

National Company of Food Supply

Brazilian Crop Assessment

Grain

2012/2013 Crops
Twelfth Inventory
Survey
September/2013



Conab

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Grain

CROP 2012/2013
Twelfth Assessment
September/2013

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1. INTRODUCTION

The Ministry of Agriculture, Cattle Breeding and Supply (MAPA) systematically undertakes agricultural crops inventories/surveys, by means of the National Company of Supply (Conab) in order to quantify and follow up on Brazilian production. For the implementation of such inventory/survey, along the period from 19th to 23rd of August, 2013, institutions directly or indirectly related to agricultural productions have been contacted in the main country's producer municipalities, chiefly professionals from agricultural cooperatives, Agriculture Secretariats, Technical Assistance and Rural Extension entities (governmental and private ones), financial agents, resellers of inputs and rural products.

The inventory/survey and its data is the outcome of summed up efforts and resources gathered from this Company and from the Brazilian Institute of Geography and Statistics (IBGE), an entity from the Ministry of Planning, Management and Budget, within close collaboration with the purpose of consolidating the official estimates of crops to main Brazilian farming, inclusively for its organization and divulgence.

In this process, the two institutions have been joining their resources and efforts, seeking to ensure the most accurate and trustworthy information on the follow-up of crops so that the Brazilian State has due access to it, progressively coordinating methods, sources, timing for ascertainments, dates and schedules of divulgence. For such, they have counted on invaluable and everlasting contributions from the federal, state and municipal public bodies and from other institutions which generate agricultural information.

We shall thank the indispensable participation and collaboration of the professionals in IBGE and in the other entities mentioned above, as well as the collaborators of this Company, which outright or indirectly have partaken in the performance of this work.

2. PLANTED AREA ESTIMATE (53.34 million hectares)

The planted area in this crop, estimated at 53.34 million hectares is 4.8% (2.46 million hectares) bigger than the cultivated area in 2011/12, which amounted to 50.89 million of hectares (Chart 1).

Soy tillage stands out, presenting growth of 10.7% (2.89 million hectares), going from 25.04 to 27.72 million hectares, and the second crop of corn having an increase of 18.1% (1.38 million hectares), going from 7.62 to nearly 9.0 million hectares. As for the first crop of corn, there has been a dwindling of 8.6% (651.7 thousand hectares), with plantations of 6.91 million hectares. The planted area with corn, first and second crops, tallies up 15.90 million hectares, that is, a growth of 4.8% (726.5 thousand hectares). A growth is also observed in the areas of peanuts, first crop (5.1%), first crop of beans (9.6%), sorghum (1.9%) and triticale (4.2%).

Other tillages show reduction in the cultivated area, above all, the total beans and first crop corn. Corn tallies up at a decrease of 8.6% (651.7 hectares), and beans (total) a reduction of 4.6% (148.9 thousand hectares), as the greatest loss in the first crop tillage, with less than 9.2% (114.2 thousand hectares).

Table 1
BRAZIL
PLANTED AREA ESTIMATE
2011/2012 AND 2012/2013 CROPS

(In 1000 ha)

PRODUCTS	HARVEST			VARIATION	
	11/12 (a)	12/13		Percentage	Absolute
		Aug/2013 (b)	Sep/2013 (c)	(c/a)	(c-a)
COTTON	1.393,4	894,1	893,5	(35,9)	(499,9)
TOTAL PEANUT	93,9	100,9	96,6	2,9	2,7
PEANUT 1ST CROP	82,1	86,2	86,3	5,1	4,2
PEANUT 2ND CROP	11,8	14,7	10,3	(12,7)	(1,5)
RICE	2.426,7	2.390,3	2.390,9	(1,5)	(35,8)
TOTAL BEANS	3.262,1	3.093,7	3.113,2	(4,6)	(148,9)
BEANS 1ST CROP	1.241,4	1.127,2	1.127,2	(9,2)	(114,2)
BEANS 2ND CROP	1.394,6	1.304,3	1.299,9	(6,8)	(94,7)
BEANS 3RD CROP	626,1	662,2	686,1	9,6	60,1
SUNFLOWER	74,5	62,6	68,7	(7,8)	(5,8)
CASTOR BEAN	128,2	87,8	87,4	(31,8)	(40,8)
TOTAL CORN	15.178,1	15.866,4	15.904,6	4,8	726,5
CORN 1ST CROP	7.558,5	6.902,7	6.906,8	(8,6)	(651,7)
CORN 2ND CROP	7.619,6	8.963,7	8.997,8	18,1	1.378,2
SOYBEAN	25.042,2	27.721,5	27.721,6	10,7	2.679,4
SORGHUM	786,9	788,9	801,7	1,9	14,8
SUBTOTAL	48.386,0	51.006,2	51.078,2	5,6	2.692,2
OAT	153,0	168,7	168,7	10,3	15,7
CANOLA	42,4	43,8	46,1	8,7	3,7
RYE	2,3	2,3	2,3	-	-
BARLEY	88,4	102,8	102,8	16,3	14,4
WHEAT	2.166,2	1.895,4	1.895,4	(12,5)	(270,8)
TRITICALE	46,9	48,0	48,0	2,3	1,1
SUBTOTAL	2.499,2	2.261,0	2.263,3	(9,4)	(235,9)
BRAZIL	50.885,2	53.267,2	53.341,5	4,8	2.456,4

Source: Conab - Suvey: Sep/2013

3. YIELD ESTIMATE (187.09 million tons)

The estimated production for 2012/13 crops in 187.09 million tons is at 12.6% above the 2011/12 crop, wherein it reached 166.20 million tons (Table 2). Such outcome represents an augmentation of 20.90 million tons, above all, due to soy tillage/plantation, which demonstrates growth in production of 22.7% (15.05 million tons) and due to corn second crop, with a growth of 18.1% (7.07 million tons) over the previously attained production.

Table 2
BRAZIL
GRAIN PRODUCTION ESTIMATE
2011/2012 AND 2012/2013 CROPS

(In 1000 t)

PRODUCTS	HARVEST			VARIATION	
	11/12 (a)	12/13		Percentage	Absolute
		Aug/2013 (b)	Sep/2013 (c)	(c/a)	(c-a)
SEED COTTON ⁽¹⁾	3.044,6	2.016,5	1.981,5	(34,9)	(1.063,1)
FIBER COTTON	1.893,3	1.275,1	1.290,4	(31,8)	(602,9)
TOTAL PEANUT	294,7	330,0	326,3	10,7	31,6
PEANUT 1ST CROP	274,6	306,1	306,7	11,7	32,1
PEANUT 2ND CROP	20,1	23,9	19,6	(2,5)	(0,5)
RICE	11.599,5	11.858,3	11.746,6	1,3	147,1
TOTAL BEANS	2.918,5	2.827,6	2.831,8	(3,0)	(86,7)
BEANS 1ST CROP	1.235,6	964,6	964,6	(21,9)	(271,0)
BEANS 2ND CROP	1.063,9	1.129,9	1.106,2	4,0	42,3
BEANS 3RD CROP	619,0	733,1	761,0	22,9	142,0
SUNFLOWER	116,4	104,1	108,1	(7,1)	(8,3)
CASTOR BEAN	24,9	15,3	15,8	(36,5)	(9,1)
TOTAL CORN	72.979,8	80.253,3	81.344,3	11,5	8.364,5
CORN 1ST CROP	33.867,1	35.111,9	35.164,8	3,8	1.297,7
CORN 2ND CROP	39.112,7	45.141,4	46.179,5	18,1	7.066,8
SOYBEAN	66.383,0	81.456,7	81.456,7	22,7	15.073,7
SORGHUM	2.221,9	2.078,1	2.101,5	(5,4)	(120,4)
SUBTOTAL	159.583,3	180.939,9	181.912,6	14,0	22.329,3
OAT	353,5	360,7	340,0	(3,8)	(13,5)
CANOL	52,0	60,5	53,9	3,7	1,9
RYE	3,5	3,7	3,7	5,7	0,2
BARLEY	305,1	287,2	287,2	(5,9)	(17,9)
WHEAT	5.788,6	4.379,5	4.379,5	(24,3)	(1.409,1)
TRITICALE	112,2	116,9	116,9	4,2	4,7
SUBTOTAL	6.614,9	5.208,5	5.181,2	(21,7)	(1.433,7)
BRAZIL ⁽²⁾	166.198,2	186.148,4	187.093,8	12,6	20.895,6

Source: Conab - Suvey: Sep/2013

⁽¹⁾ Production of cotton seed.

⁽²⁾ Exclude the production of cotton fiber.

Table 3
BRAZIL
COMPARISON OF AREA, AVERAGE AND PRODUCTION - SELECTED PRODUCTS(*)
2011/2012 AND 2012/2013 CROPS

REGION / STATE	AREA (In thousand ha)			AVERAGE - (In kg/ha)			PRODUCTION (In thousand t)		
	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %
	(a)	(b)	(b/a)	(c)	(d)	(d/c)	(e)	(f)	(f/e)
NORTH	1.795,9	1.874,6	4,4	2.760	2.936	6,4	4.956,0	5.503,2	11,0
RR	33,0	34,5	4,5	3.982	4.000	0,5	131,4	138,0	5,0
RO	411,1	421,4	2,5	2.662	2.859	7,4	1.094,3	1.204,7	10,1
AC	70,2	71,6	2,0	1.808	1.902	5,2	126,9	136,2	7,3
AM	26,8	21,5	(19,8)	2.026	1.953	(3,6)	54,3	42,0	(22,7)
AP	6,1	5,7	(6,6)	918	877	(4,5)	5,6	5,0	(10,7)
PA	507,0	506,0	(0,2)	2.313	2.666	15,3	1.172,7	1.349,0	15,0
TO	741,7	813,9	9,7	3.197	3.229	1,0	2.370,8	2.628,3	10,9
NORTHEAST	7.331,7	7.329,4	-	1.700	1.675	(1,5)	12.466,7	12.278,4	(1,5)
MA	1.533,6	1.626,7	6,1	1.906	2.210	15,9	2.922,5	3.595,7	23,0
PI	1.173,9	1.264,4	7,7	1.947	1.268	(34,9)	2.286,0	1.603,1	(29,9)
CE	1.014,6	787,7	(22,4)	169	284	68,0	171,9	223,6	30,1
RN	17,3	29,1	68,2	474	450	(5,1)	8,2	13,1	59,8
PB	79,4	109,8	38,3	98	421	329,6	7,8	46,2	492,3
PE	442,1	314,6	(28,8)	165	301	82,4	73,1	94,6	29,4
AL	69,0	76,5	10,9	813	753	(7,4)	56,1	57,6	2,7
SE	243,0	244,4	0,6	2.510	4.207	67,6	609,9	1.028,2	68,6
BA	2.758,8	2.876,2	4,3	2.295	1.953	(14,9)	6.331,2	5.616,3	(11,3)
MID-WEST	18.828,9	20.644,7	9,6	3.781	3.760	(0,6)	71.196,7	77.615,3	9,0
MT	10.969,1	12.304,0	12,2	3.681	3.729	1,3	40.373,3	45.886,2	13,7
MS	3.256,3	3.640,7	11,8	3.567	3.825	7,2	11.616,1	13.925,6	19,9
GO	4.483,2	4.566,0	1,8	4.148	3.735	(10,0)	18.597,8	17.052,7	(8,3)
DF	120,3	134,0	11,4	5.067	5.603	10,6	609,5	750,8	23,2
SOUTHEAST	4.878,9	4.963,2	1,7	4.051	4.078	0,7	19.764,7	20.241,0	2,4
MG	2.979,7	3.053,4	2,5	4.098	3.948	(3,7)	12.209,8	12.054,5	(1,3)
ES	50,8	40,6	(20,1)	1.848	1.887	2,1	93,9	76,6	(18,4)
RJ	11,4	10,3	(9,6)	2.096	1.990	(5,1)	23,9	20,5	(14,2)
SP	1.837,0	1.858,9	1,2	4.049	4.352	7,5	7.437,1	8.089,4	8,8
SOUTH	18.049,8	18.529,6	2,7	3.203	3.856	20,4	57.814,1	71.455,9	23,6
PR	9.169,4	9.242,1	0,8	3.430	3.991	16,4	31.447,7	36.881,8	17,3
SC	1.303,2	1.306,1	0,2	4.203	4.827	14,8	5.477,6	6.304,7	15,1
RS	7.577,2	7.981,4	5,3	2.757	3.542	28,5	20.888,8	28.269,4	35,3
NORTH/NORTHEAST	9.127,6	9.204,0	0,8	1.909	1.932	1,2	17.422,7	17.781,6	2,1
CENTER-SOUTH	41.757,6	44.137,5	5,7	3.563	3.836	7,7	148.775,5	169.312,2	13,8
BRAZIL	50.885,2	53.341,5	4,8	3.266	3.507	7,4	166.198,2	187.093,8	12,6

Source: Conab - Survey: Sep/2013

(*) Selected Products: cotton seed, peanut (1st and 2nd), rice, oat, rye, barley, bean (1st, 2nd and 3rs), sunflower, castorbean, corn (1st and 2nd), soybean, sorghum, wheat and triticale.

4. CROP ANALYSIS

COTTON

This Twelfth inventory/survey of the 2012/13 crops sets out the national production of cotton seed in 3,271.9 thousand tons, comprising, therefore, a drop of 33.7% as contrasted to the 2011/12 crops. Concerning cotton lint, the final figures point to a dwindling of 31.8% in relation to the 2011/12 crops, likely to amount to 1,290.4 thousand tons.

The aforementioned drawbacks are owed mainly to the expressive reductions of the areas in all the producer regions of the country, ensuing especially and mainly from the decline in prices of the domestic and foreign markets, from the high costs of production and the appealing prices of corn and soy, according to what has already been published in previous bulletins.

The harvests are nearing the end in the main producer regions; it is estimated until the present moment, something between 75.0% to 80.0% of harvests at a national scope. Despite the drought in the months of April and May in Mato Grosso, the greatest national producer, the average productivity of cotton seed has registered an increment of 0.8% as

compared to the previous crop. In Bahia, it is second on the Brazilian production scale; in spite of the adverse climate conditions (dry climate) and the attack of plagues (bollweevil and helicoverpa - cotton bollworm) an increment of 8.1% has taken place in productivity. In Minas Gerais a decline of 6.3% is estimated in overall production, resulting from losses in the regions mostly affected by droughts at the phase of farming development, especially in the north and northwest of this state and in the areas affected by the Halicoverpa Armigera caterpillar - cotton bollworm. In that state, an overall production is estimated at 3,375 kg/ha.

In the present survey and inventory, Conab consolidates the data of planted areas with cotton in the country (first and second crops), thus, the cultivated surface with the fiber is at 893.5 thousand hectares, in face of 1,393.4 thousand hectares sown in the previous crop, presenting a reduction of 35.9%.

In the Mid-South and North/Northeast regions, which took part with 65.7 and 34.3%, respectively, in the national area, they have been ascertained with declines in all the producing States.

In comparison with the previous inventory/survey, there has been a slight change in cotton seed productivity, likely to finish up the year with values over 3.3% as opposed to the previous crop. In terms of the entire Brazilian scope, the research is indicating that after the crop, the average productivity must amount to roughly 3,662 kg/ha of cotton seed.

Supply and Demand

The production obtained in the twelfth survey/inventory of the crop's assessment amounted to 1,290.4 thousand tons, a little higher than what had been communicated in the previous month, owing to the better outcomes of productivity attained by agriculturalists in the crop process in the majority of the producer states. The exception is left to Bahia, which had acutely-harmed farming plantations, because of adverse climatic conditions and plague blights, such as bollweevil and helicoverpa - cotton bollworm.

The exports prognoses remained equal to the former research value, that is, 530 thousand tons. In spite of the hike in exports, under comparison with the previous month, the performance of the shipments keep on as a frail one, if compared to the same period last year. It is wise to emphasize, also, that part of the *flex* contracts (which may be either destined for exports or for the domestic market) registered on the Brazilian Merchandize Stock – BBM (Bolsa Brasileira de Mercadorias) have been reverted for the domestic market, since they entail a broader financial return margin.

The entry of cotton lint in the market must set forth the domestic demand over the next months, so that it will not be feasible to perceive high import quantities. The import parity values do not point up that it is beneficial to purchase on the international market, and, the export parity values have not been in favor of trading within the domestic market. Thus, the expectation for imports now turns out to be 30 thousand tons of cotton lint, against 35 thousand tons estimated last month, August/13.

Taking heed of the current figure, the new supply situation setting for 2013 becomes the following: Total supplying of the product (Initial stock + production + imports) for the period beginning to be in place, is around 1,821.1 thousand tons, whereas the total demand (domestic consumption + exports) has been assessed at 1,417 thousand tons.

As the final outcome, there is an outlook of a passing stock along the winding-up of the current period, estimated at 404.1 thousand tons of cotton lint, which is sufficient to satisfy the national industry demands over the period between harvest times and to satisfy more exports over a period approximately equal to 3.4 months.

Table 4
COTTON
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2011/2012 AND 2012/2013 CROPS

REGION / STATE	AREA (In thousand ha)			YIELD (In kg/ha)			PRODUCTION (In thousand t)		
	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %
	(a)	(b)	(b/a)	(c)	(d)	(d/c)	(e)	(f)	(f/e)
NORTH	7,5	6,0	(20,0)	2.900	3.150	8,6	21,8	18,9	(13,3)
TO	7,5	6,0	(20,0)	2.900	3.150	8,6	21,8	18,9	(13,3)
NORTHEAST	460,4	300,8	(34,7)	3.016	3.261	8,1	1.388,8	980,8	(29,4)
MA	18,6	16,7	(10,0)	3.975	4.090	2,9	73,9	68,3	(7,6)
PI	21,3	11,4	(46,6)	3.480	3.570	2,6	74,1	40,7	(45,1)
CE	1,3	0,9	(33,9)	170	295	73,5	0,2	0,3	50,0
RN	0,5	0,1	(80,0)	520	3.000	476,9	0,3	0,3	-
PB	0,2	0,1	(30,0)	106	300	183,0	-	-	-
PE	0,8	0,1	(84,0)	195	380	94,9	0,2	-	(100,0)
AL	0,2	0,1	(50,0)	300	320	6,7	0,1	-	(100,0)
BA	417,5	271,4	(35,0)	2.970	3.210	8,1	1.240,0	871,2	(29,7)
MID-WEST	877,3	560,9	(36,1)	3.824	3.894	1,8	3.354,5	2.183,9	(34,9)
MT	725,7	475,3	(34,5)	3.840	3.870	0,8	2.786,7	1.839,4	(34,0)
MS	62,0	39,5	(36,3)	3.695	4.170	12,9	229,1	164,7	(28,1)
GO	89,6	46,1	(48,5)	3.780	3.900	3,2	338,7	179,8	(46,9)
SOUTHEAST	46,7	25,7	(45,0)	3.651	3.428	(6,1)	170,6	88,1	(48,4)
MG	29,6	20,0	(32,4)	3.600	3.375	(6,3)	106,6	67,5	(36,7)
SP	17,1	5,7	(66,5)	3.740	3.615	(3,3)	64,0	20,6	(67,8)
SOUTH	1,5	0,1	(93,3)	1.439	2.375	65,0	2,2	0,2	(90,9)
PR	1,5	0,1	(92,6)	1.439	2.375	65,0	2,2	0,2	(90,9)
NORTH/NORTHEAST	467,9	306,8	(34,4)	3.015	3.259	8,1	1.410,6	999,7	(29,1)
CENTER-SOUTH	925,5	586,7	(36,6)	3.811	3.873	1,6	3.527,3	2.272,2	(35,6)
BRAZIL	1.393,4	893,5	(35,9)	3.544	3.662	3,3	4.937,9	3.271,9	(33,7)

Source: Conab - Suvey: Sep/2013

Table 5
COTTON FIBER
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2011/2012 AND 2012/2013 CROPS

REGION / STATE	AREA (In thousand ha)			YIELD (In kg/ha)			PRODUCTION (In thousand t)		
	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %
	(a)	(b)	(b/a)	(c)	(d)	(d/c)	(e)	(f)	(f/e)
NORTH	7,5	6,0	(20,0)	1.131	1.213	7,3	8,5	7,3	(14,1)
TO	7,5	6,0	(20,0)	1.131	1.213	7,3	8,5	7,3	(14,1)
NORTHEAST	460,4	300,8	(34,7)	1.176	1.296	10,2	541,6	389,8	(28,0)
MA	18,6	16,7	(10,0)	1.550	1.616	4,3	28,8	27,0	(6,3)
PI	21,3	11,4	(46,6)	1.357	1.392	2,6	28,9	15,9	(45,0)
CE	1,3	0,9	(33,9)	60	103	71,7	0,1	0,1	-
RN	0,5	0,1	(80,0)	182	1.050	476,9	0,1	0,1	-
PB	0,2	0,1	(30,0)	37	105	183,8	-	-	-
PE	0,8	0,1	(84,0)	68	133	95,6	0,1	-	(100,0)
AL	0,2	0,1	(50,0)	105	112	6,7	-	-	-
BA	417,5	271,4	(35,0)	1.158	1.278	10,4	483,6	346,7	(28,3)
MID-WEST	877,3	560,9	(36,1)	1.454	1.531	5,3	1.275,8	858,8	(32,7)
MT	725,7	475,3	(34,5)	1.459	1.521	4,2	1.058,9	722,9	(31,7)
MS	62,0	39,5	(36,3)	1.423	1.647	15,7	88,2	65,1	(26,2)
GO	89,6	46,1	(48,5)	1.436	1.537	7,0	128,7	70,8	(45,0)
SOUTHEAST	46,7	25,7	(45,0)	1.426	1.341	(6,0)	66,6	34,4	(48,3)
MG	29,6	20,0	(32,4)	1.411	1.316	(6,7)	41,8	26,3	(37,1)
SP	17,1	5,7	(66,5)	1.451	1.428	(1,6)	24,8	8,1	(67,3)
SOUTH	1,5	0,1	(93,3)	547	903	65,1	0,8	0,1	(87,5)
PR	1,5	0,1	(92,6)	547	903	65,1	0,8	0,1	(87,5)
NORTH/NORTHEAST	467,9	306,8	(34,4)	1.176	1.294	10,0	550,1	397,1	(27,8)
CENTER-SOUTH	925,5	586,7	(36,6)	1.451	1.523	5,0	1.343,2	893,3	(33,5)
BRAZIL	1.393,4	893,5	(35,9)	1.359	1.444	6,3	1.893,3	1.290,4	(31,8)

Source: Conab - Suvey: Sep/2013

Table 6
COTTON SEED
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2011/2012 AND 2012/2013 CROPS

REGION / STATE	AREA (In thousand ha)			YIELD (In kg/ha)			PRODUCTION (In thousand t)		
	11/12 Crop (a)	12/13 Crop (b)	VAR. % (b/a)	11/12 Crop (c)	12/13 Crop (d)	VAR. % (d/c)	11/12 Crop (e)	12/13 Crop (f)	VAR. % (f/e)
NORTH	7,5	6,0	(20,0)	1.769	1.937	9,5	13,3	11,6	(12,8)
TO	7,5	6,0	(20,0)	1.769	1.937	9,5	13,3	11,6	(12,8)
NORTHEAST	460,4	300,8	(34,7)	1.840	1.965	6,8	847,2	591,0	(30,2)
MA	18,6	16,7	(10,0)	2.425	2.474	2,0	45,1	41,3	(8,4)
PI	21,3	11,4	(46,6)	2.123	2.178	2,6	45,2	24,8	(45,1)
CE	1,3	0,9	(33,9)	111	192	73,0	0,1	0,2	100,0
RN	0,5	0,1	(80,0)	338	1.950	476,9	0,2	0,2	-
PB	0,2	0,1	(30,0)	69	195	182,6	-	-	-
PE	0,8	0,1	(84,0)	127	247	94,5	0,1	-	(100,0)
AL	0,2	0,1	(50,0)	195	208	6,7	0,1	-	(100,0)
BA	417,5	271,4	(35,0)	1.812	1.932	6,6	756,4	524,5	(30,7)
MID-WEST	877,3	560,9	(36,1)	2.369	2.363	(0,3)	2.078,7	1.325,1	(36,3)
MT	725,7	475,3	(34,5)	2.381	2.349	(1,3)	1.727,8	1.116,5	(35,4)
MS	62,0	39,5	(36,3)	2.272	2.523	11,0	140,9	99,6	(29,3)
GO	89,6	46,1	(48,5)	2.344	2.363	0,8	210,0	109,0	(48,1)
SOUTHEAST	46,7	25,7	(45,0)	2.225	2.087	(6,2)	104,0	53,7	(48,4)
MG	29,6	20,0	(32,4)	2.189	2.059	(5,9)	64,8	41,2	(36,4)
SP	17,1	5,7	(66,5)	2.289	2.187	(4,5)	39,2	12,5	(68,1)
SOUTH	1,5	0,1	(93,3)	892	1.473	65,1	1,4	0,1	(92,9)
PR	1,5	0,1	(92,6)	892	1.473	65,1	1,4	0,1	(92,9)
NORTH/NORTHEAST	467,9	306,8	(34,4)	1.839	1.964	6,8	860,5	602,6	(30,0)
CENTER-SOUTH	925,5	586,7	(36,6)	2.360	2.350	(0,4)	2.184,1	1.378,9	(36,9)
BRAZIL	1.393,4	893,5	(35,9)	2.185	2.218	1,5	3.044,6	1.981,5	(34,9)

Source: Conab - Survey: Sep/2013

PEANUTS FIRST CROP

Table 7
PEANUT 1st CROP
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2011/2012 AND 2012/2013 CROPS

REGION / STATE	AREA (In thousand ha)			YIELD (In kg/ha)			PRODUCTION (In thousand t)		
	11/12 Crop (a)	12/13 Crop (b)	VAR. % (b/a)	11/12 Crop (c)	12/13 Crop (d)	VAR. % (d/c)	11/12 Crop (e)	12/13 Crop (f)	VAR. % (f/e)
SOUTHEAST	75,6	80,5	6,5	3.475	3.660	5,3	262,7	294,7	12,2
MG	2,6	2,9	11,5	3.462	3.379	(2,4)	9,0	9,8	8,9
SP	73,0	77,6	6,3	3.475	3.671	5,6	253,7	284,9	12,3
SOUTH	6,5	5,8	(10,8)	1.830	2.084	13,9	11,9	12,0	0,8
PR	2,8	2,4	(14,6)	2.300	2.850	23,9	6,4	6,8	6,3
RS	3,7	3,4	(8,1)	1.475	1.544	4,7	5,5	5,2	(5,5)
CENTER-SOUTH	82,1	86,3	5,1	3.344	3.555	6,3	274,6	306,7	11,7
BRAZIL	82,1	86,3	5,1	3.344	3.555	6,3	274,6	306,7	11,7

Source: Conab - Survey: Sep/2013

PEANUTS SECOND CROP

Table 8
PEANUT 2nd CROP
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2011/2012 AND 2012/2013 CROPS

REGION / STATE	AREA (In thousand ha)			YIELD (In kg/ha)			PRODUCTION (In thousand t)		
	11/12 Crop (a)	12/13 Crop (b)	VAR. % (b/a)	11/12 Crop (c)	12/13 Crop (d)	VAR. % (d/c)	11/12 Crop (e)	12/13 Crop (f)	VAR. % (f/e)
NORTH	2,5	1,5	(40,0)	3.741	3.969	6,1	9,4	6,0	(36,2)
TO	2,5	1,5	(40,0)	3.741	3.969	6,1	9,4	6,0	(36,2)
NORTHEAST	6,1	5,7	(6,6)	328	915	179,0	2,0	5,2	160,0
CE	0,7	1,1	62,6	278	270	(2,9)	0,2	0,3	50,0
PB	0,3	0,5	66,6	649	800	23,3	0,2	0,4	100,0
SE	1,3	1,1	(15,4)	1.238	1.300	5,0	1,6	1,4	(12,5)
BA	3,8	3,0	(21,0)	-	1.029	-	-	3,1	-
MID-WEST	0,3	0,2	(33,3)	200	1.633	716,5	0,1	0,3	200,0
MT	0,3	0,2	(40,0)	200	1.633	716,5	0,1	0,3	200,0
SOUTHEAST	2,9	2,9	-	2.957,0	2.806	(5,1)	8,6	8,1	(5,8)
SP	2,9	2,9	(1,0)	2.957	2.806	(5,1)	8,6	8,1	(5,8)
NORTH/NORTHEAST	8,6	7,2	(16,3)	1.320	1.551	17,5	11,4	11,2	(1,8)
CENTER-SOUTH	3,2	3,1	(3,1)	2.699	2.730	1,1	8,7	8,4	(3,4)
BRAZIL	11,8	10,3	(12,7)	1.694	1.906	12,5	20,1	19,6	(2,5)

Source: Conab - Survey: Sep/2013

TOTAL PEANUTS

Table 9
TOTAL PEANUT (1st and 2nd CROP)
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2011/2012 AND 2012/2013 CROPS

REGION / STATE	AREA (In thousand ha)			YIELD (In kg/ha)			PRODUCTION (In thousand t)		
	11/12 Crop (a)	12/13 Crop (b)	VAR. % (b/a)	11/12 Crop (c)	12/13 Crop (d)	VAR. % (d/c)	11/12 Crop (e)	12/13 Crop (f)	VAR. % (f/e)
NORTH	2,5	1,5	(40,0)	3.741	3.969	6,1	9,4	6,0	(36,2)
TO	2,5	1,5	(40,0)	3.741	3.969	6,1	9,4	6,0	(36,2)
NORTHEAST	6,1	5,7	(6,6)	328	915	179,0	2,0	5,2	160,0
CE	0,7	1,1	57,1	278	270	(2,9)	0,2	0,3	50,0
PB	0,3	0,5	66,7	649	800	23,3	0,2	0,4	100,0
SE	1,3	1,1	(15,4)	1.238	1.300	5,0	1,6	1,4	(12,5)
BA	3,8	3,0	(21,1)	-	1.029	-	-	3,1	-
MID-WEST	0,3	0,2	(33,3)	200	1.633	716,5	0,1	0,3	200,0
MT	0,3	0,2	(33,3)	200	1.633	716,5	0,1	0,3	200,0
SOUTHEAST	78,5	83,4	6,2	3.455	3.631	5,1	271,3	302,8	11,6
MG	2,6	2,9	11,5	3.462	3.379	(2,4)	9,0	9,8	8,9
SP	75,9	80,5	6,1	3.455	3.640	5,3	262,3	293,0	11,7
SOUTH	6,5	5,8	(10,8)	1.830	2.084	13,9	11,9	12,0	0,8
PR	2,8	2,4	(14,3)	2.300	2.850	23,9	6,4	6,8	6,3
RS	3,7	3,4	(8,1)	1.475	1.544	4,7	5,5	5,2	(5,5)
NORTH/NORTHEAST	8,6	7,2	(16,3)	1.320	1.551	17,5	11,4	11,2	(1,8)
CENTER-SOUTH	85,3	89,4	4,8	3.320	3.526	6,2	283,3	315,1	11,2
BRAZIL	93,9	96,6	2,9	3.137	3.379	7,7	294,7	326,3	10,7

Source: Conab - Suvey: Sep/2013

RICE

The cultivated area with rice in the country is estimated at 2,390.9 thousand hectares for the 2012/13 crops. Compared to what took place in the previous period (2,426.7 thousand hectares), that represents a decrease of 1.5%. With the exception of some few states, a generalized drop came in place in the plantations of grassy plants (grass-like plants), caused, among other reasons, by the low profitability of the tillage, by the high risks and the lack of incentives which are hindering the productive chains in several important states, by the environmental restrictions driven to growing in sensitive areas and by the low prices set out in the market.

The biggest producer state of Brazil is Rio Grande do Sul, with 1,066.6 thousand hectares, representing 44.6% of the national area, accountable yet, to 67.0% of the Brazilian production. The fact that all the planted area is related to irrigated cultivation has made it possible that the state achieve the greatest national production, in spite of the climate issues which contributed to the fact that part of sowing would have taken place out of the period technically recommended by the extension entities. In Santa Maria, a state that conjures as the second national producer, the reduction in productivity is estimated at 4.9%, as compared to last year's, wherein it is feasible to find the fact that a great majority of the plantations took place outside of the recommended agricultural zones, causing the tillages, at their initial period, to undergo a fierce blighting of the cold weather, diseases and also to undergo the lack of water for irrigation.

In the remaining producer regions of the country, dry farming was sheerly affected by climate instability. The Northeast region, even in experiencing it in less intensity, was hit by the drought for the second time, bringing about severe menace to the plantations' productivity.

For this reason, the national rice production for the 2012/13 crops is now estimated at 11,757.5 thousand tons, entailing an increase of 1.4% over the volume harvested in the earlier crop.

Supply and Demand

In the latest data made available by Secex/MDIC, in July, 2013, 72.5 thousand tons of rice were imported, wherein only 0.6 thousand tons came from third party markets not included in Mercosul. To date, September 10th, Secex/MDIC has not communicated the data pertaining the month of August 2013; for this reason, July is the *proxy* utilized in this analysis in place. These figures demonstrate a decrease of the flow of products acquired from the external market. In June, 2012, these acquisitions had been at 122.1 tons, wherein 0.4 thousand originated from other countries out of Mercosul. Concerning the exports, they have had an expressive reduction, going from 73.1 thousand tons in June/2013 to 28.7 thousand tons in July/2013. As for the consolidated international trade flow of the 2012/2013 trading period, a 387 thousand-ton superavit has been obtained, wherein the exported amount was equal to 1,455.2 thousand tons and the imported amount was equal to 1,068 thousand tons. Between March up to June, 2013, the first months of the trading period analysis of 2013/14, it is feasible to notice a deficit in the amount equivalent to 187.4 thousand tons, however, there is an expectation of a reversion of the trading flux over the next months, in face of the recent under-valuations of Real.

By means of available information, the final results of rice supply charts of 2011/12 crops have undergone changes in consumption, which began to be quantified at 11,656.5 thousand tons. The prediction of the 2012/13 crop production has suffered a reduction of 111.7 thousand tons, whereas now it is predicted at 11,746.6 thousand tons. As an aftermath of such change, the passing stocks have been affected and were then estimated at 1,971.9 thousand tons.

In the international market, rice prices keep on stable or with subtle declines in the majority of the markets. Such phenomenon is mainly the fallout of interventional policies in some countries, in which large public rice stocks have been attained; thus aiming at regulating prices. There is an expectation in the international market that these stocks be launched to the market at some moment and that they exert a reductive pressure over rice prices/values.

Table 10
RICE
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2011/2012 AND 2012/2013 CROPS

REGION / STATE	AREA (In thousand ha)			YIELD (In kg/ha)			PRODUCTION (In thousand t)		
	11/12 Crop (a)	12/13 Crop (b)	VAR. % (b/a)	11/12 Crop (c)	12/13 Crop (d)	VAR. % (d/c)	11/12 Crop (e)	12/13 Crop (f)	VAR. % (f/e)
NORTH	318,8	291,9	(8,4)	2.972	3.530	18,8	947,3	1.030,2	8,8
RR	19,8	20,0	1,0	5.354	5.452	1,8	106,0	109,0	2,8
RO	53,0	48,0	(9,4)	2.679	2.765	3,2	142,0	132,7	(6,5)
AC	13,8	13,2	(4,3)	1.377	1.326	(3,7)	19,0	17,5	(7,9)
AM	6,5	2,9	(55,0)	2.000	2.110	5,5	13,0	6,1	(53,1)
AP	2,4	2,1	(12,5)	1.089	900	(17,4)	2,6	1,9	(26,9)
PA	103,4	86,6	(16,2)	2.151	2.278	5,9	222,4	197,3	(11,3)
TO	119,9	119,1	(0,7)	3.689	4.750	28,8	442,3	565,7	27,9
NORTHEAST	596,7	588,2	(1,4)	1.288	1.271	(1,3)	769,0	747,3	(2,8)
MA	426,0	416,2	(2,3)	1.098	1.191	8,5	467,7	495,7	6,0
PI	117,4	125,1	6,6	1.171	726	(38,0)	137,5	90,8	(34,0)
CE	24,2	22,3	(7,9)	2.556	2.426	(5,1)	61,9	54,1	(12,6)
RN	0,8	1,1	32,6	2.956	2.520	(14,7)	2,4	2,8	16,7
PB	2,1	0,2	(90,5)	82	96	17,1	0,2	-	(100,0)
PE	2,5	2,5	-	5.677	5.677	-	14,2	14,2	-
AL	3,0	3,0	-	5.650	5.877	4,0	17,0	17,6	3,5
SE	6,9	9,9	43,5	6.500	6.500	-	44,9	64,4	43,4
BA	13,8	7,9	(42,8)	1.680	980	(41,7)	23,2	7,7	(66,8)
MID-WEST	218,6	216,5	(1,0)	3.406	3.223	(5,4)	744,5	697,7	(6,3)
MT	143,4	166,3	16,0	3.217	3.175	(1,3)	461,3	528,0	14,5
MS	17,0	15,2	(10,6)	6.420	6.200	(3,4)	109,1	94,2	(13,7)
GO	58,2	35,0	(39,9)	2.992	2.157	(27,9)	174,1	75,5	(56,6)
DF	-	-	-	-	-	-	-	-	-
SOUTHEAST	53,7	44,6	(16,9)	2.878	3.106	7,9	154,6	138,5	(10,4)
MG	32,2	22,8	(29,2)	1.997	1.956	(2,1)	64,3	44,6	(30,6)
ES	1,0	1,0	-	2.692	2.700	0,3	2,7	2,7	-
RJ	1,6	1,4	(15,0)	3.346	3.100	(7,4)	5,4	4,3	(20,4)
SP	18,9	19,4	2,6	4.350	4.480	3,0	82,2	86,9	5,7
SOUTH	1.238,9	1.249,7	0,9	7.252	7.308	0,8	8.984,1	9.132,9	1,7
PR	35,8	33,0	(7,8)	4.659	5.291	13,6	166,8	174,6	4,7
SC	150,1	150,1	-	7.180	6.828	(4,9)	1.077,7	1.024,9	(4,9)
RS	1.053,0	1.066,6	1,3	7.350	7.438	1,2	7.739,6	7.933,4	2,5
NORTH/NORTHEAST	915,5	880,1	(3,9)	1.875	2.020	7,7	1.716,3	1.777,5	3,6
CENTER-SOUTH	1.511,2	1.510,8	-	6.540	6.599	0,9	9.883,2	9.969,1	0,9
BRAZIL	2.426,7	2.390,9	(1,5)	4.780	4.913	2,8	11.599,5	11.746,6	1,3

Source: Conab - Survey: Sep/2013

EDIBLE BEANS FIRST CROP

The estimate for beans – first crop - area has been consolidated at 1.13 million hectares, framing a decline of 9.2% in relation to the past crop. All the producer states point to plantations of smaller areas than the ones cultivated in the previous crops, with the exception of Minas Gerais, Distrito Federal, Mato Grosso do Sul, Mato Grosso and Maranhão. The sound perspectives of other tillages, such as soy and corn, which have greater stability and liquidity, stable market trading and the climate risks alluded to the tillage of beans has inhibited a stable growth for such tillage.

Roughly 48.2% of beans – first crop – production has been harvested in the South Region, chiefly in the state of Paraná, which has harvested 31.2% of the Brazilian production. In the Southeast Region, Minas Gerais and São Paulo come in first, for they produced 15.8% and 12.8% respectively, out of the Brazilian production. Altogether, the three states were responsible for 59.8% of the beans supplies - the first crop.

In Minas Gerais, the commercial plantation, especially the northwestern part of that state; the main producer region, the farming plantations are highly technically-driven and present high productivity. In subsistence farming, the technological level is relatively low, having ultimately the use of salvia seeds and quite often consorted with coffee plantations destined for the trading only the excess of production. In the state of Minas Gerais, the

carioca beans plantations are predominant, but in the Central region and Zona da Mata region, the red and black beans plantations are expressive, and, in several municipalities in the north of Minas Gerais, cowpea beans are the front-runners.

The mild Summer at the beginning of the plantations, high temperatures between December and February, the excess of rain in the month of January, besides the longer presence of whiteflies (*Bemisia tabaci*) in the producer regions, have brought about an expressive drop in productivity and losses in the quality of part of the harvested product, alongside an average of 14.0% productivity below the 2011/12 crops.

The drop of productivity in the Mid-South and North-Northeast Regions were at around 12%. Among the four states which produce the first crops of beans in the North-Northeast Regions, three of them have shown a decline. Those were: Bahia (22.4%), Tocantins (12.9%) and Piauí (4.0%). There was an increase in revenue in the South Region (7.6%), but there was a loss in the Mid-West Regions (29.2%) and in the Southeast Region (27.7%). The national beans production – first crop – consolidates itself at 964.6 thousand tons, representing a reduction of 21.9% in relation to the 2011/12 crops.

Table 11
BEANS 1st CROP
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2011/2012 AND 2012/2013 CROPS

REGION / STATE	AREA (In thousand ha)			YIELD (In kg/ha)			PRODUCTION (In thousand t)		
	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %
	(a)	(b)	(b/a)	(c)	(d)	(d/c)	(e)	(f)	(f/e)
NORTH	6,7	4,3	(35,8)	722	629	(12,9)	4,8	2,7	(43,8)
TO	6,7	4,3	(35,8)	722	629	(12,9)	4,8	2,7	(43,8)
NORTHEAST	490,2	464,6	(5,2)	224	199	(11,2)	109,8	92,5	(15,8)
MA	35,7	40,2	12,6	335	408	21,8	12,0	16,4	36,7
PI	214,5	195,0	(9,1)	126	121	(4,0)	27,0	23,6	(12,6)
BA	240,0	229,4	(4,4)	295	229	(22,4)	70,8	52,5	(25,8)
MID-WEST	82,1	76,2	(7,2)	2.277	1.613	(29,2)	187,1	122,8	(34,4)
MT	8,5	12,3	44,2	1.737	1.369	(21,2)	14,8	16,8	13,5
MS	1,2	2,2	83,3	2.145	1.470	(31,5)	2,6	3,2	23,1
GO	62,2	49,0	(21,2)	2.268	1.809	(20,2)	141,1	88,6	(37,2)
DF	10,2	12,7	24,5	2.801	1.120	(60,0)	28,6	14,2	(50,3)
SOUTHEAST	290,7	265,1	(8,8)	1.470	1.063	(27,7)	427,3	281,7	(34,1)
MG	181,6	186,7	2,8	1.205	818	(32,1)	218,8	152,7	(30,2)
ES	6,7	6,5	(3,0)	874	727	(16,8)	5,9	4,7	(20,3)
RJ	1,6	1,3	(18,7)	954	940	(1,5)	1,5	1,2	(20,0)
SP	100,8	70,6	(30,0)	1.995	1.744	(12,6)	201,1	123,1	(38,8)
SOUTH	371,7	317,0	(14,7)	1.363	1.467	7,6	506,6	464,9	(8,2)
PR	248,7	210,2	(15,5)	1.401	1.430	2,1	348,3	300,6	(13,7)
SC	63,5	55,1	(13,2)	1.464	1.770	20,9	93,0	97,5	4,8
RS	59,5	51,7	(13,1)	1.098	1.293	17,8	65,3	66,8	2,3
NORTH/NORTHEAST	496,9	468,9	(5,6)	231	203	(12,1)	114,6	95,2	(16,9)
CENTER-SOUTH	744,5	658,3	(11,6)	1.506	1.321	(12,3)	1.121,0	869,4	(22,4)
BRAZIL	1.241,4	1.127,2	(9,2)	995	856	(14,0)	1.235,6	964,6	(21,9)

Source: Conab - Survey: Sep/2013

EDIBLE BEANS SECOND CROP

The area of beans – second crop – is estimated at 1.30 million hectares, which sets out a decrease of 6.8% in relation to the previous crop. Only seven producer states have not shown a drop in planted areas. By and large, the reduction of the area in this crop is basically in the North-Northeast, 15.7% lower than the previous crop. The state of Ceará is responsible for 54.2% of the area in the North-Northeast and has had a reduction of 22.7% in the planted area; consequently, this ensues in the reduction as a whole. Rio Grande do Norte (72.2%), Paraíba (51.4%), Amapá (45.5%) and Maranhão (27.9%) were the only to show an increase of areas. The area of Roraima remained the same as in the previous crop, wherein there was not any change in the 3.0 thousand cultivated hectares. The hike

in the Mid-South Region area is at 2.8%. Approximately 85% of beans production – second crop – shall be in this region.

In Minas Gerais, the high prices in the market and sound climate conditions were not sufficient incentives to spur growth of the beans plantation area – second crop. The inventory/survey estimates a tendency of a 6.6% drop in the cultivated area, fixed at 148.0 thousand hectares. This reduction may be attributed to the issues alluded to the hard and painstaking control of whiteflies, and, the favorable climate conditions for corn plantations – second crop – which has presented itself as a sound alternative of soil usage for the period.

The harvest, completed in this state, has reached an average dwindling of productivity at 9.2%, estimated at 1,317 kg/ha, deriving from the lack of rain in the months of April and May, mainly for the tardily planted tillages, and, which were in between the phases of vegetative development and fructification. The drop in production shall be at 15.2%, comparatively to the earlier crop, amounting to 194.9 thousand tons. A host of more technicalized areas were no longer planted on and there is also information of shifting the plantations of beans – color types – for Caupi beans in some areas, adding up to the expected reduction of revenues.

In the state of Mato Grosso, a great deal of the production is Caupi beans, counting on a cultivation system similar to soy's, at low costs. The area is estimated at 162.7 thousand hectares and with a production of 217.5 thousand tons, 31.8% above the previous crop.

Despite the drop of area in Brazil having reached 6.8%, the improvement for productivity expectancy, which must be 13.5% greater than in 2011/12 allows for an estimation of a total production of beans – second crop – at 1,125.6 thousand tons, accounting for a 5.8% growth.

Table 12
BEANS 2nd CROP
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2011/2012 AND 2012/2013 CROPS

REGION / STATE	AREA (In thousand ha)			YIELD (In kg/ha)			PRODUCTION (In thousand t)		
	11/12 Crop (a)	12/13 Crop (b)	VAR. % (b/a)	11/12 Crop (c)	12/13 Crop (d)	VAR. % (d/c)	11/12 Crop (e)	12/13 Crop (f)	VAR. % (f/e)
NORTH	88,6	74,3	(16,1)	733	801	9,3	65,0	59,4	(8,6)
RR	3,0	3,0	-	667	660	(1,0)	2,0	2,0	-
RO	52,3	39,5	(24,5)	694	790	13,8	36,3	31,2	(14,0)
AC	12,6	12,3	(2,4)	600	580	(3,3)	7,6	7,1	(6,6)
AM	5,9	5,7	(3,4)	900	897	(0,3)	5,3	5,1	(3,8)
AP	1,1	1,3	18,0	840	944	12,4	0,9	1,2	33,3
TO	13,7	12,5	(9,0)	939	1.027	9,4	12,9	12,8	(0,8)
NORTHEAST	632,7	533,2	(15,7)	117	220	88,0	73,9	117,3	58,7
MA	39,0	49,9	27,9	396	501	26,5	15,4	25,0	62,3
PI	16,0	4,3	(73,1)	594	603	1,5	9,5	2,6	(72,6)
CE	426,0	329,5	(22,7)	76	172	126,3	32,4	56,7	75,0
RN	7,2	12,4	72,2	260	285	9,6	1,9	3,5	84,2
PB	36,8	55,7	51,4	79	346	338,0	2,9	19,3	565,5
PE	107,7	81,4	(24,4)	110	125	13,6	11,8	10,2	(13,6)
MID-WEST	193,0	198,7	3,0	1.242	1.325	6,7	239,7	263,2	9,8
MT	152,1	162,7	7,0	1.085	1.250	15,2	165,0	203,4	23,3
MS	17,7	17,2	(2,8)	1.200	1.350	12,5	21,2	23,2	9,4
GO	22,6	18,3	(19,2)	2.300	1.931	(16,0)	52,0	35,3	(32,1)
DF	0,6	0,5	(16,7)	2.536	2.615	3,1	1,5	1,3	(13,3)
SOUTHEAST	208,7	188,7	(9,6)	1.478	1.369	(7,4)	308,5	258,4	(16,2)
MG	158,4	148,0	(6,6)	1.450	1.317	(9,2)	229,7	194,9	(15,2)
ES	11,6	9,0	(22,5)	757	865	14,3	8,8	7,8	(11,4)
RJ	2,1	1,7	(19,0)	980	1.013	3,4	2,1	1,7	(19,0)
SP	36,6	30,0	(18,0)	1.856	1.800	(3,0)	67,9	54,0	(20,5)
SOUTH	271,6	305,0	12,3	1.387	1.337	(3,6)	376,8	407,9	8,3
PR	226,5	263,9	16,5	1.429	1.337	(6,4)	323,7	352,8	9,0
SC	23,3	21,6	(7,5)	1.043	1.259	20,7	24,3	27,2	11,9
RS	21,8	19,5	(10,5)	1.319	1.429	8,3	28,8	27,9	(3,1)
NORTH/NORTHEAST	721,3	607,5	(15,8)	193	291	50,8	138,9	176,7	27,2
CENTER-SOUTH	673,3	692,4	2,8	1.374	1.343	(2,3)	925,0	929,5	0,5
BRAZIL	1.394,6	1.299,9	(6,8)	763	851	11,5	1.063,9	1.106,2	4,0

Source: Conab - Survey: Sep/2013

EDIBLE BEANS THIRD CROP

Concerning beans – third crop – because of the agricultural calendar, plantations go on up until August. The estimation is that the area in the country must be at around 658.5 thousand hectares, comprising an average production of 1,119 kg/ha. For the Mid-South Region, productivity must reach 2,458 kg/ha. Such high productivity at this time of the year is due to irrigated plantations and high technologies in Mato Grosso, Goiás, Distrito Federal and Minas Gerais.

Planting in Minas Gerais which initiated in April has gone on until the beginning of August, motivated by reasonable market prices through the year. The beans crop is estimated at 85.0 thousand hectares, a growth of 3.3% as compared to the earlier crop.

Approximately 7% of the tillages are found at a stage of germination and vegetative development. The planting performed earlier are currently in the blossoming stage, grains formation and maturation. Nearly 30% of tillages have already been harvested. The overall productivity expected for the state is of 2,555 kg/ha, since it has to do with highly technicalized tillages, conducted with irrigation and having an estimated production at 217.2 thousand tons, roughly the same production as in the earlier crop, which had been at 215.2 thousand tons.

The Mineiro (Miner) Farming Institute (IMA - O Instituto Mineiro de Agropecuária), in tandem with the government of Distrito Federal and with the state of Goiás have mapped out some municipalities in both states and all the area of Distrito Federal, establishing the fallows. In Minas Gerais, 16 municipalities have been selected in the Northwestern region, the main bean producer, aiming at controlling the blight of whiteflies which is a vector of the Golden mosaic virus that reduces drastically bean plants productivity. The fallows, in principle, was marked out for the period between September 15th and October 25th, a period in which there should not be any live bean plants, whose planting time limit would be June 15th. Nevertheless, in the intent to meet the needs of seed corn producers, whose harvest calendar advances up to the period of beans plantations in the winter, the IMA, for this year's crop, allowed for plantations to extend until June, 20th in farmland areas with altitudes over 700 meters, and until July 15th for altitudes below 700 meters.

In Goiás, bean plant cultivations – third crop – which, under irrigation and chemical action undergo plague blights and diseases, mainly whiteflies, causing production costs to hike up. The retraction of 1.5% of the planted area owes to these factors, besides the more appealing gains for the production of seeds by means of a central pivot and problems concerning the low availability of water for irrigation at the dams which feed the irrigation systems. The production must reach 112.1 thousand tons. The national production is estimated at 736.7 thousand tons.

Taking heed of the three crops, it is expected that the total area of beans shall be nearly 3.1 million hectares, 5.4% smaller than the earlier crop. The national production of beans must reach 2.83 million tons, 3.1% lower than the last crop.

Supply and Demand

Common Beans - Carioca

The supply to the market is currently normal and the offer of supplies is being processed by the productions of the states of Minas Gerais, São Paulo and Goiás. Even with a scant volume of grains remaining from the “little crop”, owned by the producers, the entry of the winter crop-originated production has improved significantly with the evolution of the crop, and it suffices to satisfy the market, in face of widely retracted demand.

In the 3rd crop, part of the production is led by pivots, whose product plays a strong effect on quotations, due to its reasonable quality, which is largely demanded for by Paulista brokers (brokers from São Paulo) aiming at meeting the needs of more demanding consumers. Nevertheless, there has been, in this month of August, a dropping

trajectory in prices, grounded in weak interest on the part of buyers, in the intent to freeze the market and acquire better quality merchandize at lower prices.

On the other hand, the Northeastern market is being well supplied for, partly, with offers/supplies from the States of Ceará, Sergipe, Alagoas, Bahia and from the dry areas in the northeast – Pernambuco. The harvests are considerably in advance, leading to smaller interests in purchasing in the Region in the Mid-South of the country and making quotations enhancements harder.

It shall be suitable to mention that the 2013/14 crop plantations have already started out in the South of the country and is anticipated in Paraná. In view of a favorable market perspective, a widening of the area to be cultivated is expected, in relation to the previous crop.

Common Beans – Black Beans

The supply chart is found to be in really tight restraints, since a great deal of the national production has already been used up along with the premature imports from Argentina during the months of January through May, which were able to complement the domestic market.

Prices continue fairly profitable with a behavior directly alluded to the product's quantity available in Argentina and China, for over the export-driven remainder in these two countries, there is interest of purchase on the part of other countries.

Before the panorama presented, the expectation is that over the second semester, the quotations will be able to count on broader chances of remaining steadfast, according to the current balance of offers/supplies, which is far limited.

For the ongoing season, the following scenario is predicted: the first crop production, checked over in the field survey undertaken in August, by Conab, plus the predictions for the second and third crops shall amount to 2,832.4 thousand tons, which when summed up altogether to the passing stocks and to the imports projected in terms of 400.0 thousand tons shall bring about a supply of 3.61 million tons, generating a passing stock of only 152.2 thousand tons.

Table 13
BEANS 3rd CROP
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2011/2012 AND 2012/2013 CROPS

REGION / STATE	AREA (In thousand ha)			YIELD (In kg/ha)			PRODUCTION (In thousand t)		
	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %
	(a)	(b)	(b/a)	(c)	(d)	(d/c)	(e)	(f)	(f/e)
NORTH	63,2	54,7	(13,4)	858	777	(9,4)	54,2	42,5	(21,6)
PA	48,1	48,1	-	705	705	-	33,9	33,9	-
TO	15,1	6,6	(55,9)	1.347	1.305	(3,1)	20,3	8,6	(57,6)
NORTHEAST	381,0	437,7	14,9	277	551	98,9	105,6	241,1	128,3
CE	7,6	11,6	52,4	65	1.036	1.493,8	0,5	12,0	2.300,0
PE	122,0	133,7	9,6	180	400	122,2	22,0	53,5	143,2
AL	36,1	39,0	8,0	460	465	1,1	16,6	18,1	9,0
SE	28,0	26,8	(4,3)	702	779	11,0	19,7	20,9	6,1
BA	187,3	226,6	21,0	250	603	141,2	46,8	136,6	191,9
MID-WEST	67,0	74,8	11,6	2.629	2.512	(4,5)	176,2	187,9	6,6
MT	20,2	30,4	50,5	2.207	2.160	(2,1)	44,6	65,7	47,3
MS	0,4	0,4	-	1.340	1.340	-	0,5	0,5	-
GO	41,4	40,8	(1,5)	2.779	2.748	(1,1)	115,1	112,1	(2,6)
DF	5,0	3,2	(36,0)	3.200	3.000	(6,3)	16,0	9,6	(40,0)
SOUTHEAST	108,7	113,0	4,0	2.549	2.517	(1,3)	277,1	284,5	2,7
MG	82,3	85,0	3,3	2.615	2.555	(2,3)	215,2	217,2	0,9
SP	26,4	28,0	5,9	2.345	2.402	2,4	61,9	67,3	8,7
SOUTH	6,2	5,9	(4,8)	952	850	(10,7)	5,9	5,0	(15,3)
PR	6,2	5,9	(4,8)	952	850	(10,7)	5,9	5,0	(15,3)
NORTH/NORTHEAST	444,2	492,4	10,9	360	576	60,0	159,8	283,6	77,5
CENTER-SOUTH	181,9	193,7	6,5	2.524	2.464	(2,4)	459,2	477,4	4,0
BRAZIL	626,1	686,1	9,6	989	1.109	12,1	619,0	761,0	22,9

Source: Conab - Survey: Sep/2013

TOTAL EDIBLE BEANS

Table 14
TOTAL BEANS (1st, 2nd and 3rd CROPS)
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2011/2012 AND 2012/2013 CROPS

REGION / STATE	AREA (In thousand ha)			YIELD (In kg/ha)			PRODUCTION (In thousand t)		
	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %
	(a)	(b)	(b/a)	(c)	(d)	(d/c)	(e)	(f)	(f/e)
NORTH	158,5	133,3	(15,9)	782	786	0,5	124,0	104,9	(15,4)
RR	3,0	3,0	-	667	660	(1,0)	2,0	2,0	-
RO	52,3	39,5	(24,5)	694	790	13,8	36,3	31,2	(14,0)
AC	12,6	12,3	(2,4)	600	580	(3,3)	7,6	7,1	(6,6)
AM	5,9	5,7	(3,4)	900	897	(0,3)	5,3	5,1	(3,8)
AP	1,1	1,3	18,2	840	944	12,4	0,9	1,2	33,3
PA	48,1	48,1	-	705	705	-	33,9	34,1	0,6
TO	35,5	23,4	(34,0)	1.071	1.032	(3,6)	38,0	24,2	(36,3)
NORTHEAST	1.503,9	1.435,5	(4,5)	192	314	63,5	289,3	451,0	55,9
MA	74,7	90,1	20,6	367	460	25,3	27,4	41,4	51,1
PI	230,5	199,3	(13,5)	158	131	(17,1)	36,5	26,2	(28,2)
CE	433,6	341,1	(21,3)	76	201	165,7	32,9	68,7	108,8
RN	7,2	12,4	72,2	260	285	9,6	1,9	3,5	84,2
PB	36,8	55,7	51,4	79	346	338,0	2,9	19,3	565,5
PE	229,7	215,1	(6,4)	147	296	101,1	33,8	63,7	88,5
AL	36,1	39,0	8,0	460	465	1,1	16,6	18,1	9,0
SE	28,0	26,8	(4,3)	702	779	11,0	19,7	20,9	6,1
BA	427,3	456,0	6,7	275	415	50,7	117,6	189,2	60,9
MID-WEST	342,1	349,7	2,2	1.762	1.642	(6,8)	603,0	574,1	(4,8)
MT	180,8	205,4	13,6	1.241	1.392	12,2	224,4	285,9	27,4
MS	19,3	19,8	2,6	1.262	1.363	8,0	24,4	27,0	10,7
GO	126,2	108,1	(14,3)	2.441	2.184	(10,5)	308,1	236,1	(23,4)
DF	15,8	16,4	3,8	2.917	1.532	(47,5)	46,1	25,1	(45,6)
SOUTHEAST	608,1	566,8	(6,8)	1.666	1.455	(12,7)	1.012,8	824,6	(18,6)
MG	422,3	419,7	(0,6)	1.572	1.346	(14,4)	663,7	564,8	(14,9)
ES	18,3	15,5	(15,3)	800	807	0,9	14,6	12,5	(14,4)
RJ	3,7	3,0	(18,9)	969	981	1,3	3,6	2,9	(19,4)
SP	163,8	128,6	(21,5)	2.020	1.900	(5,9)	330,9	244,4	(26,1)
SOUTH	649,5	627,9	(3,3)	1.369	1.398	2,1	889,3	877,8	(1,3)
PR	481,4	480,0	(0,3)	1.408	1.372	(2,6)	677,9	658,4	(2,9)
SC	86,8	76,7	(11,6)	1.351	1.626	20,4	117,3	124,7	6,3
RS	81,3	71,2	(12,4)	1.157	1.330	14,9	94,1	94,7	0,6
NORTH/NORTHEAST	1.662,4	1.568,8	(5,6)	249	354	42,2	413,3	555,9	34,5
CENTER-SOUTH	1.599,7	1.544,4	(3,5)	1.566	1.474	(5,9)	2.505,1	2.276,5	(9,1)
BRAZIL	3.262,1	3.113,2	(4,6)	895	910	1,7	2.918,4	2.832,4	(2,9)

Source: Conab - Survey: Sep/2013

SUNFLOWER

Table 15
SUNFLOWER
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2011/2012 AND 2012/2013 CROPS

REGION / STATE	AREA (In thousand ha)			YIELD (In kg/ha)			PRODUCTION (In thousand t)		
	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %
	(a)	(b)	(b/a)	(c)	(d)	(d/c)	(e)	(f)	(f/e)
NORTHEAST	0,2	0,5	150,0	715	422	(41,0)	0,2	0,2	-
CE	0,1	0,2	100,0	780	456	(41,5)	0,1	0,1	-
BA	0,1	0,3	175,0	650	400	(38,5)	0,1	0,1	-
MID-WEST	66,0	53,8	(18,5)	1.579	1.673	6,0	104,2	90,0	(13,6)
MT	47,1	50,7	7,6	1.686	1.671	(0,9)	79,4	84,7	6,7
MS	5,0	0,9	(82,8)	1.200	1.810	50,8	6,0	1,6	(73,3)
GO	13,9	2,2	(83,9)	1.355	1.660	22,5	18,8	3,7	(80,3)
SOUTHEAST	4,3	11,0	155,8	1.395	1.192	(14,6)	6,0	13,1	118,3
MG	4,3	11,0	155,8	1.395	1.192	(14,6)	6,0	13,1	118,3
SOUTH	4,0	3,4	(15,0)	1.507	1.394	(7,5)	6,0	4,8	(20,0)
PR	0,7	0,7	-	1.310	1.083	(17,3)	0,9	0,8	(11,1)
RS	3,3	2,7	(18,0)	1.549	1.475	(4,8)	5,1	4,0	(21,6)
NORTH/NORTHEAST	0,2	0,5	150,0	715	422	(41,0)	0,2	0,2	-
CENTER-SOUTH	74,3	68,2	(8,2)	1.565	1.581	1,0	116,2	107,9	(7,1)
BRAZIL	74,5	68,7	(7,8)	1.563	1.573	0,6	116,4	108,1	(7,1)

Source: Conab - Survey: Sep/2013

CASTOR BEANS

Table 16
CASTOR BEAN
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2011/2012 AND 2012/2013 CROPS

REGION / STATE	AREA (In thousand ha)			YIELD (In kg/ha)			PRODUCTION (In thousand t)		
	11/12 Crop (a)	12/13 Crop (b)	VAR. % (b/a)	11/12 Crop (c)	12/13 Crop (d)	VAR. % (d/c)	11/12 Crop (e)	12/13 Crop (f)	VAR. % (f/e)
NORTHEAST	123,9	84,4	(31,9)	172	163	(5,2)	21,4	13,8	(35,5)
PI	0,8	1,0	20,0	96	75	(21,9)	0,1	0,1	-
CE	33,8	12,8	(62,1)	79	140	77,2	2,7	1,8	(33,3)
RN	0,1	-	(100,0)	571	-	(100,0)	0,1	-	(100,0)
PE	2,7	1,4	(50,0)	231	267	15,6	0,6	0,4	(33,3)
BA	86,5	69,2	(20,0)	207	166	(19,8)	17,9	11,5	(35,8)
SOUTHEAST	3,3	2,1	(36,4)	862	694	(19,5)	2,9	1,5	(48,3)
MG	2,8	2,0	(28,6)	738	630	(14,6)	2,1	1,3	(38,1)
SP	0,5	0,1	(80,000)	1.554	1.980	27,4	0,8	0,2	(75,0)
SOUTH	1,0	0,9	(10,000)	620	600	(3,2)	0,6	0,5	(16,7)
PR	1,0	0,9	(10,000)	620	600	(3,2)	0,6	0,5	(16,7)
MORTH/NORTHEAST	123,9	84,4	(31,9)	172	163	(5,2)	21,4	13,8	(35,5)
CENTER-SOUTH	4,3	3,0	(30,2)	805	666	(17,3)	3,5	2,0	(42,9)
BRAZIL	128,2	87,4	(31,8)	193	180	(6,7)	24,9	15,8	(36,5)

Source: Conab - Survey: Sep/2013

CORN FIRST CROP

In the twelfth inventory/survey of 2012/13 crops, a reduction of 8.6% was observed in the planted area of the first crop, going from 7,558.5 thousand hectares in the previous period to 6,906.8 thousand hectares in the current season.

In this survey, some adjustments in corn productivity kept on being undertaken, particularly in some states of the North Region, chiefly the states Pará and Tocantins, and, in the Northeast, Maranhão, Ceará and Pernambuco. Even considering that the climate hardship in this region was not so intense as in the earlier period, the weak performance of the tillages was caused by discontinuous rain. However, such behavior was greatly counterbalanced through adjustments performed in the Mid-South Region, particularly in the states of Mato Grosso, Mato Grosso do Sul, Distrito Federal, São Paulo and Espírito Santo. The national corn production – first crop - in the current season is now estimated at 35,164.8 thousand tons, as compared to what took place in 2012- 33,867.1 thousand tons, representing a hike of 3.8%.

Table 17
CORN 1ST CROP
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2011/2012 AND 2012/2013 CROPS

REGION / STATE	AREA (In thousand ha)			YIELD (In kg/ha)			PRODUCTION (In thousand t)		
	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %
	(a)	(b)	(b/a)	(c)	(d)	(d/c)	(e)	(f)	(f/e)
NORTH	456,7	397,8	(12,9)	2.668	2.880	7,9	1.218,3	1.145,6	(6,0)
RR	6,5	6,5	-	2.000	2.000	-	13,0	13,0	-
RO	93,9	76,6	(18,4)	2.201	2.187	(0,6)	206,7	167,5	(19,0)
AC	43,8	46,1	5,3	2.290	2.421	5,7	100,3	111,6	11,3
AM	14,4	12,9	(10,4)	2.500	2.390	(4,4)	36,0	30,8	(14,4)
AP	2,6	2,3	(12,3)	825	826	0,1	2,1	1,9	(9,5)
PA	236,3	199,1	(15,7)	2.538	2.841	11,9	599,7	565,6	(5,7)
TO	59,2	54,3	(8,3)	4.400	4.700	6,8	260,5	255,2	(2,0)
NORTHEAST	1.917,3	1.777,7	(7,3)	1.713	1.720	0,4	3.284,3	3.058,5	(6,9)
MA	384,0	384,0	-	1.376	2.000	45,3	528,4	768,0	45,3
PI	330,7	366,1	10,7	2.108	1.337	(36,6)	697,1	489,5	(29,8)
CE	520,6	408,7	(21,5)	142	240	69,0	73,9	98,1	32,7
RN	7,6	13,3	75,2	337	355	5,3	2,6	4,7	80,8
PB	39,8	53,1	33,5	106	496	367,9	4,2	26,3	526,2
PE	205,8	94,5	(54,1)	117	167	42,7	24,1	15,8	(34,4)
BA	428,8	458,0	6,8	4.557	3.616	(20,6)	1.954,0	1.656,1	(15,2)
MID-WEST	743,6	565,8	(23,9)	7.697	7.677	(0,3)	5.723,2	4.343,4	(24,1)
MT	94,5	75,6	(20,0)	6.185	7.079	14,5	584,5	535,2	(8,4)
MS	68,2	48,0	(29,6)	6.729	7.700	14,4	458,9	369,6	(19,5)
GO	547,3	407,2	(25,6)	8.000	7.633	(4,6)	4.378,4	3.108,2	(29,0)
DF	33,6	35,0	4,2	8.969	9.441	5,3	301,4	330,4	9,6
SOUTHEAST	1.813,0	1.753,4	(3,3)	5.942	6.067	2,1	10.772,7	10.637,5	(1,3)
MG	1.218,5	1.149,8	(5,6)	5.978	5.944	(0,6)	7.284,2	6.834,4	(6,2)
ES	31,5	24,1	(23,5)	2.429	2.547	4,9	76,5	61,4	(19,7)
RJ	6,1	5,9	(3,3)	2.435	2.250	(7,6)	14,9	13,3	(10,7)
SP	556,9	573,6	3,0	6.100	6.500	6,6	3.397,1	3.728,4	9,8
SOUTH	2.627,9	2.412,1	(8,2)	4.897	6.625	35,3	12.868,6	15.979,8	24,2
PR	977,7	878,1	(10,2)	6.729	8.150	21,1	6.578,9	7.156,5	8,8
SC	536,7	500,7	(6,7)	5.491	6.870	25,1	2.947,0	3.439,8	16,7
RS	1.113,5	1.033,3	(7,2)	3.002	5.210	73,6	3.342,7	5.383,5	61,1
NORTH/NORTHEAST	2.374,0	2.175,5	(8,4)	1.897	1.933	1,9	4.502,6	4.204,1	(6,6)
CENTER-SOUTH	5.184,5	4.731,3	(8,7)	5.664	6.544	15,5	29.364,5	30.960,7	5,4
BRAZIL	7.558,5	6.906,8	(8,6)	4.481	5.091	13,6	33.867,1	35.164,8	3,8

Source: Conab - Survey: Sep/2013

CORN SECOND CROP

Corn plantations/tillages – second crop – according to what has already been communicated, have undergone a slight delay due to the occurrence of strong rain in the beginning of February, happening coincidentally as the harvest of precocious soy varieties in relevant producer states of the Mid-South Region.

Climate normalization which occurred afterwards spurred on a strong increment in the planted area in all the region. According to what had been reported in the earlier assessment, the information related to corn productivity – second crop – in the Mid-West Region was found, at that time, slightly hindered and still liable to changes, due to the combination, especially, in the states of Mato Grosso, Mato Grosso do Sul and Goiás, of the lack of storage rooms and because of the low prices in place. These factors kept on influencing the product's trade which goes at a slow pace and spills over in a greater tardiness of the harvest, since producers prefer to leave the product in the field/farmland, even though they are aware of the outcomes this will bring to their profitability. By and large, the harvest reached, at the time of the research performed in the farmland, the percentages of 74% in Mato Grosso, 78% in Mato Grosso do Sul, 94% in Goiás, 82% in Minas Gerais, 50% in São Paulo and 75% in Paraná.

As the harvests have been becoming intensified in the states of the Mid-West Region, the overall productivities show relevant increments, as compared to the data

obtained in the previous survey. This performance was sufficient to establish a new record for the second crop, achieving, at a national level, the amount of 46,179.5 thousand tons, against 39,112.7 thousand tons in 2012, representing an augmentation of 18.1% as compared to the previous period.

The combination of these factors shall bring about the possibility of a Brazilian crop at a record high on corn, achieving 81,344.4 thousand tons, demonstrating a hike of 11.5% in relation to the production obtained over the past year.

Supply and Demand

In spite of corn values, either in the international market or in the domestic market, comparatively to the same period in the previous year, as they were low, Brazil has moved along the month of August with a sound level of exports, reaching 3.05 million tons, according to Secex.

This may be attributed to dollar valuations which kept on well valued before Real, working at around R\$ 2,30. Even though, the recent drought in North American crops has affected the Chicago quotations, bringing to a halt a low-value sequence over the end of the month of August and in the beginning of September.

Still, the North American crops tend to be greater than in the previous year, possibly getting above 340.0 million tons, in which this is a lowering type price.

The information from *line-ups* for the months of September and the beginning of October for ships waiting solely for the shipment of the grains is at 4.86 million tons, capable of generating exports as of the start of February through the end of September at 13.8 million tons.

In this sense, taking into consideration the start of the United States' harvests and a new price retraction, it is possible that the exports' pace be slightly slowed down along the months of November, December and January, reaching an end volume of 17.5 million tons. However, even if such estimation is overcome, the available corn volumes for the beginning of February, 2014 will still be largely comfortable, keeping prices at lower levels than the ones encountered in February, 2013.

Table 18
CORN 2ND CROP
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2011/2012 AND 2012/2013 CROPS

REGION / STATE	AREA (In thousand ha)			YIELD (In kg/ha)			PRODUCTION (In thousand t)		
	11/12 Crop (a)	12/13 Crop (b)	VAR. % (b/a)	11/12 Crop (c)	12/13 Crop (d)	VAR. % (d/c)	11/12 Crop (e)	12/13 Crop (f)	VAR. % (f/e)
NORTH	112,8	130,5	15,7	3.849	4.036	4,9	434,2	526,6	21,3
RO	68,4	89,6	31,0	3.612	3.728	3,2	247,1	334,0	35,2
TO	44,4	40,9	(7,9)	4.215	4.710	11,7	187,1	192,6	2,9
NORTHEAST	504,2	629,8	24,9	2.141	3.303	54,3	1.079,8	2.080,0	92,6
MA	70,6	133,7	89,4	2.879	4.214	46,4	203,3	563,4	177,1
PI	20,9	13,7	(34,6)	4.311	3.891	(9,7)	90,1	53,3	(40,8)
AL	29,7	34,4	15,8	754	637	(15,5)	22,4	21,9	(2,2)
SE	206,8	206,6	(0,1)	2.629	4.557	73,3	543,7	941,5	73,2
BA	176,2	241,4	37,0	1.250	2.071	65,7	220,3	499,9	126,9
MID-WEST	4.548,2	5.607,1	23,3	5.583	5.528	(1,0)	25.393,1	30.996,9	22,1
MT	2.645,4	3.349,1	26,6	5.680	5.780	1,8	15.025,9	19.357,8	28,8
MS	1.199,5	1.461,0	21,8	5.100	5.100	-	6.117,5	7.451,1	21,8
GO	694,6	778,6	12,1	6.043	5.160	(14,6)	4.197,5	4.017,6	(4,3)
DF	8,7	18,4	112,0	6.000	9.261	54,4	52,2	170,4	226,4
SOUTHEAST	429,3	461,2	7,4	4.722	4.532	(4,0)	2.027,4	2.090,1	3,1
MG	94,3	118,8	26,0	5.548	5.200	(6,3)	523,2	617,8	18,1
SP	335,0	342,4	2,2	4.490	4.300	(4,2)	1.504,2	1.472,3	(2,1)
SOUTH	2.025,1	2.169,2	7,1	5.026	4.834	(3,8)	10.178,2	10.485,9	3,0
PR	2.025,1	2.169,2	7,1	5.026	4.834	(3,8)	10.178,2	10.485,9	3,0
NORTH/NORTHEAST	617,0	760,3	23,2	2.454	3.429	39,7	1.514,0	2.606,6	72,2
CENTER-SOUTH	7.002,6	8.237,5	17,6	5.369	5.290	(1,5)	37.598,7	43.572,9	15,9
BRAZIL	7.619,6	8.997,8	18,1	5.133	5.132	-	39.112,7	46.179,5	18,1

Source: Conab - Survey: Sep/2013

TOTAL CORN

Table 19
TOTAL CORN (1st and 2nd CROP)
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2011/2012 AND 2012/2013 CROPS

REGION / STATE	AREA (In thousand ha)			YIELD (In kg/ha)			PRODUCTION (In thousand t)		
	11/12 Crop (a)	12/13 Crop (b)	VAR. % (b/a)	11/12 Crop (c)	12/13 Crop (d)	VAR. % (d/c)	11/12 Crop (e)	12/13 Crop (f)	VAR. % (f/e)
NORTH	569,5	528,3	(7,2)	2.902	3.166	9,1	1.652,4	1.672,3	1,2
RR	6,5	6,5	-	2.000	2.000	-	13,0	13,0	-
RO	162,3	166,2	2,4	2.796	3.018	7,9	453,7	501,6	10,6
AC	43,8	46,1	5,3	2.290	2.421	5,7	100,3	111,6	11,3
AM	14,4	12,9	(10,4)	2.500	2.390	(4,4)	36,0	30,8	(14,4)
AP	2,6	2,3	(11,5)	825	826	0,1	2,1	1,9	(9,5)
PA	236,3	199,1	(15,7)	2.538	2.841	11,9	599,7	565,6	(5,7)
TO	103,6	95,2	(8,1)	4.321	4.704	8,9	447,6	447,8	-
NORTHEAST	2.421,5	2.407,5	(0,6)	1.802	2.134	18,4	4.364,0	5.138,6	17,7
MA	454,6	517,7	13,9	1.609	2.572	59,8	731,6	1.331,4	82,0
PI	351,6	379,8	8,0	2.239	1.429	(36,2)	787,2	542,8	(31,0)
CE	520,6	408,7	(21,5)	142	240	69,0	73,9	98,1	32,7
RN	7,6	13,3	75,0	337	355	5,3	2,6	4,7	80,8
PB	39,8	53,1	33,4	106	496	367,9	4,2	26,3	526,2
PE	205,8	94,5	(25,0)	117	167	42,7	24,1	15,8	(34,4)
AL	29,7	34,4	15,8	754	637	(15,5)	22,4	21,9	(2,2)
SE	206,8	206,6	(0,1)	2.629	4.557	73,3	543,7	941,5	73,2
BA	605,0	699,4	15,6	3.594	3.083	(14,2)	2.174,3	2.156,1	(0,8)
MID-WEST	5.291,8	6.172,9	16,7	5.880	5.725	(2,6)	31.116,3	35.340,2	13,6
MT	2.739,9	3.424,7	25,0	5.697	5.809	2,0	15.610,4	19.893,0	27,4
MS	1.267,7	1.509,0	19,0	5.188	5.183	(0,1)	6.576,4	7.820,7	18,9
GO	1.241,9	1.185,8	(4,5)	6.905	6.009	(13,0)	8.575,9	7.125,7	(16,9)
DF	42,3	53,4	26,2	8.358	9.379	12,2	353,6	500,8	41,6
SOUTHEAST	2.242,3	2.214,6	(1,2)	5.708	5.747	0,7	12.800,0	12.727,6	(0,6)
MG	1.312,8	1.268,6	(3,4)	5.947	5.874	(1,2)	7.807,4	7.452,2	(4,5)
ES	31,5	24,1	(23,5)	2.429	2.547	4,9	76,5	61,4	(19,7)
RJ	6,1	5,9	(3,3)	2.435	2.250	(7,6)	14,9	13,3	(10,7)
SP	891,9	916,0	2,7	5.495	5.678	3,3	4.901,2	5.200,7	6,1
SOUTH	4.653,0	4.581,3	(1,5)	4.953	5.777	16,6	23.046,8	26.465,7	14,8
PR	3.002,8	3.047,3	1,5	5.580	5.790	3,7	16.757,1	17.642,4	5,3
SC	536,7	500,7	(6,7)	5.491	6.870	25,1	2.947,0	3.439,8	16,7
RS	1.113,5	1.033,3	(7,2)	3.002	5.210	73,6	3.342,7	5.383,5	61,1
NORTH/NORTHEAST	2.991,0	2.935,8	(1,8)	2.012	2.320	15,3	6.016,4	6.810,9	13,2
CENTER-SOUTH	12.187,1	12.968,8	6,4	5.495	5.747	4,6	66.963,1	74.533,5	11,3
BRAZIL	15.178,1	15.904,6	4,8	4.808	5.115	6,4	72.979,5	81.344,4	11,5

Source: Conab - Survey: Sep/2013

SOYBEAN

The twelfth survey/inventory of soy crops has been able to bear out the excellent performance attained by the oleaginous products along all the stages of development of the tillage, as compared to the previous period.

The soy planted area has been estimated at a record high of 27,721.6 thousand hectares, showing an augmentation of 10.7% in comparison with what had been observed in the 2011/12 season – 25,042.2 thousand hectares. According to what had been registered in earlier bulletins, the problems in place during the evolution of the vegetative development of the oleaginous products have not brought, as imagined, any severe perils for productivity.

As a result, the overall productivity registered for the Mid-South Region, the main producer region, has shown an increment of 15.1% when compared to what had been observed in the previous period. Such performance compelled the national productivity to reach the average of 2,937 kg/ha, representing a record high of growth and an increment of 10.8% in relation to the one obtained in 2012.

The effects of these occurrences in Brazilian crops in this current year point towards a record high production of 81,456.1 million tons, as opposed to 66,383.0 thousand tons in 2012, representing a hike of 22.7%.

Table 20
SOYBEAN
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2011/2012 AND 2012/2013 CROPS

REGION / STATE	AREA (In thousand ha)			YIELD (In kg/ha)			PRODUCTION (In thousand t)		
	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %
	(a)	(b)	(b/a)	(c)	(d)	(d/c)	(e)	(f)	(f/e)
NORTH	717,6	894,5	24,7	3.027	2.954	(2,4)	2.172,2	2.641,9	21,6
RR	3,7	5,0	35,0	2.800	2.800	-	10,4	14,0	34,6
RO	143,5	167,7	16,9	3.221	3.216	(0,2)	462,2	539,3	16,7
PA	119,2	172,2	44,5	2.657	3.207	20,7	316,7	552,2	74,4
TO	451,2	549,6	21,8	3.065	2.796	(8,8)	1.382,9	1.536,4	11,1
NORTHEAST	2.117,1	2.414,3	14,0	2.880	2.193	(23,9)	6.096,3	5.294,8	(13,1)
MA	559,7	586,0	4,7	2.949	2.877	(2,4)	1.650,6	1.685,9	2,1
PI	444,6	546,4	22,9	2.841	1.678	(40,9)	1.263,1	916,9	(27,4)
BA	1.112,8	1.281,9	15,2	2.860	2.100	(26,6)	3.182,6	2.692,0	(15,4)
MID-WEST	11.495,2	12.778,2	11,2	3.036	2.981	(1,8)	34.904,8	38.091,4	9,1
MT	6.980,5	7.818,2	12,0	3.130	3.010	(3,8)	21.849,0	23.532,8	7,7
MS	1.815,0	2.017,0	11,1	2.550	2.880	12,9	4.628,3	5.809,0	25,5
GO	2.644,7	2.888,0	9,2	3.120	2.965	(5,0)	8.251,5	8.562,9	3,8
DF	55,0	55,0	-	3.200	3.395	6,1	176,0	186,7	6,1
SOUTHEAST	1.606,2	1.758,2	9,5	2.899	3.086	6,5	4.656,3	5.425,9	16,5
MG	1.024,0	1.121,2	9,5	2.987	3.010	0,8	3.058,7	3.374,8	10,3
SP	582,2	637,0	9,4	2.744	3.220	17,3	1.597,6	2.051,1	28,4
SOUTH	9.106,1	9.876,4	8,5	2.037	3.038	49,1	18.553,4	30.002,7	61,7
PR	4.460,6	4.752,8	6,6	2.453	3.348	36,5	10.941,9	15.912,4	45,4
SC	448,3	505,0	12,7	2.420	3.080	27,3	1.084,9	1.555,4	43,4
RS	4.197,2	4.618,6	10,0	1.555	2.714	74,5	6.526,6	12.534,9	92,1
NORTH/NORTHEAST	2.834,7	3.308,8	16,7	2.917	2.399	(17,8)	8.268,5	7.936,7	(4,0)
CENTER-SOUTH	22.207,5	24.412,8	9,9	2.617	3.012	15,1	58.114,5	73.520,0	26,5
BRAZIL	25.042,2	27.721,6	10,7	2.651	2.938	10,8	66.383,0	81.456,7	22,7

Source: Conab - Survey: Sep/2013

SORGHUM

Table 21
SORGHUM
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2011/2012 AND 2012/2013 CROPS

REGION / STATE	AREA (In thousand ha)			YIELD (In kg/ha)			PRODUCTION (In thousand t)		
	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %
	(a)	(b)	(b/a)	(c)	(d)	(d/c)	(e)	(f)	(f/e)
NORTH	21,5	19,1	-	1.736	1.923	10,8	37,3	36,7	(1,6)
TO	21,5	19,1	(11,2)	1.736	1.923	10,8	37,3	36,7	(1,6)
NORTHEAST	101,9	92,5	-	758	396	(47,8)	77,2	36,7	(52,5)
PI	7,7	1,4	(81,8)	2.130	1.058	(50,3)	16,4	1,5	-
CE	0,3	0,6	100,0	236	480	103,4	0,1	0,3	200,0
RN	1,1	2,2	97,0	930	872	(6,2)	1,0	1,9	90,0
PB	0,2	0,2	-	1.500	800	(46,7)	0,3	0,2	(33,3)
PE	0,6	1,0	66,6	582	467	(19,8)	0,3	0,5	66,7
BA	92,0	87,1	(5,3)	642	371	(42,2)	59,1	32,3	(45,3)
MID-WEST	483,0	478,4	-	3.160	2.965	(6,2)	1.526,2	1.418,5	(7,1)
MT	151,4	163,2	7,8	2.780	2.727	(1,9)	420,9	445,0	5,7
MS	29,0	15,0	(48,3)	2.700	2.647	(2,0)	78,3	39,7	(49,3)
GO	296,5	291,8	(1,6)	3.369	3.085	(8,4)	998,9	900,2	(9,9)
DF	6,1	8,4	37,7	4.600	4.000	(13,0)	28,1	33,6	19,6
SOUTHEAST	150,3	183,3	-	3.460	2.944	(14,9)	519,9	539,6	3,8
MG	126,1	163,7	29,8	3.519	2.883	(18,1)	443,7	472,0	6,4
SP	24,2	19,6	(19,1)	3.150	3.447	9,4	76,2	67,6	(11,3)
SOUTH	30,2	28,4	-	2.030	2.465	21,4	61,3	70,0	14,2
PR	1.8000	-	-	3.700	-	(100,0)	6,7	-	(100,0)
RS	28,4	28,4	-	1.924	2.465	28,1	54,6	70,0	28,2
MORTH/NORTHEAST	123,4	111,6	(9,6)	928	657	(29,2)	114,5	73,4	(35,9)
CENTER-SOUTH	663,5	690,1	4,0	3.176	2.939	(7,5)	2.107,4	2.028,1	(3,8)
BRAZIL	786,9	801,7	1,9	2.824	2.621	(7,2)	2.221,9	2.101,5	(5,4)

Source: Conab - Survey: Sep/2013

WINTER CROPS

OAT

Table 22
OAT 2013
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2012/2013 AND 2013/2014 CROPS

REGION/STATE	AREA (In thousand ha)			PRODUCTIVITY (In kg/ha)			PRODUCTION (In thousand t)		
	12/13 Crop (a)	13/14 Crop (b)	VAR. % (b/a)	12/13 Crop (c)	13/14 Crop (d)	VAR. % (d/c)	12/13 Crop (e)	13/14 Crop (f)	VAR. % (f/e)
MID-WEST	7,0	5,9	(15,7)	1.071	1.695	58,3	7,5	10,0	33,3
MS	7,0	5,9	(15,2)	1.078	1.694	57,1	7,5	10,0	33,3
SOUTH	161,7	165,4	2,3	2.184	2.086	(4,5)	353,2	345,1	(2,3)
PR	61,9	62,9	1,6	2.285	1.944	(14,9)	141,4	122,3	(13,5)
RS	99,8	102,5	2,7	2.122	2.174	2,5	211,8	222,8	5,2
CENTER-SOUTH	168,7	171,3	1,5	2.138	2.073	(3,0)	360,7	355,1	(1,6)
BRAZIL	168,7	171,3	1,5	2.138	2.073	(3,0)	360,7	355,1	(1,6)

Source: Conab - Suvey: Sep/2013

CANOLA

Table 23
CANOLA 2013
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2012/2013 AND 2013/2014 CROPS

REGION/STATE	AREA (In thousand ha)			PRODUCTIVITY (In kg/ha)			PRODUCTION (In thousand t)		
	12/13 Crop (a)	13/14 Crop (b)	VAR. % (b/a)	12/13 Crop (c)	13/14 Crop (d)	VAR. % (d/c)	12/13 Crop (e)	13/14 Crop (f)	VAR. % (f/e)
MID-WEST	2,3	-	(100,0)	1.043	-	(100,0)	2,4	-	(100,0)
MS	2,3	-	(100,0)	1.033	-	(100,0)	2,4	-	(100,0)
SOUTH	41,5	45,1	8,7	1.400	1.206	(13,9)	58,1	54,4	(6,4)
PR	12,9	15,2	17,8	1.667	981	(41,2)	21,5	14,9	(30,7)
SC	0,4	-	(100,0)	775	-	(100,0)	0,3	-	(100,0)
RS	28,2	29,9	6,0	1.287	1.320	2,6	36,3	39,5	8,8
CENTER-SOUTH	43,8	45,1	3,0	1.381	1.206	(12,7)	60,5	54,4	(10,1)
BRAZIL	43,8	45,1	3,0	1.381	1.206	(12,7)	60,5	54,4	(10,1)

Source: Conab - Suvey: Sep/2013

RYE

Table 24
RYE 2013
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2012/2013 AND 2013/2014 CROPS

REGION/STATE	AREA (In thousand ha)			PRODUCTIVITY (In kg/ha)			PRODUCTION (In thousand t)		
	12/13 Crop (a)	13/14 Crop (b)	VAR. % (b/a)	12/13 Crop (c)	13/14 Crop (d)	VAR. % (d/c)	11/12 Crop (e)	12/13 Crop (f)	VAR. % (f/e)
SOUTH	2,3	2,4	4,3	1.609	1.750	8,8	3,7	4,2	13,5
PR	0,8	0,9	15,0	1.590	2.052	29,1	1,3	1,8	38,5
RS	1,5	1,5	-	1.570	1.570	-	2,4	2,4	-
CENTER-SOUTH	2,3	2,4	4,3	1.609	1.750	8,8	3,7	4,2	13,5
BRAZIL	2,3	2,4	4,3	1.609	1.750	8,8	3,7	4,2	13,5

Source: Conab - Suvey: Sep/2013

BARLEY

Table 25
BARLEY
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2012/2013 AND 2013/2014 CROPS

REGION/STATE	AREA (In thousand ha)			PRODUCTIVITY (In kg/ha)			PRODUCTION (In thousand t)		
	12/13 Crop (a)	13/14 Crop (b)	VAR. % (b/a)	12/13 Crop (c)	13/14 Crop (d)	VAR. % (d/c)	11/12 Crop (e)	12/13 Crop (f)	VAR. % (f/e)
SOUTH	102,8	93,3	(9,2)	2.794	2.801	0,3	287,2	261,3	(9,0)
PR	50,8	43,6	(14,1)	3.599	3.791	5,3	182,8	165,3	(9,6)
SC	5,7	2,1	(63,1)	3.000	3.000	-	17,1	6,3	(63,2)
RS	46,3	47,6	2,7	1.885	1.885	-	87,3	89,7	2,8
CENTER-SOUTH	102,8	93,3	(9,2)	2.794	2.801	0,3	287,2	261,3	(9,0)
BRAZIL	102,8	93,3	(9,2)	2.794	2.801	0,3	287,2	261,3	(9,0)

Source: Conab - Suvey: Sep/2013

WHEAT

The wheat planted area in the 2013/14 crop shall show an augmentation of 15.0% in relation to the earlier crop, reaching 2,178.8 thousand hectares, against 1,895.4 in the 2012/13 crops. The recovery of part of the area which ceased being cultivated over the last years has to do with the betterment of prices in place in the previous period, due to lower worldwide production and Brazilian production as well, which affected favorably the producers and lead to an increase in the area.

In Paraná, where the stiff competition weighs in for already established corn farmland of second crops, the wheat tillages for 2013 must hold an area of 976.0 thousand hectares, equal to an increment of 26.3% in relation to the previous crop, which had been the smallest planted area since the 1980's. Harvests have been performed in 2.9% of the area, and the remaining of the tillage/farming is found to be in the stages of vegetative development (37.6%), blooming (15.9%), fructification (28.3%) and maturation (15.3%). Productivity has been downgraded for 2,078 kg/ha because of the losses due to frosts. The price hikes received by producers at the sales of 2012 crops, owing to lesser worldwide productions and the Brazilian production, was the main motive which lead the producers to recover part of the area that ceased being cultivated over the last crops.

The wheat crops in this state were characterized by periods of drought in the wheat tillage installations/farmland and by excessive rain between the second fortnight of June and the first week of July. The accumulation was around 500 mm. This period of rain enabled the occurrence of fungal diseases (foliage and corn-cobs, such as *Pyricularia grisea* and *gibberella*) and the hardening the operations against their control. On 24th and 25th of July, there was severe frost affecting practically all of the state of Paraná. Intense cold also caused damage to pastures, inclusively the winter ones, and damage in some areas of winter tillage planted beforehand (outside of the zone framing). Frosts jeopardized, at the time, 26.0% of the productivity in relation to the earlier survey/inventory. Such losses were focused on the north and west regions of the state, since the planted wheat in the south and east regions were at a vegetative state/condition, the state in which the plant is not liable to the damages caused by frosts.

The materials harvested in the north region have been turning out as low quality ones. Approximately 68.4% of the total harvested show PH's (hectoliter weights) below 70, being considered out of the standard, 16.6% show PH's between 72 and 75, and, 15.0% show Ph's greater or equal to 78. This low quality is due mainly to the occurrence of diseases (*Pyricularia grisea* and *gibberella*) which happened during the period of excessive rain in June. Few areas which were affected by the July frosts were actually harvested, wherein it was not possible to measure the effects of the frosts on quality.

During this assessment a new cold weather affected Paraná, causing fierce frosts and an average intensity in the mid-south and southwestern regions and low intensity in the west regions and in some localities in the north region of the state. The damages were strengthened in the winter tillages, also affecting part of the barley, new-sprouting of pastures and the quality of corn still not harvested upon the second crop. This frost blight reached a wider scope than the one in July, affecting areas which had not been affected by the previous one. Some planted areas with beans – first crop (2013/14) – were also harmed, something which will demand new planting. All these additional damages will be quantified in the next inventory/survey of farmland/fields.

In Rio Grande do Sul, the planted area shall reach 1,030.2 thousand hectares, representing an increment of 5.5% as contrasted with what happened in the previous year; on the basis of reasonable prices reached in the past season, currently incentivized by a local strict supply and demand set-up and by the possibility of production problems with main international suppliers. Moreover, the supply of more disease-resistant cultivars and those with greater productive potentials contribute to the fact that producers may experiment on this cereal in the next 2013 crop.

The harvests were sown, mostly, within the timing recommended by the research, making use of a technological package widely held in great regard, either in its sowing techniques, or in quantity and quality of inputs, owing to the perspective that the product's price shall keep on at the activity's profitable level. The increase of seed densities of the majority of the varieties is a constant reality, which drives outright toward a hike of productivity. Wheat tillage has an ordinary development up until the time of the survey/inventory, which leads to believe that there will be reasonable productivity and product quality, taking into account that climate factors continue satisfactorily. The frosts which happened along the second fortnight of July did not cause damages, since the development phases at the time of the event were not liable to damages from low temperatures. The difficulties in defining the wheat-farming productivity is justified because determinant factors of production (climatic ones and diseases) remain active up to the final of the harvests. With the data ascertained up to the moment, it is feasible to estimate productivity at 2,430 kg/ha. The prevalent stages are variables, according to the state's region.

In Mato Grosso do Sul, the planted area has undergone a reduction at around 43.3% in relation to the previous crop. In terms of productivity, there will be a significant downgrade, heeding that the frost in place in the months of July and August, wherein the broader part of this tillage was at a highly vulnerable stage to frosting blight. Losses already reach 43.8% in relation to the past crop, winding up at the moment, with productivity of 900 kg/ha. This climatic adversity occurred in all producer states, associated with a decrease of planted areas, surely will lead to a greater pressure on the price paid by producers, as well as to a hike in imports so as to satisfy the domestic demand for this product.

Wheat planting in Minas Gerais has reached a record high of 34.3 thousand hectares, superseding the previous crop at 59.5%, after the identification of new cultivated areas in the several producer regions of the state, wherein the expansion was motivated by reasonable outcomes achieved over the last crop, by the product market prices and also by its entailing a reasonable alternative for good usage of the soil in the winter period, owing to the low temperatures going on at that time of the year; most of the times limiting for planting of other tillages or forms of farming. It was observed, yet, that irrigated wheat planting lost the spot for beans and vegetable tillages and that the significant hike took place, in fact, in the planting of dry wheat farming, primarily in the central and South regions of this state, and, that this farming system is already accountable, in current crops, for more than 70% of the implemented tillages of the state. By and large, the planting period of the wheat tillages has been put off due to the occurrence of a delay in the summer crops harvesting.

With respect to irrigated farming, the dry climate, deriving from the dearth of rain since mid-April, has partaken for better health and for a stronger probability of grains harvests of good quality, and so plantations have been developing adequately and the first crops have been confirming revenues at the same standards achieved in the previous crops, approximately 5,100 to 5,700 kg/ha. It is visible that the harvest of irrigated areas is still in the initial phase, likely to expand up to October.

However, in the dry farming areas, the farming conditions vary greatly because of droughts. The harvests begun in June must be completed in September, but losses have already been experienced in several plantations, notably, in those tardily planted; some do not even present feasible harvests in the offing, having been put into use as fodder for plantations of summer crops. In the areas harvested, the revenues have varied significantly from region to region, from farming to farming, from 600 to 3,900 kg/ha.

Based on available information, a drop of 15.2% is already foreseen for the state's average productivity, estimated at 3,184 kg/ha, but yet, a production hike is expected at 35.3%, which must be around 109.2 thousand tons. Farming plantations are at a stage of grains-growing (50.6%) and maturation (22.7%). The remainder of the plantations (26.6%)

have already been harvested.

The national wheat production for the 2013/14 period shall reach 5,108.1 thousand tons, representing an increment of 16.6% in relation to the past crop, the fruit of a 15.0% increase of planted area.

Demand and Supply

The 2013/14 crop plantations estimation shows an area growth at 15.0% and productions at the amount of 4,952.2 thousand tons, 13.1% greater, wherein 50.5% is for Rio Grande do Sul, 39.6% for Paraná and the remainder for the other producer states. Due to two instances of consecutive frosts, a loss beyond 1.0 million tons is estimated, comparatively to the initial predictions.

As a reference of domestic supplies, in the crop year which ended last July 31st, the imports were at 7.01 million tons making use of divisions of US\$ 2.2 billion whereas the exports of 1.68 million tons yielded US\$ 498.6 million to the country, a value close to half a billion dollars.

For the 2013/14 period, there is a prediction of the need of imports at 6.6 million tons, 5.8% lower than in the previous year. Because of quality issues with wheat from Paraná, this entry volume might be a little higher. Concerning exports, there is an estimation of a retraction of 600 thousand tons, which shall be contingent on the quality of crops from Rio Grande do Sul (gauchos' crops), which so far presents itself with sound development and (exports) shall hinge on pricing conditions in the domestic and external markets along the first semester of 2014.

There is anticipation, still, that industrial grindings might be enhanced up to 10.4 million tons and the seeds consumptions up to 327 thousand tons, owing to the increase in cultivated areas. Thus, the grain wheat demands in the country may be elevated up to 10.7 million tons.

It has been verified that the national supplies will be highly arranged with extremely low-level passing stocks/storage, whereas they should be equivalent to a month's consumption.

Table 26
WHEAT 2013
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2012/2013 AND 2013/2014 CROPS

REGION/STATE	AREA (In thousand ha)			PRODUCTIVITY (In kg/ha)			PRODUCTION (In thousand t)		
	12/13 Crop	13/14 Crop	VAR. %	12/13 Crop	13/14 Crop	VAR. %	12/13 Crop	13/14 Crop	VAR. %
	(a)	(b)	(b/a)	(c)	(d)	(d/c)	(e)	(f)	(f/e)
MID-WEST	24,8	17,6	(29,0)	2.750	3.386	23,1	68,2	59,6	(12,6)
MS	15,0	8,5	(43,3)	1.600	900	(43,8)	24,0	7,7	(67,9)
GO	9,0	7,3	(18,9)	4.400	5.390	22,5	39,6	39,3	(0,8)
DF	0,8	1,8	125,0	5.700	7.000	22,8	4,6	12,6	173,9
SOUTHEAST	53,5	86,2	61,1	3.036	2.891	(4,8)	162,4	249,2	53,4
MG	21,5	34,3	59,5	3.753	3.184	(15,2)	80,7	109,2	35,3
SP	32,0	51,9	62,1	2.553	2.698	5,7	81,7	140,0	71,4
SOUTH	1.817,1	2.076,1	14,3	2.283	2.237	(2,0)	4.148,9	4.643,4	11,9
PR	773,8	976,9	26,3	2.730	2.011	(26,3)	2.112,5	1.964,5	(7,0)
SC	67,1	69,0	2,9	2.110	2.543	20,5	141,6	175,5	23,9
RS	976,2	1.030,2	5,5	1.941	2.430	25,2	1.894,8	2.503,4	32,1
CENTER-SOUTH	1.895,4	2.179,9	15,0	2.311	2.272	(1,7)	4.379,5	4.952,2	13,1
BRAZIL	1.895,4	2.179,9	15,0	2.311	2.272	(1,7)	4.379,5	4.952,2	13,1

Source: Conab - Survey: Sep/2013

TRITICALE

Table 27
TRITICALE 2013
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2012/2013 AND 2013/2014 CROPS

REGION/STATE	AREA (In thousand ha)			PRODUCTIVITY (In kg/ha)			PRODUCTION (In thousand t)		
	12/13 Crop	13/14 Crop	VAR. %	12/13 Crop	13/14 Crop	VAR. %	12/13 Crop	13/14 Crop	VAR. %
	(a)	(b)	(b/a)	(c)	(d)	(d/c)	(e)	(f)	(f/e)
SOUTHEAST	20,0	20,0	-	2.565	2.510	(2,1)	51,3	50,2	(2,1)
SP	20,0	20,0	-	2.563	2.509	(2,1)	51,3	50,2	(2,1)
SOUTH	28,0	22,2	(20,7)	2.343	2.270	(3,1)	65,6	50,4	(23,2)
PR	22,4	16,3	(27,2)	2.391	2.298	(3,9)	53,6	37,5	(30,0)
SC	0,4	0,7	75,0	2.181	2.570	17,8	0,9	1,8	100,0
RS	5,2	5,2	-	2.140	2.140	-	11,1	11,1	-
CENTER-SOUTH	48,0	42,2	(12,1)	2.435	2.384	(2,1)	116,9	100,6	(13,9)
BRAZIL	48,0	42,2	(12,1)	2.435	2.384	(2,1)	116,9	100,6	(13,9)

Source: Conab - Suvey: Sep/2013

5. BALANCE OF SUPPLY AND DEMAND

Table 28
BRAZIL
GRAINS - SUPPLY AND DEMAND FIGURES

(In thousand t)

PRODUCTS	SEASON	INITIAL STOCK	PRODUCTION	IMPORTS	SUPPLY	CONSUMPTION	EXPORTS	END STOCK
COTTON FIBRE	2008/09	675,0	1.213,7	14,5	1.903,2	1.004,1	504,9	394,2
	2009/10	394,2	1.194,1	39,2	1.627,5	1.039,0	512,5	76,0
	2010/11	76,0	1.959,8	144,2	2.180,0	900,0	758,3	521,7
	2011/12	521,7	1.893,3	3,5	2.418,5	865,0	1.052,8	500,7
	2012/13	500,7	1.290,4	35,0	1.826,1	887,0	530,0	409,1
RICE	2008/09	2.033,7	12.602,5	908,0	15.544,2	12.118,3	894,4	2.531,5
	2009/10	2.531,5	11.660,9	1.044,8	15.237,2	12.152,5	627,4	2.457,3
	2010/11	2.457,3	13.613,1	825,4	16.895,8	12.236,7	2.089,6	2.569,5
	2011/12	2.569,5	11.599,5	1.068,0	15.237,0	11.656,5	1.455,2	2.125,3
	2012/13	2.125,3	11.746,6	1.000,0	14.871,9	12.000,0	900,0	1.971,9
EDIBLE BEAN	2008/09	230,0	3.502,7	110,0	3.842,7	3.500,0	25,0	317,7
	2009/10	317,7	3.322,5	181,2	3.821,4	3.450,0	4,5	366,9
	2010/11	366,9	3.732,8	207,1	4.306,8	3.600,0	20,4	686,4
	2011/12	686,4	2.918,4	312,3	3.917,1	3.500,0	43,3	373,8
	2012/13	373,8	2.832,4	400,0	3.606,2	3.400,0	50,0	156,2
CORN	2008/09	7.675,5	51.003,8	1.181,6	59.860,9	45.414,1	7.333,9	7.112,9
	2009/10	7.112,9	56.018,1	391,9	63.522,9	46.967,6	10.966,1	5.589,2
	2010/11	5.589,2	57.406,9	764,4	63.760,5	48.485,5	9.311,9	5.963,1
	2011/12	5.963,1	72.979,5	774,0	79.716,6	51.533,4	22.313,7	5.869,5
	2012/13	5.869,5	81.344,4	500,0	87.713,9	52.053,9	17.500,0	18.160,0
SOYBEAN	2008/09	4.540,1	57.161,6	99,4	61.801,1	32.564,0	28.562,7	674,4
	2009/10	674,4	68.688,2	117,8	69.480,4	37.800,0	29.073,2	2.607,2
	2010/11	2.607,2	75.324,3	41,0	77.972,5	41.970,0	32.986,0	3.016,5
	2011/12	3.016,5	66.383,0	266,5	69.666,0	36.754,0	32.468,0	444,0
	2012/13	444,0	81.456,7	150,0	82.050,7	42.401,4	38.810,0	839,3
SOYBEAN MEAL	2008/09	3.053,0	23.187,8	43,4	26.284,2	12.000,0	12.253,0	2.031,2
	2009/10	2.031,2	26.719,0	39,5	28.789,7	12.300,0	13.668,6	2.821,1
	2010/11	2.821,1	29.298,5	24,8	32.144,4	13.400,0	14.355,0	4.389,4
	2011/12	4.389,4	26.026,0	5,0	30.420,4	13.950,0	14.289,0	2.181,4
	2012/13	2.181,4	29.739,5	6,0	31.926,9	14.325,0	14.925,0	2.676,9
SOYBEAN OIL	2008/09	246,2	5.872,2	27,4	6.145,8	4.250,0	1.593,6	302,2
	2009/10	302,2	6.766,5	16,2	7.084,9	4.980,0	1.563,8	541,1
	2010/11	541,1	7.419,8	0,1	7.961,0	5.400,0	1.741,0	820,0
	2011/12	820,0	6.591,0	1,0	7.412,0	5.495,0	1.757,1	159,9
	2012/13	159,9	7.531,4	3,0	7.694,3	5.640,0	1.100,0	954,3
WHEAT	2008/09	895,7	5.884,0	5.676,4	12.456,1	9.398,0	351,4	2.706,7
	2009/10	2.706,7	5.026,2	5.922,2	13.655,1	9.614,2	1.170,4	2.870,5
	2010/11	2.870,5	5.881,6	5.771,9	14.524,0	10.242,0	2.515,9	1.766,1
	2011/12	1.766,1	5.788,6	6.011,8	13.566,5	10.444,9	1.901,0	1.220,6
	2012/13	1.220,6	4.379,5	7.010,2	12.610,3	10.584,3	1.683,8	342,2
	2013/14	342,2	4.952,2	6.600,0	11.894,4	10.777,0	600,0	517,4

Source: Conab - Suvey: Sep/2013

ENDING STOCKS:

- Cotton Fiber, Beans and Soybeans: December, 31 - Rice: February, 28 - Corn: January, 31 - Wheat: July, 31

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