AGRIN DATA NOVEMBER 2021











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The fruit on the Bulletin cover of this edition has a special importance to the people of Goiás. The pequi fruit flavor and appearance are unmistakable and carries a symbol of food and cultural identity. In addition, it is a source of income for many families in Goiás. This month's publication shows that pequi fruit extraction in Goiás has grown in recent years, from 2018 to 2020, the volume extracted rose 28.0%.

The state has a large extraction, consumption and a wide market for pequi fruit. In the year-to-date (January to October), the Goiás Supply Centers (Ceasa) amounted R\$ 5.7 million in pequi fruit trade. Precisely about its nutritional, cultural and economic importance, pequi has been the object of research by the Agency for Technical Assistance, Rural Extension and Agricultural Research in Goiás (Emater) for over two decades. Emater, an institution under the jurisdiction of the Secretariat of Agriculture, Livestock and Supply of Goiás State (Seapa), has the largest pequi germplasm bank in the world. There are more than a thousand fruit trees planted in their Experimental Station of Native Plants in the Cerrado, in Goiânia.

The work carried out by researchers such as Elainy Botelho, under the guidelines of the President Pedro Leonardo Resende, is essential for the conservation and study of the species, having produced relevant information for pests control and the development of the already famous thornless variety. The expectation is that the results of these surveys will boost the production of pequi fruit in Goiás and support families in the fruit supply chain.

It is interesting to note that the largest extraction cities are located in the Northeast, North and Northwest of the state. The development of the fruit supply chain, therefore, can contribute to the economic growth of regions that hold potential to become viable commercial markets. This advance generates more direct and indirect jobs and better income for underprivileged populations. And from a marketing point of view, there is plenty of room to grow: the demand at Ceasa far exceeds the supply in the state.

These and other analyzes can be done from this Agri in Data. This November bulletin also brings information about soybean, corn, cattle, poultry, swine and dairy products. it could serve as a source to assist business decisions and to guide public policies. Enjoy your reading!

#ÉPorVocêQueAGenteFaz #OAgroédeTodos #SomosTodosGoiás



TIAGO MENDONCA STATE SECRETARY OF AGRICULTURE. LIVESTOCK AND SUPPLY IN GOIÁS

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INTRODUCTION

The expectations for the 2021/22 Brazilian grain crop have been highly positive. According to CONAB forecasts, the country may set a new record at 288.6 million tons - an increase of 14.2% in production, 9.9% in yield and 3.0% in planted area, compared to the 2020/21 crop. Goiás should also reach a record in this new season with 28.8 million tons of grains and have better performance than the national one - an increase of 21.1% in production, 4.4% in yield and 16.0% in planted area, compared to last season (CONAB). In Goiás, the IBGE survey estimates growth in the crops of oranges, grapes, cassava and bananas. On the other hand, crops such as Arabica coffee (-8.7%), tomato (-7.9%) and sugar cane (-5.4%) should decline.

In livestock, the Municipal Livestock Survey (PPM), published by the IBGE, brought positive data on the performance of animal breeding chains in 2020. According to the survey, there was an increase in the national herds of cattle, pigs and poultry, as well as in milk production -



check the data from Brazil and Goiás in the Livestock section of this Bulletin. The 2021 estimate of the Gross Value of Agricultural Production (VBP) points to a growth of 10.0%, compared to 2020, and should reach R\$ 1.1 trillion, in which 67.7% of this value is from agriculture and 32.3% from livestock. The country's highlight is soybean, which increased 28.4%, compared to 2020. The forecast for Goiás VBP is R\$ 93.6 billion, in which R\$ 62.0 billion comes from agriculture an increase of 10.2% - and R\$ 31.6 billion from livestock - an increase of 13.8%, both compared to 2020. In the regional scenario, in addition to the soybean VBP, which grew 22.5%, the VBP of poultry and beef stood out, reaching an increase of 26.6% and 15.9%, compared to the previous year.

The agribusiness in international trade is quite representative. In the year-to-date (January to September), national exports resulted in US\$ 93.6 billion in revenue. During this period, higher growth rates were registered in the volume shipped of beverages (32.7%), dairy products (32.1%) and live

plants and floriculture products (25.1%), compared to the same period of 2020. In Goiás, agribusiness was responsible for 70.0% of the state's exports throughout 2021 (January to September), a record of US\$ 5.3 billion.

The agriculture in the country has shown consistent results in the employment generation and income. The sector accounts for 1,795,010 formal jobs, especially directed to activities in livestock and temporary crops (Ministry of Economy). In Goiás, the total number of formal jobs in this chain is 109,009, in which 36.4% are employed in cattle raising and 16.2% in soybean crop.

The data and analysis presented by the Market Intelligence of SEAPA¹, in this publication, aim at contributing to the decision making agents in the supply chains and to support the policies developed. The State Government remains in optimistic expectations to expand Goiás agribusiness in this new crop and is working to improve the quality of life, income increase and food security for people in Goiás.

1 SEAPA - Secretariat of Agriculture, Livestock and Supply of Goiás State

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





The national **beef** exports remain strong and, in the year-to-date (January to September), reached an amount of US\$ 7.4 billion - an increase of 21.9% compared to the same period of 2020. Goiás foreign sales also showed a positive performance in the same period and had higher growth than the national one (see highlights). It should be noted the market's concern on the consequences of the commerce embargo of Brazilian beef sales to China, which may impact the exports. This scenario has been reflected in prices decrease, that dropped 8.5% in the monthly variation on 10/15, reaching R\$ 266.80/arroba (CEPEA¹/B3). In the regional market, a drop in prices was also observed in the fed cattle in Goiás which, on the same date, closed at R\$ 250.82/arroba²(IFAG³).



The **pork** prices in the domestic market had a downward trend in October. The price of live swine, on 10/15, was R\$ 7.34/kg - negative monthly variation of 3.6% (CEPEA¹/ESALQ-SP). On the same date, in Goiás, stability in prices was observed at R\$ 7.50/kg (IFAG³). National pork exports amounted to US\$ 2.0 billion, in the year-to-date (January to September), up 22.7% compared to the same period in 2020. In the same comparison in Goiás, even with a decline in the volume shipped, there was an increase in the export value (see the highlights).



The scenario for the global sales of **poultry** is positive, due to the competitiveness of this animal protein, favored by the exchange rate. In the year-to-date (January to September), a growth of 21.1% in the value exported was observed in the country, compared to the same period in 2020. Exports of this protein in Goiás follow the national operations - data presented in the highlights. The pace of foreign trade contributes to sustaining poultry meat prices in the domestic market. In the CEPEA¹/ESALQ-SP index, frozen poultry was at R\$ 8.08/kg on 10/15, a positive monthly variation of 0.5%. In the regional market, on the same date, IFAG³ registered R\$ 6.00/kg for live poultry.





The high milk production costs continue to be the main problem for the sustainability of this production chain, considering the scenario of demand reduction. In October, the national price average paid to the producer for a liter of milk was R\$ 2.33 while the average in Goiás was R\$ 2.35 - negative variation of 2.2% and 2.5%, compared to the month previous (CEPEA1). Besides, the Bulletin of Dairy Market in Goiás pointed to a drop in the total weighted variation of the dairy products basket index of 3.18%, in the reference month of October, compared to September.

National exports of dairy products, year-to-date (January to September), was 30.7 thousand tons, growth of 32.1%, compared to the same period in 2020. The performance of foreign sales by Goiás, however, showed a negative variation for the same period (check out the data in the highlights). On the import side, a decline in the pace of domestic purchases was seen for dairy products year-to-date (January to September), which registered 102.7 thousand tons, 3.3% less than the volume imported in the first nine months last year.

Municipal Livestock Survey - 2020 PPM/IBGE

The Municipal Livestock Survey, released at the end of September/2021, presents the data on the number of animals and production value for the year of 2020. There was an increase of 1.5% in the national cattle herd, compared to the previous year, and reached over 218 million head. Goiás accounts for 10.8% of the national herd and, on the same comparison, recorded a higher growth rate of 3.5%, 23.6 million head, which keeps the state as the second largest herd in the country.

The national swine herd grew 1.4% in 2020, compared to 2019, accounting for 41.1 million head. In Goiás, in the same period, there was a decline of 3.0% - with registration of 1.8 million animals - and the state remains ranked in the sixth place in the national scenario. The same market trend was observed in the poultry data released by the survey, in which the national herd (chickens, pullets, roosters, hens and chicks) had a growth of 1.5% in 2020 and, in Goiás, a reduction of 2.7%, both compared to the previous year. For the national herd of dairy cows, there was a slight reduction of 0.8% from 2019 to 2020, and recorded 16.2 million head. In Goiás, the number of milk cows was 1.9 million head, a decrease of 0.4% in the annual comparison. The milk production in Goiás, on the other hand, totaled 3.2 billion liters, an increase of 0.8%.

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

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



CATTLE/BEEF F

Goiás: Gross Value of Beef Production

Estimate 2021

R\$ 15.9 BILLION

15.9%*





10.3% OF THE NATIONAL **GROSS VALUE OF BEEF PRODUCTION**



50.4% OF THE GROSS VALUE OF LIVESTOCK PRODUCTION IN GOIÁS

Goiás: Beef exports

Year-to-date (January to September)

US\$ 1.1 BILLION

32.0%*

214.0 THOUSAND tons **1** 9.2%*



September 2021

US\$ 189.2 MILLION

138.0%*

32.4 THOUSAND tons

1 65.4%*

GOIÁS: BEEF EXPORTS - YEAR-TO-DATE (JANUARY TO SEPTEMBER) YEAR-TO-DATE SHARE OF MAIN DESTINATIONS 52.0% China **]** 13.1% **Hong Kong** 7.2% Egypt 27.7% Others 2018 2019 2020 **2020 2021**

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

^{*} Compared to the previous year ** Among the states and the Federal District

PORK/HOGS 🗑

Goiás: Gross Value of Pork Production

Estimate 2021

R\$ 1.3 BILLION







4.2% OF THE NATIONAL GROSS VALUE OF PORK **PRODUCTION**



4.0% OF THE GROSS VALUE OF LIVESTOCK PRODUCTION IN GOIÁS

Goiás: Pork Exports

Year-to-date (January to September)

US\$13.2 MILLION

16.7%*

7.8 THOUSAND tons **↓** 7.4%* th LARGEST **EXPORTER****

September 2021

US\$ 1.2 MILLION

41.5%*

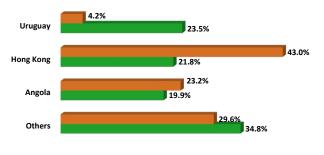
722.9 tons

48.4%*

GOIÁS: PORK EXPORTS - YEAR-TO-DATE (JANUARY TO SEPTEMBER)

YEAR-TO-DATE

2018 2019 2020 2021 SHARE OF MAIN DESTINATIONS



■ 2020 ■ 2021

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

^{*} Compared to the previous year ** Among the states and the Federal District

POULTRY 6

Goiás: Gross Value of Poultry Production

Estimate 2021

R\$ 7.8 BILLION

126.6%*





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



24.7% OF THE GROSS VALUE OF LIVESTOCK PRODUCTION IN GOIÁS

Goiás: Poultry Meat Exports

Year-to-date (January to September)

US\$ 301.8 MILLION

19.4%*

163.7 THOUSAND tons

1 3.5%*

LARGEST /_th **EXPORTER****

September 2021

US\$ 36.2 MILLION

36.4%*

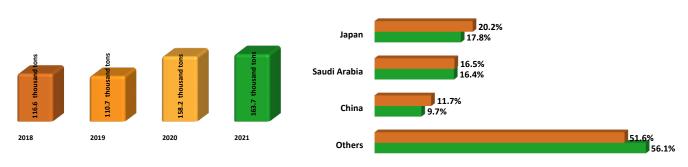
19.0 THOUSAND tons

1 8.9%*

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

YEAR-TO-DATE

SHARE OF MAIN DESTINATIONS



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

2020 2021

^{*} Compared to the previous year ** Among the states and the Federal District



Goiás: Gross Value of Milk Production

Estimate 2021

R\$ 5.6 BILLION







11.1% OF THE NATIONAL GROSS VALUE OF MILK PRODUCTION



17.6% OF THE GROSS VALUE OF LIVESTOCK PRODUCTION IN GOIAS

Goiás: International Dairy trade

Exports

Year-to-date (January to September)

US\$ 661.3 THOUSAND

10.4%*

262.8 tons

→ 23.9%*

Rth LARGEST **EXPORTER****

September 2021

US\$ 33.5 THOUSAND

45.8%*

9.1 tons

↓ 70.8%*

Imports

Year-to-date (January to September)

US\$ 2.1 MILLION

55.1%*

642.0 tons **₹ 56.4%***

12th LARGEST IMPORTER**

September 2021

US\$764.2THOUSAND

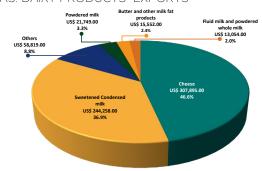
200.0 tons **4** 26.5%*

GOIÁS: DAIRY EXPORTS AND IMPORTS - YEAR-TO-DATE (JANUARY TO SEPTEMBER)

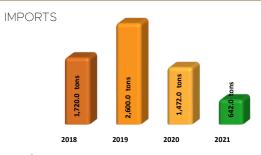
EXPORTS



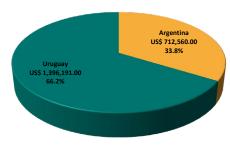
GOIÁS: DAIRY PRODUCTS EXPORTS



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



GOIÁS: DAIRY IMPORTS ORIGIN



^{*} Compared to the previous year

** Among the states and the Federal District



The large rainfall events and precipitation forecasts favored **soybean** planting progress over the country. Until 10/23, 36.8% of the estimated area had been planted in Brazil. In Goiás, the planting progress was 45.0%, while in the 2020/21 season, at this same time, just 18.0% of the area had been planted. The national soybean acreage should reach 39.9 million hectares, an increase of 2.5% (CONAB1).

Despite the soybean price drop in October, it remained at high levels. The ESALQ/BM&FBovespa-Paranaguá index pointed out R\$ 171.97/bag, on 10/25, a negative monthly variation of 2.1%. In Goiás, the average soybean price in the third week of October closed at R\$ 163.56/bag (IFAG2). The country exported 91.6 million tons of soybean complex, in the year-to-date (January to September) - a volume of 9.6% less than in the same period of 2020. Foreign sales data carried out by Goiás are in the highlights of soybeans.



Brazilian corn exports continue at a slow pace. Year-to-date (January to September), the country shipped 12.8 million tons, 35.4% less than the volume exported in the same period of 2020. In Goiás, corn foreign sales decreased as in the country - see the values in the highlights. The cereal imports, on the other hand, remain strong, pushed by low national stocks. In the first nine months of 2021, Brazil purchased 1.6 million tons of corn from other countries - especially from Paraguay - to supply the domestic market.

The corn price had a downward trend during October and closed at R\$ 89.56/ bag on 10/20 - negative monthly variation of 2.5% (ESALQ/BM&FBovespa). In Goiás, the price in the third week of October reached R\$ 79.45/bag (IFAG2). Regarding production, CONAB¹ estimates a growth of 33.7%, compared to the 2020/21 crop - which was impacted by weather problems.

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



SOYBEAN &

Goiás: Soybean Crop - 2021/22

Estimate

14.1 MILLION tons

2.9%*

th LARGEST PRODUCER**



SHARE OF 10.0% OF NATIONAL PRODUCTION

3.9 MILLION hectares



AVERAGE YIELD: 3.6 ton/ha



Goiás: Gross Value of Soybean Production

Estimate 2021

R\$ 34.6 BILLION







9.6% OF THE NATIONAL GROSS VALUE OF SOYBEAN PRODUCTION



55.9% OF THE GROSS VALUE OF CROP PRODUCTION IN GOIÁS

Goiás: Soybean Complex Exports

Year-to-date (January to September)

US\$ 3.7 BILLION

18.1%*

8.4 MILLION tons **↓ 6.8%***

/ th LARGEST **EXPORTER****

September 2021

US\$ 178.9 MILLION

21.2%*

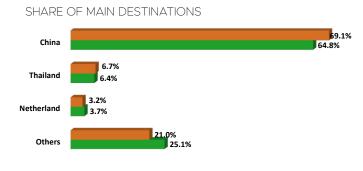
343.7 THOUSAND tons

14.4%*

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



Source: CONAB/MAPA/Ministry of Economy.



2020 2021

^{*}Compared to the previous crop

** Among the states and the Federal District

^{*} Compared to the previous year

^{**} Among the states and the Federal District



Goiás: Corn Crop - 2021/22

Estimate

12.8 MILLION tons



Z I LARGEST



SHARE OF 11.0% OF NATIONAL PRODUCTION

1.9 MILLION hectares

3.6%

AVERAGE YIELD: **6.7** ton/ha

46.5%

Goiás: Gross Value of Corn Production

Estimate 2021

R\$ 11.6 BILLION







9.5% OF THE NATIONAL GROSS VALUE OF CORN PRODUCTION



18.7% OF THE GROSS VALUE OF CROP PRODUCTION IN GOIÁS

Goiás: Corn Exports

Year-to-date (January to September)

US\$ 135.1 MILLION

64.4%*

694.6 THOUSAND tons

↓ 70.4%*

LARGEST EXPORTER**

September 2021

US\$ 42.3 MILLION

68.5%*

209.0 THOUSAND tons

→ 74.2%*

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



SHARE OF MAIN DESTINATIONS South Korea 17.1% 15.2% Japan 63.0% Others

2020 2021

Source: CONAB/MAPA/Ministry of Economy.

^{*} Compared to the previous crop ** Among the states and the Federal District

^{*}Compared to the previous year

Pequi, also called pequizeiro (*Caryocar Brasilia*), is a native tree of the Brazilian Cerrado, which is present in many ecosystems of the country and has an important socio-economic role. In some regions, it is also known by other names such as: piqui, pequiá, piquiá, piquiá-bravo, pequiá-pedra, amêndoa-de-espinho, grão-de-cavalo, pequerim e suari. Its meaning in the indigenous language is "thorny bark".

The pequi tree is a perennial plant with multiple uses, that can vary from popular pharmacopoeia to the regional gastronomy, including its fruit, which has a marked and peculiar flavor and aroma, also used for liqueurs development. Furthermore, it can be used for oil extraction, which has a chemical composition for cosmetics and medicines manufactures.

Although it is a native plant of the Cerrado biome, the production of pequi seedlings on a commercial scale is not easily achieved, due to the seed dormancy. As a result, the fruits sold are almost entirely from individual tree extraction which, in 2020, in the country, had an expressive growth of 127.9%, compared to

the previous year - amounting 63.5 thousand tons (IBGE³). The Goiás results are presented in the highlights below.

3 IBGE – Brazilian Institute of Geography and Statistics

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



PEQUI FRUIT

Goiás: Pequi Fruit Extraction - 2020

Estimate

2,582.0 tons

10.4%*



Pequi Fruit Traded at Ceasa in Goiânia City

Year-to-date (January to October)

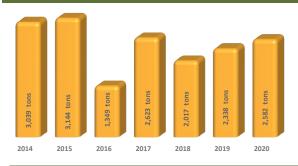
3,756.6 tons

66.7%*

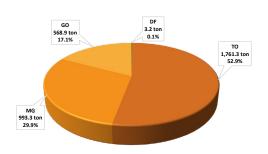
R\$ 5,702,040.03

103.1%

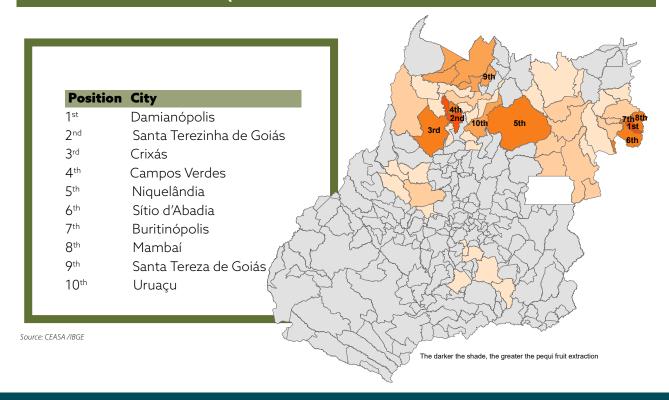
GOIÁS: HISTORICAL SERIES DATA OF **PEQUI FRUIT EXTRACTION**



GOIÁS: ORIGIN OF PEQUI FRUIT TRADED AT CEASA -YEAR-TO-DATE (JANUARY TO OCTOBER)



GOIÁS: CITIES THAT RECORDED PEQUI FRUIT EXTRACTION (2020)



^{*} Compared to the previous year ** Among the states and the Federal District

AGENCY FOR TECHNICAL ASSISTANCE, RURAL EXTENSION AND AGRICULTURAL RESEARCH IN GOIÁS

Rural Productive Activities Incentive Program | Agriculture is Social

The Rural Productive Activities Incentive Program, carried out by Emater as part of the initiative actions "Agriculture is Social - generating income and transforming lives", has already benefited 813 rural families and has invested R\$ 1.9 million in 37 cities in Goiás. The amounts are transferred directly to the beneficiaries for using in their operations and investing in their productive activities, such as poultry, horticulture, fruit growing, among others, in order to generate income and improve the quality of life in the countryside.

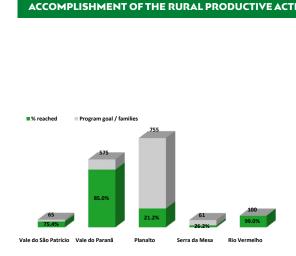
Emater joined the program in 2019, based on an agreement signed with the Ministry of Citizenship, and the State Secretariat of Agriculture, Livestock and Supply (Seapa) position as an intervening party. The role of the Agency is to select the eligible families and monitor the resources application, which are deposited in the beneficiaries Citizen Card.

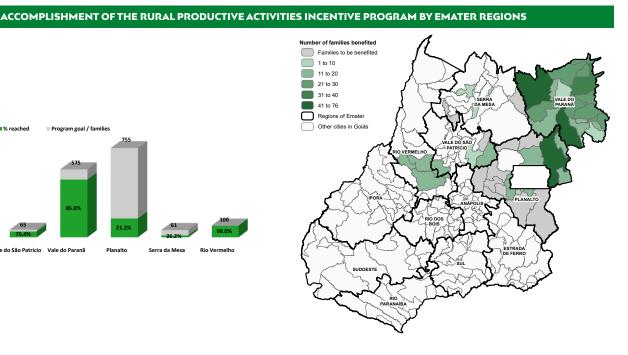
Each family receives R\$ 2,400.00 divided into two payments: the first one amounts to R\$ 1,400.00 and the second one R\$ 1,000.00. The goal is to benefit 1,556 families in 50 cities in Goiás, accounting for almost R\$ 3.8 million established in the agreement policies. This part of the program is expected to be accomplished by December this year.

PROGRAM RESULTS - AUGUST TO OCTOBER 2021
R\$ 1,949,356.80 already applied
813 benefited families
37 cities

PROGRAM GOAL - UNTIL DECEMBER 2021
R\$ 3,734,400.00
1,556 families
50 cities

52.2% of the program already accomplished







Goiás economy - 2nd quarter of 2021

Goiás Gross Domestic Product (GDP) grew 4.4%, in the second quarter of 2021, compared to the same period of the previous year.

GOIÁS: QUARTERLY GDP FROM 2019 TO 2021 (%)*



*Compared to the same period of the previous year

Source: IBGE, IMB.

Provided by: Mauro Borges Institute / General Secretariat of Governorship – 2021



The GDP growth of Goiás was mainly driven by the services sector, which increased 8.0% in the second quarter of 2021, compared to the same period of 2020. The sector was severely impacted by the pandemic and has supported the recovery trajectory.



Industry in Goiás also sustained a positive growth rate of 0.7%, compared with the same period in 2020. The Industrial public services, extractive industry and, mainly, civil construction were the activities that built the development during the quarter.



Agriculture in Goiás, on the other hand, decreased 2.1% in the second guarter of 2021, compared to the same period in 2020, driven mainly by negative effects in crops caused by weather problems.





The labor market participation has improved in the state of Goiás and indicated recovery in the unemployment rate. In the second quarter of 2020, it was ranked as the 13th among the states with the lowest unemployment rate and, in the second quarter of 2021, it moved up to the 8th position, an unemployment rate of 12.4%. Although the state rate continues at a high level, it is under the national one (14.1%).



Finally, in the international market, the state of Goiás was the eighth largest exporter among the states. In addition, it pointed to an increase of 22.1% in the value exported in the second quarter of 2021, compared to the same period of the previous year, rising from US\$ 2.5 billion to US\$ 3.1 billion, with emphasis on the grain, meat and mineral supply chains.





















