National Company of Food Supply

Brazilian Crop Assessment

Grain

CROP 2012/2013
Ninth Assessment
Jun/2013

Conab

Ministry of Agriculture, Livestock and Supply

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INTRODUCTION

The Ministry of Agriculture, Livestock, and Supply-MAPA systematically carries out assessments of the agriculture crops, through the National Food Supply Company – Conab, to quantify and follow up the Brazilian yield. The ninth field survey undertaken during the period of May 20 – 24, 2013, involved 60 technicians from Conab – Headquarters and Regional Superintendences, who carried out interviews and applied questionnaires to agronomists and technicians from Cooperatives, State Agriculture Secretariats, Technical Assistance and Rural Extension (public and private), Financing agents and Input Resellers.

We acknowledge the indispensable participation and collaboration of professionals from the Brazilian Institute of Geography and Statistics (IBGE) and the aforementioned institutions and all technicians from Conab who directly or indirectly participated in this work.

In attention to the demand from crop information users, assessments have been undertaken in close collaboration with IBGE, agency of the Ministry of Planning, Budget, and Management, consolidating the harmonization process of official estimates for the major Brazilian crops.

In this process, both institutions have added up their resources and efforts, aiming to ensure more accurate and reliable information on the follow up of crops in the Brazilian State outreach, progressively coordinating methods, sources, assessment period, dissemination date and time. To that extent, one counted with the invaluable and permanent contribution from the Federal, State, and Municipal agencies, and the remaining agricultural information generating institutions.

2. PLANTED AREA ESTIMATE (53.20 million hectares)

The current assessment estimates planting of 53.20 million hectares with the major crops, 4.6% or 2.32 million hectares larger than the planted area in previous crop that amounted to 50.89 million hectares (Table 1). Tables encompass practically defined information for farmed areas with all crops in the Center-South Region, except for edible beans third crop. In the country's Northeast region, mostly in the Northeast portion of Bahia, in the Semi-arid regions of Rio Grande do Norte, Paraiba, Pernambuco and Alagoas, planting is completed. Rainfall in these regions has been irregular, confirming weather forecasts that show below average rainfall for the period for this year.

Among major summer crops, those of soybeans and corn second crop present growth with highlights for soybeans with addition of 2.67 million (10.7%), estimated in 27.72 million hectares, followed by corn second crop with additional 1.33 million hectares (17.5%), and it is estimated in 8.95 million hectares. Increase is also presented in: peanuts first crop (5.0%), peanuts second crop (18.6%), sorghum (6.3%), oats (10.3%), canola (3.3%), barley (16.3%), and triticale (4.2%). All other crops present reduction in farmed areas. Cotton had the largest reduction with 35.8%, followed by castor beans (31.8%), wheat (12.5%), edible beans first crop (9.5%), corn first crop (9.2%), edible beans second crop (8.8%), sunflower (7.59%), and rice (1.3%).

.

Table 1

BRAZIL

PLANTED AREA ESTIMATE

2011/2012 AND 2012/2013 CROPS

(In 1000 ha)

PRODUCTS	HARVEST			VARIATION	
	11/12	12/13		Percentage	Absolute
	(a)	May/2013 (b)	Jun/2013 (c)	(c/a)	(c-a)
COTTON	1.393,4	886,7	894,9	(35,8)	(498,5)
TOTAL PEANUT	93,9	100,6	100,2	6,7	6,3
PEANUT 1ST CROP	82,1	86,3	86,2	5,0	4,1
PEANUT 2ND CROP	11,8	14,3	14,0	18,6	2,2
RICE	2.426,7	2.389,7	2.396,0	(1,3)	(30,7)
TOTAL BEANS	3.262,1	2.952,7	3.026,9	(7,2)	(235,2)
BEANS 1ST CROP	1.241,4	1.122,6	1.122,9	(9,5)	(118,5)
BEANS 2ND CROP	1.394,6	1.275,4	1.271,7	(8,8)	(122,9)
BEANS 3RD CROP	626,1	554,7	632,3	1,0	6,3
SUNFLOWER	74,5	60,4	68,9	(7,5)	(5,6)
CASTOR BEAN	128,2	87,5	87,4	(31,8)	(40,8)
TOTAL CORN	15.178,1	15.686,2	15.817,4	4,2	639,3
CORN 1ST CROP	7.558,5	6.879,2	6.864,7	(9,2)	(693,8)
CORN 2ND CROP	7.619,6	8.807,0	8.952,7	17,5	1.333,1
SOYBEAN	25.042,2	27.715,2	27.715,5	10,7	2.673,3
SORGHUM	786,9	836,4	836,4	6,3	49,5
SUBTOTAL	48.386,0	50.715,4	50.943,6	5,3	2.557,7
OAT	153,0	168,7	168,7	10,3	15,7
CANOLA	42,4	43,8	43,8	3,3	1,4
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	2.261,0	(9,5)	(238,2)
BRAZIL	50.885,2	52.976,4	53.204,6	4,6	2.319,5

SOURCE: CONAB - Suvey: Jun/2013

3. YIELD ESTIMATE (184.30 million tons)

The estimated yield is of 184.30 million tons, 10.9% higher than in 2011/12, when it reached 166.17 million tons (Table 2). This outcome represents an increment of 18.13 million tons due, mostly to soybeans and corn second crop that present increase in yield of 22.4% and 11.5%, respectively.

Table 2

BRAZIL

GRAIN PRODUCTION ESTIMATE

2011/2012 AND 2012/2013 CROPS

(In 1000 t)

PRODUCTS	HARVEST			VARIATION	
	11/12	12/13		Percentage	Absolute
	(a)	May/2013 (b)	Jun/2013 (c)	(c/a)	(c-a)
SEED COTTON [1]	3.018,6	1.997,0	1.997,0	(33,8)	(1.021,6)
FIBER COTTON	1.877,3	1.260,7	1.260,6	(32,9)	(616,7)
TOTAL PEANUT	294,7	326,2	329,9	11,9	35,2
PEANUT 1ST CROP	274,6	300,0	306,1	11,5	31,5
PEANUT 2ND CROP	20,1	26,2	23,8	18,4	3,7
RICE	11.599,5	11.945,1	11.924,2	2,8	324,7
TOTAL BEANS	2.918,5	2.856,3	2.840,3	(2,7)	(78,2)
BEANS 1ST CROP	1.235,6	984,9	957,1	(22,5)	(278,5)
BEANS 2ND CROP	1.063,9	1.211,7	1.189,2	11,8	125,3
BEANS 3RD CROP	619,0	659,7	694,0	12,1	75,0
SUNFLOWER	116,4	99,9	110,4	(5,2)	(6,0)
CASTOR BEAN	24,9	24,7	16,7	(32,9)	(8,2)
TOTAL CORN	72.979,8	77.998,2	78.468,1	7,5	5.488,3
CORN 1ST CROP	33.867,1	34.810,5	34.845,6	2,9	978,5
CORN 2ND CROP	39.112,7	43.187,7	43.622,5	11,5	4.509,8
SOYBEAN	66.383,0	81.513,4	81.281,4	22,4	14.898,4
SORGHUM	2.221,9	2.259,9	2.127,6	(4,2)	(94,3)
SUBTOTAL	159.557,3	179.020,7	179.095,6	12,2	19.538,3
OAT	353,5	360,7	360,7	2,0	7,2
CANOL	52,0	60,5	60,5	16,3	8,5
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	4.300,4	4.379,5	(24,3)	(1.409,1)
TRITICALE	112,2	116,9	116,9	4,2	4,7
SUBTOTAL	6.614,9	5.129,4	5.208,5	(21,3)	(1.406,4)
BRAZIL [2]	166.172,2	184.150,1	184.304,1	10,9	18.131,9

SOURCE: CONAB - Suvey: Jun/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 (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	**1.795,9**	**13 (b)**	**4,1**	**2.760**	**2.926**	**6,0**	**4.956,0**	**5.470,3**	**10,4**
RR	33,0	34,5	4,5	3.982	4.000	0,5	131,4	138,0	5,0
RO	411,1	413,8	0,7	2.662	2.815	5,7	1.094,3	1.164,9	6,5
AC	70,2	71,6	2,0	1.808	1.920	6,2	126,9	137,5	8,4
AM	26,8	24,5	(8,6)	2.026	1.980	(2,3)	54,3	48,5	(10,7)
AP	6,1	6,9	13,1	918	986	7,4	5,6	6,8	21,4
PA	507,0	500,1	(1,4)	2.313	2.700	16,7	1.172,7	1.350,2	15,1
TO	741,7	818,1	10,3	3.197	3.208	0,3	2.370,8	2.624,4	10,7
NORTHEAST	**7.331,7**	**7.242,1**	**(1,2)**	**1.700**	**1.640**	**(3,5)**	**12.466,7**	**11.875,9**	**(4,7)**
MA	1.533,6	1.638,1	6,8	1.906	2.206	15,7	2.922,5	3.613,6	23,6
PI	1.173,9	1.264,1	7,7	1.947	1.267	(34,9)	2.286,0	1.601,8	(29,9)
CE	1.014,6	720,3	(29,0)	169	329	94,7	171,9	237,0	37,9
RN	17,3	19,1	10,4	474	435	(8,2)	8,2	8,3	1,2
PB	79,4	123,3	55,3	98	193	96,9	7,8	23,8	205,1
PE	442,1	304,1	(31,2)	165	295	78,8	73,1	89,8	22,8
AL	69,0	86,0	24,6	813	779	(4,2)	56,1	67,0	19,4
SE	243,0	245,7	1,1	2.510	2.533	0,9	609,9	622,3	2,0
BA	2.758,8	2.841,4	3,0	2.295	1.975	(13,9)	6.331,2	5.612,3	(11,4)
MID-WEST	**18.828,9**	**20.608,3**	**9,5**	**3.780**	**3.653**	**(3,4)**	**71.170,7**	**75.286,3**	**5,8**
MT	10.969,1	12.294,9	12,1	3.679	3.615	(1,7)	40.353,0	44.440,2	10,1
MS	3.256,3	3.601,6	10,6	3.566	3.580	0,4	11.610,4	12.895,0	11,1
GO	4.483,2	4.583,8	2,2	4.148	3.767	(9,2)	18.597,8	17.268,3	(7,1)
DF	120,3	128,0	6,4	5.067	5.334	5,3	609,5	682,8	12,0
SOUTHEAST	**4.878,9**	**4.959,9**	**1,7**	**4.051**	**4.005**	**(1,1)**	**19.764,7**	**19.865,8**	**0,5**
MG	2.979,7	3.033,5	1,8	4.098	3.925	(4,2)	12.209,8	11.907,4	(2,5)
ES	50,8	45,1	(11,2)	1.848	1.792	(3,0)	93,9	80,8	(14,0)
RJ	11,4	10,2	(10,5)	2.096	2.000	(4,6)	23,9	20,4	(14,6)
SP	1.837,0	1.871,1	1,9	4.049	4.199	3,7	7.437,1	7.857,2	5,6
SOUTH	**18.049,8**	**18.488,7**	**2,4**	**3.203**	**3.884**	**21,3**	**57.814,1**	**71.805,8**	**24,2**
PR	9.169,4	9.209,4	0,4	3.430	4.046	18,0	31.447,7	37.265,5	18,5
SC	1.303,2	1.306,1	0,2	4.203	4.812	14,5	5.477,6	6.284,6	14,7
RS	7.577,2	7.973,2	5,2	2.757	3.544	28,5	20.888,8	28.255,7	35,3
NORTH/NORTHEAST	**9.127,6**	**9.111,6**	**(0,2)**	**1.909**	**1.904**	**(0,3)**	**17.422,7**	**17.346,2**	**(0,4)**
CENTER-SOUTH	**41.757,6**	**44.056,9**	**5,5**	**3.562**	**3.790**	**6,4**	**148.749,5**	**166.957,9**	**12,2**
BRAZIL	**50.885,2**	**53.168,5**	**4,5**	**3.266**	**3.466**	**6,1**	**166.172,2**	**184.304,1**	**10,9**

SOURCE: CONAB - Suvey: Jun/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

Conab carried out in June the ninth assessment of the 2012/13 crop encompassing all producing regions of the country. Changes were not significant compared to previous survey, thus the planted area was defined in 894.9 thousand hectares, that is, 35.8% smaller than farmed area in the previous crop.

Reduction in planted area, consequently in fiber yield in majority of producing states, had fall in prices both in the domestic and foreign markets, high production costs in addition to corn and soybean attractive prices as main factors.

Cotton first crop in Mato Grosso is about to be harvested and it is predicted to begin in the second half of June. In that state, less rainfall an high luminosity have favored crop full development.

In western portion of Bahia, the survey points to average productivity higher in 12.6% compared to past season, in spite of intense Indian summers recorded during crops development, in addition to pest and diseases proliferation.

Harvest has already started in Minas Gerais with intensification predicted for the second half of June and it shall last until August. Given the adverse weather conditions,

markedly in the North and Northwest portions in the state, along with pests and diseases attacks, it is already predicted a setback in productivity of 5.0%.

In Goias, a major producer, crops are in blossoming and fructification stages, and in spite of weather alternances (Indian summer and continued rainfall), there is expectation of increased productivity.

Nationally, it is estimated that cotton seeds average productivity rate will reach 3,640 kg/ha compared to 3,513 kg/ha gotten in previous crop, representing average increase of 3.6%. In addition to the weather factor, the technological package applied by farmers across several regions in the country contributed for productivity increase, namely in the states of Goias and Mato Grosso do Sul whose estimated productivity average is 4,020 and 4,000 kg/ha, respectively.

Concerning the Brazilian cotton fiber yield, the reduction shall be around 32.9%. Yield amounted to 1,877.3 thousand tons in the previous crop. National cotton fiber yield for the current crop shall reach 1,260.6 thousand tons, representing a reduction of 616.7 thousand tons in absolute value.

Supply and Demand

The yield figure gotten in this crop assessment, 1,260.6 thousand tons of cotton fiber, is just the same to the figure disseminated in the previous month.

Exports predictions was changed also, reduced to 595 thousand tons, therefore, less than the 612 thousand tons predicted in the previous survey. This reduction, which was already expected, derives from weaker performance of cotton fiber exports until now. It must be highlighted that part of the flex contracts (contracts that may be traded both in the domestic and foreign markets) recorded in the Brazilian Commodity Exchange – BBM is been traded in the domestic market.

Imports parity figures show that it more profitable for the industry to acquire the produce in the domestic market. Thus, imports expectations have been reduced that now is predicted in 163 thousand tons o fiber against 216 thousand tons, which was estimated in April 2013.

Considering the current figure, the new setup of the supply picture for 2013 is now as follows: total supply of produce (initial stock + yield + imports) for the season that starts now is set in 1,908.3 thousand tons, while total demand (domestic consumption + exports) was evaluated in 1,482 thousand tons.

As final result, there is a prediction of carry over stock at the end of current season to be 426.3 thousand tons of fiber, which is enough to supply the domestic industrial demand plus exports during a period of approximately 3.5 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 (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**	**n/2013**	**(20,0)**	**2.900**	**3.150,0**	**8,6**	**21,8**	**18,9**	**(13,3)**
TO	7,5	6,0	(20,0)	2.900	3.150,0	8,6	21,8	18,9	(13,3)
NORTHEAST	**460,4**	**301,6**	**(34,5)**	**3.016**	**3.345,0**	**10,9**	**1.388,8**	**1.008,8**	**(27,4)**
MA	18,6	16,7	(10,0)	3.975	3.750,0	(5,7)	73,9	62,6	(15,3)
PI	21,3	11,4	(46,6)	3.480	3.300,0	(5,2)	74,1	37,6	(49,3)
CE	1,3	1,0	(22,6)	170	310,0	82,4	0,2	0,3	50,0
RN	0,5	-	(100,0)	520	-	(100,0)	0,3	-	(100,0)
PB	0,2	0,2	-	106	300,0	183,0	-	0,1	-
PE	0,8	0,8	-	195	500,0	156,4	0,2	0,4	100,0
AL	0,2	0,1	(50,0)	300	320,0	6,7	0,1	-	(100,0)
BA	417,5	271,4	(35,0)	2.970	3.345,0	12,6	1.240,0	907,8	(26,8)
MID-WEST	**877,3**	**560,9**	**(36,1)**	**3.776**	**3.815,0**	**1,0**	**3.312,5**	**2.139,9**	**(35,4)**
MT	725,7	475,3	(34,5)	3.795	3.780,0	(0,4)	2.754,0	1.796,6	(34,8)
MS	62,0	39,5	(36,3)	3.545	4.000,0	12,8	219,8	158,0	(28,1)
GO	89,6	46,1	(48,5)	3.780	4.020,0	6,3	338,7	185,3	(45,3)
SOUTHEAST	**46,7**	**26,3**	**(43,7)**	**3.651**	**3.413,0**	**(6,5)**	**170,6**	**89,8**	**(47,4)**
MG	29,6	20,0	(32,4)	3.600	3.420,0	(5,0)	106,6	68,4	(35,8)
SP	17,1	6,3	(63,0)	3.740	3.390,0	(9,4)	64,0	21,4	(66,6)
SOUTH	**1,5**	**0,1**	**(93,3)**	**1.439**	**2.375,0**	**65,0**	**2,2**	**0,2**	**(90,9)**
PR	1,5	0,1	(92,6)	1.439	2.375,0	65,0	2,2	0,2	(90,9)
NORTH/NORTHEAST	**467,9**	**307,6**	**(34,3)**	**3.015**	**3.341,0**	**10,8**	**1.410,6**	**1.027,7**	**(27,1)**
CENTER-SOUTH	**925,5**	**587,3**	**(36,5)**	**3.766**	**3.797,0**	**0,8**	**3.485,3**	**2.229,9**	**(36,0)**
BRAZIL	**1.393,4**	**894,9**	**(35,8)**	**3.513**	**3.640,0**	**3,6**	**4.895,9**	**3.257,6**	**(33,5)**

SOURCE: CONAB - Suvey: Jun/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 (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**	**n/2013**	**(20,0)**	**1.769**	**1.953,0**	**10,4**	**13,3**	**11,7**	**(12,0)**
TO	7,5	6,0	(20,0)	1.769	1.953,0	10,4	13,3	11,7	(12,0)
NORTHEAST	**460,4**	**301,6**	**(34,5)**	**1.840**	**2.041,0**	**10,9**	**847,2**	**615,4**	**(27,4)**
MA	18,6	16,7	(10,0)	2.425	2.288,0	(5,6)	45,1	38,2	(15,3)
PI	21,3	11,4	(46,6)	2.123	2.017,0	(5,2)	45,2	22,9	(49,3)
CE	1,3	1,0	(22,6)	111	202,0	82,0	0,1	0,2	100,0
RN	0,5	-	(100,0)	338	-	(100,0)	0,2	-	(100,0)
PB	0,2	0,2	-	69	195,0	182,6	-	0,1	-
PE	0,8	0,8	-	127	325,0	155,9	0,1	0,3	200,0
AL	0,2	0,1	(50,0)	195	208,0	6,7	0,1	-	(100,0)
BA	417,5	271,4	(35,0)	1.842	2.040,0	12,6	756,4	553,7	(26,8)
MID-WEST	**877,3**	**560,9**	**(36,1)**	**2.349**	**2.345,0**	**-0,2**	**2.053,7**	**1.315,1**	**(35,9)**
MT	725,7	475,3	(34,5)	2.959	2.885,0	(2,5)	1.707,5	1.104,9	(35,3)
MS	62,0	39,5	(36,3)	2.166	2.462,0	13,7	135,2	97,3	(28,1)
GO	89,6	46,1	(48,5)	2.444	2.454,0	0,4	219,0	113,2	(48,3)
SOUTHEAST	**46,7**	**26,3**	**(43,7)**	**2.225**	**2.076,0**	**(6,7)**	**104,0**	**54,7**	**(47,4)**
MG	29,6	20,0	(32,4)	2.189	2.079,0	(5,0)	64,8	41,6	(35,8)
SP	17,1	6,3	(63,0)	2.289	2.075,0	(9,3)	39,2	13,1	(66,6)
SOUTH	**1,5**	**0,1**	**(93,3)**	**892**	**1.473,0**	**65,1**	**1,4**	**0,1**	**(92,9)**
PR	1,5	0,1	(92,6)	892	1.473,0	65,1	1,4	0,1	(92,9)
NORTH/NORTHEAST	**467,9**	**307,6**	**(34,3)**	**1.839**	**2.039,0**	**10,9**	**860,5**	**627,1**	**(27,1)**
CENTER-SOUTH	**925,5**	**587,3**	**(36,5)**	**2.332**	**2.333,0**	**-**	**2.158,1**	**1.369,9**	**(36,5)**
BRAZIL	**1.393,4**	**894,9**	**(35,8)**	**2.166**	**2.232,0**	**3,0**	**3.018,6**	**1.997,0**	**(33,8)**

SOURCE: CONAB - Suvey: Jun/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**	**n/2013**	**(20,0)**	**1.131**	**1.197,0**	**5,8**	**8,5**	**7,2**	**(15,3)**
TO	7,5	6,0	(20,0)	1.131	1.197,0	5,8	8,5	7,2	(15,3)
NORTHEAST	**460,4**	**301,6**	**(34,5)**	**1.176**	**1.304,0**	**10,9**	**541,6**	**393,4**	**(27,4)**
MA	18,6	16,7	(10,0)	1.550	1.469,0	(5,6)	28,8	24,4	(15,3)
PI	21,3	11,4	(46,6)	1.357	1.296,0	(4,5)	28,9	14,7	(49,1)
CE	1,3	1,0	(22,6)	60	109,0	81,7	0,1	0,1	-
RN	0,5	-	(100,0)	182	-	(100,0)	0,1	-	(100,0)
PB	0,2	0,2	-	37	105,0	183,8	-	0,1	-
PE	0,8	0,8	-	68	175,0	157,4	0,1	0,1	-
AL	0,2	0,1	(50,0)	103	112,0	8,7	0,1	-	(100,0)
BA	417,5	271,4	(35,0)	1.581	1.748,0	10,6	660,0	474,3	(28,1)
MID-WEST	**877,3**	**560,9**	**(36,1)**	**1.436**	**1.471,0**	**2,4**	**1.259,8**	**824,8**	**(34,5)**
MT	725,7	475,3	(34,5)	1.442	1.455,0	0,9	1.046,5	691,7	(33,9)
MS	62,0	39,5	(36,3)	1.365	1.540,0	12,8	84,6	60,8	(28,1)
GO	89,6	46,1	(48,5)	1.458	1.568,0	7,5	128,7	72,3	(43,8)
SOUTHEAST	**46,7**	**26,3**	**(43,7)**	**1.426**	**1.355,0**	**(5,0)**	**66,6**	**35,7**	**(47,3)**
MG	29,6	20,0	(32,4)	1.411	1.341,0	(5,0)	41,8	26,8	(35,9)
SP	17,1	6,3	(63,0)	1.454	1.415,0	(2,7)	24,8	8,9	(64,1)
SOUTH	**1,5**	**0,1**	**(93,3)**	**1.347**	**2.225,0**	**65,2**	**2,0**	**0,2**	**(90,0)**
PR	1,5	0,1	(92,6)	1.347	2.225,0	65,2	2,0	0,2	(90,0)
NORTH/NORTHEAST	**467,9**	**307,6**	**(34,3)**	**1.176**	**1.302,0**	**10,7**	**550,1**	**400,6**	**(27,2)**
CENTER-SOUTH	**925,5**	**587,3**	**(36,5)**	**1.434**	**1.464,0**	**2,1**	**1.327,2**	**860,0**	**(35,2)**
BRAZIL	**1.393,4**	**894,9**	**(35,8)**	**1.347**	**1.405,0**	**4,3**	**1.877,3**	**1.260,6**	**(32,8)**

SOURCE: CONAB - Suvey: Jun/2013

PEANUTS

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**	**80,4**	**6,3**	**3.475**	**3.657,0**	**5,2**	**262,7**	**294,1**	**12,0**
MG	2,6	2,8	7,7	3.462	3.269,0	(5,6)	9,0	9,2	2,2
SP	73,0	77,6	6,3	3.475	3.671,0	5,6	253,7	284,9	12,3
SOUTH	**6,5**	**5,8**	**(10,8)**	**1.830**	**2.084,0**	**13,9**	**11,9**	**12,0**	**0,8**
PR	2,8	2,4	(14,6)	2.300	2.850,0	23,9	6,4	6,8	6,3
RS	3,7	3,4	(8,1)	1.475	1.544,0	4,7	5,5	5,2	(5,5)
CENTER-SOUTH	**82,1**	**86,2**	**5,0**	**3.344**	**3.551,0**	**6,2**	**274,6**	**306,1**	**11,5**
BRAZIL	**82,1**	**86,2**	**5,0**	**3.344**	**3.551,0**	**6,2**	**274,6**	**306,1**	**11,5**

SOURCE: CONAB - Suvey: Jun/2013

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**	**3.969,0**	**6,1**	**9,4**	**6,0**	**(36,2)**
TO	2,5	1,5	(40,0)	3.741	3.969,0	6,1	9,4	6,0	(36,2)
NORTHEAST	**6,1**	**9,4**	**54,1**	**328**	**981,0**	**199,1**	**2,0**	**9,2**	**360,0**
CE	0,7	0,4	(37,1)	278	424,0	52,5	0,2	0,2	-
PB	0,3	0,4	33,3	649	580,0	(10,6)	0,2	0,2	-
SE	1,3	1,1	(15,4)	1.238	1.000,0	(19,2)	1,6	1,1	(31,3)
BA	3,8	7,5	97,4	-	1.029,0	-	-	7,7	-
MID-WEST	**0,3**	**0,2**	**(33,3)**	**200**	**1.633,0**	**716,5**	**0,1**	**0,3**	**200,0**
MT	0,3	0,2	(33,3)	200	1.633,0	716,5	0,1	0,3	200,0
SOUTHEAST	**78,5**	**83,3**	**6,1**	**3.455**	**3.629,0**	**5,0**	**271,3**	**302,4**	**11,5**
MG	2,6	2,8	7,7	3.462	3.269,0	(5,6)	9,0	9,2	2,2
SP	75,9	80,5	6,1	3.455	3.641,9	5,4	262,3	293,2	11,8
SOUTH	**6,5**	**5,8**	**(10,8)**	**1.830**	**2.084,0**	**13,9**	**11,9**	**12,0**	**0,8**
PR	2,8	2,4	(14,3)	2.300	2.850,0	23,9	6,4	6,8	6,3
RS	3,7	3,4	(8,1)	1.475	1.544,0	4,7	5,5	5,2	(5,5)
NORTH/NORTHEAST	**8,6**	**10,9**	**26,7**	**1.320**	**1.392,0**	**5,5**	**11,4**	**15,2**	**33,3**
CENTER-SOUTH	**85,3**	**89,3**	**4,7**	**3.320**	**3.525,0**	**6,2**	**283,3**	**314,7**	**11,1**
BRAZIL	**93,9**	**100,2**	**6,7**	**3.137**	**3.293,0**	**5,0**	**294,7**	**329,9**	**11,9**

SOURCE: CONAB - Suvey: Jun/2013

RICE

Rice crop in Brazil is farmed in the irrigated and upland systems. The upland system, as in other crops like soybeans and corn, counts only on rainfall for its development and this system is used in majority of states. Upland rice crops have been reduced in crops after crops. Reasons are: competition with soybeans and corn, the impossibility of opening new areas and adverse weather problems in the Northeast Region. In the previous crop, irrigated rice farming area surpassed the upland farming.

Irrigated rice predominates in the South Region, in addition to the states of Tocantins and Maranhao. Among the systems, flooded irrigation with contour lines reaches 87%, and the remnant 13%, flooding occurs in plateaus (area with constant level) with seeds distributed after previous germination.

In this ninth assessment, rice farmed area is estimated in 2.40 million hectares, which represents a decrease of 1.3%, compared to past crop. Except for the states of Rio Grande do Sul, Sao Paulo, Sergipe, Piaui, Amapa, and Roraima, all other producing states had reduction in farmed area or remained with the same area of 2011/12 crop.

Brazil's largest producing state is Rio Grande do Sul with 1,066.6 thousand hectares, which represents 44.5% of national area, still responding for 66.5% of the Brazilian yield. Santa Catarina is second with 150.1 thousand hectares and 1,024.9 thousand tons of yielded rice, followed by Maranhao, which shall harvest 632.6 thousand tons of rice in 416.2 thousand hectares.

The crop in the state of Santa Catarina that had a major portion of the area sowed out of the recommended schedule suffered with cold weather, pest attacks and lack of irrigation water, which decreased productivity expectation in 4.9% and, consequently, its yield.

The estimated rice yield for the 2012/13 crop shall be 11.9 million tons, 2.8% larger than the harvest volume in the previous crop. The South Region shall produce 9.1 million tons, representing 76.6% of total estimated yield and the other states will yield 2.8 million tons yielded in the 2012/13 season.

In the Center-West Region, the upland rice harvest is completed with average productivity of 3,223 kg/ha. In the Northeast Region stands out the reduction of 55.2% in Bahia and 32.1% in average productivity in Piaui that are regions where upland rice farming predominates. This reduction reflects the Indian summers that took place in February and March. Rainfalls occurring after the Indian summers strengthened the rice crop, recovering some of its yielding, which in this season shall be 752 kg/ha and 795 kg/ha, in face of the 1,680 kg/ha and 1,171 kg/ha in past crop for the states of Bahia and Piaui, respectively.

Supply and Demand

According to data made available by Secex/MDIC, in April 2013, 114.4 thousand tons of rice were imported, while only 0.4 thousand tons were imported from markets outside. Until now, June 06, Secex/MDIC did not release data related to May 2013, therefore, April is the *proxy* used for this analysis. These figures show the maintenance of retrieved flow of the commodity acquired in the foreign market. In March 2012, these purchases were 94.8 thousand tons, while 3.0 thousand came from countries outside Mercosur. Concerning exports, these also had a significant increase, from 107.6 thousand tons in March/2013 to 77.2 thousand tons in April/2013. Concerning the consolidated international trade flow for 2012/2013 crop, there was a surplus of 387 thousand tons, while the exported amount is equal to 1,455.2 thousand tons and the imported amount equals to 1,068 thousand tons. In March and April 2013, the first months of analysis for the 2013/14 crop, a deficit of 22.4 thousand tons was seen.

According to available information, the final outcome of rice supply scenario for the 2011/12 crop remains unchanged. The prediction for the 2012/13 crop yield, nevertheless, it underwent reduction of 20.9 thousand tons, now estimated in 11,924.2 thousand tons. As consequence of this change, the carryover stock was affected slightly and it is estimated now in 1,406 thousand tons, to be confirmed in the next assessment of private stocks.

Rice prices in the international market are stable or with small falls in majority of markets. This phenomenon derives mainly from the interventionist policy in some countries where large public stocks of rice were set aiming, thus, at price regulation. There are expectations in the international market that these stocks will be released in the market and, consequently, will put down pressure in prices of rice.

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**	**298,3**	**(6,4)**	**2.972**	**3.558,0**	**19,7**	**947,3**	**1.061,3**	**12,0**
RR	19,8	20,0	1,0	5.354	5.452,0	1,8	106,0	109,0	2,8
RO	53,0	48,0	(9,4)	2.679	2.800,0	4,5	142,0	134,4	(5,4)
AC	13,8	13,2	(4,3)	1.377	1.420,0	3,1	19,0	18,7	(1,6)
AM	6,5	5,9	(9,0)	2.000	2.050,0	2,5	13,0	12,1	(6,9)
AP	2,4	2,7	12,5	1.089	1.112,0	2,1	2,6	3,0	15,4
PA	103,4	89,4	(13,5)	2.151	2.443,0	13,6	222,4	218,4	(1,8)
TO	119,9	119,1	(0,7)	3.689	4.750,0	28,8	442,3	565,7	27,9
NORTHEAST	**596,7**	**586,9**	**(1,6)**	**1.288**	**1.523,0**	**18,2**	**769,0**	**893,8**	**16,2**
MA	426,0	416,2	(2,3)	1.098	1.520,0	38,4	467,7	632,6	35,3
PI	117,4	125,1	6,6	1.171	795,0	(32,1)	137,5	99,5	(27,6)
CE	24,2	21,3	(11,9)	2.556	2.923,0	14,4	61,9	62,3	0,6
RN	0,8	0,7	(12,5)	2.956	2.520,0	(14,7)	2,4	1,8	(25,0)
PB	2,1	0,3	(85,7)	82	114,0	39,0	0,2	-	(100,0)
PE	2,5	2,5	-	5.677	5.677,0	-	14,2	14,2	-
AL	3,0	3,0	-	5.650	5.877,0	4,0	17,0	17,6	3,5
SE	6,9	9,9	43,5	6.500	6.051,0	(6,9)	44,9	59,9	33,4
BA	13,8	7,9	(42,8)	1.680	752,0	(55,2)	23,2	5,9	(74,6)
MID-WEST	**218,6**	**216,5**	**(1,0)**	**3.406**	**3.223,0**	**(5,4)**	**744,5**	**697,7**	**(6,3)**
MT	143,4	166,3	16,0	3.217	3.175,0	(1,3)	461,3	528,0	14,5
MS	17,0	15,2	(10,6)	6.420	6.200,0	(3,4)	109,1	94,2	(13,7)
GO	58,2	35,0	(39,9)	2.992	2.157,0	(27,9)	174,1	75,5	(56,6)
SOUTHEAST	**53,7**	**44,6**	**(16,9)**	**2.878**	**3.106,0**	**7,9**	**154,6**	**138,5**	**(10,4)**
MG	32,2	22,8	(29,2)	1.997	1.956,0	(2,1)	64,3	44,6	(30,6)
ES	1,0	1,0	-	2.692	2.700,0	0,3	2,7	2,7	-
RJ	1,6	1,4	(15,0)	3.346	3.100,0	(7,4)	5,4	4,3	(20,4)
SP	18,9	19,4	2,6	4.350	4.480,0	3,0	82,2	86,9	5,7
SOUTH	**1.238,9**	**1.249,7**	**0,9**	**7.252**	**7.308,0**	**0,8**	**8.984,1**	**9.132,9**	**1,7**
PR	35,8	33,0	(7,8)	4.659	5.291,0	13,6	166,8	174,6	4,7
SC	150,1	150,1	-	7.180	6.828,0	(4,9)	1.077,7	1.024,9	(4,9)
RS	1.053,0	1.066,6	1,3	7.350	7.438,0	1,2	7.739,6	7.933,4	2,5
NORTH/NORTHEAST	**915,5**	**885,2**	**(3,3)**	**1.875**	**2.209,0**	**17,8**	**1.716,3**	**1.955,1**	**13,9**
CENTER-SOUTH	**1.511,2**	**1.510,8**	**-**	**6.540**	**6.599,0**	**0,9**	**9.883,2**	**9.969,1**	**0,9**
BRAZIL	**2.426,7**	**2.396,0**	**(1,3)**	**4.780**	**4.977,0**	**4,1**	**11.599,5**	**11.924,2**	**2,8**

SOURCE: CONAB - Suvey: Jun/2013

EDIBLE BEANS FIRST CROP

Edible beans first crop planted area is estimated in 1.12 million hectares, which sets up a decrease of 9.5% compared to the past crop. All producing states show smaller planting areas than those farmed in previous crop, except for the states of Minas Gerais, Mato Grosso do Sul, Maranhao, and the Federal District. The good perspectives for other crops, such as soybeans and corn that have greater stability and liquidity, the unstable

trade and climate risks associated to edible beans farming, have inhibited farmers to keep a stable growth for this crop.

Approximately 41% of edible beans first crop yield comes from the South Region, considering the past crop, with highlights for the state of Parana; 34.6% in the Southeast Region, the states of Minas Gerais and Sao Paulo standing out; 15.1% in the Center-West Region with the state of Goias standing out, and 8.9% in the Northeast Region, with highlights for the states of Bahia and Piaui.

t is predicted an area reduction of 15.5% in current estimate in the state of Parana, which produced 28.2% of the national yield in the previous crop, where 210.2 thousand hectares are farmed. The inherent high risks in edible beans production, added to trade difficulties due to low prices, have induced farmers to migrate to other more attracting crops like corn and soybeans. The dry and cold weather in September and drought in November have jeopardized productivity.

In Minas Gerais, second largest producer of edible beans first crop (13.34% of total volume in previous crop), presented an increase of 2.8% in farmed area, reaching 186.7 thousand hectares, induced mostly by the favorable market and by expectation of crop profitability. This increase was not bigger due to the high risks of quantitative and qualitative losses associated to weather adversities, namely during the harvest stage, in addition to competition from other crops like corn and soybeans, which have presented good market prospects and seeds distribution stoppage by the Minas Without Hunger Program, in compliance with restrictions imposed by the elections period.

In Minas Gerais, commercial farming, with highlights for the Northwest portion of the state, major producing region, crops are highly technical and they present high productivities. The technological level in the subsistence farming is relatively low with use of saved seeds and, often, with farming associated to coffee plantations, and only yield surpluses are left for trading. In the state of Minas Gerais *Carioquinha* edible beans planting predominates, but farmed areas in the Central region and in *Zona da Mata* area predominate red and black beans, while in the state northern municipalities the planting of string beans stands out.

Edible beans first crop areas have been totally harvested. In the Northwest portion of the state, main producing region, and in some municipalities of the Upper Paranaiba as well, farmers faced two Indian summer periods, with high average temperatures in December and February, and excessive rainfall in January, along with high incidence of the whitefly (*Bemisia tabaci)*, which were factors that competed to an expressive drop in productivity leading to quality loss in part of harvested produce. There were significant losses also in the North region of the state of Minas Gerais.

The impact of weather instability, although less aggressive, was also felt in the south of Minas Gerais, second major producing region in the state for summer beans, and in other regions in the state. Average productivity was 818 kg/ha, 32.1% lower than in past crop, and yield was reduced by 30.2%, amounting to 152.7 thousand tons in total.

In Sao Paulo, because of the frequent risks inherent to the produce (lack of rains during sowing or excessive rainfall during harvest) and the strong fluctuations in prices, farmers migrated to other more stable and profitable crops. With this move, there was a 30.0% reduction in planted area, and a drop in productivity of 12.6% due to adverse weather and pest attacks.

In the state of Rio Grande do Sul, good weather conditions have caused gains in productivity.

Concerning the average yield for this eighth assessment, it is observed a drop compared to previous crop because of weather conditions during crop development,

mainly in the states of Parana, Minas Gerais, Sao Paulo, Goias, and Mato Grosso do Sul. In overall, yielding had a loss of 14,3%.

In the Northeast Region due to harvest losses in past season and perspectives for yielding within normal average, recovery in productivity is noticed. In the Center-South Region, productivity presented gains in the South, and losses in the Center-West and Southeast regions.

If the trends seen in assessed data is confirmed, the national edible beans first crop yield is estimated in 957.1 thousand tons, which represents a reduction of 22.5%.

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 (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	**6,7**	**4,3**	**(35,8)**	**722**	**629,0**	**(12,9)**	**4,8**	**2,7**	**(43,8)**
TO	6,7	4,3	**(35,8)**	722	629,0	(12,9)	4,8	2,7	(43,8)
NORTHEAST	**490,2**	**464,6**	**(5,2)**	**224**	**190,0**	**(15,2)**	**109,8**	**88,2**	**(19,7)**
MA	35,7	40,2	12,6	335	408,0	21,8	12,0	16,4	36,7
PI	214,5	195,0	(9,1)	126	121,0	(4,0)	27,0	23,6	(12,6)
BA	240,0	229,4	(4,4)	295	210,0	(28,8)	70,8	48,2	(31,9)
MID-WEST	**82,1**	**71,9**	**(12,4)**	**2.277**	**1.664,0**	**(26,9)**	**187,1**	**119,6**	**(36,1)**
MT	8,5	8,0	(6,0)	1.737	1.695,0	(2,4)	14,8	13,6	(8,1)
MS	1,2	2,2	83,3	2.145	1.470,0	(31,5)	2,6	3,2	23,1
GO	62,2	49,0	(21,2)	2.268	1.809,0	(20,2)	141,1	88,6	(37,2)
DF	10,2	12,7	24,5	2.801	1.120,0	(60,0)	28,6	14,2	(50,3)
SOUTHEAST	**290,7**	**265,1**	**(8,8)**	**1.470**	**1.063,0**	**(27,7)**	**427,3**	**281,7**	**(34,1)**
MG	181,6	186,7	2,8	1.205	818,0	(32,1)	218,8	152,7	(30,2)
ES	6,7	6,5	(3,0)	874	727,0	(16,8)	5,9	4,7	(20,3)
RJ	1,6	1,3	(18,7)	954	940,0	(1,5)	1,5	1,2	(20,0)
SP	100,8	70,6	(30,0)	1.995	1.744,0	(12,6)	201,1	123,1	(38,8)
SOUTH	**371,7**	**317,0**	**(14,7)**	**1.363**	**1.467,0**	**7,6**	**506,6**	**464,9**	**(8,2)**
PR	248,7	210,2	(15,5)	1.401	1.430,0	2,1	348,3	300,6	(13,7)
SC	63,5	55,1	(13,2)	1.464	1.770,0	20,9	93,0	97,5	4,8
RS	59,5	51,7	(13,1)	1.098	1.293,0	17,8	65,3	66,8	2,3
NORTH/NORTHEAST	**496,9**	**468,9**	**(5,6)**	**231**	**194,0**	**(16,0)**	**114,6**	**90,9**	**(20,7)**
CENTER-SOUTH	**744,5**	**654,0**	**(12,2)**	**1.506**	**1.325,0**	**(12,0)**	**1.121,0**	**866,2**	**(22,7)**
BRAZIL	**1.241,4**	**1.122,9**	**(9,5)**	**995**	**853,0**	**(14,3)**	**1.235,6**	**957,1**	**(22,5)**

SOURCE: CONAB - Suvey: Jun/2013

EDIBLE BEANS SECOND CROP

Edible beans second crop planted area is estimated in 1.27 million hectares, which sets up a decrease of 8.8% if compared to past crop. Just like edible beans first crop, this crop points to smaller planted areas than farmed in previous crop in almost all producing states. Area reduction in this crop is basically located in the Northeast Region, while in the Center-South Region it is seen a maintenance in farmed areas. In spite of unstable trading and climate risks associated to edible beans farming, this second crop moment is an opportunity in the Center-South Region for farmers to invest in this crop.

The great volume in the second crop also comes from the Center-South Region. Around 87% of the edible beans second crop yield comes from this region, compared to past crop, with the states of Parana, Minas Gerais, Sao Paulo, Goias, and Mato Grosso standing out.

The state of Parana presented an increase of 8.7% in planted area and estimated productivity recovery of 20.2%, reaching 1,718 kg/ha.

High market prices and favorable weather conditions in Minas Gerais are not sufficiently attractive to stimulate increases in edible beans second crop farming area. Assessment, still susceptible to adjustments, points to trend of 6.6% reduction in farmed area, which is estimated in 148.0 thousand hectares. The increase in the incidence of the whitefly contributes for this reduction, which makes edible beans second crop farming practically unfeasible in several areas in the Northwest portion of Minas Gerais, a problem also felt in other regions in the state, such as Upper Alto Paranaiba and in the Triangulo Mineiro The increase in the incidence of the whitefly contributes for this reduction, which makes edible beans second crop farming practically unfeasible in several areas in the Northwest portion of Minas Gerais, a problem also felt in other regions in the state, such as Upper Alto Paranaiba and in the Triangulo Mineiro.

In the southern portion of Minas Gerais, which is responsible for the largest farming area of the dry season edible beans and ranks second in state volume yield, and where the whitefly is not a problem, the trend is of almost 20% increase in planted area. Also, the trend in the Central and Center-West portions of the state is of increase, although more moderate.

In Upper Paranaiba, ranked second in area and largest producer in the state, the situation is inverted, setting up a decrease trend, and reduction is certain in the Northwestern portion of the state, where the whitefly problem is serious. It is already predicted a drop in productivity of 6.2%, which is estimated in 1,360 kg/ha, aattributed to lack of rainfall during April and May, mainly in crops sowed later and that were in vegetative development and fructification stages.

Many areas that are more technology intensive have not been planted, in addition to information of replacement of colored edible beans for *Caupi* beans in some other areas, contributing to expected reduction in yielding. A little over 30% of the farmed areas have been harvested. The majority is under the maturation and fructification stages, but farmed areas under blossoming and vegetative development stages are still found. Harvesting should be intensified by end of May and June and completion is predicted for July.

With information available during this assessment, it is estimated a drop of 12.4% in yield that shall reach 201.3 thousand tons.

In the state of Mato Grosso, the majority of produce is of Caupi beans, with farming system similar to soybeans, with low costs and going to the second crop.

In spite of area reduction of 8.8% at national level, improvements in productivity expectation, which in the overall achieves 22.5%, allows for estimating edible beans second crop yield in 1,189.2 tons, representing an increase of 11.9%.

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**	**74,6**	**(15,8)**	**733**	**800,0**	**9,1**	**65,0**	**59,6**	**(8,3)**
RR	3,0	3,0	-	667	660,0	(1,0)	2,0	2,0	-
RO	52,3	39,5	(24,5)	694	773,0	11,4	36,3	30,5	(16,0)
AC	12,6	12,3	(2,4)	600	589,0	(1,8)	7,6	7,2	(5,3)
AM	5,9	5,7	(3,4)	900	986,0	9,6	5,3	5,6	5,7
AP	1,1	1,6	45,5	840	910,0	8,3	0,9	1,5	66,7
TO	13,7	12,5	(9,0)	939	1.027,0	9,4	12,9	12,8	(0,8)
NORTHEAST	**632,7**	**516,6**	**(18,3)**	**117**	**220,0**	**88,0**	**73,9**	**113,5**	**53,6**
MA	39,0	49,9	27,9	396	496,0	25,3	15,4	24,8	61,0
PI	16,0	4,3	(73,1)	594	603,0	1,5	9,5	2,6	(72,6)
CE	426,0	310,1	(27,2)	76	186,0	144,7	32,4	57,7	78,1
RN	7,2	8,9	23,6	260	268,0	3,1	1,9	2,4	26,3
PB	36,8	62,0	68,4	79	259,0	227,8	2,9	16,1	455,2
PE	107,7	81,4	(24,4)	110	122,0	10,9	11,8	9,9	(16,1)
MID-WEST	**193,0**	**197,4**	**2,3**	**1.242**	**1.345,0**	**8,3**	**239,7**	**265,5**	**10,8**
MT	152,1	162,7	7,0	1.085	1.291,0	19,0	165,0	210,0	27,3
MS	17,7	15,5	(12,4)	1.200	1.500,0	25,0	21,2	23,3	9,9
GO	22,6	18,7	(17,3)	2.300	1.641,0	(28,7)	52,0	30,7	(41,0)
DF	0,6	0,5	(16,7)	2.536	2.900,0	14,4	1,5	1,5	-
SOUTHEAST	**208,7**	**195,8**	**(6,2)**	**1.478**	**1.407,0**	**(4,8)**	**308,5**	**275,6**	**(10,7)**
MG	158,4	148,0	(6,6)	1.450	1.360,0	(6,2)	229,7	201,3	(12,4)
ES	11,6	9,1	(21,6)	757	856,0	13,1	8,8	7,8	(11,4)
RJ	2,1	1,6	(23,8)	980	985,0	0,5	2,1	1,6	(23,8)
SP	36,6	37,1	1,3	1.856	1.750,0	(5,7)	67,9	64,9	(4,4)
SOUTH	**271,6**	**287,3**	**5,8**	**1.387**	**1.653,0**	**19,2**	**376,8**	**475,0**	**26,1**
PR	226,5	246,2	8,7	1.429	1.718,0	20,2	323,7	423,0	30,7
SC	23,3	21,6	(7,5)	1.043	1.259,0	20,7	24,3	27,2	11,9
RS	21,8	19,5	(10,5)	1.319	1.270,0	(3,7)	28,8	24,8	(13,9)
NORTH/NORTHEAST	**721,3**	**591,2**	**(18,0)**	**193**	**293,0**	**51,8**	**138,9**	**173,1**	**24,6**
CENTER-SOUTH	**673,3**	**680,5**	**1,1**	**1.374**	**1.493,0**	**8,7**	**925,0**	**1.016,1**	**9,8**
BRAZIL	**1.394,6**	**1.271,7**	**(8,8)**	**763**	**935,0**	**22,5**	**1.063,9**	**1.189,2**	**11,8**

SOURCE: CONAB - Suvey: Jun/2013

EDIBLE THIRD CROP

For edible beans third crop, in view of the planting schedule and methodology applied in estimates, previous crop areas were repeated and the average yielding of past five years, discharging atypical years and aggregating technological gain were applied.

Preliminary assessments in Minas Gerais, still susceptible to adjustments, indicate a drop of 4.9% in edible beans third crop farmed area, estimated in 78.3 thousand hectares, in spite of market prices been very attractive. Risk and high pests and disease control costs of the crop, markedly the whitefly, have weighted in farmer's decision, and in the Northwest portion of the state of Minas Gerais implementation of the sanitation void is already considered for the crop, as means to help solving the problem at the expenses of reducing edible beans third crop planting window. Higher rates of occupation in corn seed pivot areas, whose harvesting Schedule advances in the planting period for edible beans winter crop also competed toward the reduced area trend.

The attractive market prices hike may surpass the concern with weather adversities and high cost of pest and diseases control of the crop, namely the whitefly, stimulating planting, inclusively replacing areas occupied by other crops. A large number of farmers did not define yet their planting intention, which is concentrated mostly in May to July.

In Goias, despite attracting prices, area is reduced in 8.9% due to pressure of pests and diseases attacks, such as the whitefly, extremely favored by high temperatures. Another reported problem is the delay in planting. During the assessment period, 30% of planted area was in germination, 53% in vegetative development, and 17% in blossoming stages.

Considering all three crops, it is estimated for this ninth assessment that total edible beans area should reach 3.03 million hectares, 9.5% smaller than past crop. The national

edible beans yield shall achieve 2.86 million tons, 7.2% less than in past crop. National edible beans yield shall reach 2.84 million tons, 2.6% smaller that the last crop.

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 (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	**63,2**	**57,9**	**(8,3)**	**858**	**871,0**	**1,5**	**54,2**	**50,4**	**(7,0)**
PA	48,1	43,9	(8,7)	705	716,0	1,6	33,9	31,4	(7,4)
TO	15,1	14,0	(7,0)	1.347	1.358,0	0,8	20,3	19,0	(6,4)
NORTHEAST	**381,0**	**392,3**	**3,0**	**277**	**501,0**	**80,9**	**105,6**	**196,5**	**86,1**
CE	7,6	10,7	40,8	65	450,0	592,3	0,5	4,8	860,0
PE	122,0	122,0	-	180	400,0	122,2	22,0	48,8	121,8
AL	36,1	44,4	22,9	460	460,0	-	16,6	20,4	22,9
SE	28,0	27,9	(0,4)	702	630,0	(10,3)	19,7	17,6	(10,7)
BA	187,3	187,3	-	250	560,0	124,0	46,8	104,9	124,1
MID-WEST	**67,0**	**70,0**	**4,5**	**2.629**	**2.548,0**	**(3,1)**	**176,2**	**178,4**	**1,2**
MT	20,2	26,9	33,2	2.207	2.186,0	(1,0)	44,6	58,8	31,8
MS	0,4	0,4	-	1.340	1.340,0	-	0,5	0,5	-
GO	41,4	37,7	(8,9)	2.779	2.760,0	(0,7)	115,1	104,1	(9,6)
DF	5,0	5,0	-	3.200	3.000,0	(6,3)	16,0	15,0	(6,3)
SOUTHEAST	**108,7**	**106,2**	**(2,3)**	**2.549**	**2.480,0**	**(2,7)**	**277,1**	**263,4**	**(4,9)**
MG	82,3	78,3	(4,9)	2.615	2.615,0	-	215,2	204,8	(4,8)
SP	26,4	27,9	5,7	2.345	2.100,0	(10,4)	61,9	58,6	(5,3)
SOUTH	**6,2**	**5,9**	**(4,8)**	**952**	**890,0**	**(6,5)**	**5,9**	**5,3**	**(10,2)**
PR	6,2	5,9	(4,8)	952	890,0	(6,5)	5,9	5,3	(10,2)
NORTH/NORTHEAST	**444,2**	**450,2**	**1,4**	**360**	**549,0**	**52,5**	**159,8**	**246,9**	**54,5**
CENTER-SOUTH	**181,9**	**182,1**	**0,1**	**2.524**	**2.455,0**	**(2,7)**	**459,2**	**447,1**	**(2,6)**
BRAZIL	**626,1**	**632,3**	**1,0**	**989**	**1.097,0**	**10,9**	**619,0**	**694,0**	**12,1**

SOURCE: CONAB - Suvey: Jun/2013

Supply and Demand

Produce availability is kept strong, favored by the supply derived from the second crop, which is under harvest now and shall be intensified in June.

In Parana, main producing state, it is estimated that half of farmed area in the second crop have been harvested and around 35% have been traded. Of the remaining 50%, 23% is in fructification, and 31% in maturation stages.

In Minas Gerais, just over 30% of planted area has been harvested, and crops are under fructification and maturation stages, although there are still areas in the blossoming stage. Harvest will be intensified in June, and it will be completed by July. However, harvest is been finalized in Goias.

Edible beans third and last crop in 2012/13 started to be farmed at end of April. In the Federal District, Goias, and Northwestern Minas Gerais, farming is carried out under irrigation. In these locations, the sanitation void has been implemented due to risks, high costs and often inefficient for whitefly control. This procedure aims at pest management and, consequently, of the golden mosaic virus in order to reduce the incidence of virosis to satisfactory levels and losses minimized.

Therefore, the period between September 15 and October was defined. During this period, the existence of live common edible beans plants will not be allowed in the traditional farming areas, under irrigation system or any other farming modality.

It must be clarified that, with implementation of the sanitation void, the sowing period was limited to mid-June, the normal planting schedule has been reduced in one and half months, which usually goes until July. Thus, the trend is reduction in farming, although

there are still seed corn pivot areas, and to lesser extent with cotton whose harvest extends over the period recommended now.

In the other hand, in Brazil's Northeast Region, where farming is carried out in upland system, the weather Picture is favorable with rainfall in good intensity and well distributed. In Alagoas, Sergipe, and Northeast of Bahia, major producing hub, around 70% of intended planting area has been sowed and harvest is predicted for August and September.

It worth mentioning that estimated yield for the second and third crops is 1,88.2 thousand tons. Of this total, around 40%, approximately 750.0 thousand tons are ensured, in terms, since they come from irrigation systems, but the remnant depends much on the weather conditions.

The Brazilian yield is estimated in 2,843.0 thousand tons, which represents 75.4 thousand tons less than the unsuccessful crop recorded in 2012, in an area of 3,026.9 thousand hectares, that is, 235.2 thousand hectares smaller than previously farmed.

In summary, it is difficult to estimate prices behavior due to problems faced by packing industries to pass on to retailer sector price increases and these latter to consumers. Buyers are more cautious, acquiring small lots or seeking some price differential at production source. However, taking the supply picture as parameter, sudden price fall should not be expected since total available volumes until next season first crop – 2013/14, perhaps might not be sufficient to meet satisfactorily domestic supply, except if there is a decrease in consumption.

Now, the trend is more affordable prices with harvest intensification, as packers are acquiring just the necessary to meet their commitment, due to difficulties to pass on prices to the retailer sector, and these latter to consumers. However, price fall should not be expected due to narrow supply picture.

Thus, it is predicted the following scenario for this season: first crop yield assessed in the field survey carried out by Conab in April, plus prediction for the second and third crops will amount to 2,843.0 thousand tons, which added to the carryover stocks of 400.0 thousand tons will provide a supply of 3.62 million tons, generating a carryover stock of only 166.8 thousand tons.

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 (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	**158,5**	**136,8**	**(13,7)**	**782**	**825,0**	**5,5**	**124,0**	**115,5**	**(6,9)**
RR	3,0	3,0	-	667	660,0	(1,0)	2,0	2,0	-
RO	52,3	39,5	(24,5)	694	773,0	11,4	36,3	30,5	(16,0)
AC	12,6	12,3	(2,4)	600	589,0	(1,8)	7,6	7,2	(5,3)
AM	5,9	5,7	(3,4)	900	986,0	9,6	5,3	5,6	5,7
AP	1,1	1,6	45,5	840	910,0	8,3	0,9	1,5	66,7
PA	48,1	43,9	(8,7)	705	716,0	1,6	33,9	34,1	0,6
TO	35,5	30,8	(13,1)	1.071	1.121,9	4,7	38,0	34,6	(8,9)
NORTHEAST	**1.503,9**	**1.373,5**	**(8,7)**	**192**	**290,0**	**51,0**	**289,3**	**398,2**	**37,6**
MA	74,7	90,1	20,6	367	456,7	24,5	27,4	41,2	50,4
PI	230,5	199,3	(13,5)	158	131,4	(17,1)	36,5	26,2	(28,2)
CE	433,6	320,8	(26,0)	76	194,8	157,0	32,9	62,5	90,0
RN	7,2	8,9	23,6	260	268,0	3,1	1,9	2,4	26,3
PB	36,8	62,0	68,5	79	259,0	227,8	2,9	16,1	455,2
PE	229,7	203,4	(11,4)	147	288,7	96,2	33,8	58,7	73,7
AL	36,1	44,4	23,0	460	460,0	-	16,6	20,4	22,9
SE	28,0	27,9	(0,4)	702	630,0	(10,3)	19,7	17,6	(10,7)
BA	427,3	416,7	(2,5)	275	367,3	33,4	117,6	153,1	30,2
MID-WEST	**342,1**	**339,3**	**(0,8)**	**1.762**	**1.661,0**	**(5,7)**	**603,0**	**563,5**	**(6,6)**
MT	180,8	197,6	9,3	1.241	1.429,2	15,2	224,4	282,4	25,8
MS	19,3	18,1	(6,2)	1.262	1.492,8	18,3	24,4	27,0	10,7
GO	126,2	105,4	(16,5)	2.441	2.119,4	(13,2)	308,1	223,4	(27,5)
DF	15,8	18,2	15,2	2.917	1.685,4	(42,2)	46,1	30,7	(33,4)
SOUTHEAST	**608,1**	**567,1**	**(6,7)**	**1.666**	**1.447,0**	**(13,1)**	**1.012,8**	**820,7**	**(19,0)**
MG	422,3	413,0	(2,2)	1.572	1.352,9	(13,9)	663,7	558,8	(15,8)
ES	18,3	15,6	(14,8)	800	802,3	0,3	14,6	12,5	(14,4)
RJ	3,7	2,9	(21,6)	969	964,8	(0,4)	3,6	2,8	(22,2)
SP	163,8	135,6	(17,2)	2.020	1.818,9	(10,0)	330,9	246,6	(25,5)
SOUTH	**649,5**	**610,2**	**(6,1)**	**1.369**	**1.549,0**	**13,1**	**889,3**	**945,1**	**6,3**
PR	481,4	462,3	(4,0)	1.408	1.576,5	12,0	677,9	728,8	7,5
SC	86,8	76,7	(11,6)	1.351	1.626,1	20,4	117,3	124,7	6,3
RS	81,3	71,2	(12,4)	1.157	1.286,7	11,2	94,1	91,6	(2,7)
NORTH/NORTHEAST	**1.662,4**	**1.510,3**	**(9,1)**	**249**	**338,0**	**35,7**	**413,3**	**513,7**	**24,3**
CENTER-SOUTH	**1.599,7**	**1.516,6**	**(5,2)**	**1.566**	**1.536,0**	**(1,9)**	**2.505,1**	**2.329,3**	**(7,0)**
BRAZIL	**3.262,1**	**3.026,9**	**(7,2)**	**895**	**938,0**	**4,8**	**2.918,4**	**2.843,0**	**(2,6)**

SOURCE: CONAB - Suvey: Jun/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 (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	**0,2**	**0,4**	**100,0**	**715**	**425,0**	**(40,6)**	**0,2**	**0,2**	**-**
CE	0,1	0,1	(39,4)	780	500,0	(35,9)	0,1	0,1	-
BA	0,1	0,3	175,0	650	400,0	(38,5)	0,1	0,1	-
MID-WEST	**66,0**	**54,4**	**(17,6)**	**1.579**	**1.636,0**	**3,6**	**104,2**	**89,0**	**(14,6)**
MT	47,1	49,4	4,9	1.686	1.643,0	(2,6)	79,4	81,2	2,3
MS	5,0	1,7	(66,0)	1.200	1.600,0	33,3	6,0	2,7	(55,0)
GO	13,9	3,3	(76,0)	1.355	1.548,0	14,2	18,8	5,1	(72,9)
SOUTHEAST	**4,3**	**10,7**	**148,8**	**1.395**	**1.500,0**	**7,5**	**6,0**	**16,1**	**168,3**
MG	4,3	10,7	148,8	1.395	1.500,0	7,5	6,0	16,1	168,3
SOUTH	**4,0**	**3,4**	**(15,0)**	**1.507**	**1.483,0**	**(1,6)**	**6,0**	**5,1**	**(15,0)**
PR	0,7	0,7	-	1.310	1.380,0	5,3	0,9	1,0	11,1
RS	3,3	2,7	(18,0)	1.549	1.510,0	(2,5)	5,1	4,1	(19,6)
NORTH/NORTHEAST	**0,2**	**0,4**	**100,0**	**715**	**425,0**	**(40,6)**	**0,2**	**0,2**	**-**
CENTER-SOUTH	**74,3**	**68,5**	**(7,8)**	**1.565**	**1.607,0**	**2,7**	**116,2**	**110,2**	**(5,2)**
BRAZIL	**74,5**	**68,9**	**(7,5)**	**1.563**	**1.600,0**	**2,4**	**116,4**	**110,4**	**(5,2)**

SOURCE: CONAB - Suvey: Jun/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**	**170**	**(1,2)**	**21,4**	**14,4**	**(32,7)**
PI	0,8	0,9	12,5	96	74	(22,9)	0,1	0,1	-
CE	33,8	12,0	(64,4)	79	191	141,8	2,7	2,3	(14,8)
RN	0,1	-	(100,0)	571	-	(100,0)	0,1	-	(100,0)
PE	2,7	2,3	(13,0)	231	209	(9,5)	0,6	0,5	(16,7)
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**	**695**	**(19,4)**	**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	2.000	28,7	0,8	0,2	(75,0)
SOUTH	**1,0**	**0,9**	**(10,000)**	**620**	**887**	**43,1**	**0,6**	**0,8**	**33,3**
PR	1,0	0,9	(10,000)	620	887	43,1	0,6	0,8	33,3
MORTH/NORTHEAST	**123,9**	**84,4**	**(31,9)**	**172**	**170**	**(1,2)**	**21,4**	**14,4**	**(32,7)**
CENTER-SOUTH	**4,3**	**3,0**	**(30,2)**	**805**	**753**	**(6,5)**	**3,5**	**2,3**	**(34,3)**
BRAZIL	**128,2**	**87,4**	**(31,8)**	**193**	**190**	**(1,6)**	**24,9**	**16,7**	**(32,9)**

SOURCE: CONAB - Suvey: Jun/2013

CORN FIRST CROP

In the ninth assessment of 2012/13 crop, corn first crop yield reached 34,845.6

thousand tons, compared to 33,867,1 from previous crop, presenting an increment of 0.1% compared to last month estimates and around 2.9% higher than past season. As reported already in previous reports, area competition in the Center-South region and discontinuity of rains during crop vegetative development stage in major producing states in the Northeast Region affected produce supply at this first stage.

It is worth highlighting that planting in majority of the Center-South Region states initiated with delay, since rainfall shortage and irregularity prevailed in major producing locations. What was previously seen and highlighted in field surveys carried out at end of May is that losses predicted in productivity will not happen in the estimated scope, a fact highlighted in last month report and corroborated from first crop harvest data, which by now is practically completed.

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 (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	**456,7**	**393,6**	**(13,8)**	**2.668**	**2.868**	**7,5**	**1.218,3**	**1.128,6**	**(7,4)**
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	2,6	-	825	889	7,8	2,1	2,3	9,5
PA	236,3	194,6	(17,7)	2.538	2.817	11,0	599,7	548,2	(8,6)
TO	59,2	54,3	(8,3)	4.400	4.700	6,8	260,5	255,2	(2,0)
NORTHEAST	**1.917,3**	**1.735,4**	**(9,5)**	**1.713**	**1.777**	**3,7**	**3.284,3**	**3.083,7**	**(6,1)**
MA	384,0	384,0	-	1.376	2.078	51,0	528,4	798,0	51,0
PI	330,7	366,1	10,7	2.108	1.350	(36,0)	697,1	494,2	(29,1)
CE	520,6	364,4	(30,0)	142	300	111,3	73,9	109,3	47,9
RN	7,6	8,2	7,9	337	376	11,6	2,6	3,1	19,2
PB	39,8	60,2	51,3	106	120	13,2	4,2	7,2	71,4
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**	**7.663**	**(0,4)**	**5.723,2**	**4.335,8**	**(24,2)**
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	9.222	2,8	301,4	322,8	7,1
SOUTHEAST	**1.813,0**	**1.757,8**	**(3,0)**	**5.942**	**5.891**	**(0,9)**	**10.772,7**	**10.354,9**	**(3,9)**
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	28,5	(9,5)	2.429	2.300	(5,3)	76,5	65,6	(14,2)
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	6.000	(1,6)	3.397,1	3.441,6	1,3
SOUTH	**2.627,9**	**2.412,1**	**(8,2)**	**4.897**	**6.609**	**35,0**	**12.868,6**	**15.942,6**	**23,9**
PR	977,7	878,1	(10,2)	6.729	8.119	20,7	6.578,9	7.129,3	8,4
SC	536,7	500,7	(6,7)	5.491	6.850	24,7	2.947,0	3.429,8	16,4
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**	**2.129,0**	**(10,3)**	**1.897**	**1.979**	**4,3**	**4.502,6**	**4.212,3**	**(6,4)**
CENTER-SOUTH	**5.184,5**	**4.735,7**	**(8,7)**	**5.664**	**6.469**	**14,2**	**29.364,5**	**30.633,3**	**4,3**
BRAZIL	**7.558,5**	**6.864,7**	**(9,2)**	**4.481**	**5.076**	**13,3**	**33.867,1**	**34.845,6**	**2,9**

SOURCE: CONAB - Suvey: Jun/2013

CORN SECOND CROP

Corn second crop planting was affected at the beginning of its operation by strong

rains that coincided with soybeans harvesting of precocious varieties in major producing states.

In Mato Grosso, main corn second crop producer, planting extended until March, distancing therefore from technical recommendations that suggest February as deadline for best planting schedule. With this move, as reported in past report, it was thought that this picture would compromise strongly crop average productivity. Really, from data assessed in questionnaires done by Conab at the end of May, there were productivity reductions in practically all producing states in the Center-South Region, standing out the states of Mato Grosso do Sul, Goias, and Minas Gerais.

The assessment showed that farmers' intention in undertaking an expressive increase of second crop planting, out of the recommended "window" for the best producing performance, made that varied crop gradients happened in these states, presenting differentiated development stages, which would suggest rainfall for its perfect implementation. This information was captured in Conab assessments in May. What has been seen since then, more specifically from the week initiated in 04/27, was occurrence of generalized rains in the Center-West Region, which will influence in crops productivity enhancement, particularly for those planted out of the recommended cycle. This particularity will be captured in the next assessment questionnaires, suggesting increment expectations in corn second crop yield levels.

Productivity levels of the 2012/13 crop presented, when the summation of the two crops are considered at national level, increment of 3.2% when compared to past year outcome, result of the improved performance of crops in the South Region states, and a better performance both in the North and Northeast Regions. The consolidated yield seen in this ninth assessment reached the total of 78,468.3 thousand tons, representing increment of 7.5% when compared to previous season that had reached 72,979.5 thousand tons.

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**	**122,9**	**9,0**	**3.849**	**3.953**	**2,7**	**434,2**	**485,8**	**11,9**
RR	-	-	-	-	-	-	-	-	-
RO	68,4	82,0	19,9	3.612	3.575	(1,0)	247,1	293,2	18,7
TO	44,4	40,9	(7,9)	4.215	4.710	11,7	187,1	192,6	2,9
NORTHEAST	**504,2**	**645,5**	**28,0**	**2.141**	**2.370**	**10,7**	**1.079,8**	**1.529,9**	**41,7**
MA	70,6	145,1	105,5	2.879	2.879	-	203,3	417,7	105,5
PI	20,9	13,7	(34,6)	4.311	2.893	(32,9)	90,1	39,6	(56,0)
AL	29,7	38,5	29,7	754	754	-	22,4	29,0	29,5
SE	206,8	206,8	-	2.629	2.629	-	543,7	543,7	-
BA	176,2	241,4	37,0	1.250	2.071	65,7	220,3	499,9	126,9
MID-WEST	**4.548,2**	**5.568,6**	**22,4**	**5.583**	**5.145**	**(7,8)**	**25.393,1**	**28.649,5**	**12,8**
MT	2.645,4	3.349,1	26,6	5.680	5.340	(6,0)	15.025,9	17.884,2	19,0
MS	1.199,5	1.421,0	18,5	5.100	4.514	(11,5)	6.117,5	6.414,4	4,9
GO	694,6	783,5	12,8	6.043	5.400	(10,6)	4.197,5	4.230,9	0,8
DF	8,7	15,0	72,0	6.000	8.000	33,3	52,2	120,0	129,9
SOUTHEAST	**429,3**	**461,0**	**7,4**	**4.722**	**4.573**	**(3,2)**	**2.027,4**	**2.108,4**	**4,0**
MG	94,3	118,6	25,8	5.548	4.930	(11,1)	523,2	584,7	11,8
SP	335,0	342,4	2,2	4.490	4.450	(0,9)	1.504,2	1.523,7	1,3
SOUTH	**2.025,1**	**2.154,7**	**6,4**	**5.026**	**5.035**	**0,2**	**10.178,2**	**10.848,9**	**6,6**
PR	2.025,1	2.154,7	6,4	5.026	5.035	0,2	10.178,2	10.848,9	6,6
NORTH/NORTHEAST	**617,0**	**768,4**	**24,5**	**2.454**	**2.623**	**6,9**	**1.514,0**	**2.015,7**	**33,1**
CENTER=SOUTH	**7.002,6**	**8.184,3**	**16,9**	**5.369**	**5.084**	**(5,3)**	**37.598,7**	**41.606,8**	**10,7**
BRAZIL	**7.619,6**	**8.952,7**	**17,5**	**5.133**	**4.873**	**(5,1)**	**39.112,7**	**43.622,5**	**11,5**

SOURCE: CONAB - Suvey: Jun/2013

Supply and Demand

Market concern with the North American crop was evident in May since it is suffering with excessive rainfall and cold weather, where a good evolution only happened in the second half of past month from 28.0% to 71.0% according to USDA report in 05/26.

Thus, prices in Chicago that had a down trend, were kept firm, with a few peaks of high, and the month average closing in US$ 6.69/bu (US$ 2.63/ton).

In the domestic market, prices in Parana are kept firm at R$ 19.00/60Kg sustained by higher exports parity. In the other hand, in Mato Grosso, in view of new record yield expectation and, due to logistics problems in production yielding, price had a strong downturn and it reached R$11.20/60 kg in Lucas do Rio Verde, in the end of May.

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**	**516,5**	**(9,3)**	**2.902**	**3.126**	**7,7**	**1.652,4**	**1.614,4**	**(2,3)**
RR	6,5	6,5	-	2.000	2.000	-	13,0	13,0	-
RO	162,3	158,6	(2,3)	2.796	2.905	3,9	453,7	460,7	1,5
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	2,6	-	825	889	7,8	2,1	2,3	9,5
PA	236,3	194,6	(17,6)	2.538	2.817	11,0	599,7	548,2	(8,6)
TO	103,6	95,2	(8,1)	4.321	4.704	8,9	447,6	447,8	-
NORTHEAST	**2.421,5**	**2.380,9**	**(1,7)**	**1.802**	**1.938**	**7,5**	**4.364,0**	**4.613,8**	**5,7**
MA	454,6	529,1	16,4	1.609	2.298	42,8	731,6	1.215,7	66,2
PI	351,6	379,8	8,0	2.239	1.406	(37,2)	787,2	533,9	(32,2)
CE	520,6	364,4	(30,0)	142	300	111,3	73,9	109,3	47,9
RN	7,6	8,2	7,9	337	376	11,6	2,6	3,1	19,2
PB	39,8	60,2	51,3	106	120	13,2	4,2	7,2	71,4
PE	205,8	94,5	(25,0)	117	167	42,7	24,1	15,8	(34,4)
AL	29,7	38,5	29,6	754	754	-	22,4	29,0	29,5
SE	206,8	206,8	-	2.629	2.629	-	543,7	543,7	-
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**	**6.134,4**	**15,9**	**5.880**	**5.377**	**(8,6)**	**31.116,3**	**32.985,3**	**6,0**
MT	2.739,9	3.424,7	25,0	5.697	5.378	(5,6)	15.610,4	18.419,4	18,0
MS	1.267,7	1.469,0	15,9	5.188	4.618	(11,0)	6.576,4	6.784,0	3,2
GO	1.241,9	1.190,7	(4,1)	6.905	6.164	(10,7)	8.575,9	7.339,1	(14,4)
DF	42,3	50,0	18,2	8.358	8.855	5,9	353,6	442,8	25,2
SOUTHEAST	**2.242,3**	**2.218,8**	**(1,0)**	**5.708**	**5.617**	**(1,6)**	**12.800,0**	**12.463,3**	**(2,6)**
MG	1.312,8	1.268,4	(3,4)	5.947	5.849	(1,6)	7.807,4	7.419,1	(5,0)
ES	31,5	28,5	(9,5)	2.429	2.300	(5,3)	76,5	65,6	(14,2)
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	5.421	(1,4)	4.901,2	4.965,3	1,3
SOUTH	**4.653,0**	**4.566,8**	**(1,9)**	**4.953**	**5.867**	**18,5**	**23.046,8**	**26.791,5**	**16,2**
PR	3.002,8	3.032,8	1,0	5.580	5.928	6,2	16.757,1	17.978,2	7,3
SC	536,7	500,7	(6,7)	5.491	6.850	24,7	2.947,0	3.429,8	16,4
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**	**2.897,4**	**(3,1)**	**2.012**	**2.150**	**6,9**	**6.016,4**	**6.228,2**	**3,5**
CENTER-SOUTH	**12.187,1**	**12.920,0**	**6,0**	**5.495**	**5.591**	**1,7**	**66.963,1**	**72.240,1**	**7,9**
BRAZIL	**15.178,1**	**15.817,4**	**4,2**	**4.808**	**4.961**	**3,2**	**72.979,5**	**78.468,3**	**7,5**

SOURCE: CONAB - Suvey: Jun/2013

SOYBEAN

Planted area with the oleaginous in the current season presents an increment of 10.7% compared to the 2011/12 season, reaching 27,715.5 thousand hectares. In all states of the Federation, the behavior was similar, except the Federal District that remained with 55.0 thousand hectares. This increase is related to the high level in the oleaginous prices in both domestic and foreign markets and good performance related to advanced trading, which in this season reached record levels.

The delay in this season caused by the weather in the beginning of planting in the Center-West Region, mainly in Mato Grosso and Goias, and rainfall coinciding with harvest had effects in the crop productivity levels. Excessive rainfall caused losses in graining because of low luminosity and, high incidence of Asian rust in the harvest. In spite of all this, this season performance points to productivity behavior very close to past season, with a reduction of just 1.8%, thanks to the good performance seen in the state of Mato Grosso do Sul and in the Federal District. When this assessment is extended to the other states in the Southeast and South Regions, an expressive oleaginous performance is observed due to good weather conditions during almost all major stages of the crop.

In this context, the Center-South Region shall yield 73.4 million tons, an increment of 26.2%. This increase derives both from area increase (9.9%) and productivity (14.8%). It is worth highlighting the effect of weather performance had on productivity in two main producing states, Parana and Rio Grande do Sul, which presented increment of 36% and 74.5%, respectively, in this assessment.

North and Northeast Regions account for the negative standout, particularly in the Matopiba Region, comprising territories of Maranhao, Tocantins, Piaui, and Bahia, strongly hit by drought. The region shall present average productivity of 2,303 kg/ha, a reduction of 20.9% in comparison to the 2011/12 season (2,912 kg/ha).

In the overall, the effects of these effects in the Brazilian crop pointed to yield of 81,281.4 thousand tons for this crop, an increment of 22.4%, compared to 66,383.0 thousand tons yielded in the 2011/12 season.

Supply and Demand

Due to weather conditions influence, international market prices of the grain have remained high because of the delay in planting in producing regions caused by excessive rains and low North American stocks

International market prices in May were well above the historical average for this period and 3.32% higher than in May 2012, which directly influenced the domestic market.

In spite of the logistics problems, according to the Ministry of Development, Industry and Foreign Trade, Brazilian soybean exports in May amounted approximately to 7.95 million tons, highest practice Brazilian exports, thus reaching a total of 19.60 million tons exported in 2013 against 18.08 million tons exported in the same period in 2012.

Thus, it is expected that Brazil will export around 36.78 million tons in 2013.

Domestic consumption is estimated in 42.40 million tons, producing approximated 29.73 million tons of soybean bran and 7.53 million liters of oil.

The carryover stock for 2012/13 is estimated in 2.69 million tons.

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 (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	**717,6**	**888,4**	**23,8**	**3.027**	**2.953**	**(2,4)**	**2.172,2**	**2.623,5**	**20,8**
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	543,5	20,5	3.065	2.793	(8,9)	1.382,9	1.518,0	9,8
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**	**3.035**	**4,7**	**4.656,3**	**5.336,2**	**14,6**
MG	1.024,0	1.121,2	9,5	2.987	2.930	(1,9)	3.058,7	3.285,1	7,4
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**	**3.031**	**48,8**	**18.553,4**	**29.935,5**	**61,3**
PR	4.460,6	4.752,8	6,6	2.453	3.336	36,0	10.941,9	15.855,3	44,9
SC	448,3	505,0	12,7	2.420	3.060	26,4	1.084,9	1.545,3	42,4
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**	**3.302,7**	**16,5**	**2.917**	**2.398**	**(17,8)**	**8.268,5**	**7.918,3**	**(4,2)**
CENTER-SOUTH	**22.207,5**	**24.412,8**	**9,9**	**2.617**	**3.005**	**14,8**	**58.114,5**	**73.363,1**	**26,2**
BRAZIL	**25.042,2**	**27.715,5**	**10,7**	**2.651**	**2.933**	**10,6**	**66.383,0**	**81.281,4**	**22,4**

SOURCE: CONAB - Suvey: Jun/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 (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	**21,5**	**22,0**	**-**	**1.736**	**1.850**	**6,6**	**37,3**	**40,7**	**9,1**
TO	21,5	22,0	2,3	1.736	1.850	6,6	37,3	40,7	9,1
NORTHEAST	**101,9**	**90,7**	**-**	**758**	**399**	**(47,4)**	**77,2**	**36,3**	**(53,0)**
PI	7,7	1,2	(84,0)	2.130	2.000	(6,1)	16,4	2,4	-
CE	0,3	0,3	-	236	236	-	0,1	0,1	-
RN	1,1	1,3	18,2	930	732	(21,3)	1,0	1,0	-
PB	0,2	0,2	-	1.500	800	(46,7)	0,3	0,2	(33,3)
PE	0,6	0,6	-	582	439	(24,6)	0,3	0,3	-
BA	92,0	87,1	(5,3)	642	371	(42,2)	59,1	32,3	(45,3)
MID-WEST	**483,0**	**490,3**	**-**	**3.160**	**2.990**	**(5,4)**	**1.526,2**	**1.465,9**	**(4,0)**
MT	151,4	163,2	7,8	2.780	3.010	8,3	420,9	491,2	16,7
MS	29,0	16,8	(42,1)	2.700	2.800	3,7	78,3	47,0	(40,0)
GO	296,5	306,3	3,3	3.369	2.970	(11,8)	998,9	909,7	(8,9)
DF	6,1	4,0	(34,0)	4.600	4.500	(2,2)	28,1	18,0	(35,9)
SOUTHEAST	**150,3**	**175,3**	**-**	**3.460**	**2.959**	**(14,5)**	**519,9**	**518,7**	**(0,2)**
MG	126,1	151,1	19,8	3.519	2.984	(15,2)	443,7	450,9	1,6
SP	24,2	24,2	-	3.150	2.800	(11,1)	76,2	67,8	(11,0)
SOUTH	**30,2**	**22,0**	**-**	**2.030**	**3.002**	**47,9**	**61,3**	**66,0**	**7,7**
PR	1,8000	1,8000	-	3.700	3.740	1,1	6,7	6,7	-
RS	28,4	20,2	(29,0)	1.924	2.936	52,6	54,6	59,3	8,6
MORTH/NORTHEAST	**123,4**	**112,7**	**(8,7)**	**928**	**682**	**(26,5)**	**114,5**	**77,0**	**(32,8)**
CENTER-SOUTH	**663,5**	**687,6**	**3,6**	**3.176**	**2.982**	**(6,1)**	**2.107,4**	**2.050,6**	**(2,7)**
BRAZIL	**786,9**	**836,4**	**6,3**	**2.824**	**2.544**	**(9,9)**	**2.221,9**	**2.127,6**	**(4,2)**

SOURCE: CONAB - Suvey: Jun/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**	**3,2**	**(54,3)**	**1.071**	**1.063**	**(0,7)**	**7,5**	**3,4**	**(54,7)**
MS	7,0	3,2	(54,3)	1.078	1.078	-	7,5	3,4	(54,7)
SOUTH	**161,7**	**169,6**	**4,9**	**2.184**	**2.387**	**9,3**	**353,2**	**404,9**	**14,6**
PR	61,9	66,6	7,6	2.285	2.520	10,3	141,4	167,8	18,7
RS	99,8	103,0	3,2	2.122	2.302	8,5	211,8	237,1	11,9
CENTER-SOUTH	**168,7**	**172,8**	**2,4**	**2.138**	**2.363**	**10,5**	**360,7**	**408,3**	**13,2**
BRAZIL	**168,7**	**172,8**	**2,4**	**2.138**	**2.363**	**10,5**	**360,7**	**408,3**	**13,2**

SOURCE: CONAB - Suvey: Jun/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**	**2,3**	**-**	**1.043**	**1.043**	**-**	**2,4**	**2,4**	**-**
MS	2,3	2,3	-	1.033	1.033	-	2,4	2,4	-
SOUTH	**41,5**	**38,2**	**(8,0)**	**1.400**	**1.437**	**2,6**	**58,1**	**54,9**	**(5,5)**
PR	12,9	13,1	1,6	1.667	1.743	4,6	21,5	22,8	6,0
SC	0,4	0,4	-	775	775	-	0,3	0,3	-
RS	28,2	24,7	(12,4)	1.287	1.287	-	36,3	31,8	(12,4)
CENTER-SOUTH	**43,8**	**40,5**	**(7,5)**	**1.381**	**1.415**	**2,5**	**60,5**	**57,3**	**(5,3)**
BRAZIL	**43,8**	**40,5**	**(7,5)**	**1.381**	**1.415**	**2,5**	**60,5**	**57,3**	**(5,3)**

SOURCE: CONAB - Suvey: Jun/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**	**2,3**	**-**	**1.609**	**1.783**	**10,8**	**3,7**	**4,1**	**10,8**
PR	0,8	0,8	0,4	1.590	2.150	35,2	1,3	1,7	30,8
RS	1,5	1,5	-	1.570	1.570	-	2,4	2,4	-
CENTER-SOUTH	**2,3**	**2,3**	**-**	**1.609**	**1.783**	**10,8**	**3,7**	**4,1**	**10,8**
BRAZIL	**2,3**	**2,3**	**-**	**1.609**	**1.783**	**10,8**	**3,7**	**4,1**	**10,8**

SOURCE: CONAB - Suvey: Jun/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**	**107,0**	**4,1**	**2.794**	**3.200**	**14,5**	**287,2**	**342,4**	**19,2**
PR	50,8	55,0	8,3	3.599	3.816	6,0	182,8	209,9	14,8
SC	5,7	5,7	-	3.000	3.000	-	17,1	17,1	-
RS	46,3	46,3	-	1.885	2.493	32,3	87,3	115,4	32,2
CENTER-SOUTH	**102,8**	**107,0**	**4,1**	**2.794**	**3.200**	**14,5**	**287,2**	**342,4**	**19,2**
BRAZIL	**102,8**	**107,0**	**4,1**	**2.794**	**3.200**	**14,5**	**287,2**	**342,4**	**19,2**

SOURCE: CONAB - Suvey: Jun/2013

WHEAT

Wheat planted area for the 2013/14 season is estimated to present an increase of 9.4% in comparison to previous season, reaching 2,074.3 thousand hectares, against 1,895.4 thousand hectares in 2012/13 season. The recovery of part of area that was not farmed in the past years, is related to improvement in prices paid in previous season because of lower world and Brazilian yield, which reverberated favorably with farmers, inducing to planting increase.

In the state of Parana, in spite of competition for area set with corn second crop, wheat farming in 2013 indicates planting intension area of around 896.8 thousand hectares, representing an increment of 15.9% compared to previous season, which was the smallest planted area since 1980s. In majority of the state, there was rainfall shortage in the second half of April and in the first three weeks of May, delaying the beginning of wheat planting. However, rainfall was normalized in the last week of May, favoring crop establishment, while approximately 58% of the area in the state is planted. Currently, crop is under germination (24%) and vegetative development (76%) stages.

In the state of Rio Grande do Sul, planted area is estimated to reach 1,010.4 thousand hectares, representing an increment of 3.5% compared to the previous year, having as basis the good prices paid in the past season, currently stimulated by a narrow local supply and demand scenario and by the possibility of production problems for main international suppliers. Additionally, the supply of new cultivars that are more resistant to diseases and with higher yielding potential has contributed for farmers to opt for this grain in the 2013 season.

In the other regions of the country, the state of Minas Gerais stands out wherer farmers expect area increase of 34,0%. In this state, planting of the grain appears as a good alternative for the winter period due the fact that low temperatures coincide with vegetative development.

Domestic wheat yield in the 2013/14 season shall reach 5,555.8 thousand tons, representing an increment of 26.9% compared to past crop.

Supply and Demand

The estimate for planting intension in 2013/14 shows a yield of around 5,555.8 thousand tons, 44.4% in Rio Grande do Sul, 47.2% in Parana, and the remnant in all other producing states.

The farmed area shall surpass 2.07 million hectares, 9.4% more than the previous one, which may yield a production that will represent a positive variation in relation to the previous season of 26.9%.

Concerning domestic supply, wheat crop season will end in the coming July 31. Thus, the situation in 2012/13 is not conclusive yet, bearing in mind that imports and exports may present changes.

It is predicted for the 2013/14 season the necessity of imports around 6.8 million tons, just 5.5% smaller than in previous year and that shall be of 7.2 million tons. Regarding exports, it is estimated a reduction to 1.5 million, which will depend on the actual volume to be harvested until the end of the year and on the domestic and foreign markets conjuncture during the first semester in 2014.

Still, it is predicted that industrial milling shall evolve to 10.4 million and seeds consumption toward 301 thousand tons due to increase in farming area. Therefore, domestic consumption shall reach 10.7 million tons.

It is verified that domestic supply will be very adjusted with extremely low carryover stocks.

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 (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	**24,8**	**22,1**	**(10,9)**	**2.750**	**3.548**	**29,0**	**68,2**	**78,4**	**15,0**
MS	15,0	10,0	(33,3)	1.600	1.800	12,5	24,0	18,0	(25,0)
GO	9,0	11,4	27,0	4.400	4.987	13,3	39,6	56,9	43,7
DF	0,8	0,7	(12,5)	5.700	5.000	(12,3)	4,6	3,5	(23,9)
SOUTHEAST	**53,5**	**76,9**	**43,7**	**3.036**	**2.925**	**(3,7)**	**162,4**	**224,9**	**38,5**
MG	21,5	28,8	34,0	3.753	3.400	(9,4)	80,7	97,9	21,3
SP	32,0	48,1	50,3	2.553	2.641	3,4	81,7	127,0	55,4
SOUTH	**1.817,1**	**1.975,3**	**8,7**	**2.283**	**2.659**	**16,5**	**4.148,9**	**5.252,5**	**26,6**
PR	773,8	896,8	15,9	2.730	2.926	7,2	2.112,5	2.624,0	24,2
SC	67,1	68,1	1,5	2.110	2.543	20,5	141,6	173,2	22,3
RS	976,2	1.010,4	3,5	1.941	2.430	25,2	1.894,8	2.455,3	29,6
CENTER-SOUTH	**1.895,4**	**2.074,3**	**9,4**	**2.311**	**2.678**	**15,9**	**4.379,5**	**5.555,8**	**26,9**
BRAZIL	**1.895,4**	**2.074,3**	**9,4**	**2.311**	**2.678**	**15,9**	**4.379,5**	**5.555,8**	**26,9**

SOURCE: CONAB - Suvey: Jun/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 (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)
SOUTHEAST	**20,0**	**20,0**	**-**	**2.565**	**2.565**	**-**	**51,3**	**51,3**	**-**
SP	20,0	20,0	-	2.563	2.563	-	51,3	51,3	-
SOUTH	**28,0**	**24,1**	**(13,9)**	**2.343**	**2.726**	**16,3**	**65,6**	**65,7**	**0,2**
PR	22,4	18,2	(18,8)	2.391	2.875	20,2	53,6	52,3	(2,4)
SC	0,4	0,7	75,0	2.181	2.181	-	0,9	1,5	66,7
RS	5,2	5,2	-	2.140	2.282	6,6	11,1	11,9	7,2
CENTER-SOUTH	**48,0**	**44,1**	**(8,1)**	**2.435**	**2.653**	**9,0**	**116,9**	**117,0**	**0,1**
BRAZIL	**48,0**	**44,1**	**(8,1)**	**2.435**	**2.653**	**9,0**	**116,9**	**117,0**	**0,1**

SOURCE: CONAB - Suvey: Jun/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	1.877,3	3,5	2.402,5	865,0	1.052,8	484,7
	2012/13	484,7	1.260,6	163,0	1.908,3	887,0	595,0	426,3
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	12.100,0	1.455,2	1.681,8
	2012/13	1.681,8	11.924,2	1.000,0	14.606,0	12.100,0	1.100,0	1.406,0
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	2.843,0	400,0	3.616,8	3.400,0	50,0	166,8
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	78.468,3	300,0	84.637,8	52.053,9	15.000,0	17.583,9
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	81.281,4	150,0	81.875,4	42.401,4	36.782,7	2.691,3
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	1.750,0	304,3
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	7.200,0	12.800,1	10.552,3	1.683,4	564,4
	2013/14	564,4	5.555,8	6.800,0	12.920,2	10.701,1	1.500,0	719,1

SOURCE: CONAB - Suvey: Jun/2013

ENDING STOCKS:

- COTTON FIBER, BEANS, CORN AND SOYBEANS: December, 31
- RICE: February, 28
- WHEAT: July, 31

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