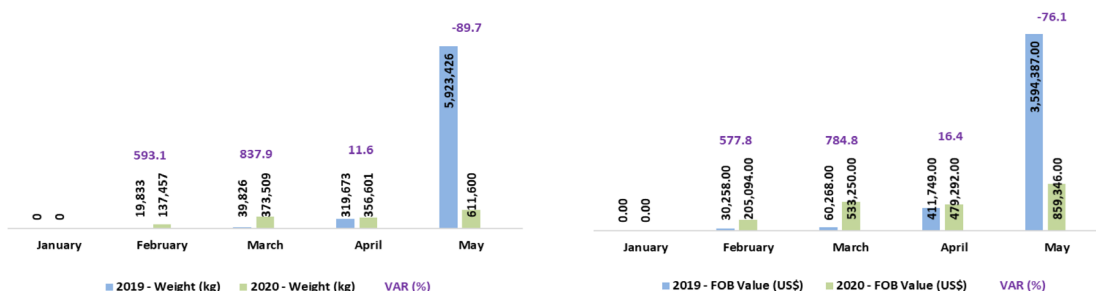
↓ **49.3%** compared to the same period in 2019

EXPORTS IN MAY 2020:

US\$ 859,346.00

↓ **76.1%** compared to May 2019

GOIÁS: ALCOHOL EXPORTS



Agrostat/MAPA, 2020
Accessed on June 30, 2020

SUGAR CANE

SUGAR

Sugar is among the main products exported by the country and the sales of this Brazilian commodity remains strong in the international market. Due to the adverse weather conditions that occurred in the main sugar producing countries in Asia, the international demand has been addressed to Brazil. In May this year, the Brazilian sugar exports increased by 79.3%, in volume, compared to May 2019.

BRAZIL

YEAR-TO-DATE EXPORTS (JANUARY TO MAY 2020):

US\$ 2,507,084,511.00

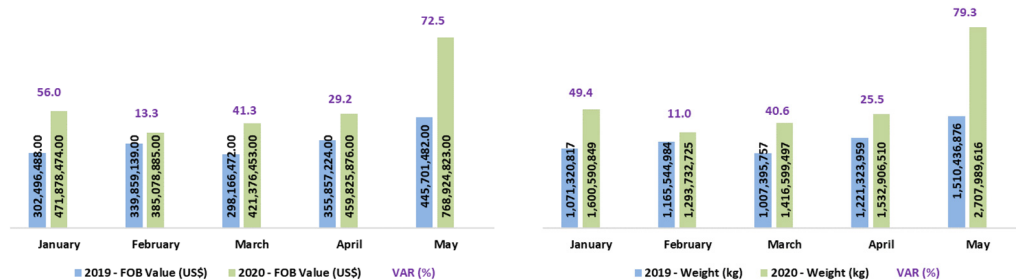
↑ **43.9%** compared to the same period in 2019

EXPORTS IN MAY 2020:

US\$ 768,924,823.00

↑ **72.5%** compared to May 2019

BRAZIL: SUGAR EXPORTS



Agrostat/MAPA, 2020.
Accessed on June 30, 2020.

The international sales in Goiás follow the same pace as the country, registering an increase of 63.7% in the volume of sugar exported in the year, with Bangladesh, the United States and Morocco as the main destinations.

GOIÁS

YEAR-TO-DATE EXPORTS (JANUARY TO MAY 2020):

US\$ 90,951,108.00

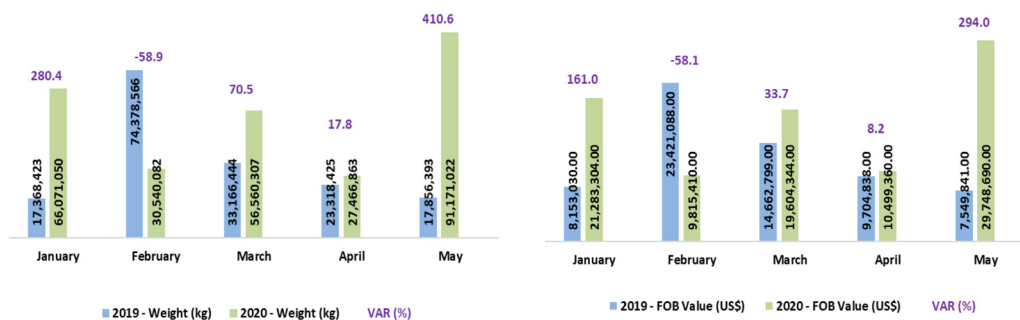
↑ **43.2%** over the same period in 2019

EXPORTS IN MAY 2020:

US\$ 29,748,690.00

↑ **294.0%** compared to May 2019

GOIÁS: SUGAR EXPORTS



Agrostat/MAPA, 2020.
Accessed on June 30, 2020.

In the short term, given the current scenario, the sugar cane production chain in Goiás may continue suffering the negative impacts of the pandemic, in which the decline in ethanol demand may persist as long as the social isolation measures are necessary. It is expected that the sugar and alcohol industries will be able to return their productive capacity of sugar production and take advantage of the growth in international demand. In the medium and long term, it is advisable to carefully monitor the market movement, especially in India, which in previous years was the major exporter of this commodity, in addition to analyzing the competitiveness of Brazilian sugar in the global context.

Although the health crisis and its consequences have impacted the fruit and vegetables sales in the country, Ceasa Goiás continues to work for maintaining the supply in the state, as well as the safe farmers markets that have contributed for the food to reach families in Goiás.

The demand decline, due to the increase in unemployment rates and the reduction of the family income, has contributed to falls in prices in the country and, in the medium term, the indicators is likely to continue to decrease. Despite this scenario, Ceasa Goiás has traded more than 69 thousand tons of food and almost R\$181 million in May 2020. Fruit sales were the most affected, while vegetables sales grew slightly in May compared to April.

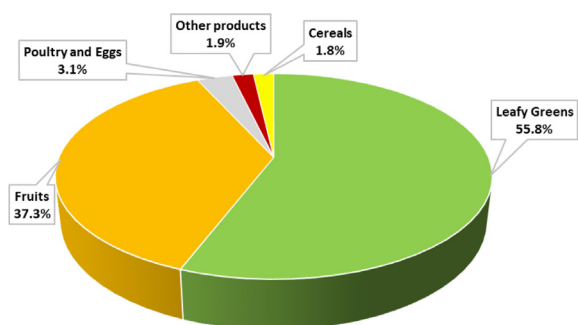
TRADE:

R\$ 180,919,258.92 TRADED

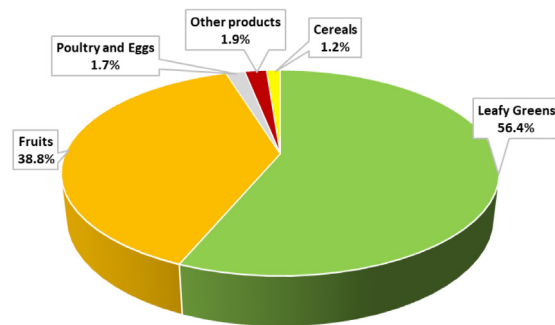
69,075.40 TONS TRADED

GOIÁS – PRODUCTS TRADED AT CEASA GOIÁS, IN MAY 2020

VALUE - R\$



VOLUME (TON)



HIGHLIGHTS

TOMATO: 9,276.3 tons



Accounts for **13.4%** of the total volume traded in May 2020

Conab's Bulletin points out that Ceasa/Goiânia registered the sharpest drop in tomato prices among the Supply Centers in Brazil, with **27.1%** in May, compared to the previous month.

CABBAGE: 3,961.5 tons



Accounts for **5.7%** of the total volume traded in May 2020

R\$ 1.07/kg ( 7.0% in May compared to April 2020)

APPLE: 3,639.9 tons



Accounts for **5.3%** of the total volume traded in May 2020

R\$3.51 /kg ( 0.28% in May compared to April 2020)

ORANGE: 3,094.7 tons



Accounts for **4.5%** of the total volume traded in May 2020

R\$1.67 /kg ( 5.65% in May compared to April 2020)

PAPAYA: 2,768.5 tons



Accounts for **4.0%** of the total volume traded in May 2020

R\$1.21 /kg ( 30.46% in May compared to April 2020)

THESE **5 PRODUCTS** ACCOUNT FOR **32.9% OF THE**
TOTAL VOLUME SOLD IN MAY THIS YEAR.

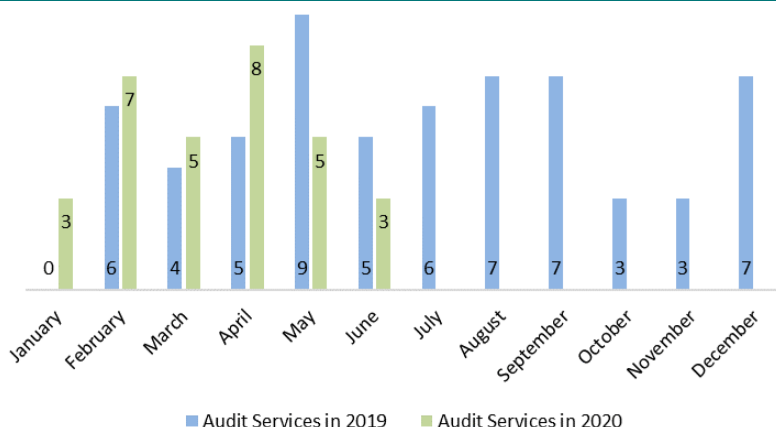
Goiás has the second largest herd of cattle in the country and is moving towards being recognized as Free of Foot-and-Mouth Disease without vaccination, working to reach this international certification by the World Organization for Animal Health.

In this context, the **Brazilian Traceability Service for Bovine Production Chain - SISBOV** - goes beyond the objective of simply monitoring the Brazilian herd. It also works as a tool for opening and maintaining new markets, guaranteeing the origin and quality of products, in accordance with the international trade requirements.

In this scenario of health crisis in the world, it is necessary to ensure that the traceability process takes place in an efficient and auditable way, in order to promote the safe and correct assessment of the parameters that involve the certification. In Goiás, the auditors who carry out this work are Inspectors of Agrodefesa with a degree in Agricultural Engineering, Veterinary Medicine or Zootechnics (Animal Science), that receive specific training for this activity. The audit services are scheduled according to the request from the Certifier Company while the re-audit services are established by the Ministry of Agriculture, Livestock and Supply (MAPA).

In 2019, Agrodefesa carried out 65 audit and/or re-audit services. This year, the estimate is that 60 properties will be audited (31 already assessed) and 42 re-audited.





GOIÁS — AUDIT SERVICES CARRIED OUT IN 2019 AND 2020

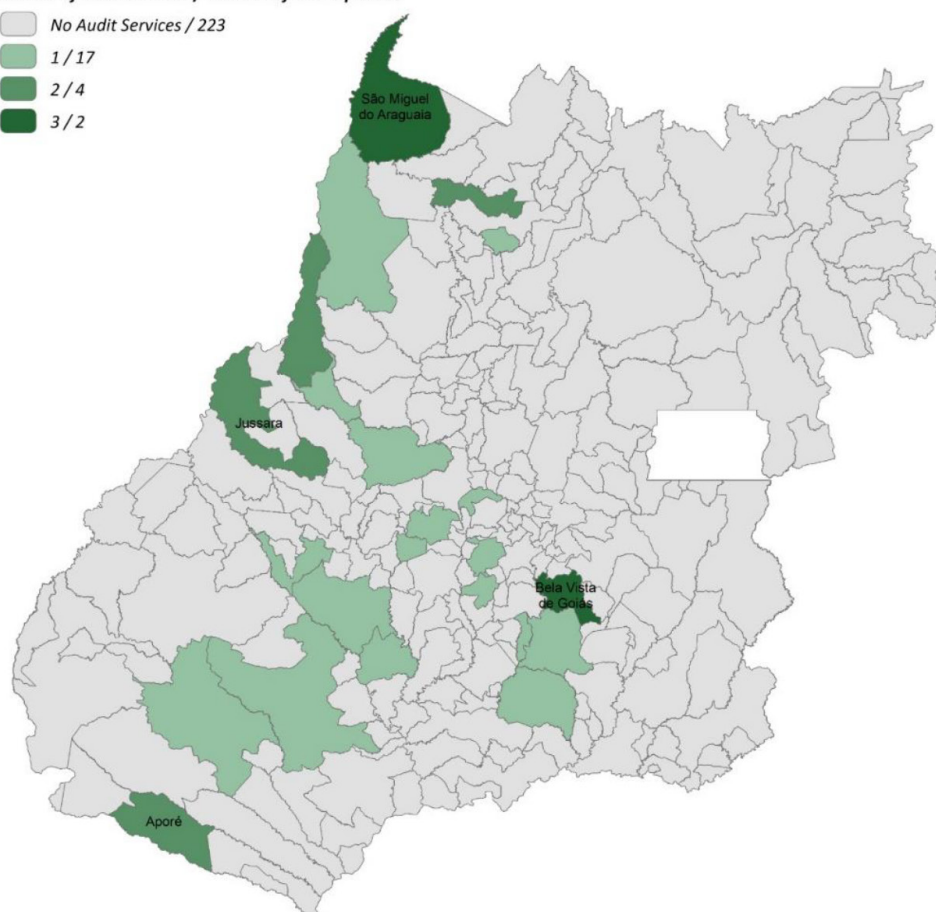


Note: Data until June 23, 2020.

GOIÁS — AUDIT SERVICES BY MUNICIPALITY IN 2020

Number of Audit Services / Number of municipalities

-  No Audit Services / 223
-  1 / 17
-  2 / 4
-  3 / 2



The SISBOV system also allows to carry out the health control of the herd, identifying possible disease outbreaks and epidemics in a quick way, as well as to find the destination and also remove from the market any products that may be contaminated.

The procedures and controls made through SISBOV can be used in public action decisions, providing subsidies to the Health Defense System, supporting the implementation of health policies, fiscal and land policies. In addition, they may provide information in attempts to combat animal theft, clandestine slaughter and border control.

It is a reliable system, which supports Brazil's leadership position in the international market and also guarantees safety to the Brazilian consumer, who is increasingly demanding, seeking safe products in their production processes, which are socially fair and ecologically correct.

DECLARATION OF APTITUDE TO PRONAF - DAP

DAP is a declaration of suitability for family farmers enabling them to take part in the National Program for Strengthening Family Farming – PRONAF. In our state, Emater Goiás is an important issuer of those declarations and, **from January 2019 until the first week of June 2020**, it has already issued more than 14 thousand DAPs to our family producers. During this moment of crisis that we are going through, the declarations allow, among other things, the small farmer to access specific credit lines of PRONAF. Thus, Emater is at the farmers' disposal for the projects elaboration, contributing for the development of agriculture production, income generation and job creation in the municipalities of Goiás.

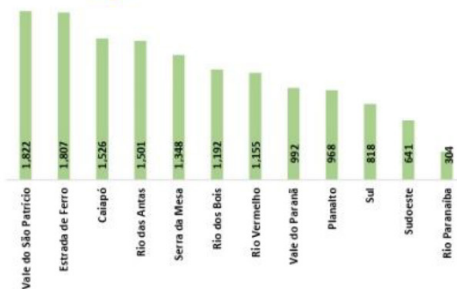
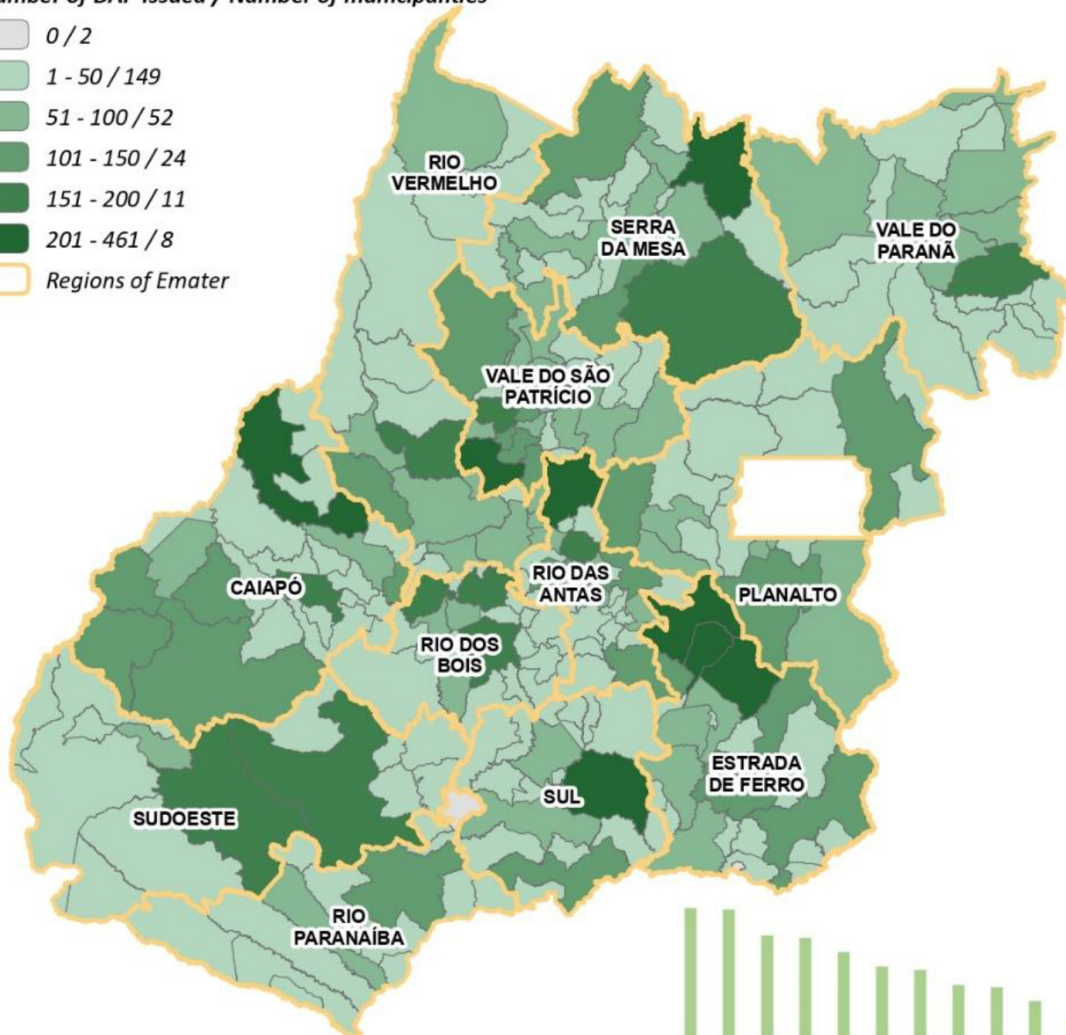
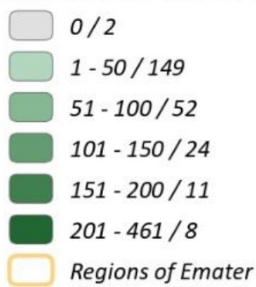
14,081

DAPS ISSUED

13,986FOR INDIVIDUALS **(99.3%)****95**FOR LEGAL ENTITIES **(0.7%)**

GOIÁS - DAPS ISSUED BY EMATER FROM JANUARY/2019 UNTIL THE 1ST WEEK OF JUNE/2020

Number of DAP Issued / Number of municipalities



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



Centrais de Abastecimento de Goiás S/A

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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