

AGRI IN DATA

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SEAPA
Secretaria de
Estado de
Agricultura,
Pecuária e
Abastecimento



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GOVERNMENT OF GOIÁS

■ GOIÁS STATE GOVERNOR

Ronaldo Caiado

■ DEPUTY STATE GOVERNOR

Lincoln Tejota

■ STATE SECRETARY OF AGRICULTURE, LIVESTOCK AND SUPPLY

Antônio Carlos de Souza Lima Neto

■ SUPERINTENDENT OF SUSTAINABLE AND RURAL PRODUCTION

Donalvam Maia

■ MARKET INTELLIGENCE MANAGER

Juliana Dias Lopes

■ HEAD OF SECTOR COMMUNICATION

Fernando Dantas

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José Essado Neto

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Wilmar da Silva Gratão

■ PRESIDENT OF EMATER

Pedro Leonardo de Paula Rezende

State Secretariat of Agriculture, Livestock and Supply in Goiás

256 Street, n.52, Setor Leste Universitário, Goiânia (GO)

Zip Code: 74.610-200

Telephone Number: +55 (62) 3201-8935

www.agricultura.go.gov.br

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PRESENTATION

By coincidence, after 12 issues of Agri in Data, completed in the last edition, we start a new year of publications of our newsletter, in parallel to the beginning of a new crop. The 2020/2021 crop began to be planted on September 29, when we were with Governor Ronaldo Caiado, in Cristalina City, when he opened another round of planting important crops for the state, as soybeans.

Reaching record levels in the 2019/2020 crop, in which Goiás got the third place in the national grain production - 13.2 million tons of soybeans and 12.6 million tons of corn - for the 2020/2021 crop, Goiás is expected to increase the planted area and can also overcome its productivity, producing more food, wealth, employment and income for the farmers.

We count on the efforts of the state's rural producers, whom the governor named them as "true heroes", during the opening of soybean planting, making reference to the role of the agricultural production in the economy of Goiás, even in the midst of the pandemic. A hard work associated with public policies of the Government of Goiás, which show the agricultural vocation of the state, seek for production diversification and the development of the different regions in the state.

Part of this bulletin includes data that prove the results of the last crop, including analyzes related to exports and the market, and serve as a guide for the development of actions, in the most different aspects.

Government of Goiás actions, through the State Secretariat of Agriculture, Livestock and Supply (Seapa) and the institutions under its jurisdiction - Emater, Agrodefesa and Ceasa. Some examples of ongoing actions are: the State Food Acquisition Program (PAA/GO), that will be receiving proposals by mid-October; the partnership with Ambev for the creation of cassava-based beer, which the production is obtained from family farmers in the Northeast of the State; in addition to actions related to herbivore rabies control; among several others.

The Government of Goiás has always looked carefully at all the links in the agricultural production chain, from the larger exporting producer to a small family farmer. And for that, data is important. We hope that this newsletter will encourage new productive crops in all sectors of our state.

Enjoy your reading!



**ANTÔNIO CARLOS DE
SOUZA LIMA NETO**

STATE SECRETARY OF
AGRICULTURE, LIVESTOCK
AND SUPPLY IN GOIÁS



INTRODUCTION

On the international scene, the agriculture in Goiás continues to show itself even more competitive and dynamic, reaching new markets and expanding the already opened ones. In 2020, Goiás has already commercialized agribusiness products with 154 countries. Until August, US\$ 4.6 billion in products has been exported by Goiás, a value 17.0% higher than the same period in 2019. The highlights are soybeans and meat complexes, mainly as answer to China's strong demand.

In the national scenario, Goiás continues with significant participation: 8.0% of the gross value of agricultural production (VBP) of the country. For 2020, the estimated VBP of agriculture in the state is R\$ 61.9 billion - an increase of 10.4% compared to 2019. Much of this value is leveraged by the production of soybeans, corn and beef, which together represent 61.6% of this amount. It is noted that other crops are also registering excellent results, such as wheat, with an increase of 37.1% in relation to 2019 and beans that are positioned as the 3rd largest VBP among the producing states.

The relevance of the agriculture in Goiás is confirmed by the statistics published by IBGE on Municipal Agricultural Production survey, in which Rio Verde and Jataí obtained national highlight, holding the 2nd and 4th position in corn production in the Brazilian ranking, respectively. For the value of agriculture production, the cities Rio Verde, Cristalina and Jataí had significant results, occupying, respectively, the 5th, 6th and 7th place in the national

ranking. The data presented shows the importance of Goiás cities to the country, especially for the production of soybeans, sorghum, tomato, potato, garlic, sugarcane and sunflower. This confirms the agricultural aptitude of the state and the importance of the segment for the economic development of different regions of Goiás.

The success of the agribusiness is mainly related to the following pillars: investment, climate and commercialization. Up to the investment, according to the National Association of Automotive Vehicle Manufacturers - Anfavea, from January to August 2020, in Goiás, there was a growth of 27.9% in retail sales of wheeled tractors and 13.4% of grain harvesters, compared to the same period in 2019. These technological contributions are directly associated with the availability of credit to farmers. In 2020, from January to August, the State Development Council of the Deliberative Chamber of the Constitutional Fund for Financing in the Center-West Region (CDE/FCO) approved 314 request letters of rural projects reviewed and approved by SEAPA - more than 90% of analyzed letters compared to the same period in 2019. The approved letters authorize the use of approximately R\$ 350 million in resources from the Fund for the Center-West Region (FCO), in which 32.0% were addressed to the acquisition of agricultural machinery and implements.

The expansion of the resources application reflects directly on the results of production and productivity in the state. As reported by Conab, in the last grain

survey 2019/20, a national record is confirmed - with 257.8 million tons. Production was 4.5% higher than last year, boosted by the good perspective of the farmer who expanded their investments. In Goiás, the grain crop also reached record levels, with 27.5 million tons, accounting for 10.7% of the country's crop. The growth rate of production in Goiás exceeded the national one, up 8.9% compared to the previous one. This is the result of the work from farmers who remain optimistic about the market prospects and are provided with credit lines to enhance agribusiness activity in Goiás. In the grain crop that ended in September, Goiás achieved growth of 1.5% in average yield. The expectation is that Goiás will continue the excellent performance and productivity gains using technology, mainly due to the increase in resources and lower interest rates of the Plano Safra for rural financings.

Weather conditions have been determinant for the success of crops. According to the Monthly Agroclimatological Bulletin of September, released by the National Institute of Meteorology-INMET, there is a 70% chance of La Niña to start during the spring this year, in a moderate to weak intensity, with probable duration until the summer of 2020/2021. In general, this phenomenon causes delay in the regularization of rainfall, but according to INMET, this typical behavior does not always occur, because it is necessary to consider other factors, such as temperature of the Atlantic Ocean, which can

minimize or intensify the impacts of La Niña.

All these economic indicators are reflected in the labor market, in which, according to the latest National Continuous Household Sample Survey - PNAD, published by IBGE, in Goiás there are more than 281,000 people employed in agriculture, livestock, fishing, forest production and aquaculture activities. It is noted that formal labor market statistics also confirm the importance of agribusiness in Goiás. According to data from the General Register of Employees and Unemployed - CAGED, released by the Ministry of Economy, year-to-date (January to August), Goiás registered creation of 7,098 formal jobs in agriculture and 3,925 in the food industry.

Another statistic released this month that reflects the strength of agriculture in Goiás, is the growth of the agricultural economy in the state in the second quarter of 2020. According to Mauro Borges Institute, agricultural activity registered a growth rate of 4.7% in this period compared to the second quarter of 2019 - ratifying the support that agribusiness gives to Goiás economy.

The government of Goiás continues to work for strengthening agribusiness in the state, with highlight for Selo Arte in handmade cheese and State Food Acquisition Program - which in addition to ensure the commercialization of the small farmer production also has an important social role in providing food to people in situations of social vulnerability in Goiás.

CATTLE / BEEF

In the national scenario, the supply of cattle for slaughter continues reduced. There is also an increase in the price of calves and animal feed, in addition to the growth of the international demand. These factors have contributed to the beef appreciation in the country. According to the statistics of the 2nd quarter of 2020, released by IBGE, in Brazil, there was a 5.0% drop in the cattle carcass weight, compared to the same period of 2019. In Goiás, slaughter increased in the 2nd quarter, compared to the 1st quarter, however, it is lower than in previous years. In Goiás market, as indicated by IFAG, in the bulletin of the 4th week of September, the average price for the fed cattle closed at R\$ 237.31, an increase of 0.9% compared to the previous week. The constant price growth has impacted the Gross Value of Beef Production for 2020 - estimate growth of 13.7% compared to 2019, in Goiás.



GOIÁS: CATTLE SLAUGHTERING

2nd quarter of 2020



699.4 THOUSAND HEADS

↑ 13.3%* ↓ 4.4%**

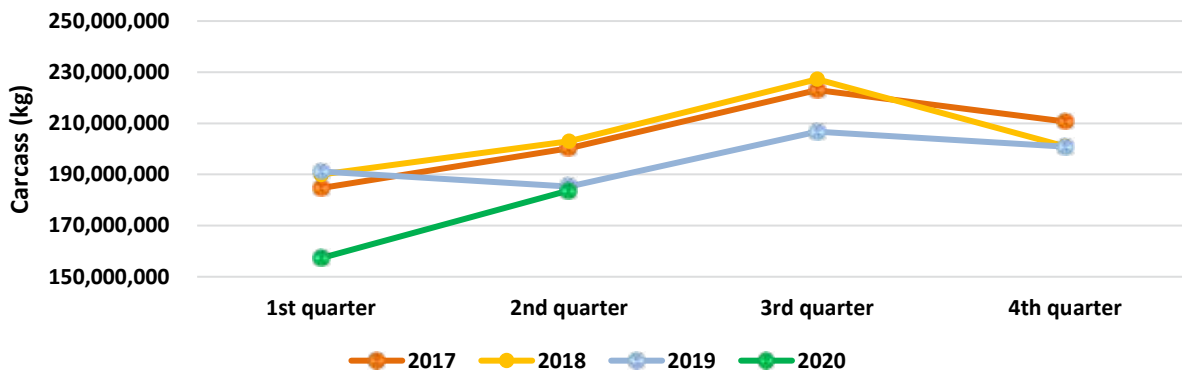
183.8 THOUSAND TONNES

↑ 16.8%* ↓ 0.8%**

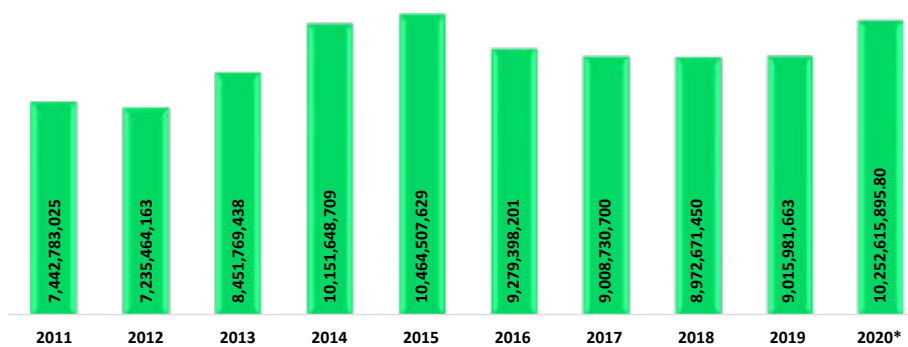
* in relation to the 1st quarter of 2020

** in relation to the 2nd quarter of 2019

GOIÁS: NUMBER OF CATTLE SLAUGHTERED (KG)



GOIÁS: GROSS VALUE OF MEAT PRODUCTION



* Estimate released in September

CATTLE / BEEF

GOIÁS: BEEF EXPORTS

YEAR-TO-DATE (JANUARY TO AUGUST):

US\$ 761.9 million ↑ **22.3%***

75.4% of the meat complex in Goiás

176.4 thousand tonnes ↑ **10.9%***

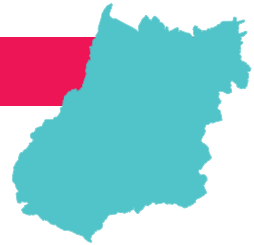
AUGUST 2020:

US\$ 103.9 million ↑ **10.5%***

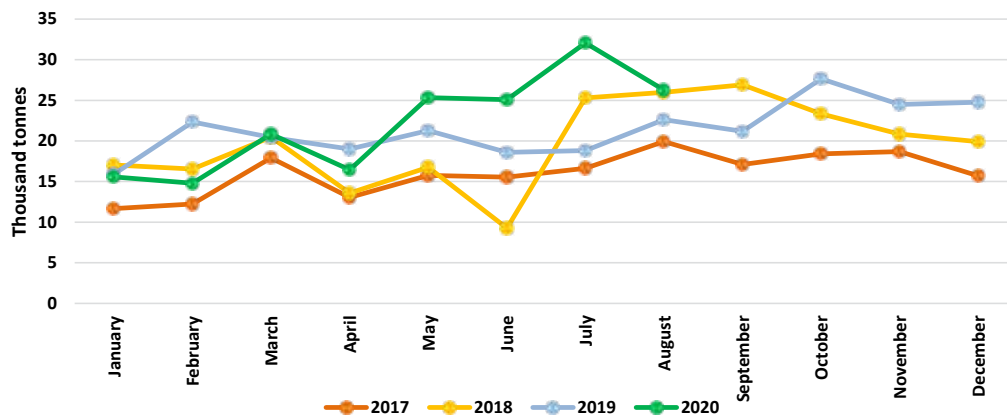
75.8% of the meat complex in Goiás

26.3 thousand tonnes ↑ **16.1%***

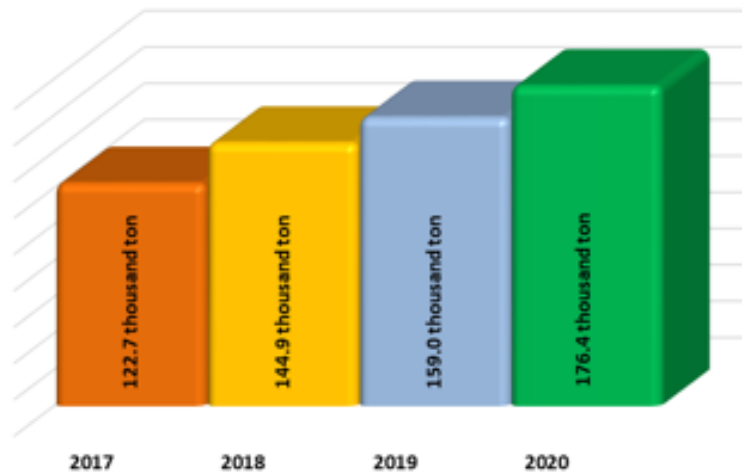
** In relation to the same period of 2019*



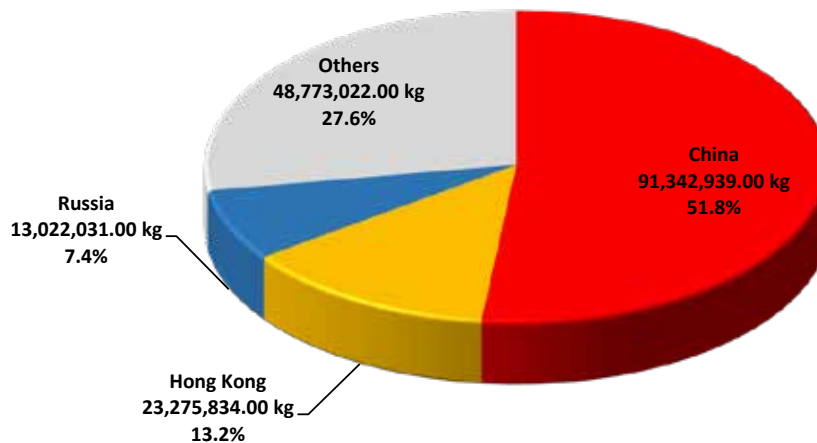
GOIÁS: BEEF EXPORTS



GOIÁS: YEAR-TO-DATE BEEF EXPORTS - JANUARY TO AUGUST



GOIÁS: MAIN DESTINATIONS FOR BEEF EXPORTS – 2020



Despite the reduction of beef exports in August, compared to the previous month in Goiás, the international scenario is attractive for livestock. Asian demand remains firm, absorbing almost 70% of the beef exported by the state in 2020. Technology and investments in the health of animals raised in the state of Goiás are determining factors for obtaining the meat eligible for export and for strengthening the productive chain in the State. The expectation in relation to price is that it will remain high, due to the decline in supply and the aftermarket appreciation.

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



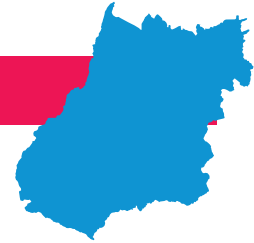
PORK / PIG PRODUCTION

In the national scenario, pig slaughter reached 12.1 million head during the 2nd quarter of 2020, registering growth in relation to the previous quarter and the same period of 2019. Goiás has the 6th largest herd of pigs in the country, however, a decrease was observed in the number of animals slaughtered and in the total carcass weight, on this basis of comparison. According to IFAG, in the Bulletin of the 4th week of September, the average price for live pigs registered R\$ 8.20 per kilo. Prices remain high, with a nominal variation of 60.8%, in relation to the May 28 record of this year. According to the institute, the upward trend has been occurring in most Brazilian markets, due to the strong foreign market, which has generated restriction in the domestic supply of animals. In the same sense, an analysis by Cepea points out that exports have been one of the main factors for increased domestic prices - both for live pig and pork. Another factor that has also contributed to the maintenance of high prices for pig sales in the country, is the appreciation of inputs for animal feed. In this scenario, the market perspective is that prices are likely to remain at high levels.



GOIÁS: PIG SLAUGHTERING

2nd quarter of 2020



411.5 THOUSAND HEADS

↓ 15.3%* ↓ 10.3%**

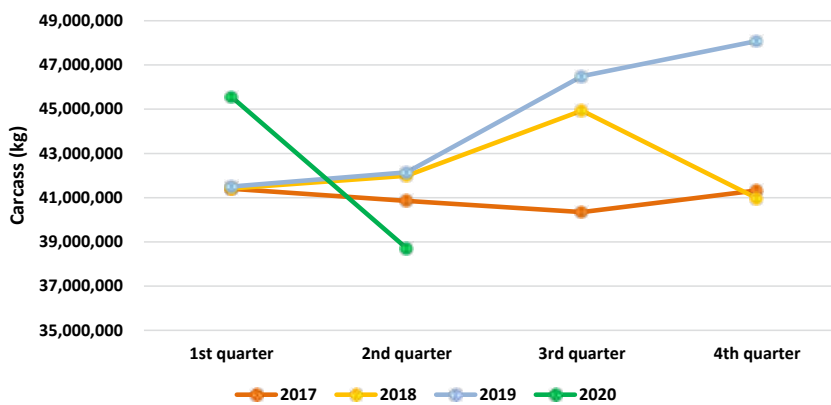
38.7 THOUSAND TONNES

↓ 15.0%* ↓ 8.2%**

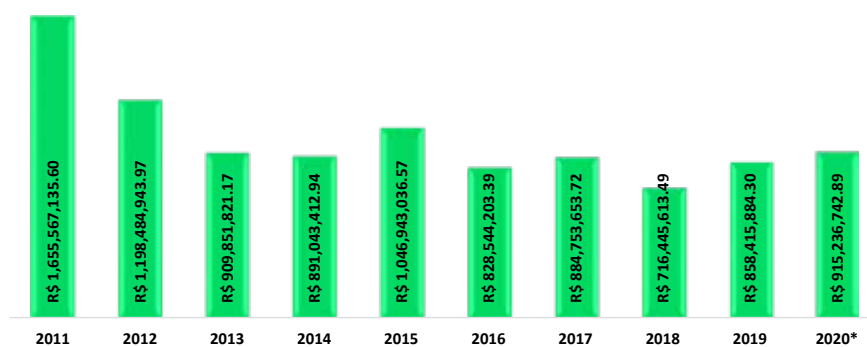
* in relation to the 1st quarter of 2020

** in relation to the 2nd quarter of 2019

GOIÁS: NUMBER OF PIG SLAUGHTERED (KG)



GOIÁS: GROSS VALUE OF PORK PRODUCTION



* Estimate released in September

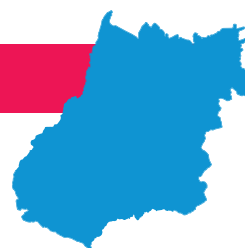
PORK / PIG PRODUCTION

GOIÁS: PORK EXPORTS

YEAR-TO-DATE (JANUARY TO AUGUST):

US\$ 9.3 million

↑ **163.4%***



7.0 thousand tonnes

↑ **183.4%***

AUGUST 2020:

US\$ 1.9 million

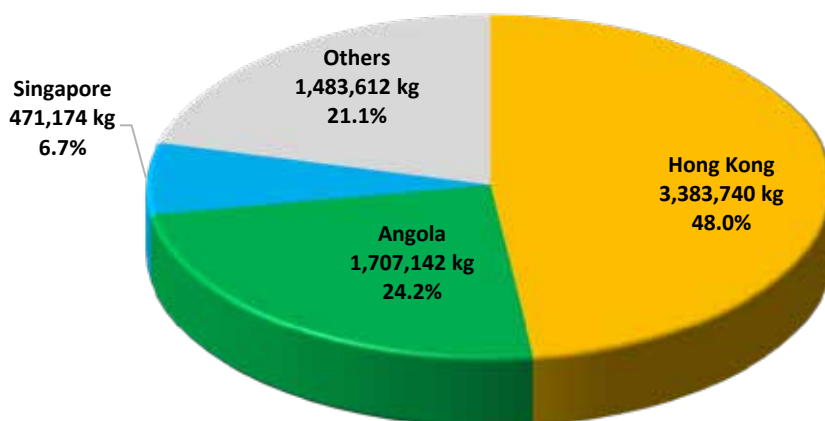
↑ **129.6%***

1.4 thousand tonnes

↑ **119.6%***

** In relation to the same period of 2019*

GOIÁS: MAIN DESTINATIONS FOR PORK EXPORTS – 2020



In the international scenario, due to the procedures of registration the wild boars contaminated by the African Swine Fever in Germany - which put to the test the health conditions of the swine herd in that country - it is expected Brazilian exports to China to be boosted, considering that Germany is an important pork exporter, even to that Asian country. The forecast is that international demand will contribute for the export certification and the productive capacity in Goiás, in order to attend this expanding market.

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

POULTRY

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Poultry meat has been gaining competitiveness compared to other animal proteins. According to Cepea, the difference between the prices of whole chicken and those of beef and pork carcasses has been increasing consecutively, reaching a record difference in September.

Exports of poultry meat from Brazil totaled 2.8 million tons from January to August, volume 0.1% lower than that registered in the same period last year. On the same basis of comparison, the revenue accounts for greater decline - of 12.9% - revealing the low prices of this animal protein on the international market in this period. For Goiás, there was an increase of shipments, ratifying the quality and health conditions of the poultry meat from the state.

In the domestic market, prices, although oscillating, have been recovering. In the state of Goiás, according to data collected by IFAG, published in the Bulletin of the 4th week of September, the average price for live chicken closed at R\$ 3.84/kg, with a negative variation of 1.3% over the previous week.

Data on chicken slaughter in the 2nd quarter of this year, according to IBGE, registered a drop - at the national and state levels.



POULTRY

GOIÁS: POULTRY SLAUGHTERING

2nd quarter of 2020



87.1 MILLION HEAD

↓ 12.1%* ↓ 13.6%**

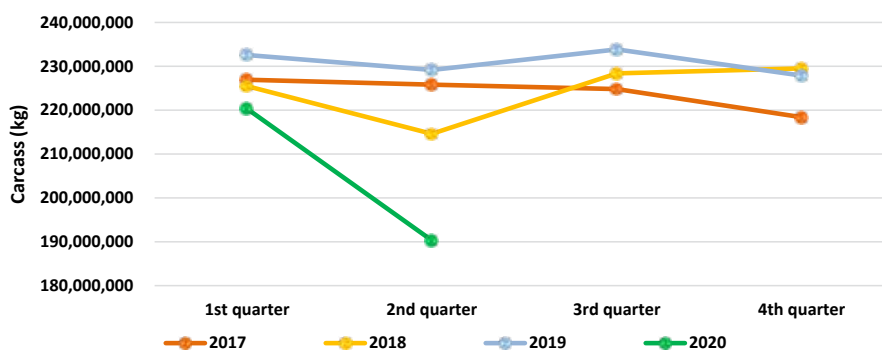
190.3 THOUSAND TONNES

↓ 13.6%* ↓ 17.0%**

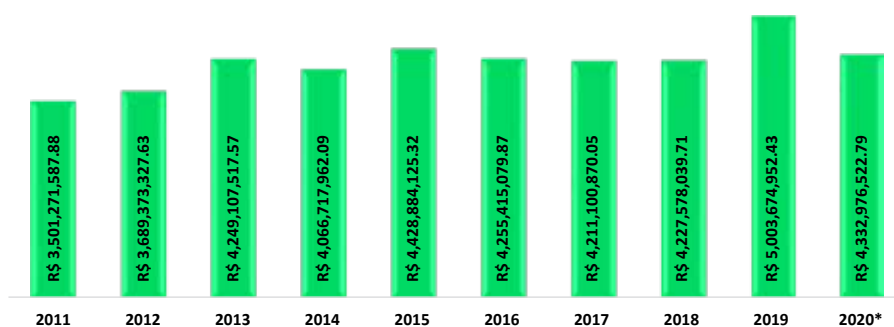
* in relation to the 1st quarter of 2020

** in relation to the 2nd quarter of 2019

GOIÁS: NUMBER OF CHICKEN SLAUGHTERED (KG)



GOIÁS: GROSS VALUE OF POULTRY PRODUCTION



* Estimate released in September

GOIÁS: POULTRY EXPORTS

YEAR-TO-DATE (JANUARY TO AUGUST):

US\$ 226.4 million ↑ **28.8%***

140.8 thousand tonnes ↑ **51.8%***

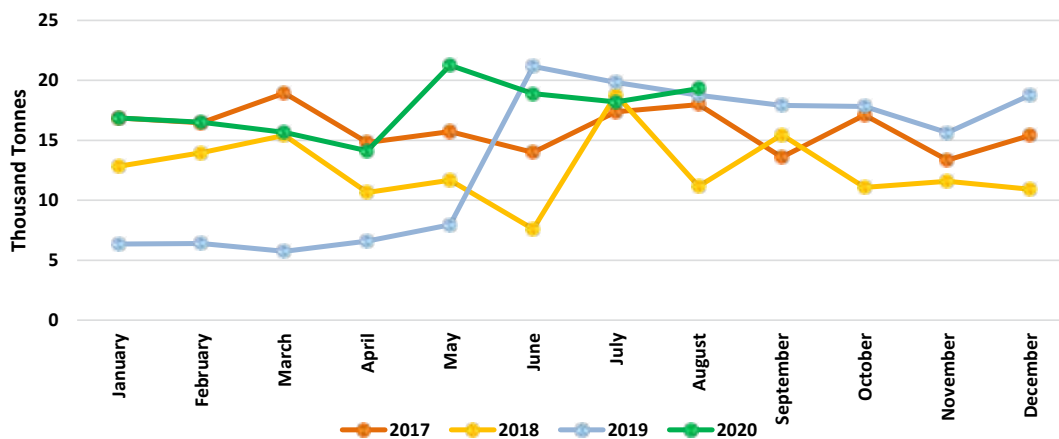
AUGUST 2020:

US\$ 29.5 million ↓ **15.4%***

19.3 thousand tonnes ↑ **3.0%***

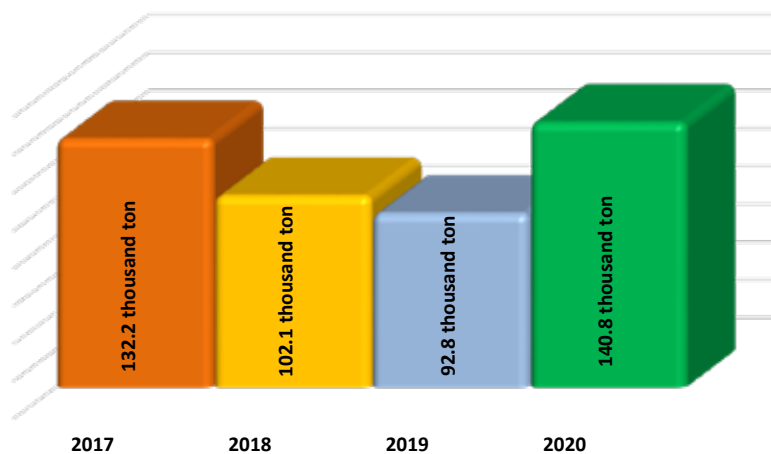
** In relation to the same period of 2019*

GOIÁS: POULTRY EXPORTS

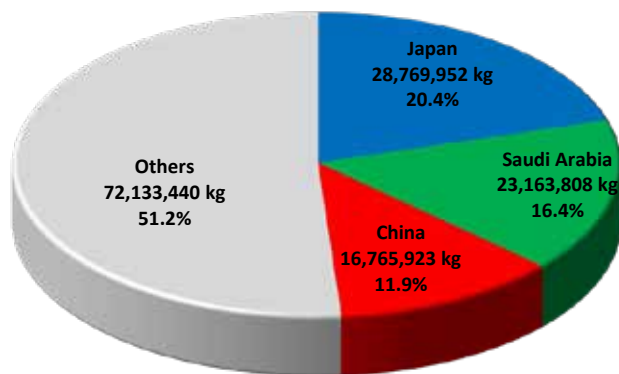


POULTRY

GOIÁS: YEAR-TO-DATE POULTRY EXPORTS - JANUARY TO AUGUST



GOIÁS: MAIN DESTINATIONS FOR POULTRY MEAT EXPORTS – 2020



The forecast is that exports from Goiás to the main trading partners in Asia and the Middle East will remain steady. The increase of the volume traded by Goiás, added to the appreciation of the dollar against the Real, has contributed to reduce the impacts of the low price of the product in the international market.

The agents involved in this production chain need to be aware of the expanding plans of chicken production in China, a major global player, which, according to the United States Department of Agriculture (USDA), may produce a record of 14.85 million tons in 2020. This has increased the demand for grains used in the production of animal feed, such as corn and soybeans, and has impacted meat production costs in Brazil.

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

CHICKEN EGGS

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In the national scenario, the egg market is oversupplied. According to data released by IBGE, the production of chicken eggs in the country increased in the 2nd quarter of 2020, compared to the previous quarter and the same period in 2019. The lack of demand, explained by the reduction in consumption of food – in which eggs are used as ingredient – at snack bars and events, for example, as well as by the decrease of exports, has pushed down the trade prices. This situation has impacted the farmer's profitability, who faces input prices raising and, according to Cepea, also faces difficulties in carrying out culling of laying hens to control the production.

In Goiás, the egg production is fully consumed by the domestic market and a production drop was observed, compared to the first half of 2019.



CHICKEN EGGS

GOIÁS: CHICKEN EGGS PRODUCTION

2nd quarter of 2020

52.9 MILLION DOZEN EGGS

↑ 2.8%* ↓ 2.9%**

9.5 MILLION OF LAYER HENS

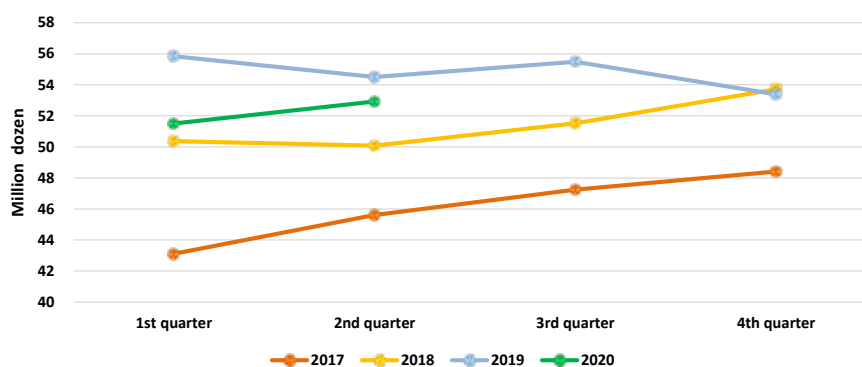
↑ 3.9%* ↓ 2.2%**

* in relation to the 1st quarter of 2020

** in relation to the 2nd quarter of 2019

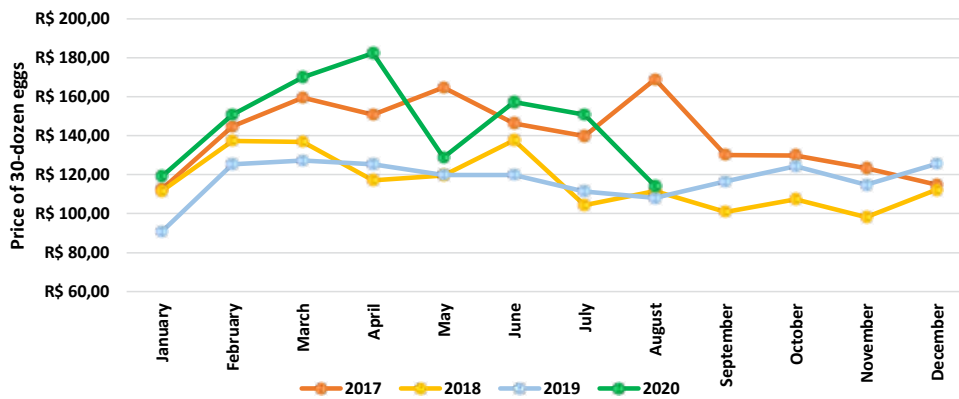


GOIÁS: CHICKEN EGGS PRODUCTION



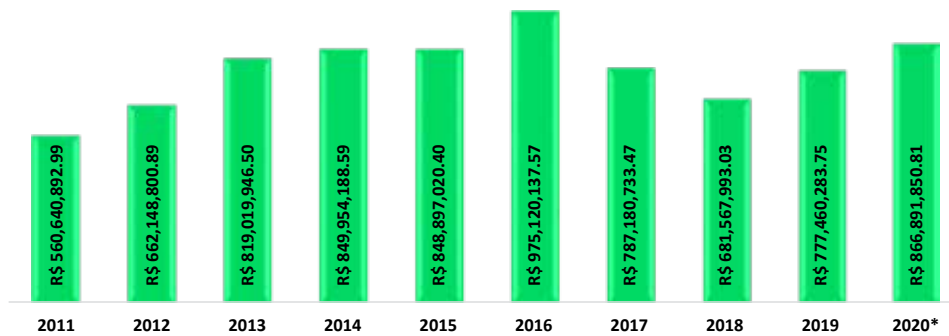
According to Conab, the average price of 30-dozen large white chicken eggs in Goiás had a raise at the beginning of the pandemic - in February this year. The consecutive increases led the product to register the highest value in April, with an average of R\$ 167.08 at wholesale. The Gross Value of Egg Production (GVP), released in September for Goiás, forecasts growth of 11.5% this year compared to 2019, however, in April, the estimate was of 19.4%, showing that the GVP of eggs is sensitive to price changes over the months. Thus, the prices variation reflects the volatility of the market, especially the increases observed during the peak period of the social isolation measures - March and April.

GOIÁS: AVERAGE WHOLESALE PRICE FOR 30-DOZEN WHITE CHICKEN EGGS



Conab (corrected by Brazil's IGP-DI / FGV) - adapted by Seapa.

GOIÁS: GROSS VALUE OF EGG PRODUCTION



* Estimate released in September

In the international scenario, it was observed a decrease of the egg shipments in Brazil, registering US\$ 30.7 million, year-to-date (January to August), in eggs and yolks to several countries, mainly Arabs. These sales are expected to expand, according to the Brazilian Animal Protein Association, since Mexico - the largest egg consumer in the world - has opened its market for Brazilian production. Goiás does not participate in the international commercialization of eggs yet, however, this information points to an excellent opportunity for layer poultry farming in the state, which continues to demonstrate the quality of products and health control of the flocks.

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

MILK



According to Cepea, the price of milk paid to the farmer has been increasing since the beginning of 2020 - especially in recent months due to seasonal factors, in which milk production is reduced because of the low availability of forage, and the decrease in rainfall in the Southeast and Center-West regions of the country. During this period, the appreciation of milk to the farmer was also related to the greater competition among the dairy industries to guarantee the purchase of raw materials. In addition, the Brazilian imports of powdered milk became more expensive, due to the devaluation of the Real against the dollar.

In September, according to the Bulletin of the Dairy Market in Goiás, the state dairy industry had the average price increased for the dairy products basket, compared to the previous month, with a weighted total variation of 11.5%.

GOIÁS: NOMINAL WHOLESALE PRICES FOR 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)
August	3.33	19.52	27.12	7.84 ⁽¹⁾	23.30
September	3.62	21.86	29.72	9.57 ⁽²⁾	24.67
Variance					
September/August	8.81%	11.95%	9.60%	22.02%	5.88%

According to Cepea, the scenario has been impacted by three main factors: more severe weather conditions, which make it difficult to resume milk production; increase in production costs in relation to the previous year - which has compromised the increase in investments; and stock reduction of dairy products - related to the recovery of consumption, anchored in the Emergency Aid programs.

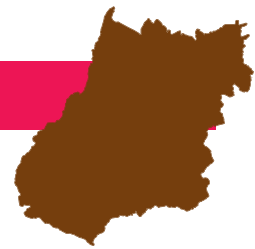
The quarterly survey of milk production, carried out by IBGE, pointed out that, in the 2nd quarter of 2020, a decrease in national production was observed, both in relation to the previous quarter and to the 2nd quarter of 2019. The state of Goiás also recorded a retraction during this period.

GOIÁS: MILK PRODUCTION

2nd quarter of 2020

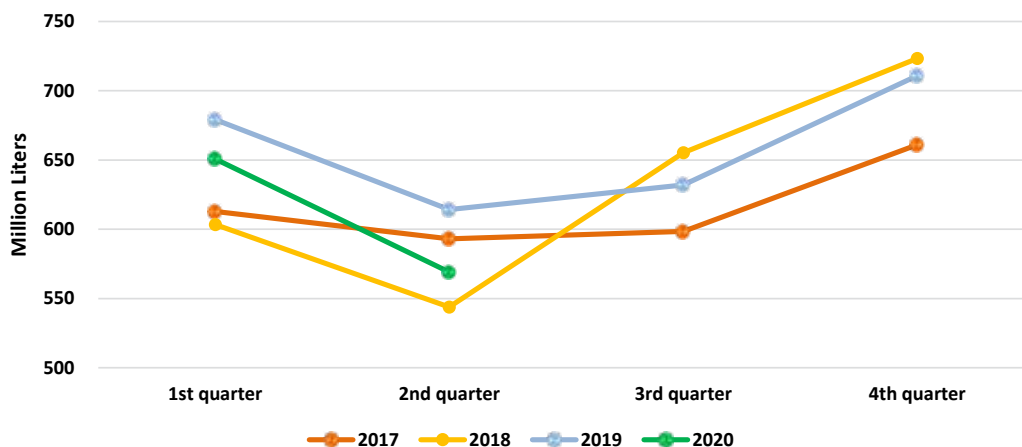
569.1 MILLION LITERS OF MILK

↓ 12.5%* ↓ 7.4%**



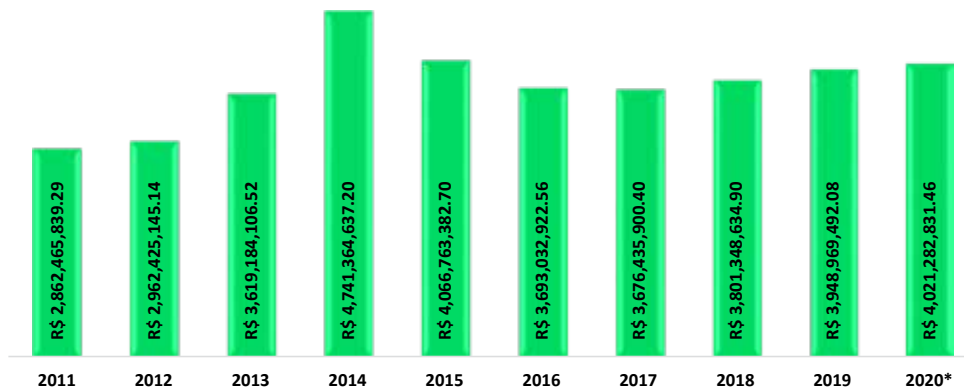
* in relation to the 1st quarter of 2020
** in relation to the 2nd quarter of 2019

GOIÁS: MILK PRODUCTION



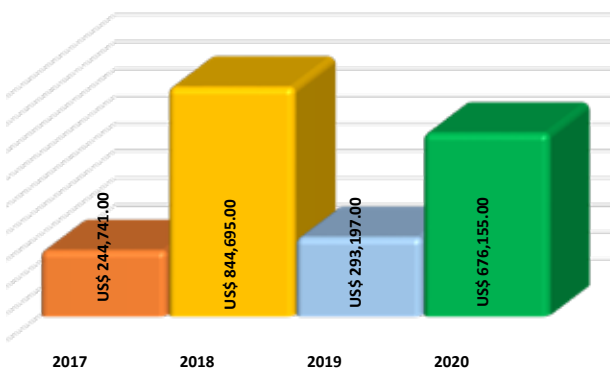
MILK

GOIÁS: GROSS VALUE OF MILK PRODUCTION

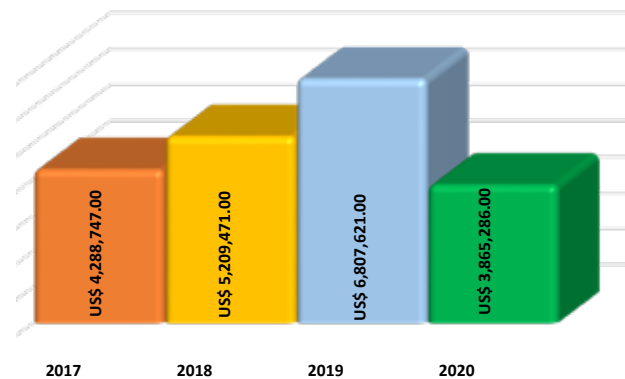


* Estimate released in September

GOIÁS: YEAR-TO-DATE MILK EXPORTS (JANUARY TO AUGUST)



GOIÁS: YEAR-TO-DATE MILK IMPORTS (JANUARY TO AUGUST)



Considering the arrival of the rainy season in Goiás in the coming months, the expectation is that there will be an increase in production and a decrease in costs, since the availability of pastures reduces the need for feeding supplementation.

In order to strengthen this production chain in the state, the Government of Goiás has supported artisanal cheese producers to be part of the Selo Arte Program - created by the Ministry of Agriculture aimed at reducing bureaucracy in the product registration process for interstate sales, with inspections of a primarily guiding nature. With this, it is expected to add value to artisanal cheese from Goiás, promoting safe production and income generation for family farmers in Goiás.

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

SOYBEAN

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In the international market, the appreciation of the dollar against the Real continues to push up the price of Brazilian soybeans, with a tendency to remain the high values in the domestic market. Although soybean prices in Chicago declined in the last days of September, the increase in the exchange rate was sufficient to sustain high domestic prices. In the country, the year-to-date result (January to August 2020) shows that the favorable exchange rates for exports and the increased Asian demand boosted shipments of soybean complex products, which accounted for US\$ 30.3 billion, 25.6% higher than the same period of 2019. Goiás stands out in this scenario, participating with 9.7% of the Brazilian soybeans complex exports.

According to the latest survey of the crop 2019/2020 - crop closure - released by CONAB, the soybean production was a record in the country. Even having a crop failure in Rio Grande Sul, the national production of the oilseed increased 4.3% compared to the previous crop. Following the same good national performance, Goiás also confirms a record production with a growth of 8.8%, in relation to the 2018/2019 crop.

In the previous crops, the growth of soybean production can be verified

in the productivity gains in Goiás. While production grew 3.2 times between the 2000/2001 and 2019/2020 crops, the area expansion increased 2.3 times. The good results are mainly the consequences of the investments made by the producers and the access to credit lines addressed to this activity.

According to data collected by IFAG, released in the 4th week bulletin, in Goiás, the average price for soybean was at R\$ 140.00/bag, the over-the-counter price was between R\$ 120.00 and R\$ 135.00/bag and soybean futures can be sold at R\$ 113.20/bag. Still according to the Institute, freights rates have dropped - leaving Rio Verde (GO) to Paranaguá (PR) - in which vehicles have been operating at reduced shipping fee, reflecting the decline in export negotiations, due to the shortage of this grain in the country.

The good performance of soybean crops and high prices have been directly reflected in the Gross Value of Soybean Production in Goiás for 2020, exceeding R\$19.3 billion, an increase of 35.0% compared to that registered in 2019.



SOYBEAN

GOIÁS: SOYBEAN CROP 2019/20



PRODUCTION:
13.2 million tonnes

ACCOUNTS FOR:

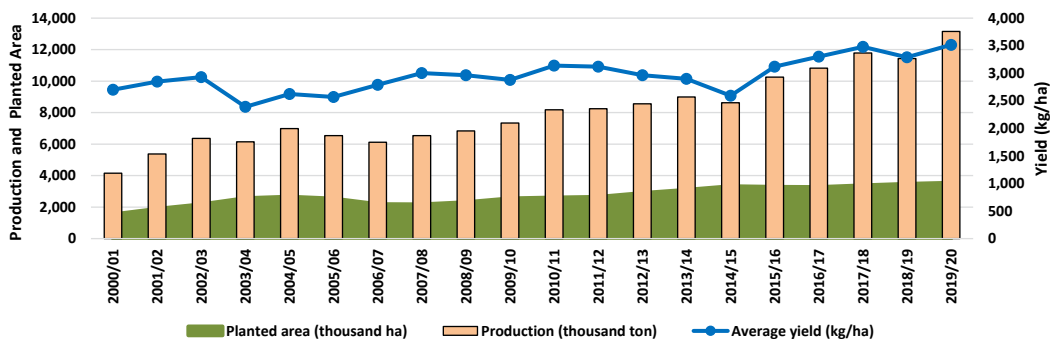
10.5% of the national production

PLANTED AREA:
3.5 million hectares (ha) ↑ 2.0%*

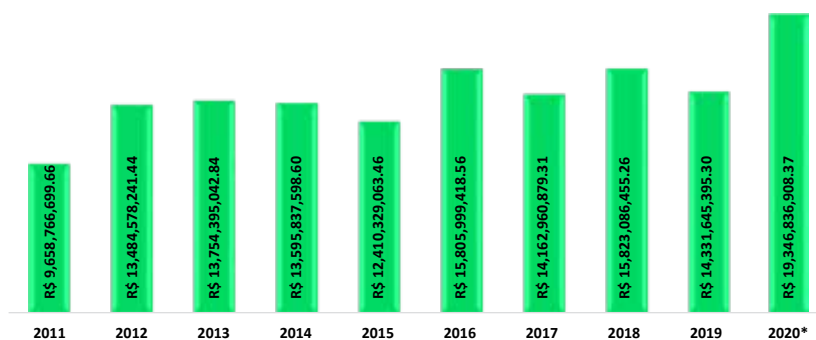
AVERAGE YIELD:
3.7 t/ha ↑ 6.7%*

**In relation to the previous crop.*

GOIÁS: SOYBEAN CROPS



GOIÁS: GROSS VALUE OF SOYBEAN PRODUCTION



** Estimate released in September*

GOIÁS: SOYBEAN COMPLEX EXPORTS

YEAR-TO-DATE (JANUARY TO AUGUST):

US\$ 2.9 billion

↑ **49.0%***

ACCOUNTS FOR:

63.3% of the agribusiness exports in Goiás

8.5 million tonnes

↑ **55.0%***

AUGUST 2020:

US\$ 263.0 million

↑ **117.8%***

ACCOUNTS FOR:

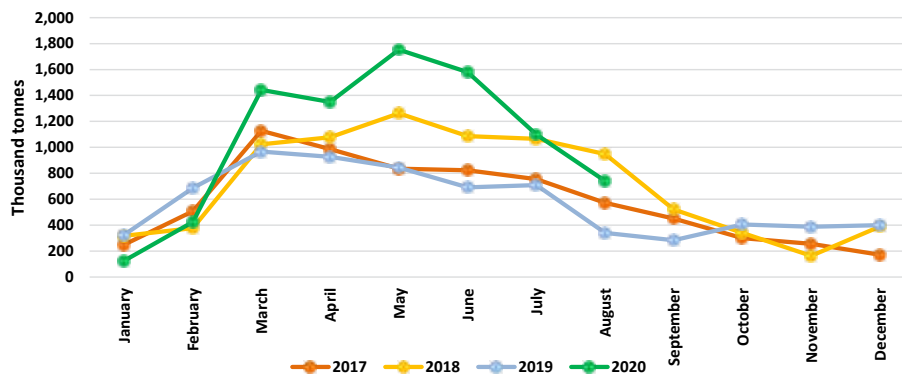
45.7% of the agribusiness exports in Goiás

741.3 thousand tonnes

↑ **118.0%***

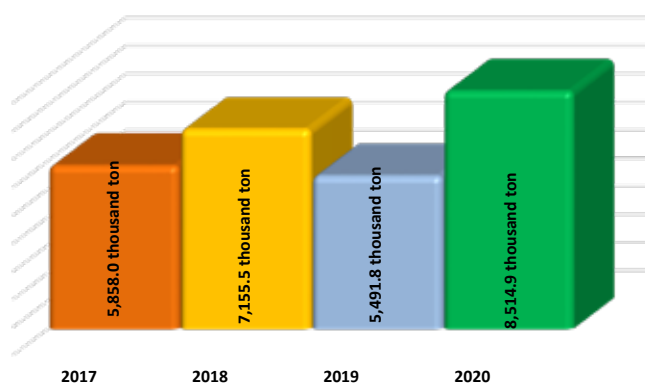
** In relation to the same period of 2019*

GOIÁS: SOYBEAN COMPLEX EXPORTS

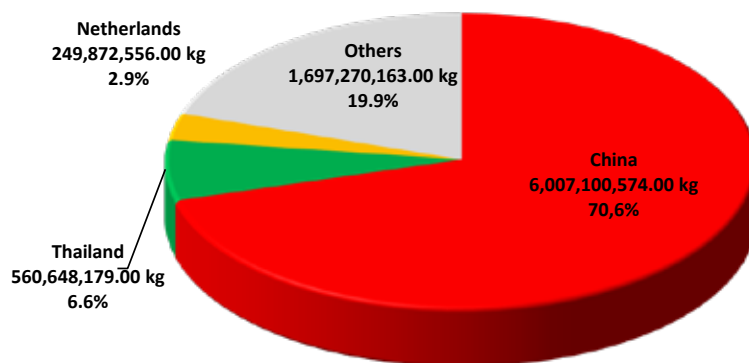


SOYBEAN

GOIÁS: YEAR-TO-DATE SOYBEAN COMPLEX EXPORTS - JANUARY TO AUGUST



GOIÁS: MAIN DESTINATIONS FOR SOYBEAN EXPORTS – 2020



Considering the excellent results reached in the 2019/2020 production, the producers are optimistic for the 2020/2021 crop, with the expectation of increasing the planted area for the new sowing that can begin with the end of the soybean host-free period in the state - the September 24.

As for prices, the forecast is that they will keep at high levels, driven by the expectation of the strong Chinese demand to continue, growth in demand in the domestic market and favorable exchange rates for exports.

In this context, both the state of Goiás and the country remain competitive in the dynamics of the oilseed foreign trade. Large volumes of exports, advance purchases for the 20/21 crop and the closed deals for 2022 show the competitiveness of the Brazilian soybeans. Farmers, however, need to be aware of weather issues that can affect the productivity indicators of the new crop that is about to begin.

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

CORN

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The Brazilian corn market forecast for the 2020/21 crop is good. According to the projections made by Conab, growth in both planted area and production is expected, with the possibility of decline in productivity due to weather issues. The supply rise is driven by the good profitability seen in the 2019/20 crop, increased consumption for animal feed, expectations of increased exports and the resumption of ethanol production from corn.

Corn prices remain at high levels and the forecast is that they will get steady or even continue up, due to the need of stock replenishment in the industry. In Goiás, September registered price appreciation, according to data collected by IFAG, the average price of corn was R\$ 51.59/ 60-kg bag on September 28, compared to R\$ 48.61 on September 02.

The production growth and high prices are determining factors for the increase in the estimate of the Gross Value of Corn Production for Goiás in 2020, of R\$ 8.5 billion, a raise of 26.2% compared to 2019.

CORN

GOIÁS: CORN CROP 2019/20



PRODUCTION:

12.6 million tonnes

↑ **9.8%***

ACCOUNTS FOR:

12.3% of the national production

PLANTED AREA:

1.9 million hectares (ha)

↑ **14.0%***

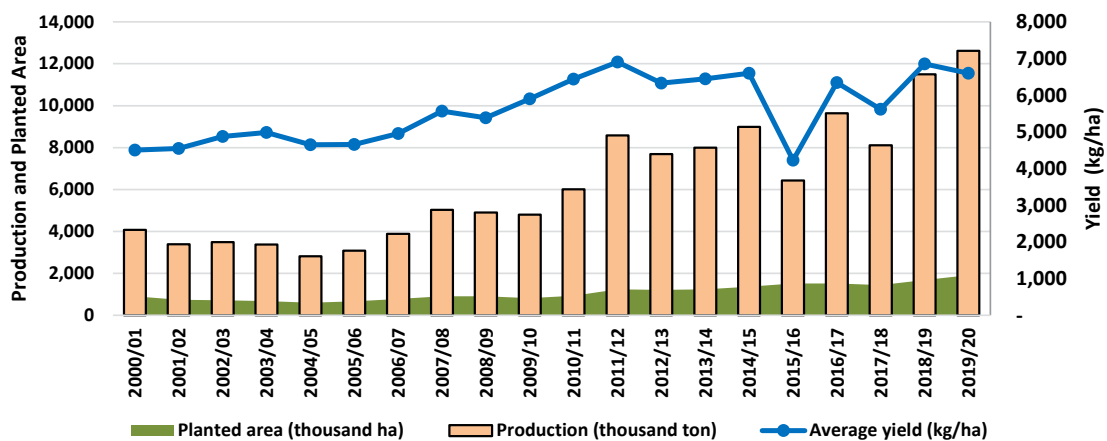
AVERAGE YIELD:

6.6 t/ha

↓ **3.7%***

**In relation to the previous crop.*

GOIÁS: CORN CROPS



GOIÁS: GROSS VALUE OF CORN PRODUCTION



* Estimate released in September

GOIÁS: CORN EXPORTS

YEAR-TO-DATE (JANUARY TO AUGUST):

US\$ 213.3 million ↓ **37.4%***

ACCOUNTS FOR:

4.6% of the agribusiness exports

1.3 million tonnes ↑ **33.9%***

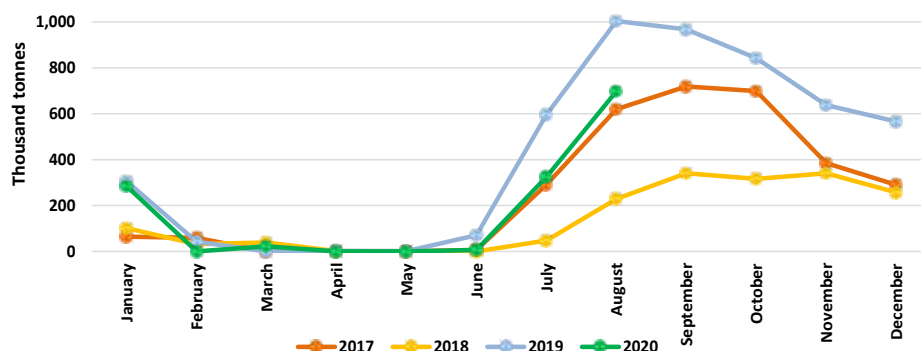
AUGUST 2020:

US\$ 110.4 million ↓ **34.4%***

697.7 thousand tonnes ↓ **30.5%***

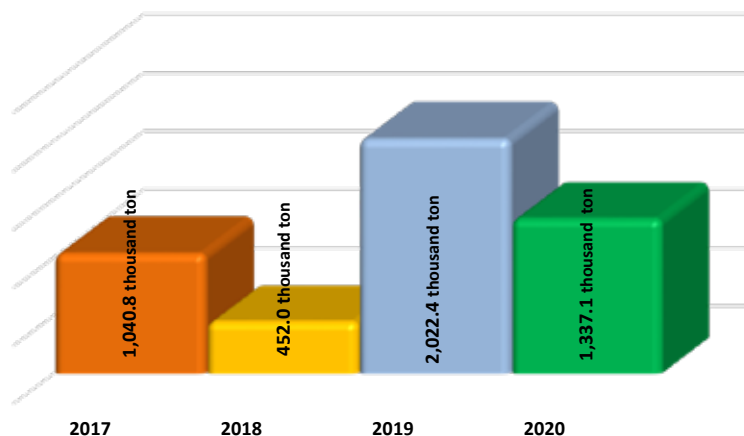
* In relation to the same period of 2019

GOIÁS: CORN EXPORTS

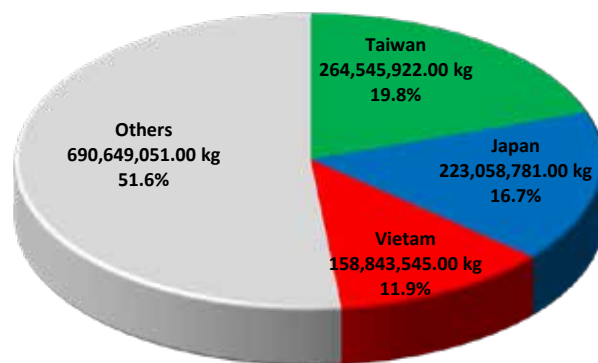


CORN

GOIÁS: YEAR-TO-DATE CORN EXPORTS - JANUARY TO AUGUST



GOIÁS: MAIN DESTINATIONS FOR CORN EXPORTS – 2020



In the international context, Goiás has sold corn to 40 countries in 2020. Asia is expected to expand their grain imports, driven by a production decline in the region - due to weather conditions that affected crops. Argentina also points to a reduction in the corn supply for international trade. This scenario indicates an opportunity for the producer of this cereal in Brazil to expand markets.

The strong Chinese demand for Brazilian soybean may affect the farmer's decision on which grain to grow in the 2020/2021 summer crop. The same is for Goiás, it is possible that the competitiveness of soybeans influences the choice of the producer to the detriment of planting the 1st crop corn. As for the 2nd crop, the forecast is to increase the planted area, driven by high prices. The farmer must, however, be aware of the weather conditions that will be decisive for the productivity of the safrinha corn in the state.

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

The recent increase in rice prices in the world and also in Brazil is driven by the expansion of the global demand and the exports restrictions imposed by some countries. According to Reuters, major players in the world, such as Thailand, Vietnam and India, restricted their rice exports at the beginning of the pandemic. The companies which have the grain as their main products have been standing out on the stock exchange in recent weeks. In Brazil, according to Cepea, not all rice farmer are benefiting from this moment of rice appreciation, since these values do not fully reach the rural producer, as many anticipate the sales, in which at least one third of the production was negotiated in advance with the rice industries in the last five crops.

For the rice consumer in the capital of Goiás, the increase of this product price, according to the IPCA / IBGE, was of 14.53% - year-to-date variation (January to August), which is below the national year-to-date average variation of 19.25%.

The State of Goiás does not stand out for the quantity of rice produced, which makes it necessary to seek supply to the industry in other units of the federation, mainly in Rio Grande do Sul. Goiás does not have representative participation in international trade either.

In the last crops, the rice planted area in Goiás has been decreasing. During this period, there have been productivity gain, due to irrigation systems, however, the competitiveness of this cereal produced in the state is still low.

RICE

CROP 2019/20



PRODUCTION:

120.4 thousand tonnes

↑ **6.9%***

ACCOUNTS FOR:

1.1% of the national production

PLANTED AREA:

22.6 thousand hectares

↓ **0.9%***

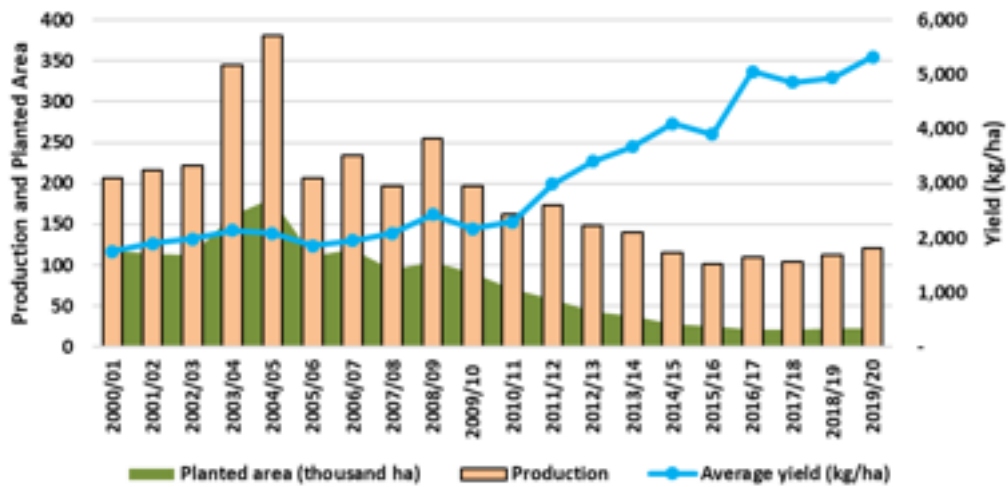
AVERAGE YIELD:

5.3 t/ha

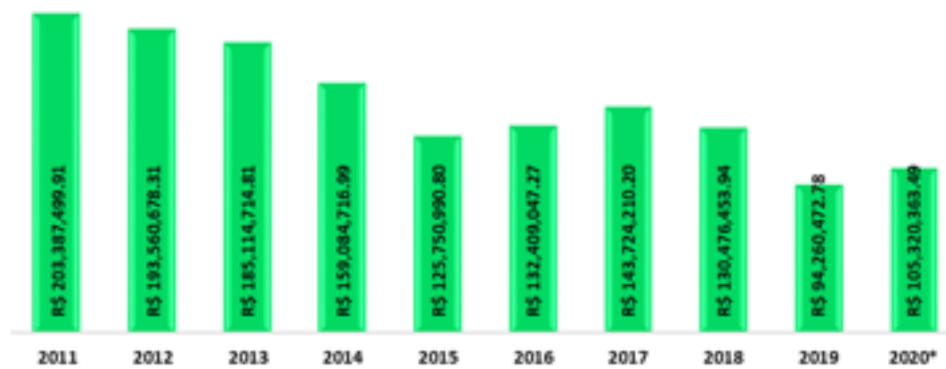
↑ **7.9%***

**In relation to the previous crop.*

GOIÁS: RICE CROP



GOIÁS: GROSS VALUE OF RICE PRODUCTION



* Estimate released in September

With regard to international trade of this grain, the year-to-date result (January to August) shows that Brazilian rice exports reached 1.2 million tons, an increase of 73.5%, compared to the same period in 2019, driven by the appreciation of the dollar against the Real. On the imports side, there was a reduction of 17.2%, on the same basis of comparison. In order to assure the domestic supply, on Sept 9/2020, the federal government decided to eliminate the import tax rate for paddy and processed rice until December 31 of this year. Rice imports, in the first 3 weeks of September, according to information from the Brazilian trade balance, had registered a daily average of 2.3 thousand tons imported, while in the same period last year it was 210.4 tons. The forecast is that imports will grow even more, given the import tariff-free until the end of this year, guaranteeing food security in Brazil.

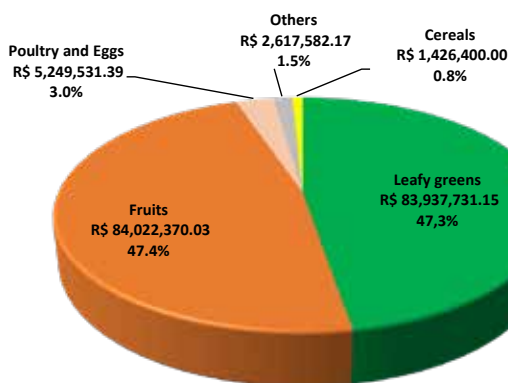
In addition, according to the Ministry of Agriculture, for the 2020/21 rice crop, which starts to be traded in March 2021, it is expected production to be expanded, with prices decrease next year. It is noteworthy that, after constant reductions in the rice planted area, Conab estimates an expansion of area of 12.1% and production to reach 12 million tons for the 2020/21 crop.

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

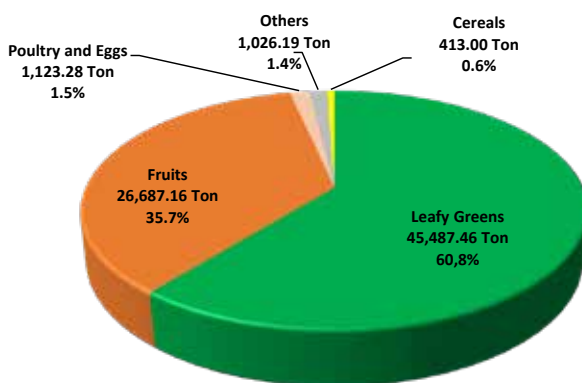
During the dry season, fruit and vegetable producers become dependent on the practice of irrigation to maintain production, in addition to the losses in transport and drop in quality due to high temperatures. In August, Ceasa-GO registered a decrease of 2.0% in the volume traded compared to July. This reduction is partially explained by the prices increase of important products that is part of the daily meal in Goiás, such as watermelon, tomatoes, carrots and bananas, since the rise in production costs is passed on to consumers to maintain production.

GOIÁS: TRADE IN AUGUST 2020

VALUE



VOLUME



GOIÁS: AVERAGE PRICE FOR THE MAIN FRUITS AND VEGETABLES TRADED IN AUGUST

	Banana	Orange	Apple	Papaya	Watermelon
Price (R\$/kg)	3.15	1.39	4.56	2.09	1.72
VAR % (Aug/Jul)	↑ 2.3	0.0	↑ 8.1	↑ 78.6	↑ 28.5

	Lettuce	Potato	Onion	Carrot	Tomato
Price (R\$/kg)	1.67	1.60	2.44	1.69	1.91
VAR % (Aug/Jul)	↓ 6.2	↓ 1.2	↓ 30.3	↑ 61.7	↑ 49.2

In Goiás, the prices in August over July were increased for fruits and reduced for vegetables - except for carrots and tomatoes, which had very significant raises, caused by the lower supply in the state. As for tomatoes, any local production decrease causes a quickly reaction on prices, while carrots, after a period of falling prices, had a reversal of this trend in August and, for September, this scenario is not expected to change.

The fruit market in Goiás was characterized by high prices, especially for watermelon and papaya. Watermelon presented good prices for the farmer, with excellent profitability, despite the increase in production costs. Papaya prices rose in the first weeks of August, due to the lower supply.

Source: CEASA/PROHORT - CONAB, 2020.

STATE PROGRAM FOR HERBIVORE RABIES CONTROL

Agrodefesa promotes the herbivores rabies prevention and control of the herds in Goiás, by using strategies that involve several aspects, with emphasis on vaccination of animals susceptible to the disease. In addition, the Agency identifies the risky regions for the disease, delimiting the municipalities where vaccination should be mandatory because of that risk.

Rabies is a disease that does not have cure, it is caused by viruses transmitted through the infected animal saliva and affects all mammals, including man. Hematophagous bats (vampires) are the main rabies transmitters for herbivores (cattle, buffaloes, horses, goats and sheep). Given this, Agrodefesa promotes two semiannual vaccination campaigns against rabies of herbivores in the state. Educational actions are also carried out to raise the awareness of the ranchers about the importance of vaccinating their herds, in order to avoid the occurrence of the disease on their farms. Furthermore, it prevents major economic losses, since the disease is fatal in 100% of cases.

OBJECTIVES OF THE STATE PROGRAM FOR HERBIVORE RABIES CONTROL:

- Reduce the prevalence of rabies in herbivores
- Control of Transmissible Spongiform Encephalopathies - TSE



HIGHLIGHTS OF ACTIONS PERFORMED BY AGRODEFESA IN 2020

EPIDEMIOLOGICAL SURVEILLANCE: 2,567 ACTIONS

- Visits to places with reported suspected cases of rabies in herbivore animals
- Collection of material for the disease diagnosis
- Monitor the outbreaks areas and high risky regions
- Surveillance in rural establishments, searching for animals that may be with neurological symptoms, as well as animals that have been bitten by blood-sucking bats

VACCINATION OF HERBIVORES

- Compulsory vaccination of herbivores carried out in 121 municipalities considered as high risk for rabies, according to the Normative Instruction nº 002/2017 - Agrodefesa

- Vaccination Results - May/2020 campaign:

:

12,940,930

animals

in more than

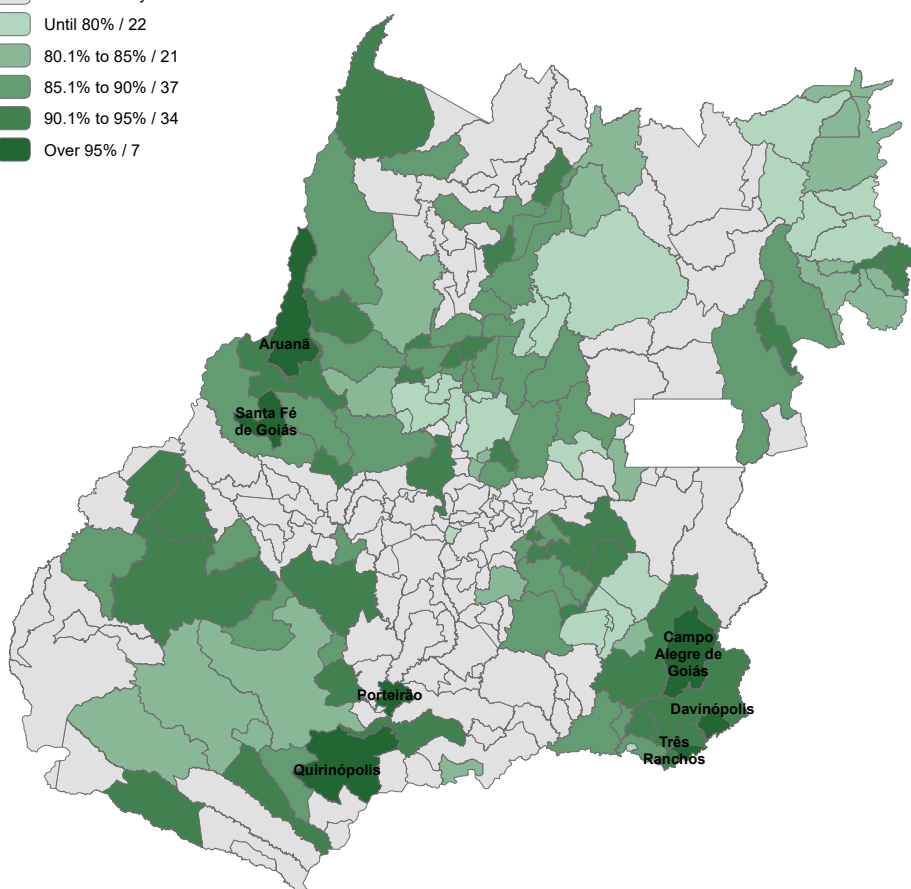
120 THOUSAND

rural establishments

GOIÁS: VACCINATION OF THE HERBIVORE HERD IN 2020*

Percentage of vaccinated animals / number of municipalities

- No mandatory / 125
- Until 80% / 22
- 80.1% to 85% / 21
- 85.1% to 90% / 37
- 90.1% to 95% / 34
- Over 95% / 7



TRANSMITTERS CONTROL: 185 ACTIONS *

- Shelters registration and monitoring of blood-sucking bats (*Desmodus rotundus* species) – the main rabies transmitters to herds.
- Bats capture for population control in cases of rabies outbreaks, as well as for rabies diagnosis, aiming at detecting viral circulation in colonies.

Agrodefesa, in collaboration with the farmer's work, seeks to reach high levels of animal vaccination in Goiás, presenting good results in rabies prevention and control in the state.

* Data from January to September 14/2020

Source: Agrodefesa, 2020

**PARTNERSHIP BETWEEN AMBEV
AND SMALL CASSAVA PRODUCERS**

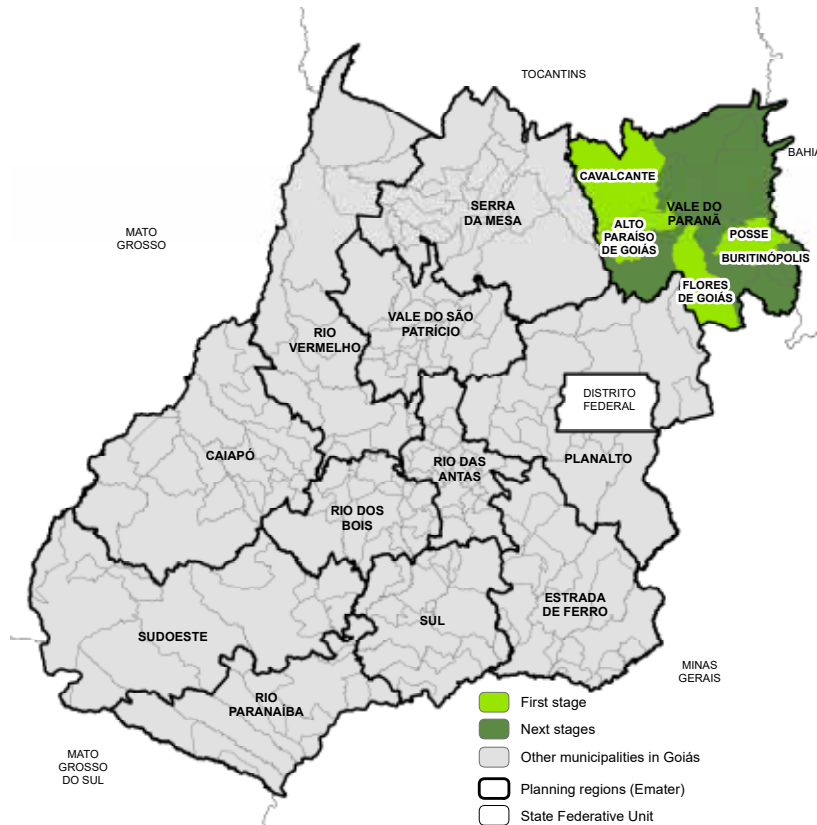
The partnership between Ambev - a Brazilian beverage production company - and small producers of cassava in Goiás boosts the production and the income generation for the family farming members in the northeastern municipalities of Goiás.

In this project, Emater performs a mapping of these producing families, which have small areas of cultivation, and promotes the dialogue between rural workers and the multinational. By means of this work, the Government of Goiás seeks to help small producers to commercialize their production

Ambev intends to buy 750 tons of cassava, by the end of the year, for beer production. In this first round, purchase will be made from small producers and members of family farming assisted by Emater from the municipalities of Cavalcante, Alto Paraíso, Buritinópolis, Flores de Goiás and Posse.

According to the project guidelines, cassava was identified as a key ingredient in the beer production process. Researches were carried out to know the specifics of each culture and the local market needs. The purpose is to readapt the production logistics of the regions, making them even more economically competitive.

GOIÁS: MUNICIPALITIES THAT MAKE UP THE PROJECT WITH EMPHASIS ON THOSE COMPRISED IN THE FIRST PURCHASE ROUND



FIRST ROUND:

65 families **340** tonnes

EXPECTANCY (BY 2022):

300 families **12** thousand tonnes

Data updated on Sept 22/2020

This project shows its relevance in contributing to the socioeconomic progress of the region, especially in the social aspect, since it prioritizes members of family farming and producers from rural settlements. Present in most municipalities in Goiás, Emater has the role of identifying the most vulnerable places and rural families, so that the technical assistance reaches them, promoting the commercialization of production, generating income and local development. This initiative is expected to promote greater production of cassava and attract specialized industries in the process of extracting cassava starch, an operation that is not yet carried out in the state, in order to add value to the productive stages of this chain in Goiás.

Source: EMATER, 2020.

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**AGRO
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Agência Goiana de Defesa Agropecuária



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





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