



**BRAZILIAN
SOYBEANS AND CORN
OVERVIEW:
A BUMPER CROP,
A CROP FAILURE
AND THE EXPORT/IMPORT
DYNAMICS**

**DANIELE SIQUEIRA
AGRURAL MARKET ANALYST**

BLACK SEA GRAIN 2021
May 21, 2021





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DE VER O MERCADO



AgRural is a consultancy established since 1996 in Curitiba, Paraná, Brazil's #2 corn and soybean producer.

Our core business is to develop marketing strategies for farmers and grain buyers in Brazil and Paraguay.

We also provide market intelligence services for ag companies in Brazil and information/analysis on corn and soybean crop production, crop progress and farmer selling pace for a worldwide audience.

Learn more: agrural.com.br/brazilian-soybeans/



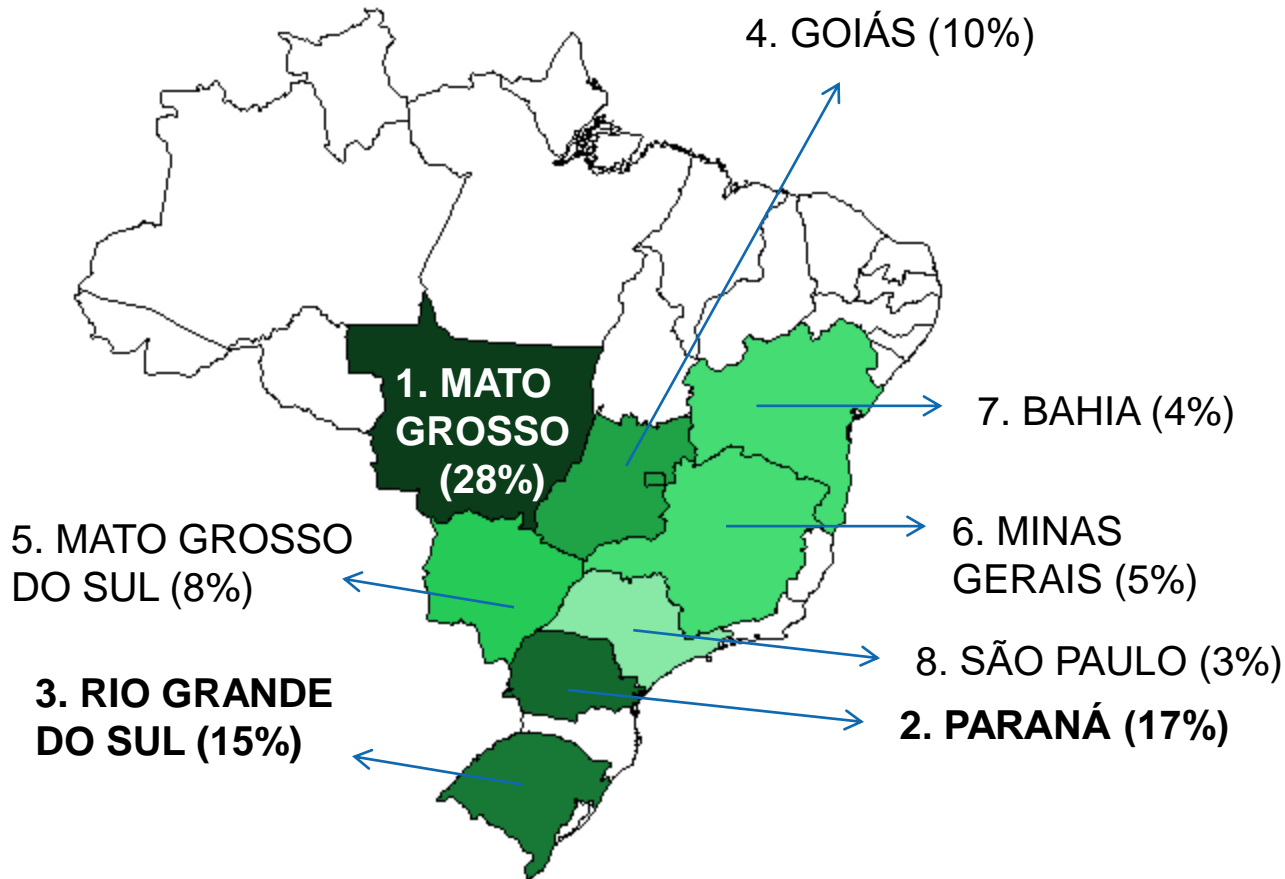
CURITIBA,
PARANÁ

BRAZILIAN SOYBEANS

Soybeans

Brazilian main producing states – 5-year average

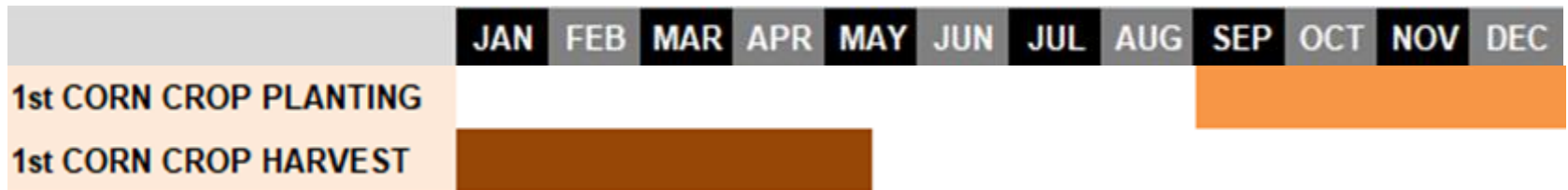
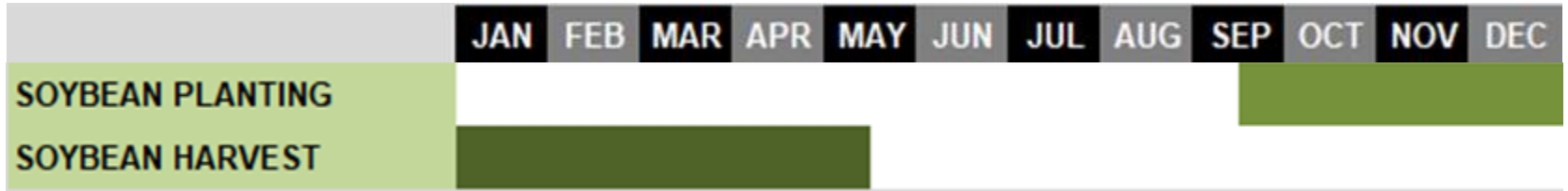
STATES



PLANTING: SEP-DEC
HARVEST: JAN-MAY

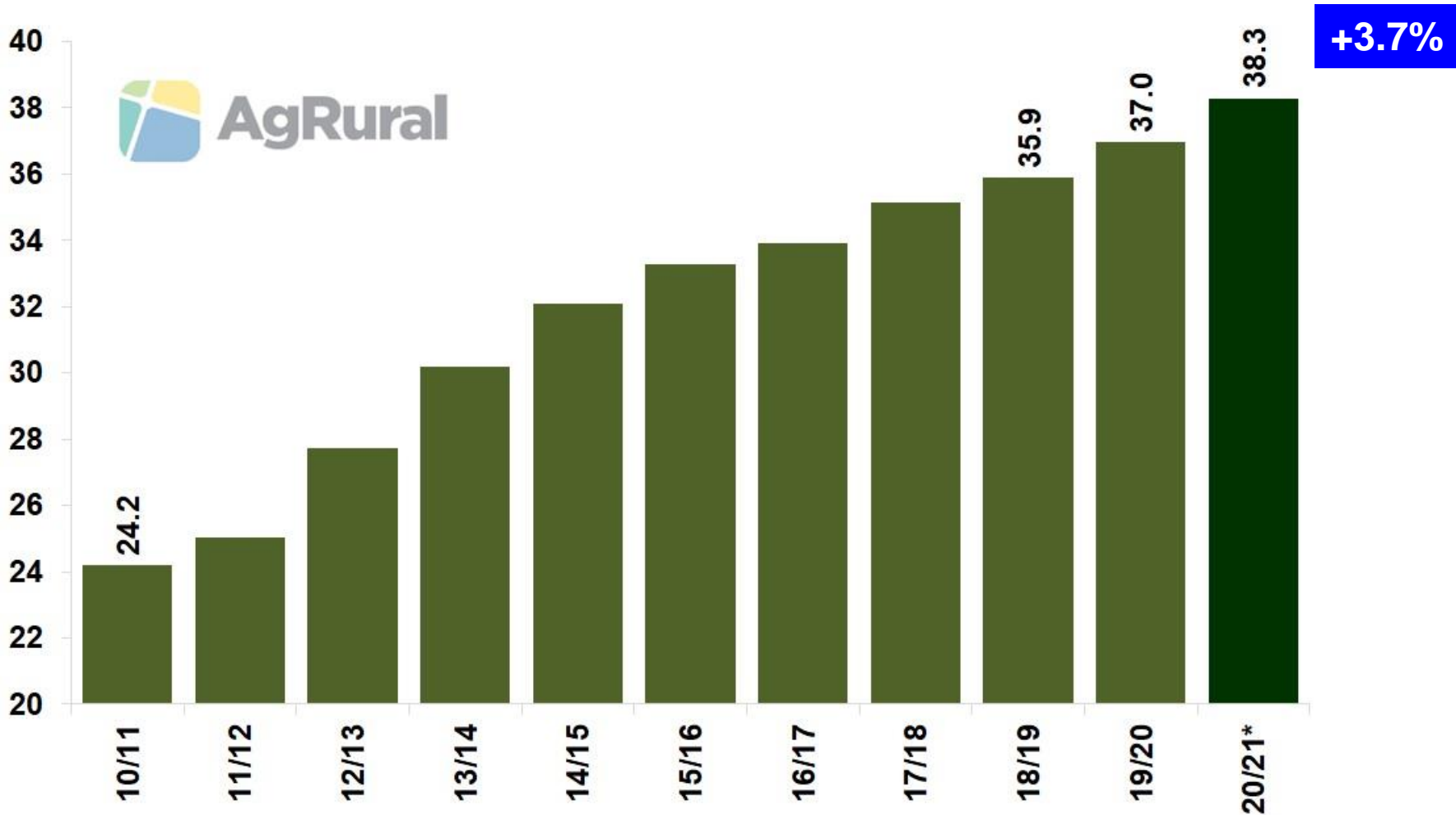
Brazil

Soybeans and corn crop calendar



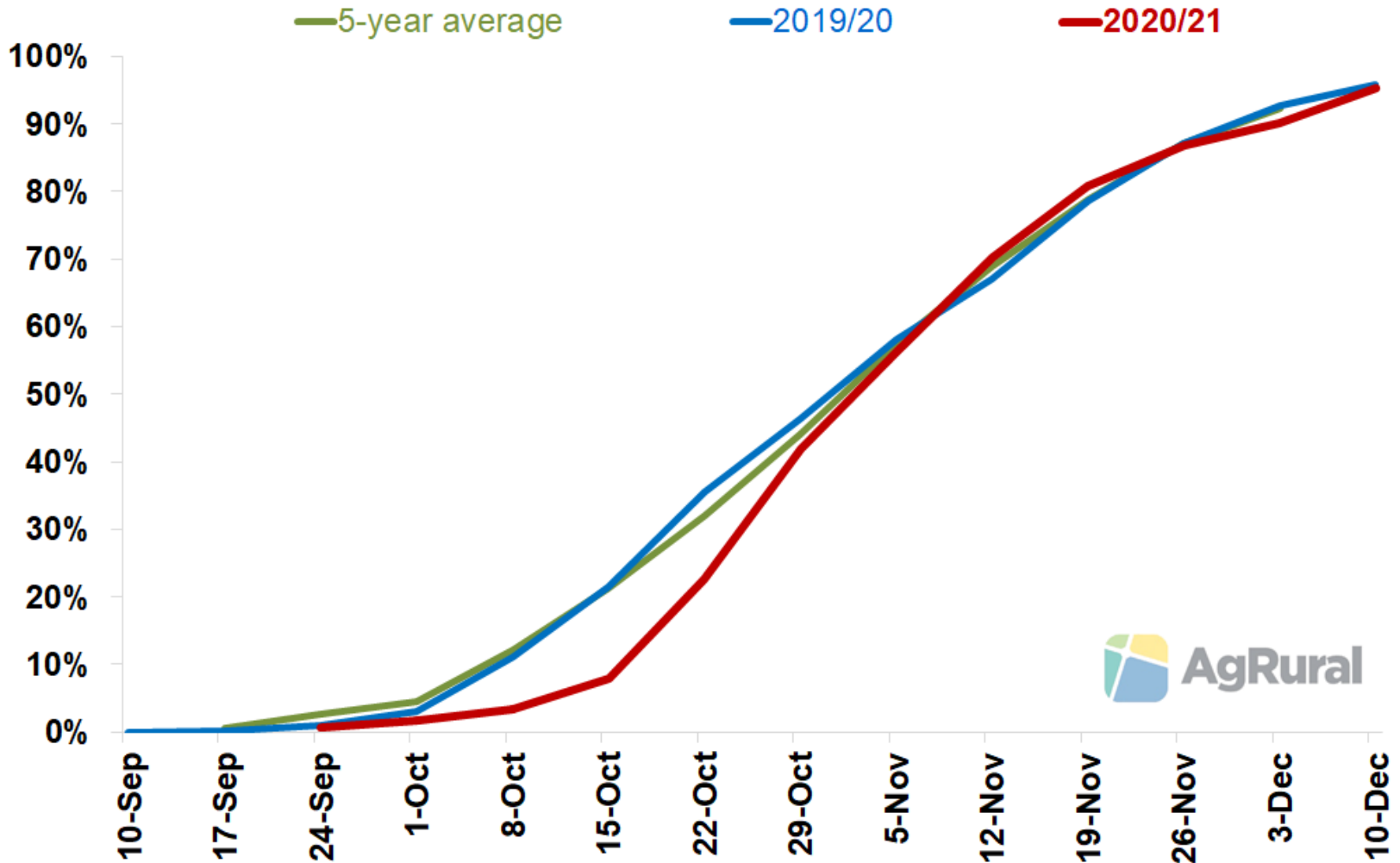
Brazil

Soybean planted area
(million hectares)



Brazil

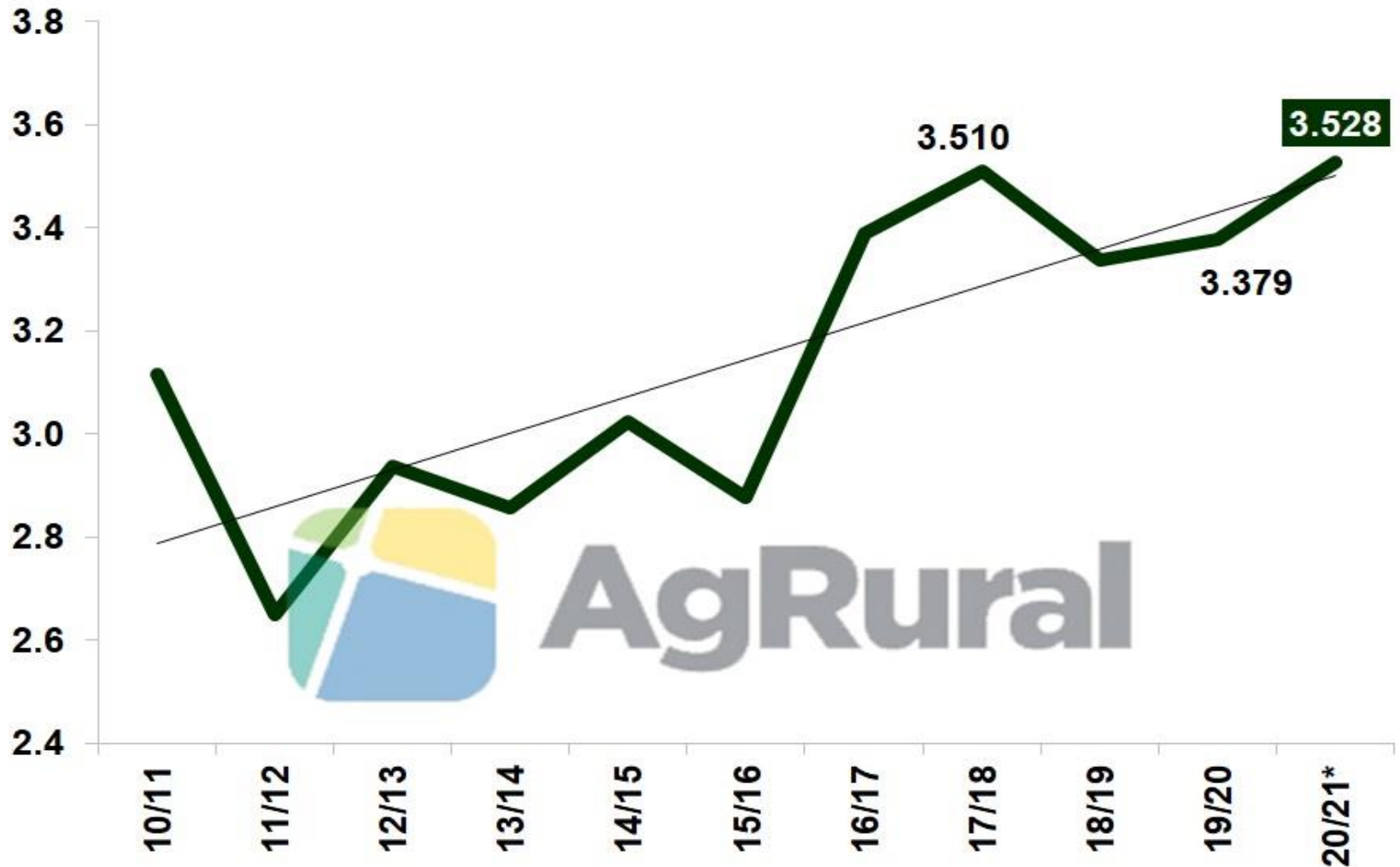
Soybean **planting** progress
(as a % of the total estimated area)



Brazil

Soybean yield

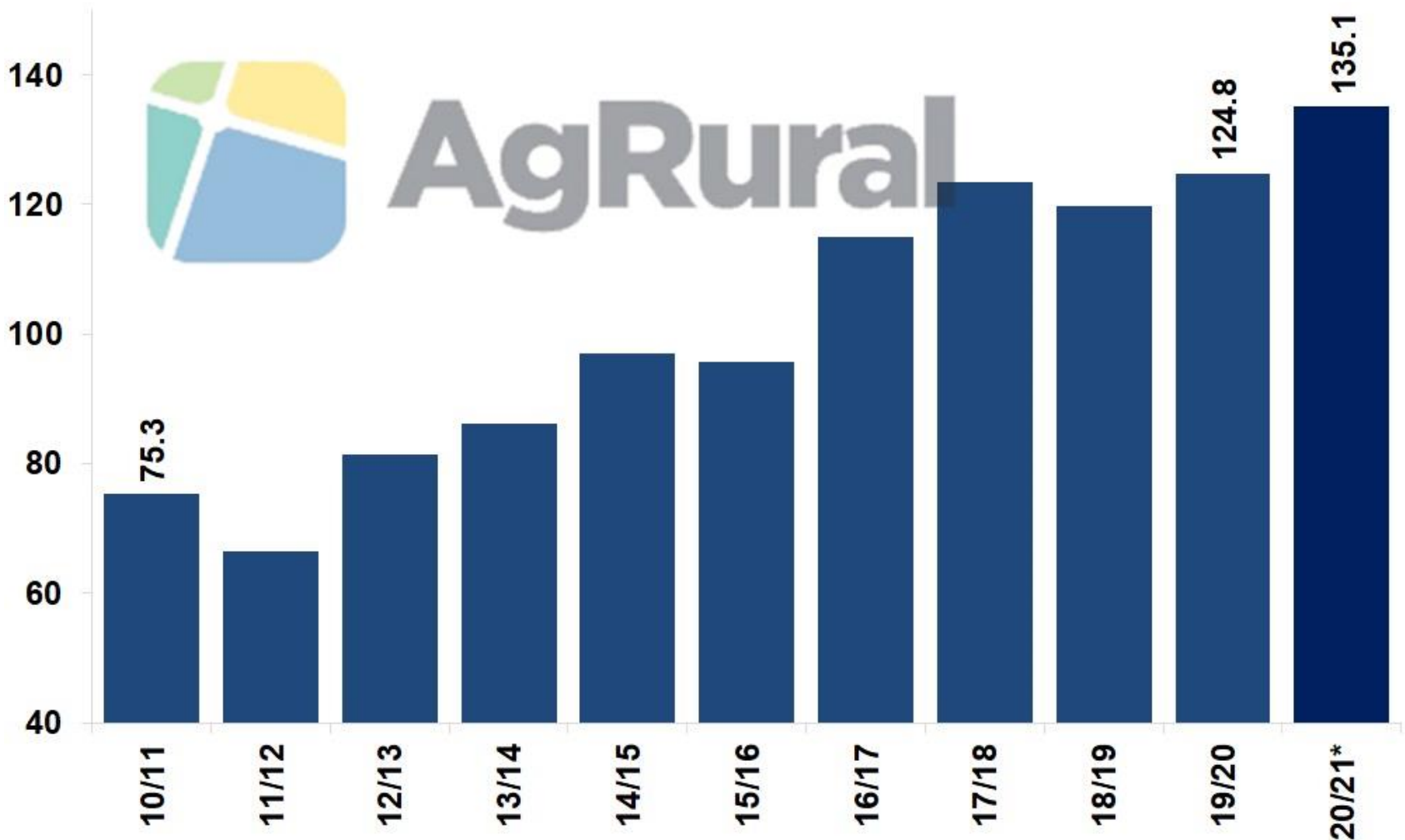
(metric tons per hectare)



Brazil

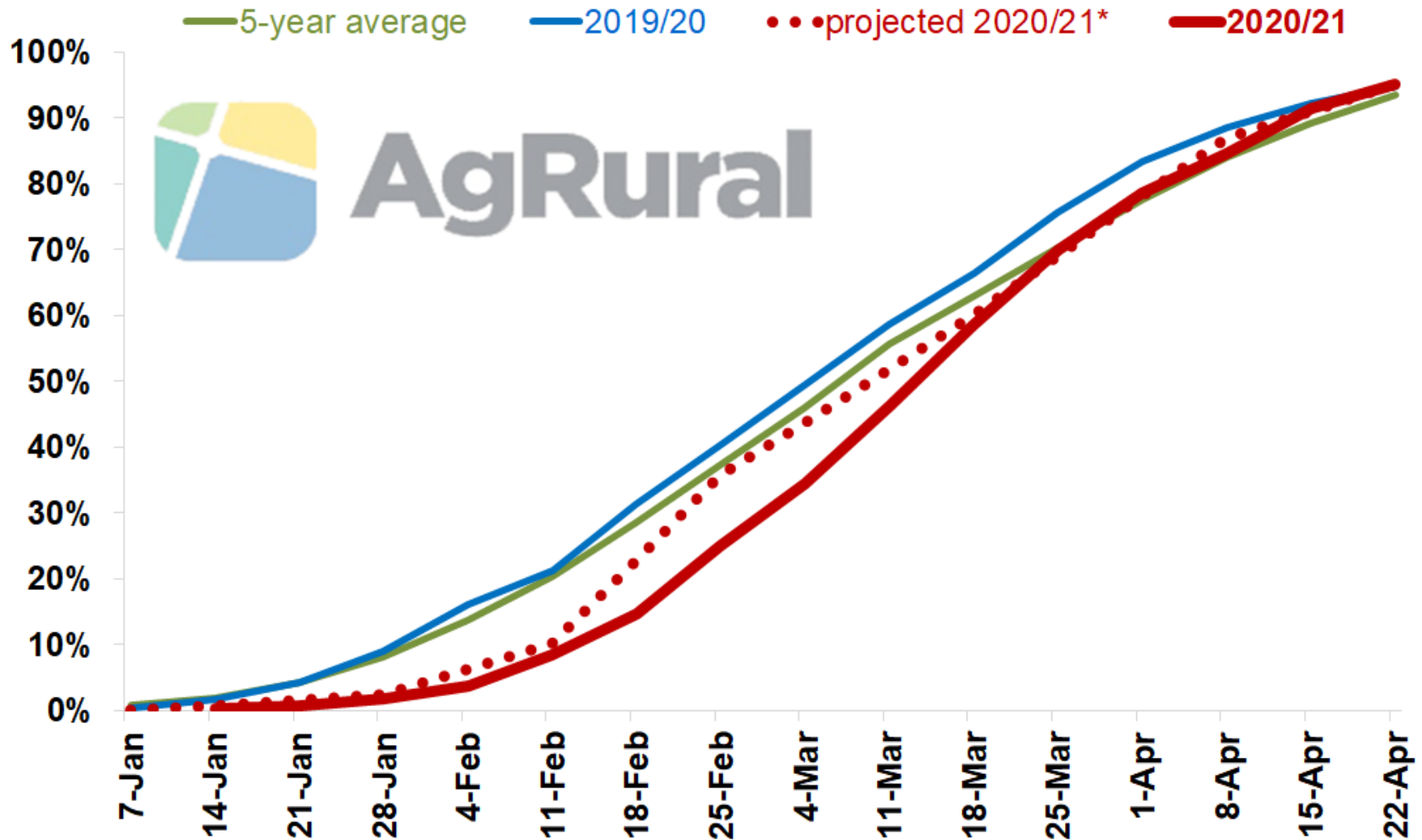
Soybean production

(million metric tons)



Brazil

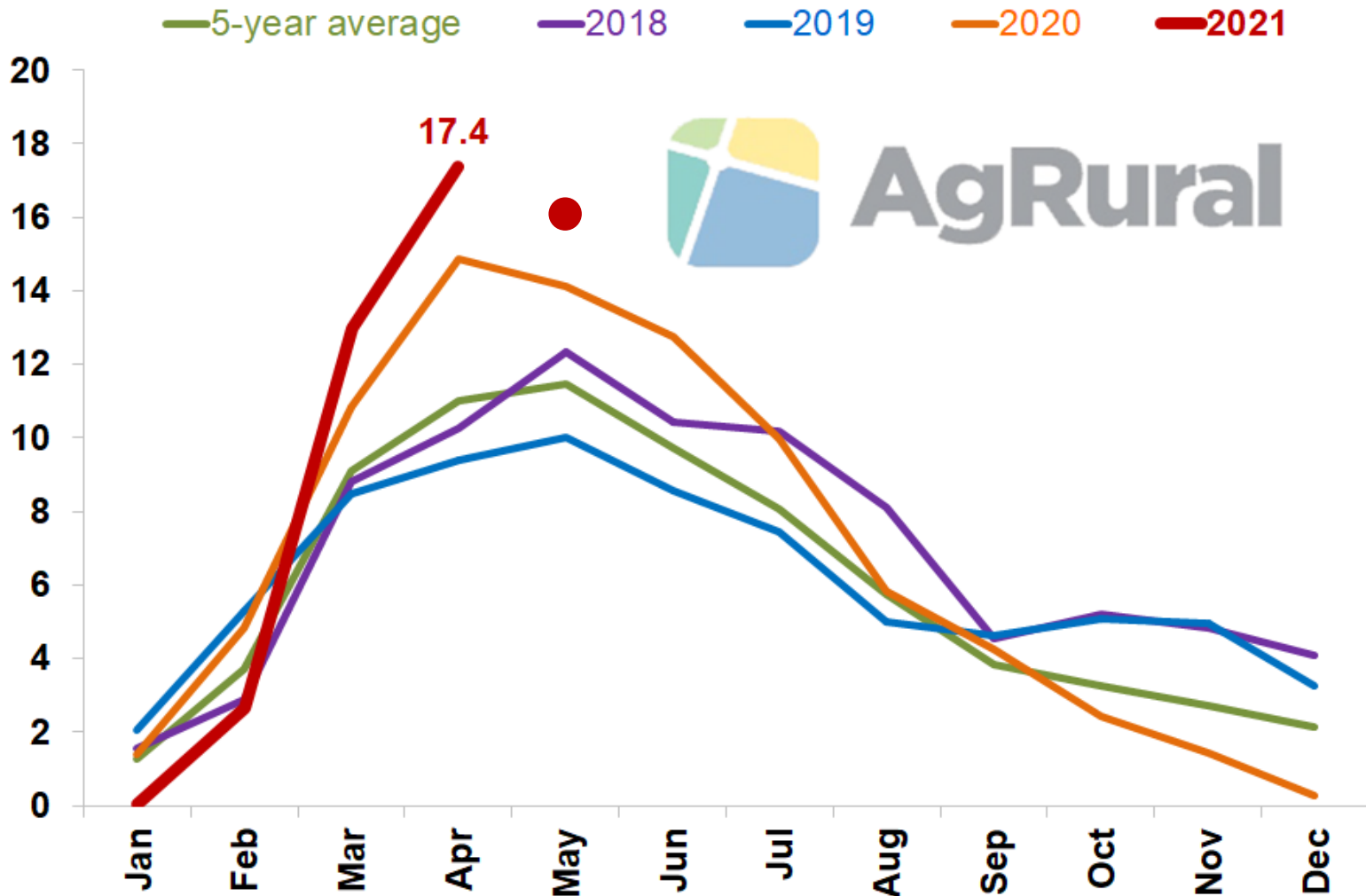
Soybean **harvest** progress
(as a % of the total estimated area)



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Brazil

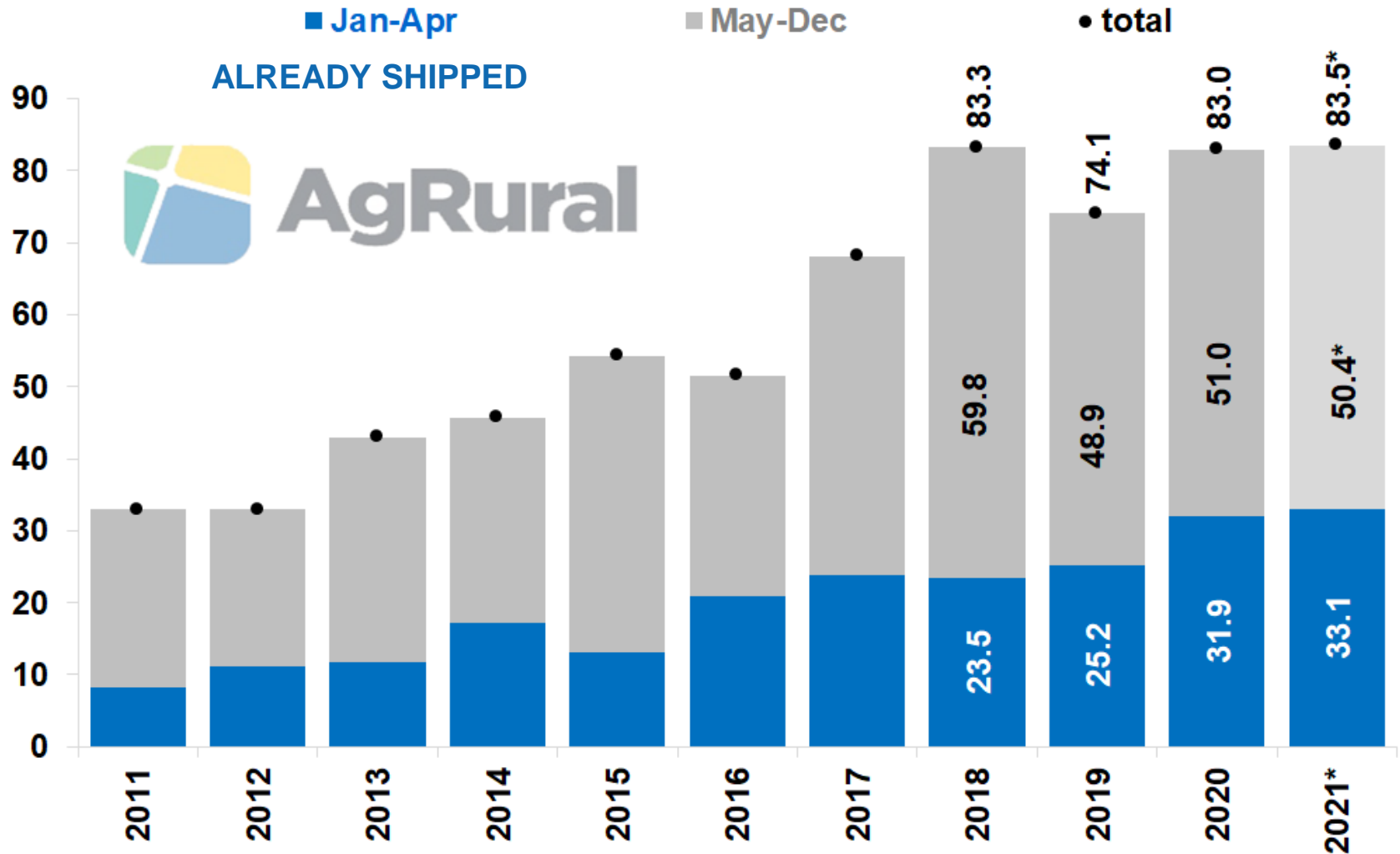
Soybean monthly exports (million metric tons)



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Brazil

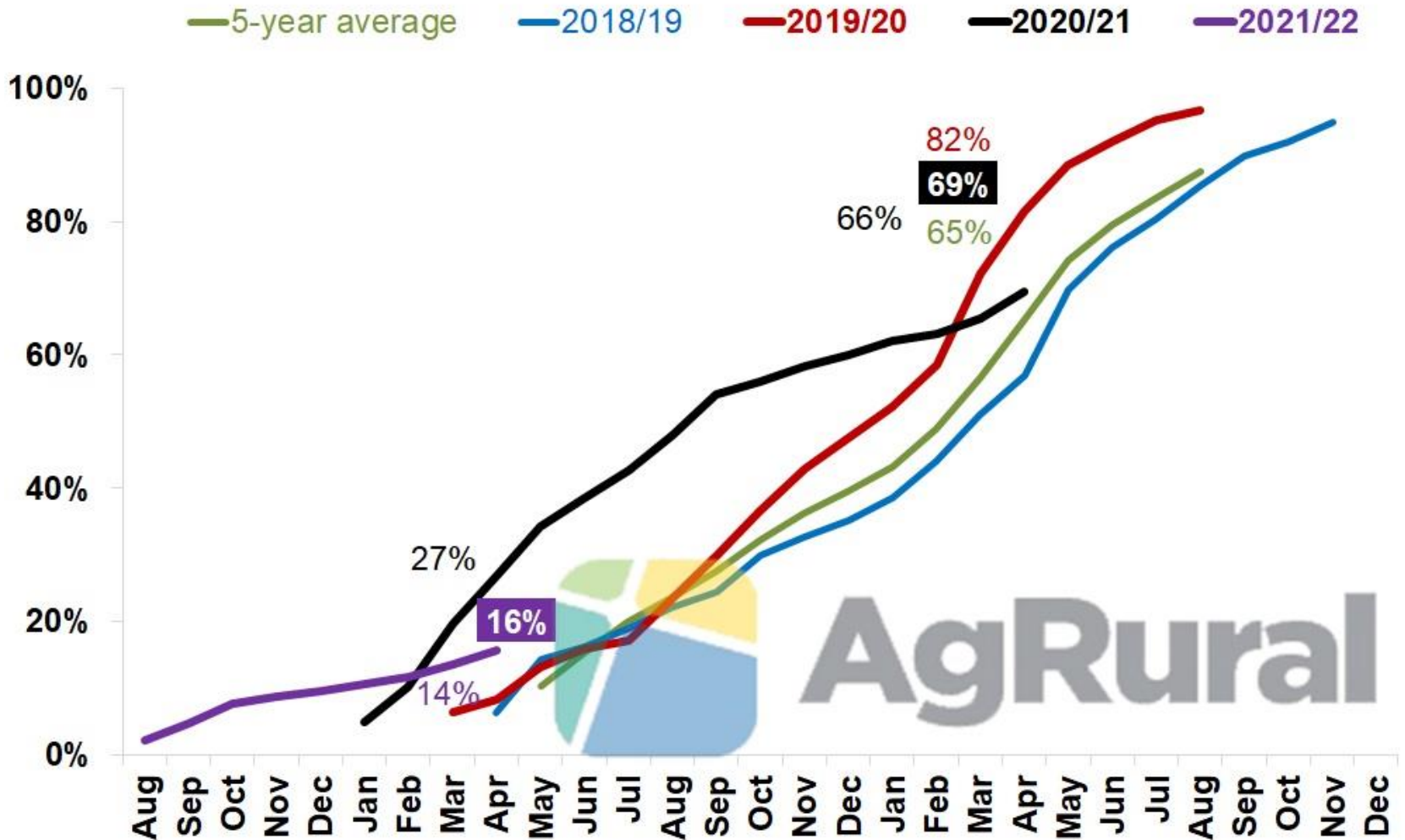
Soybean **exports** by calendar year (Jan-Dec)
(million metric tons)



Brazil

Soybean farmer selling

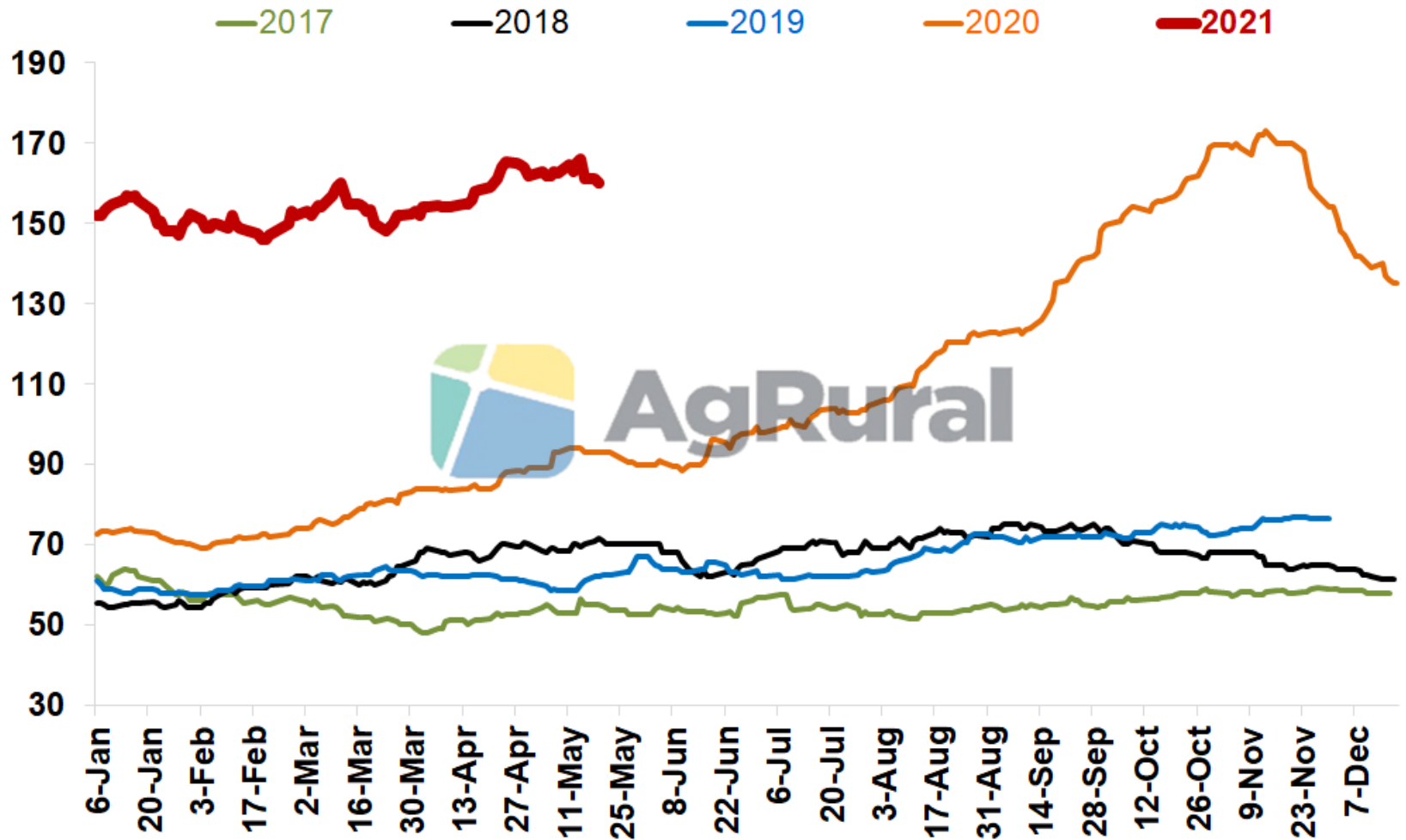
(as a % of the estimated or potential production)



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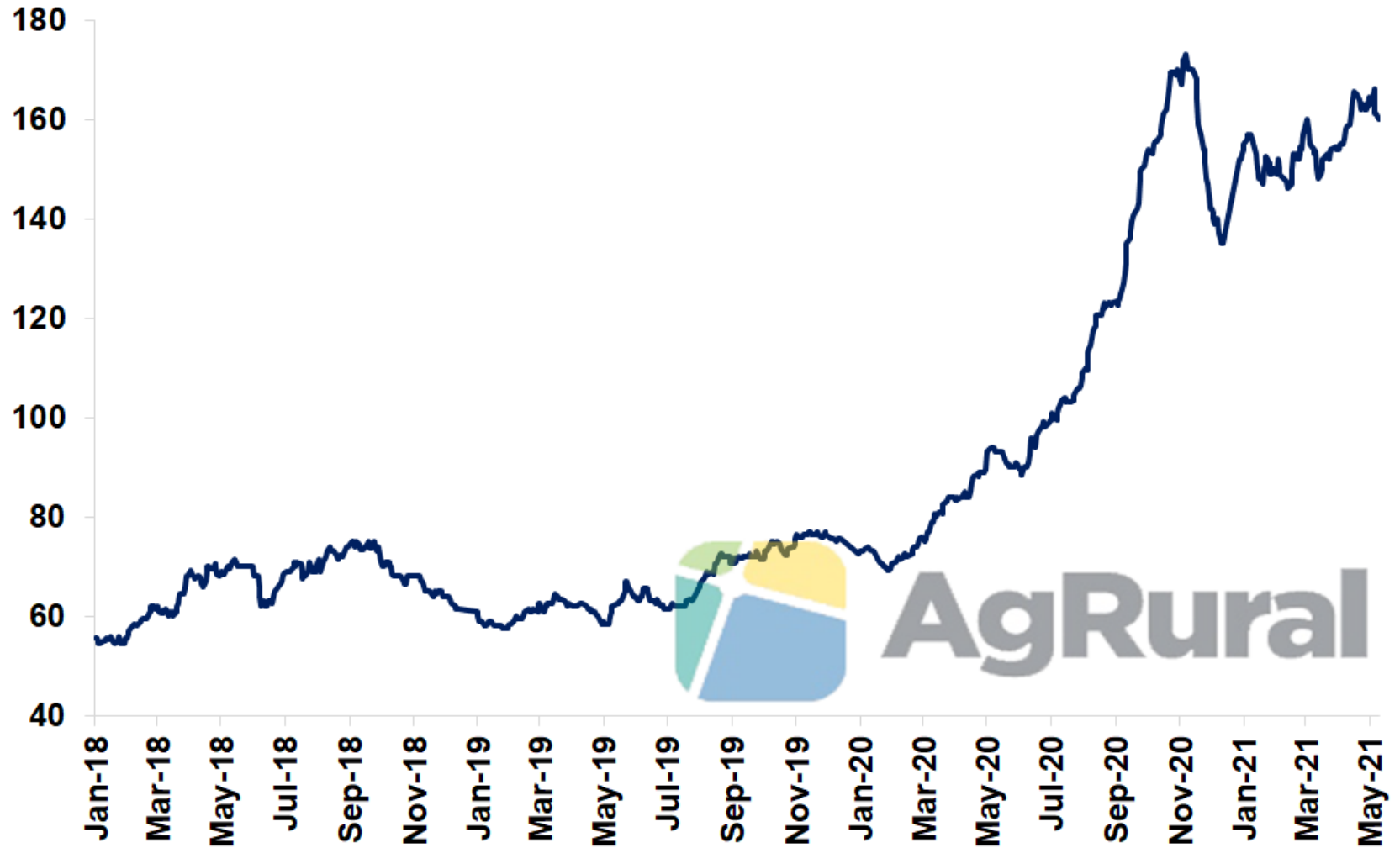
Sorriso, northern Mato Grosso, Brazil

Soybean cash prices
(BRL/60-kg bag)



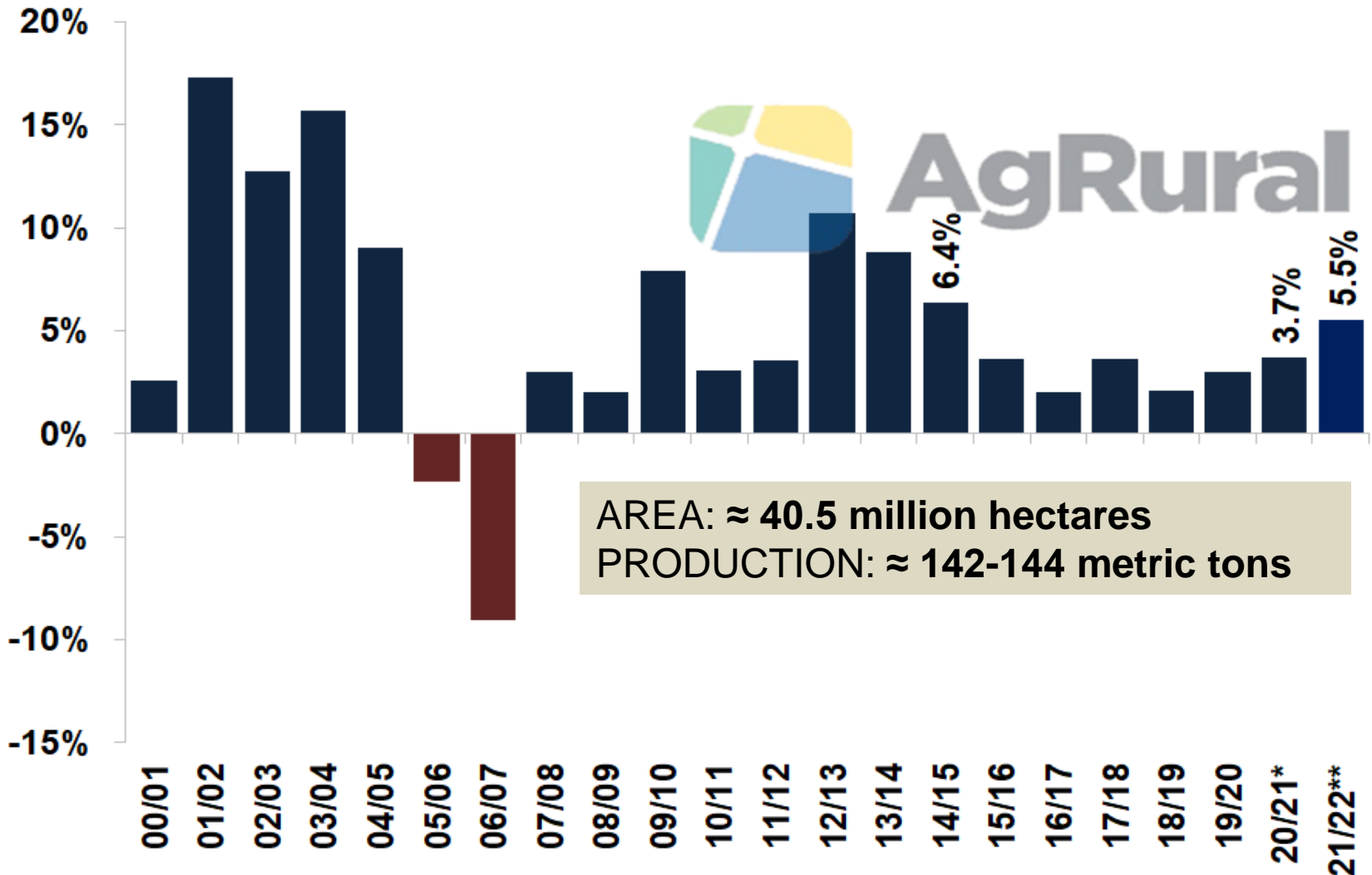
Sorriso, northern Mato Grosso, Brazil

Soybean cash prices
(BRL/60-kg bag)



Brazil – 2021-22 crop

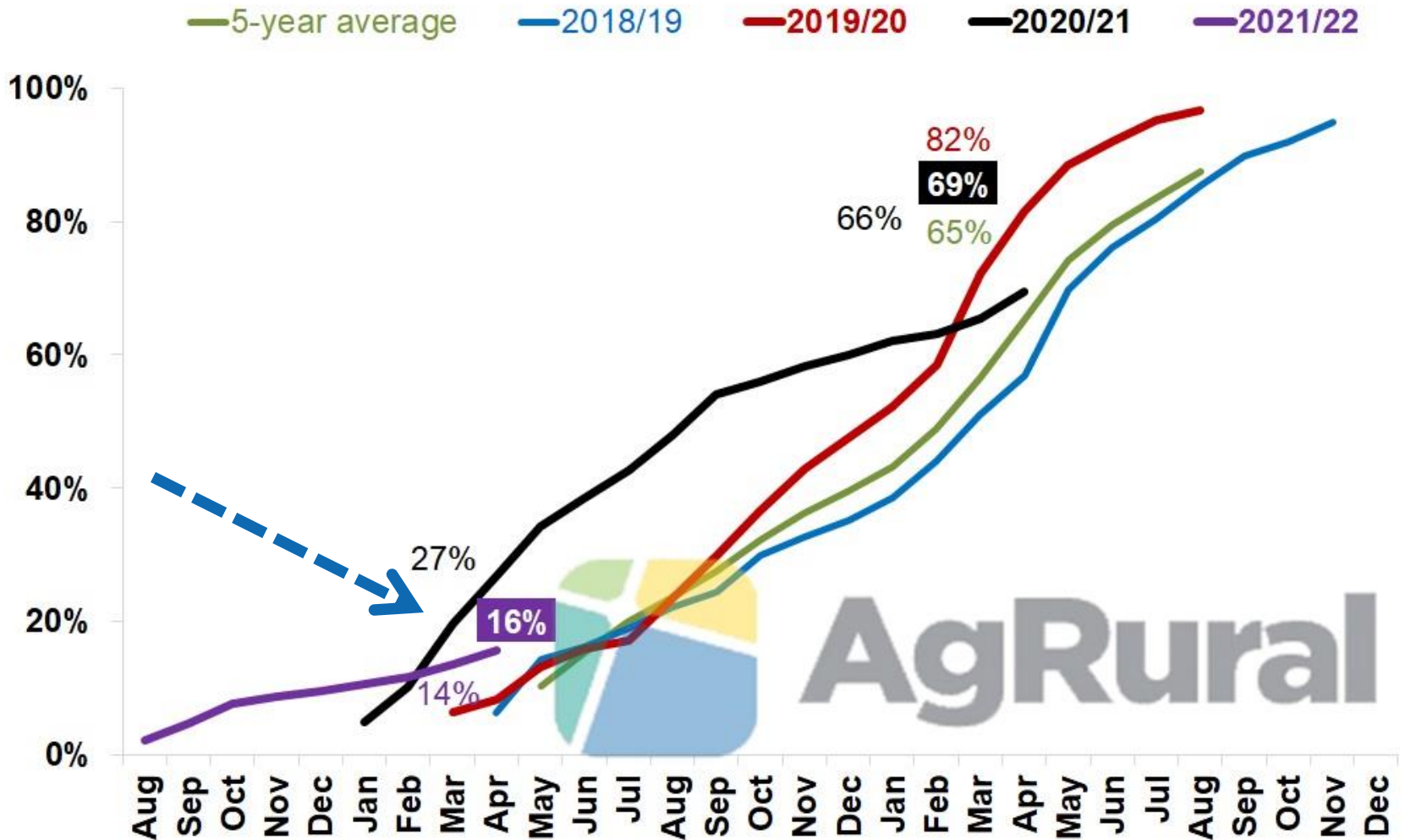
Soybean area annual change (%)



Brazil

Soybean farmer selling

(as a % of the estimated or potential production)

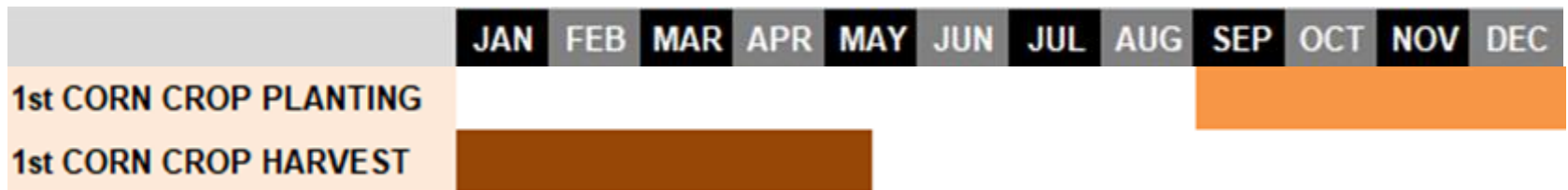
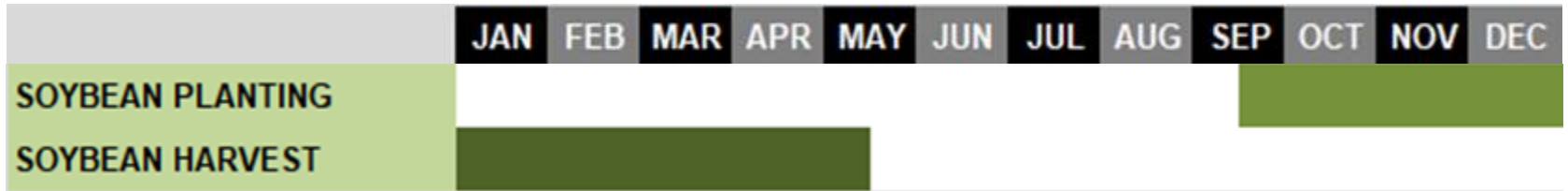


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BRAZILIAN CORN

Brazil

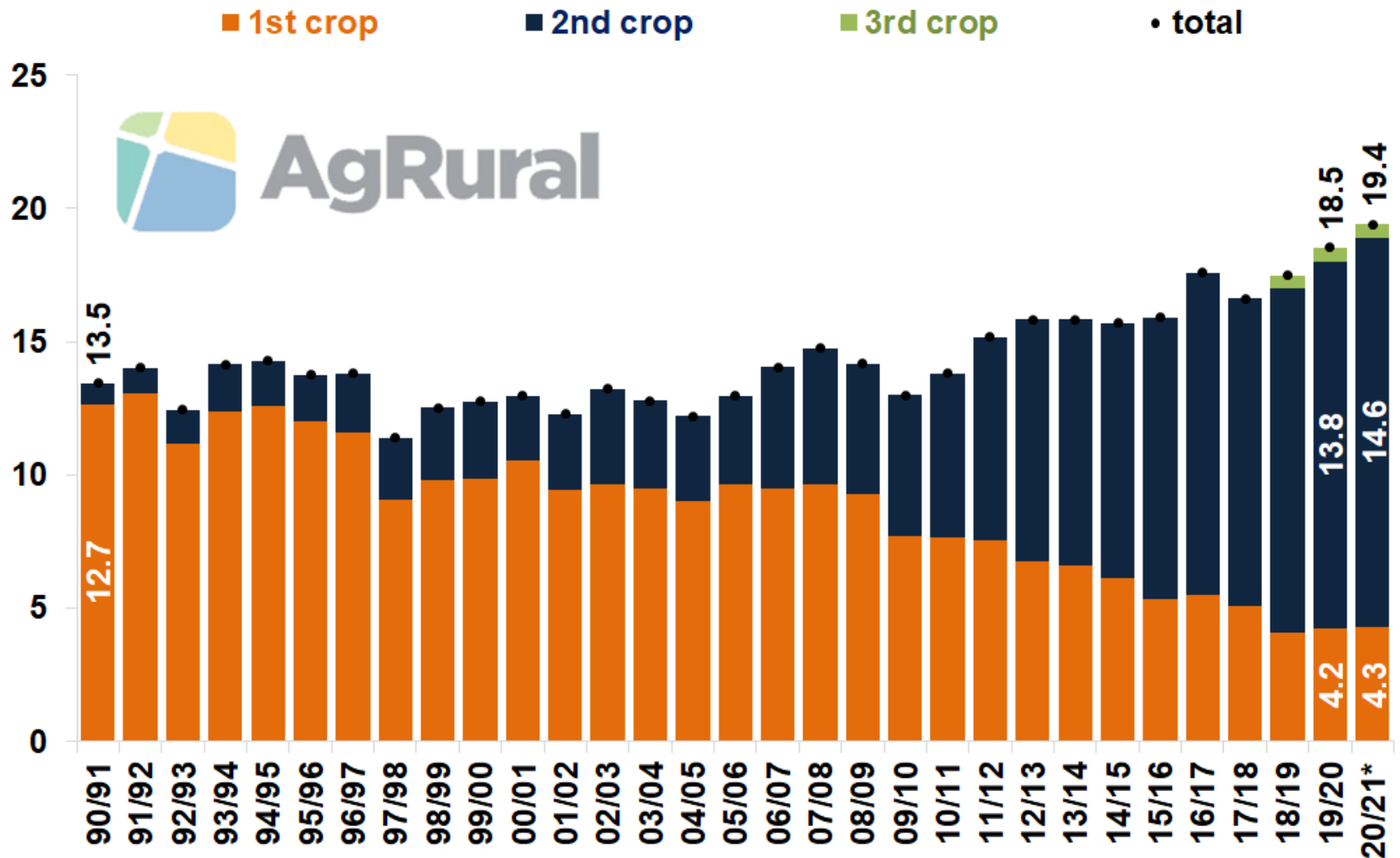
Soybeans and corn crop calendar



Brazil

Corn area

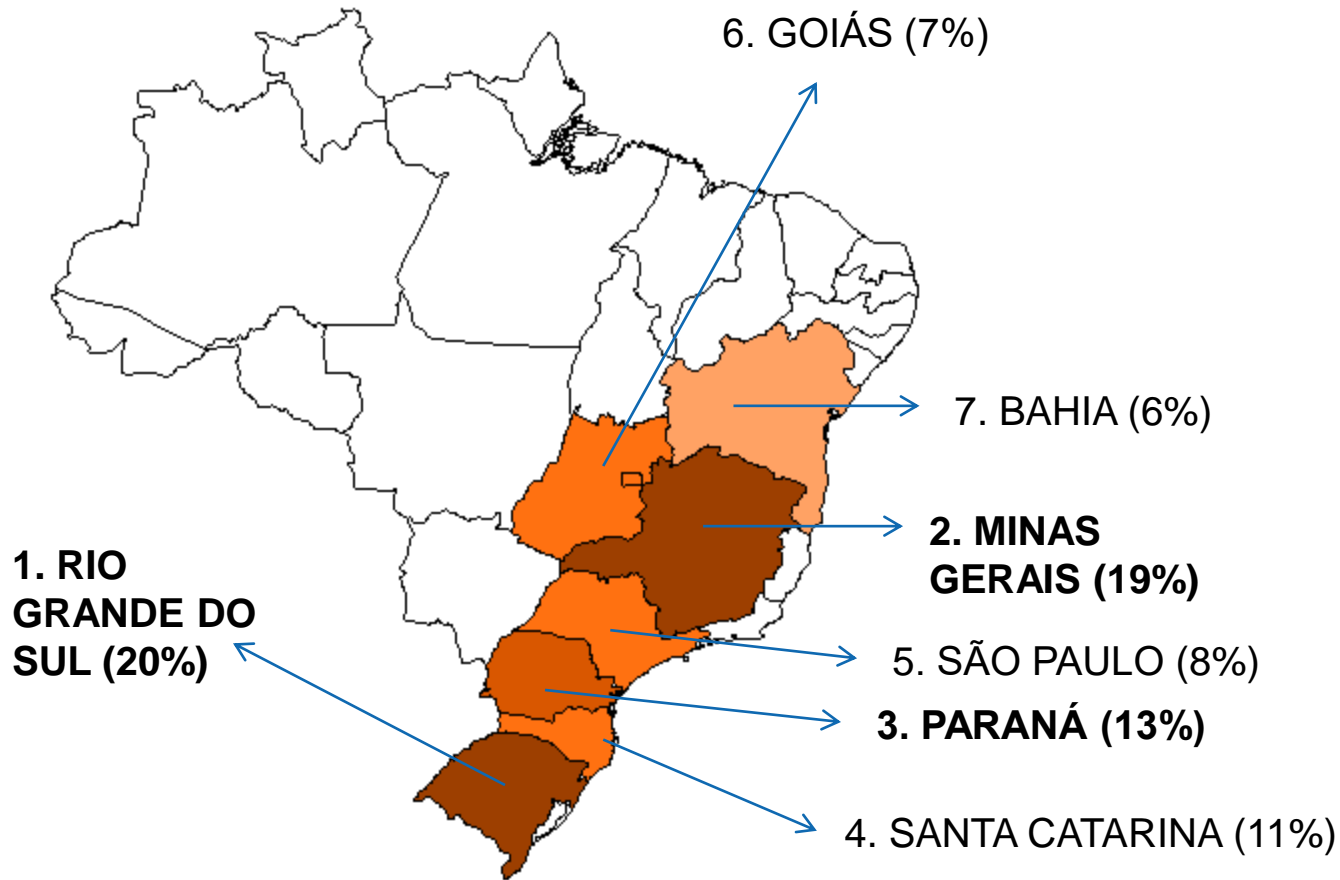
(million hectares)



Corn – 1st crop

Brazilian main producing states – 5-year average

STATES

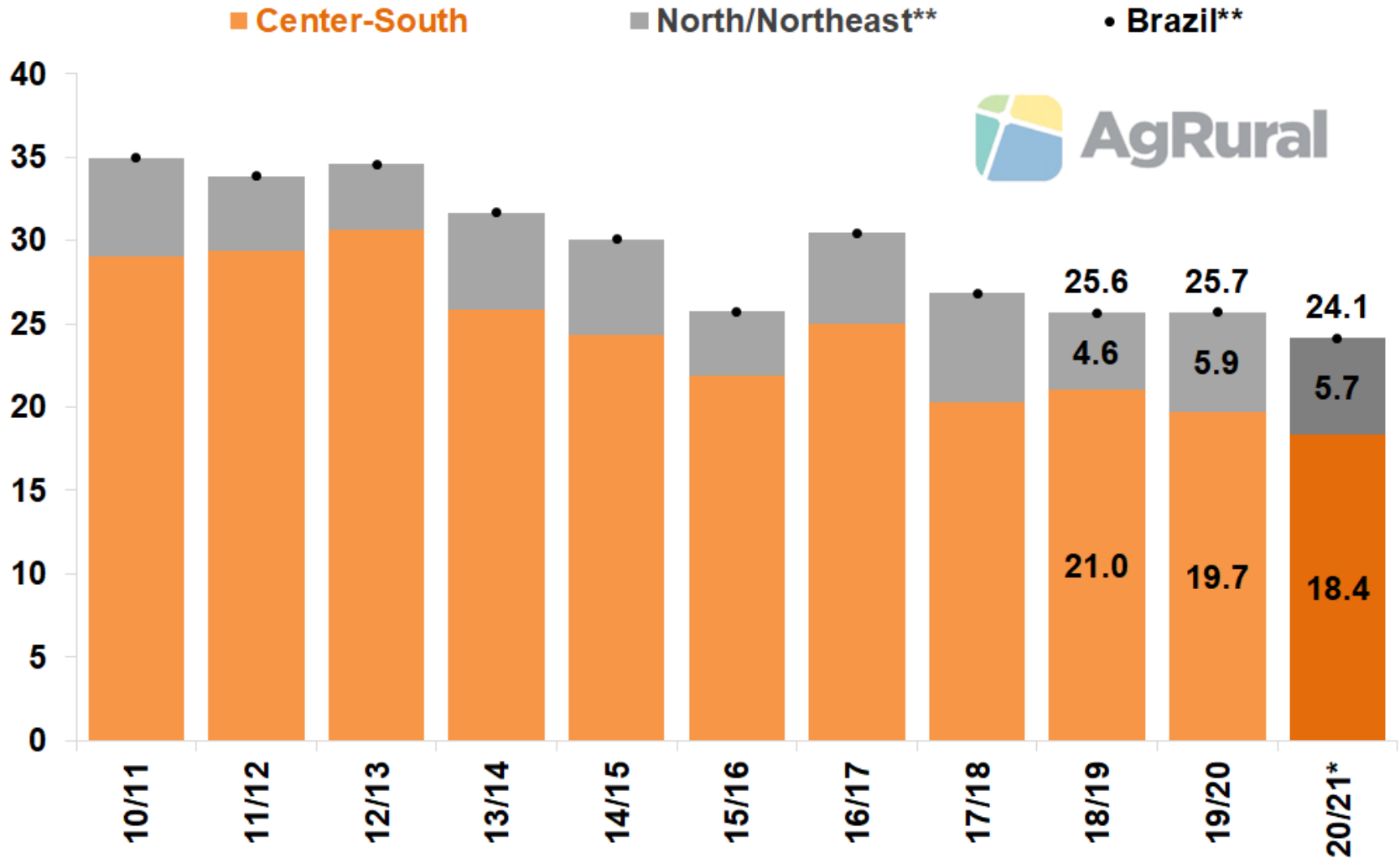


PLANTING: SEP-DEC (same as soybeans!)

HARVEST: JAN-MAY

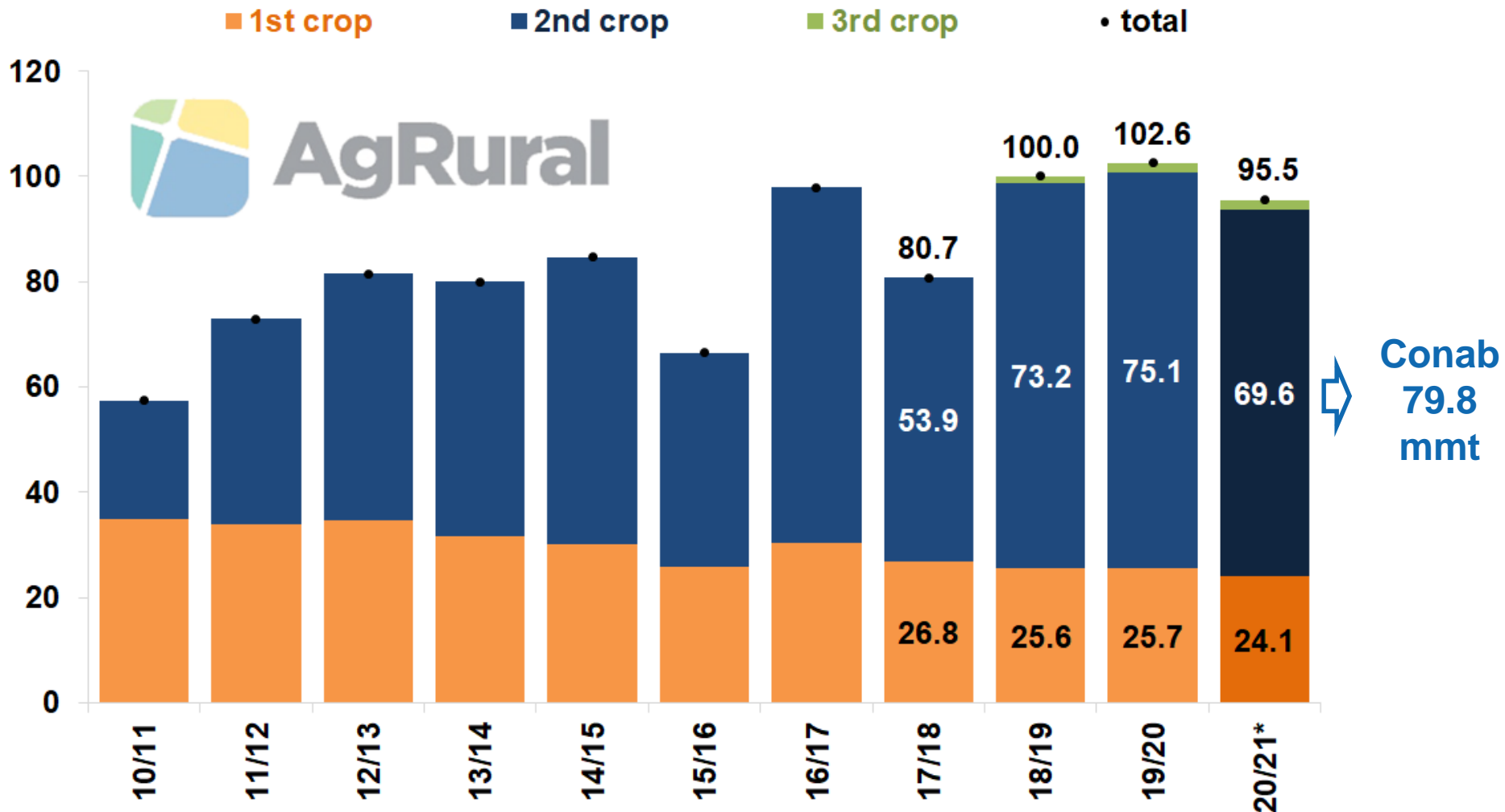
Brazil

1st corn crop production
(million metric tons)



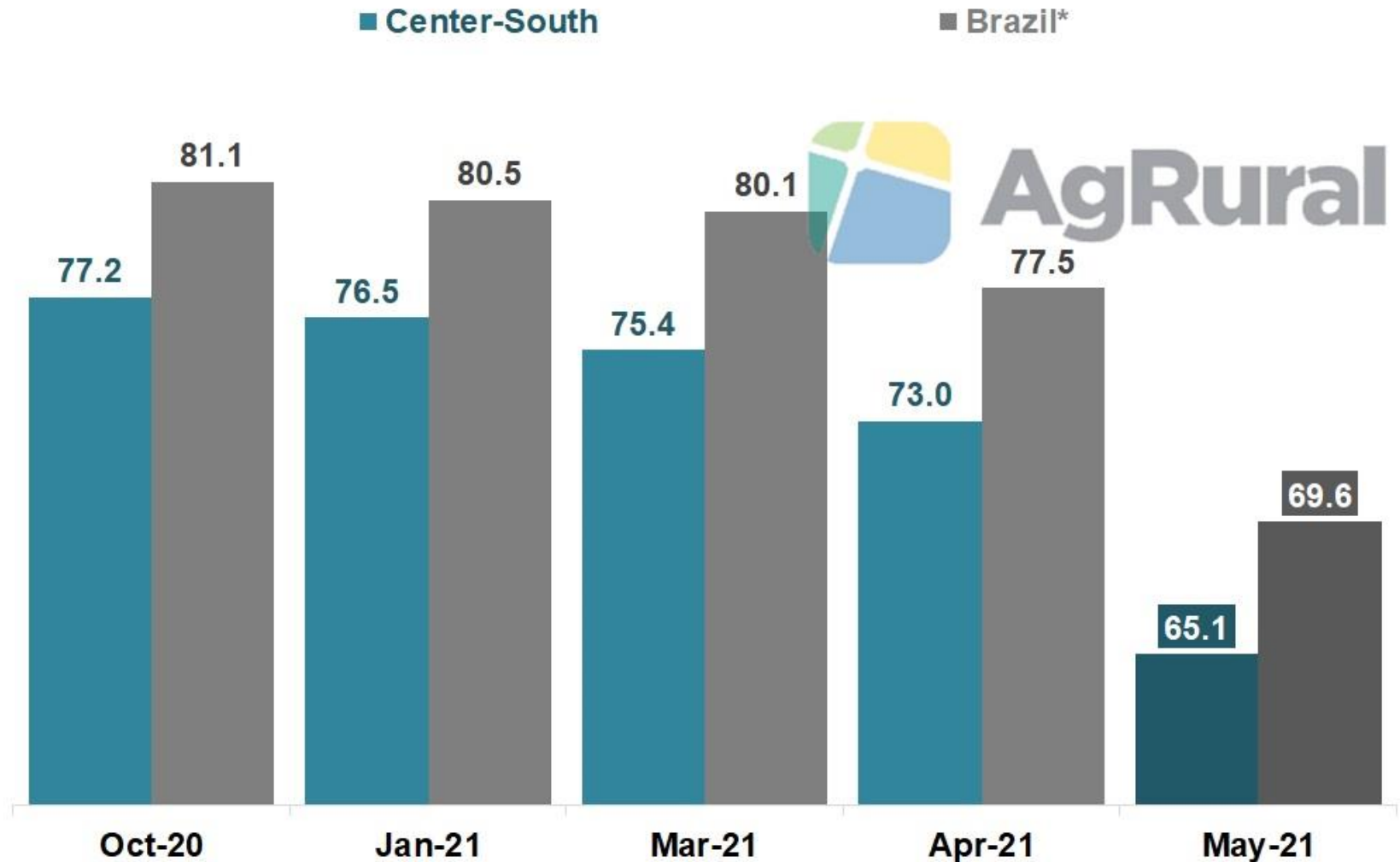
Brazil

Total corn production
(million metric tons)



Brazil – 2021 2nd corn crop

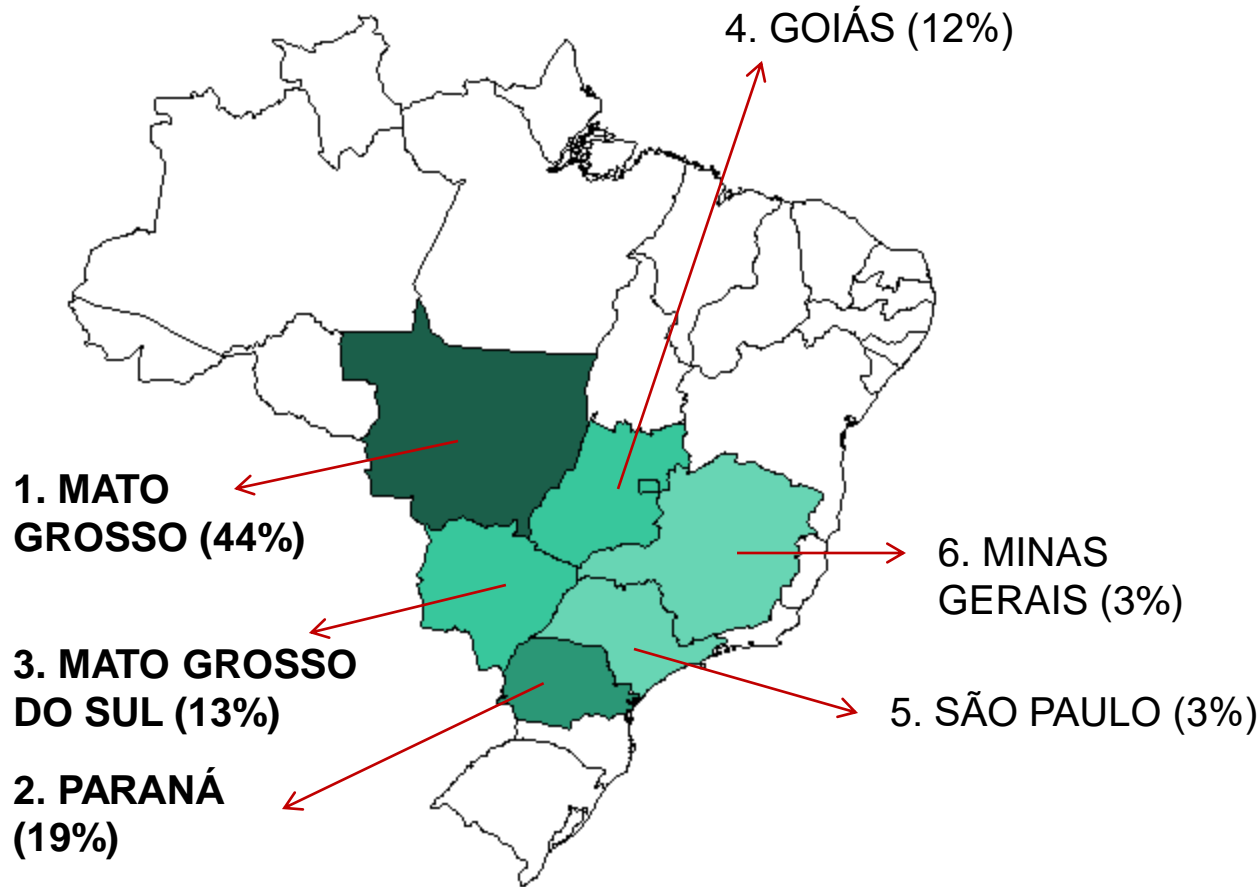
Monthly production estimates
(million metric tons)



Corn – 2nd crop

Brazilian main producing states – 5-year average

STATES

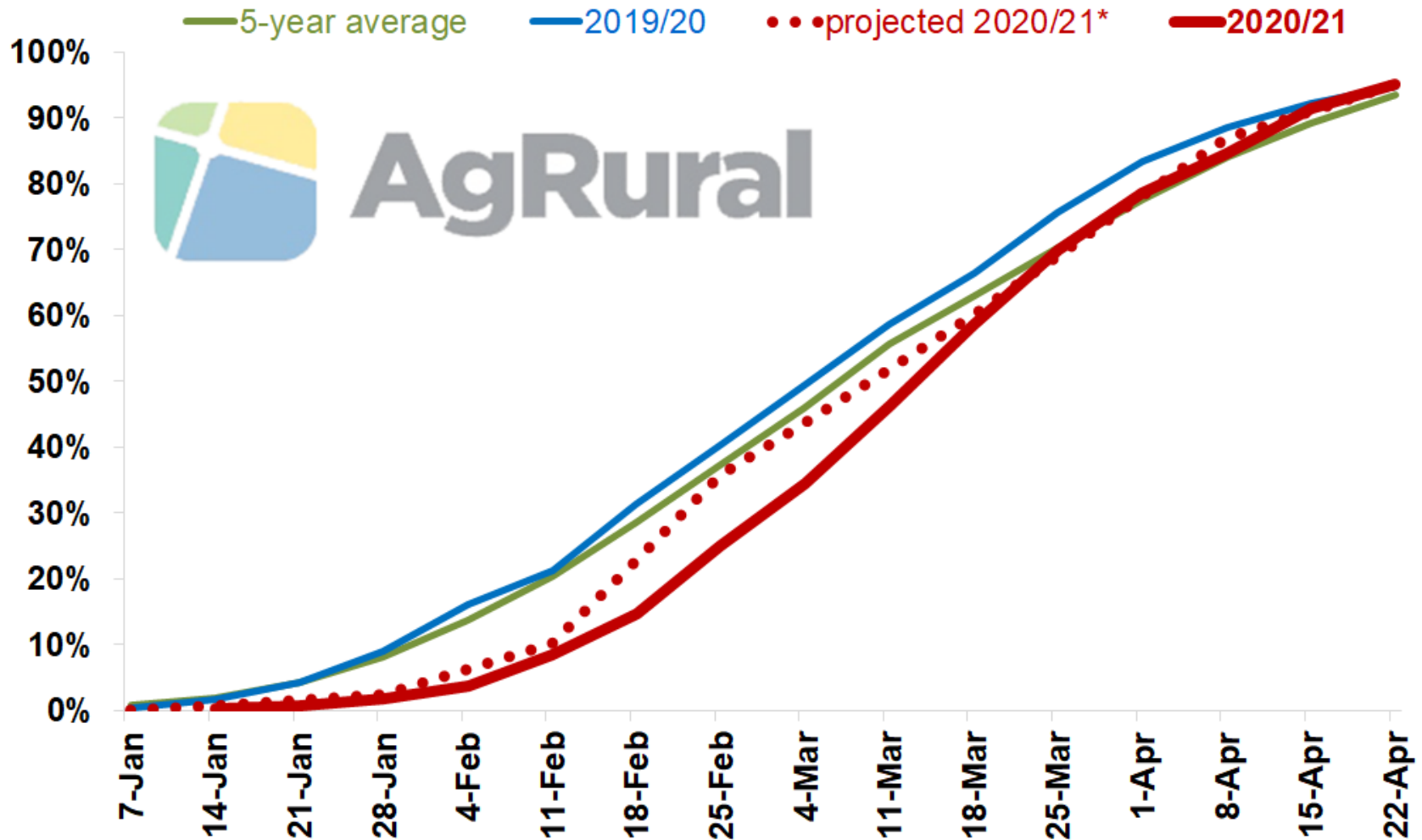


PLANTING: JAN-MAR (after soy harvest)

HARVEST: JUN-AUG

Brazil

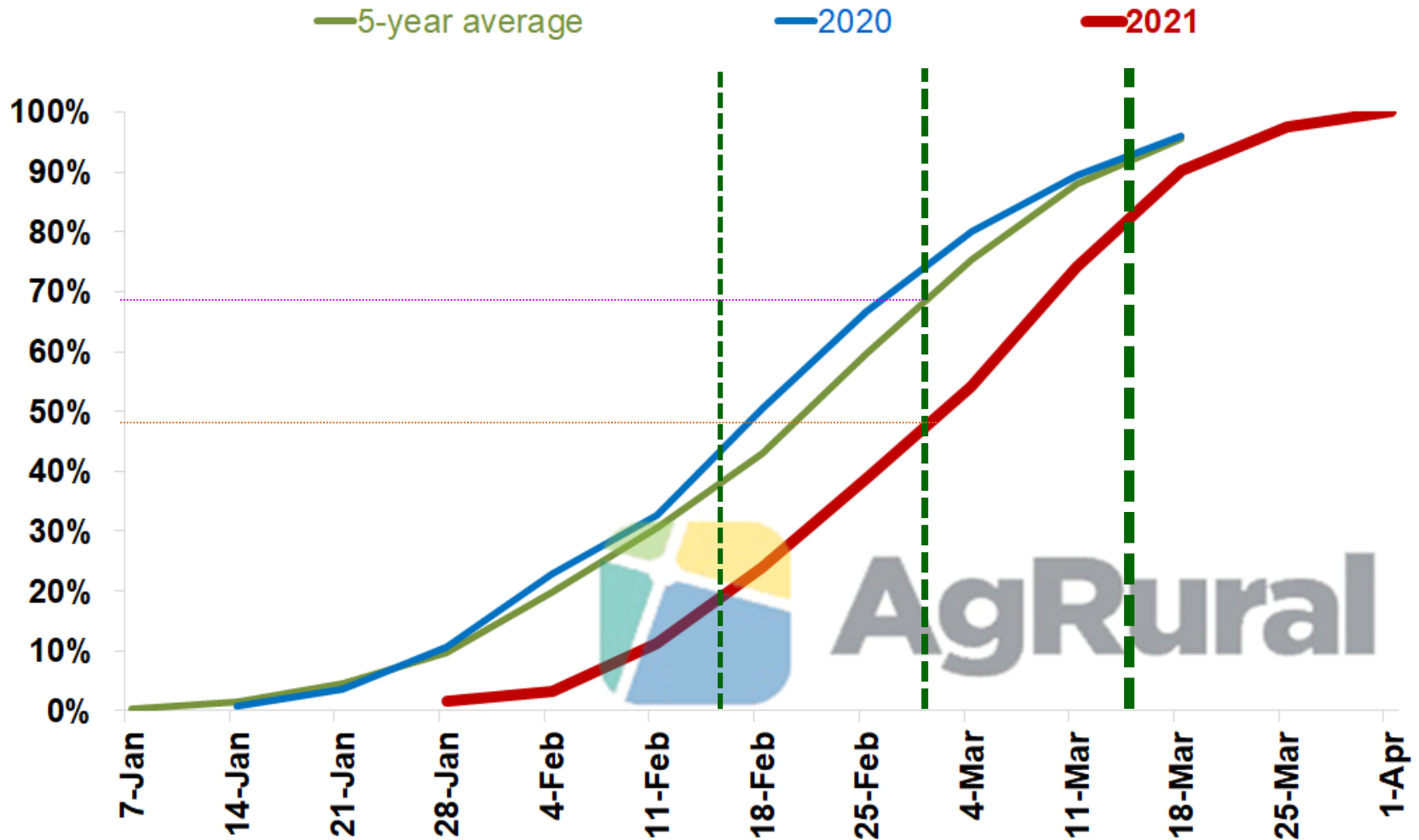
Soybean **harvest** progress
(as a % of the total estimated area)



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South-Central Brazil

2nd corn crop planting progress
(as a % of the total estimated area)



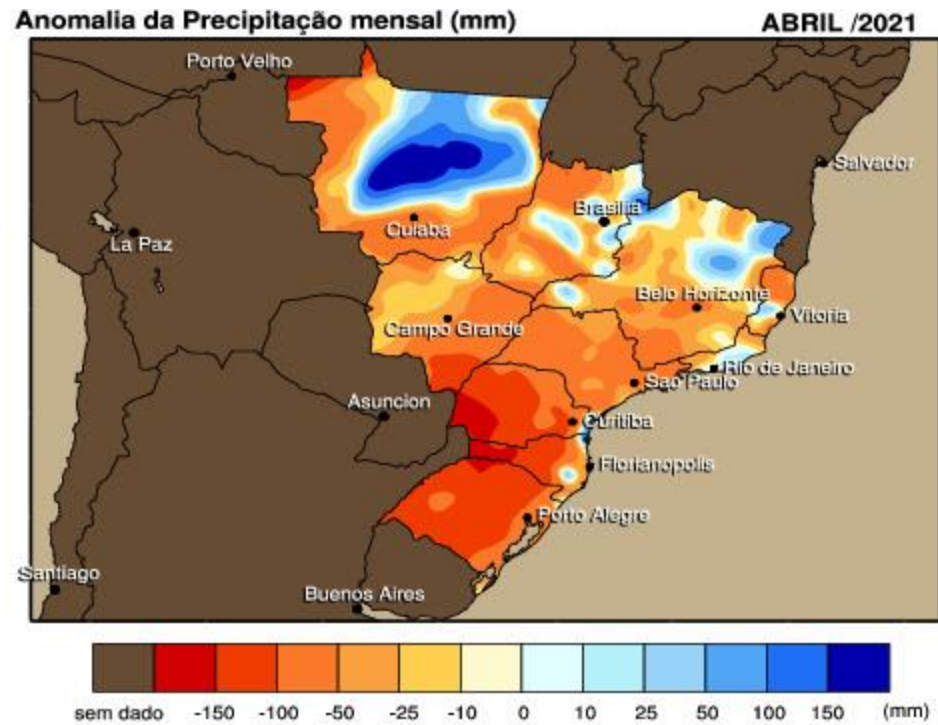
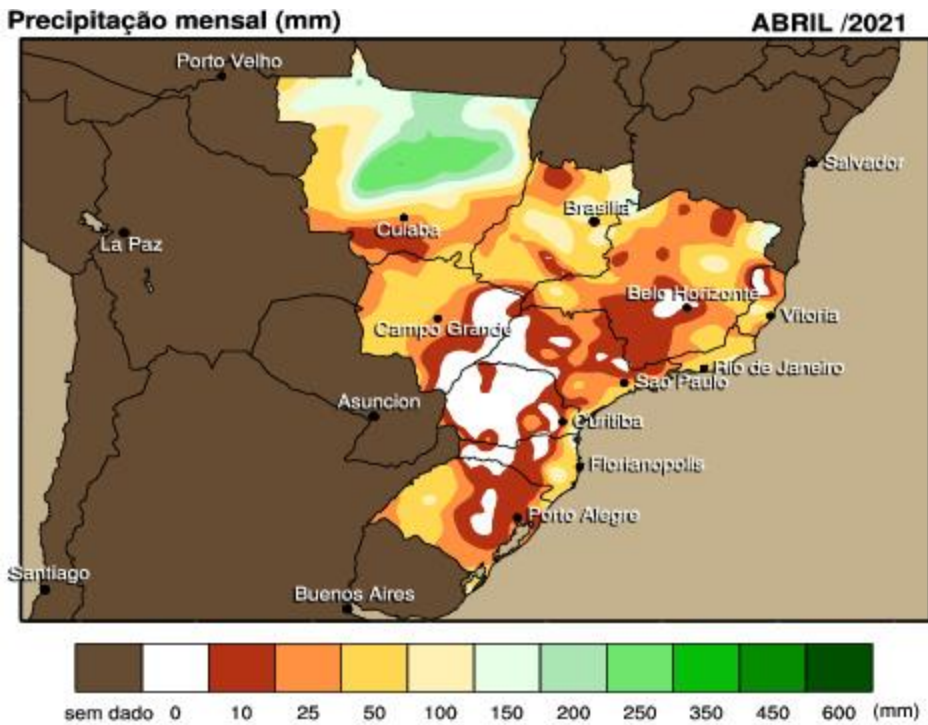
South-Central Brazil

Precipitation in April 2021



ACCUMULATED (mm)

ANOMALY (0 mm= normal)



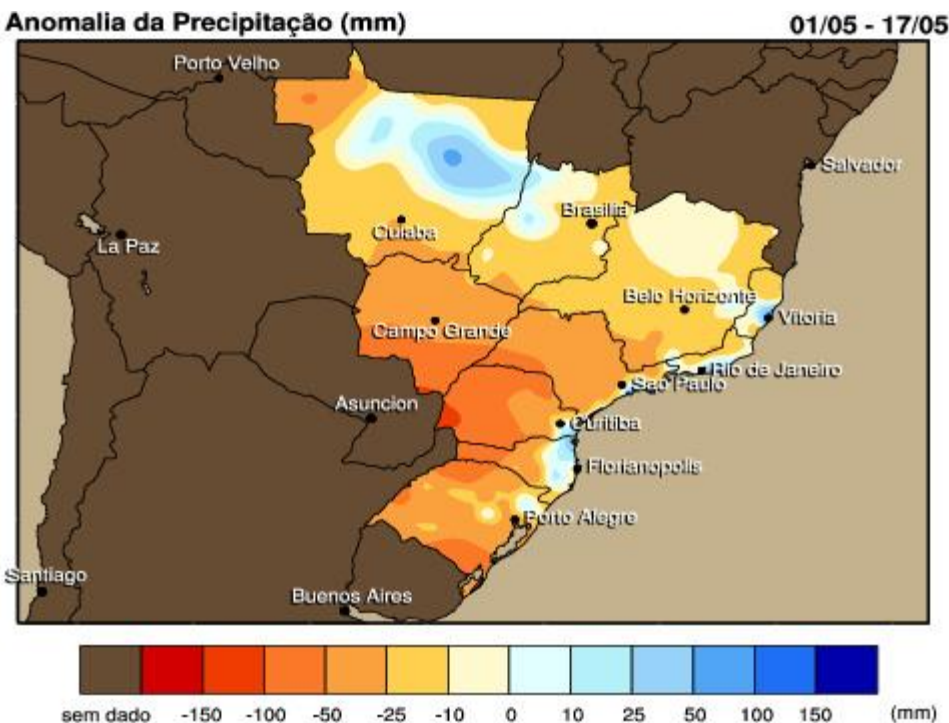
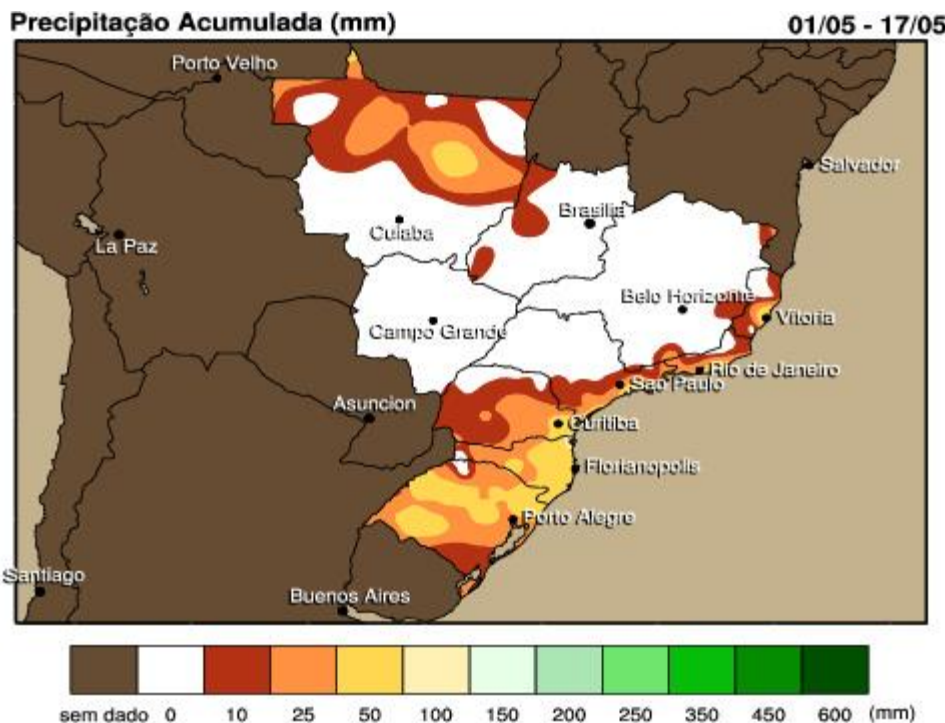
South-Central Brazil

Precipitation in May 2021*



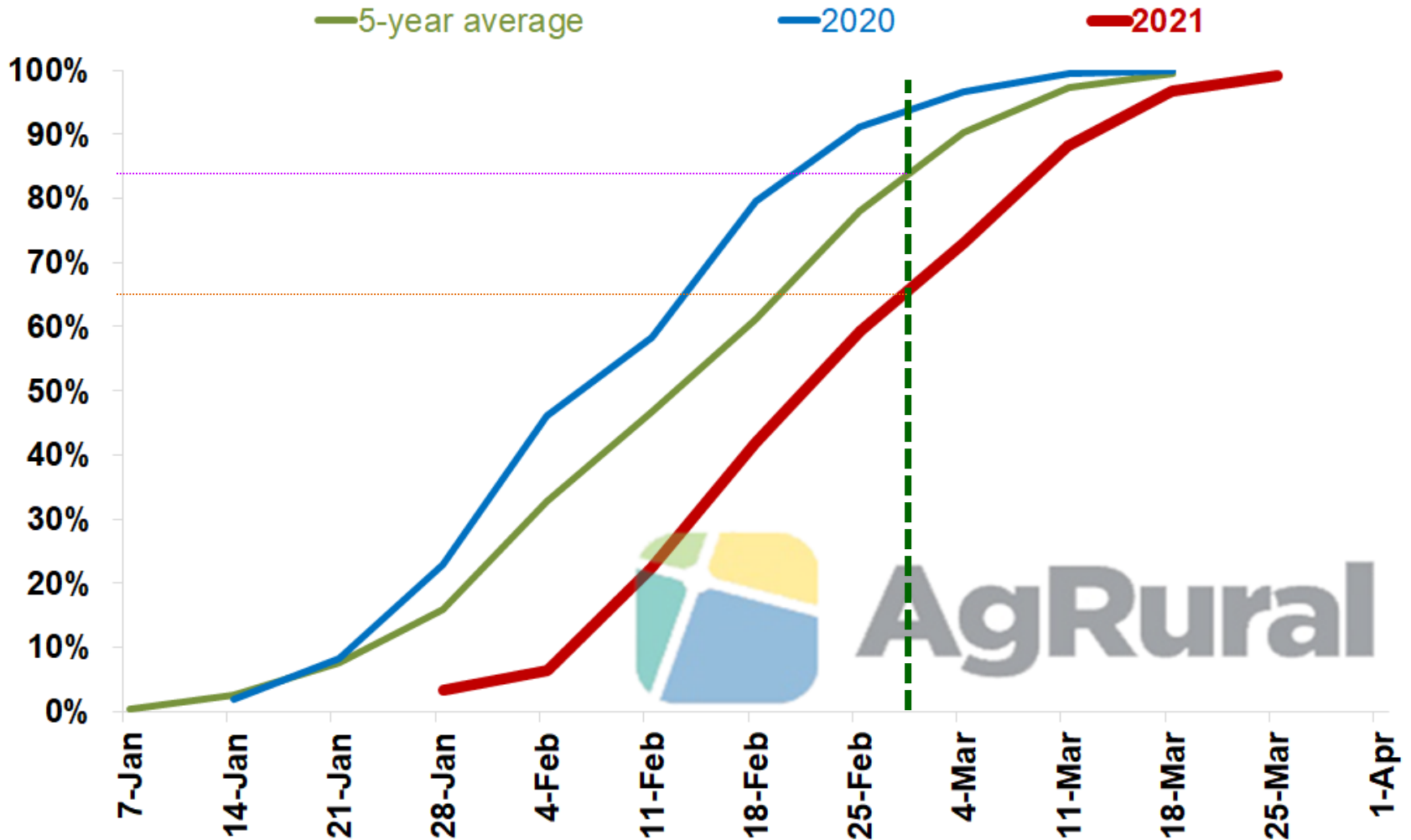
ACCUMULATED (mm)

ANOMALY (0 mm= normal)



Mato Grosso

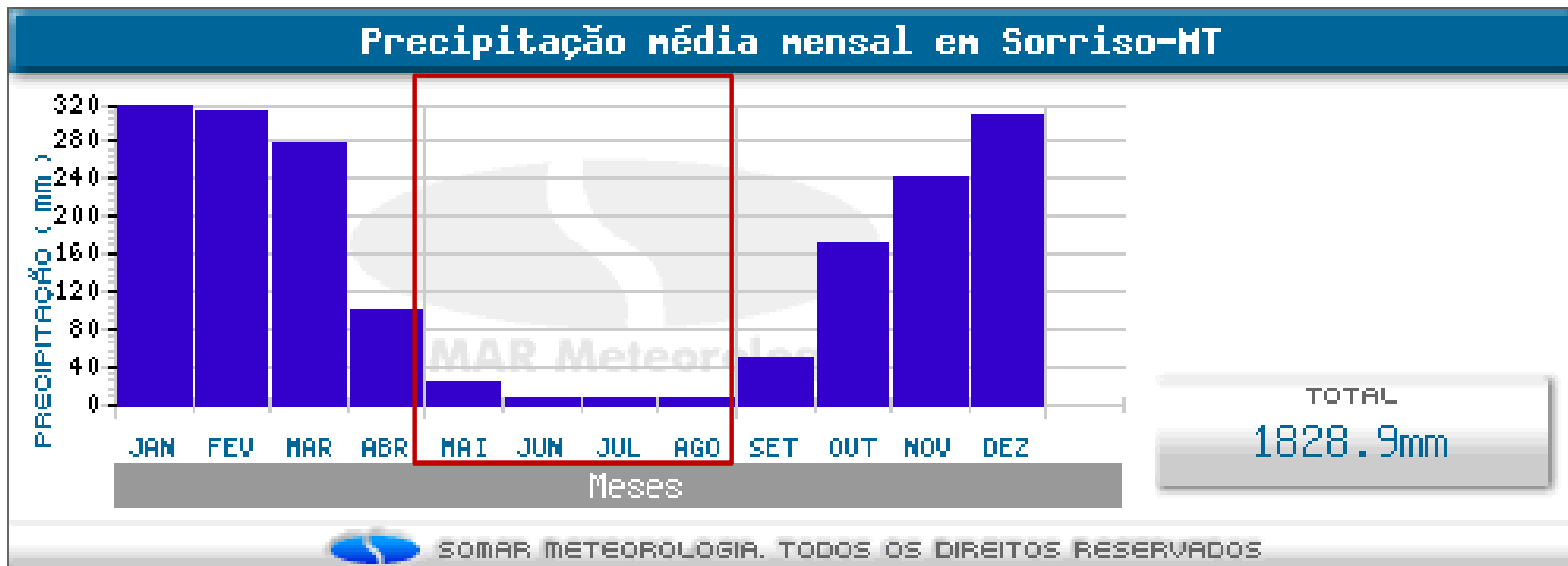
2nd corn crop **planting** progress
(as a % of the total estimated area)



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Sorriso, northern Mato Grosso

Normal precipitation by month
(mm)

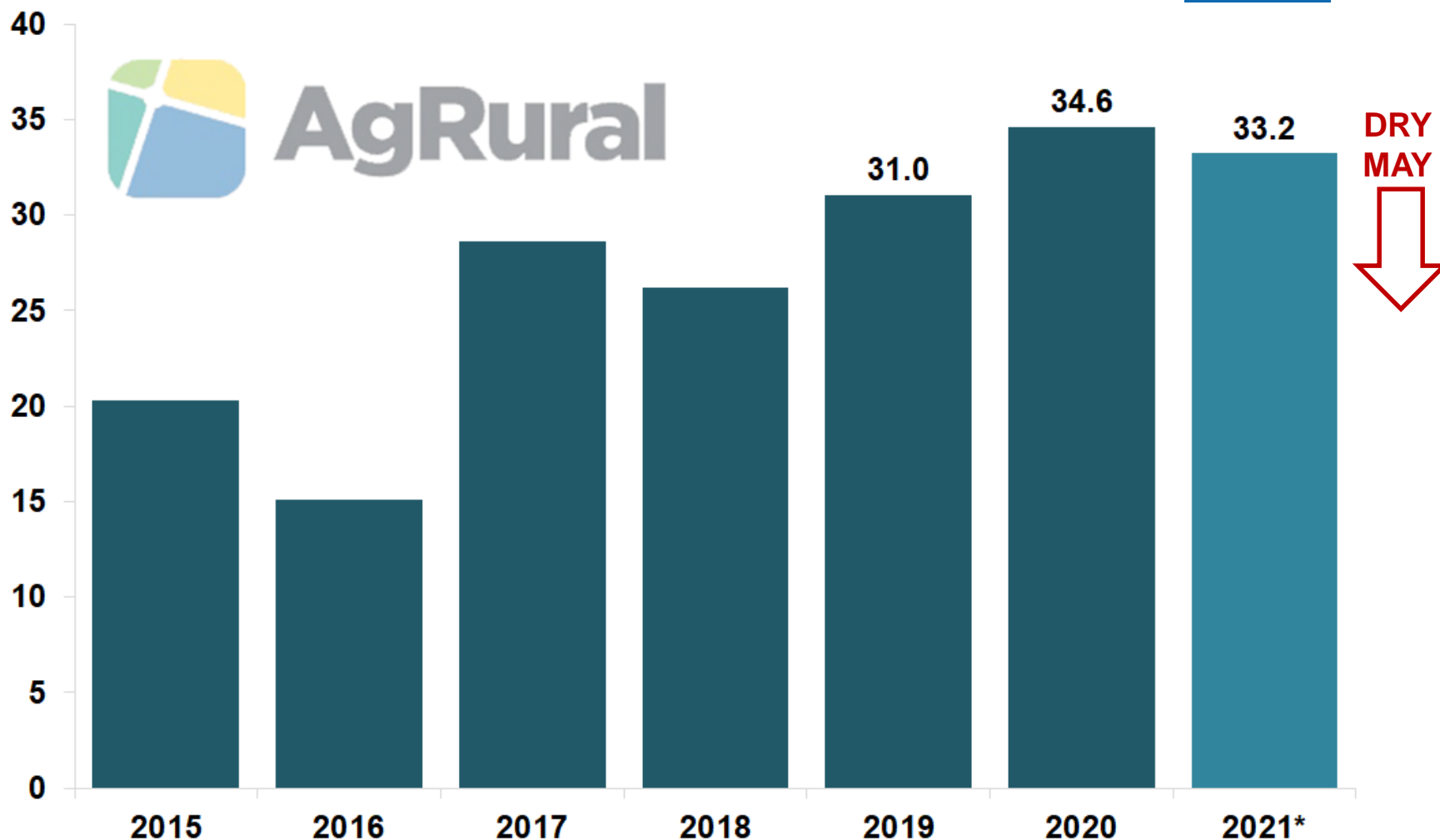


Mato Grosso

2nd corn crop production
(million metric tons)

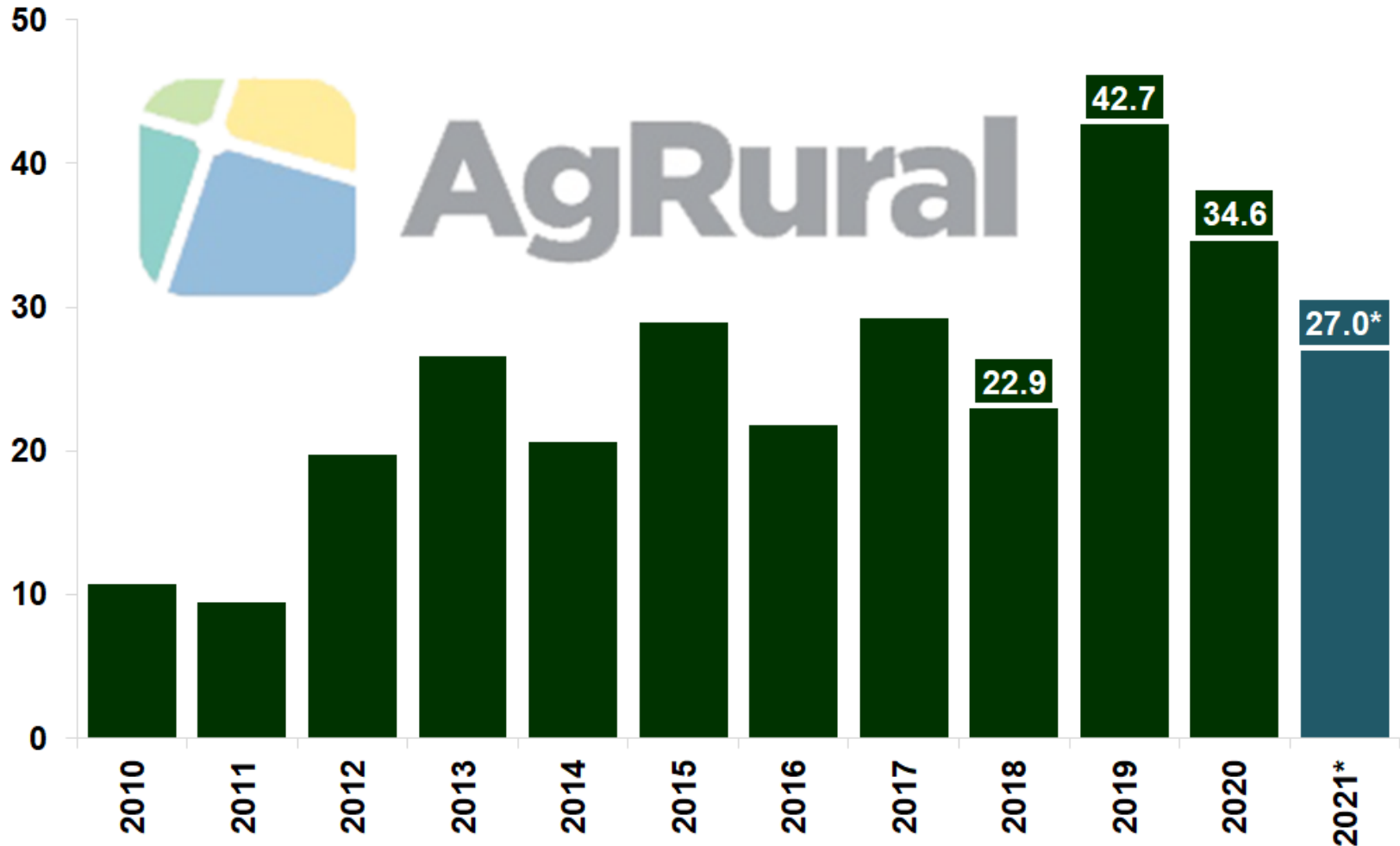


37.0



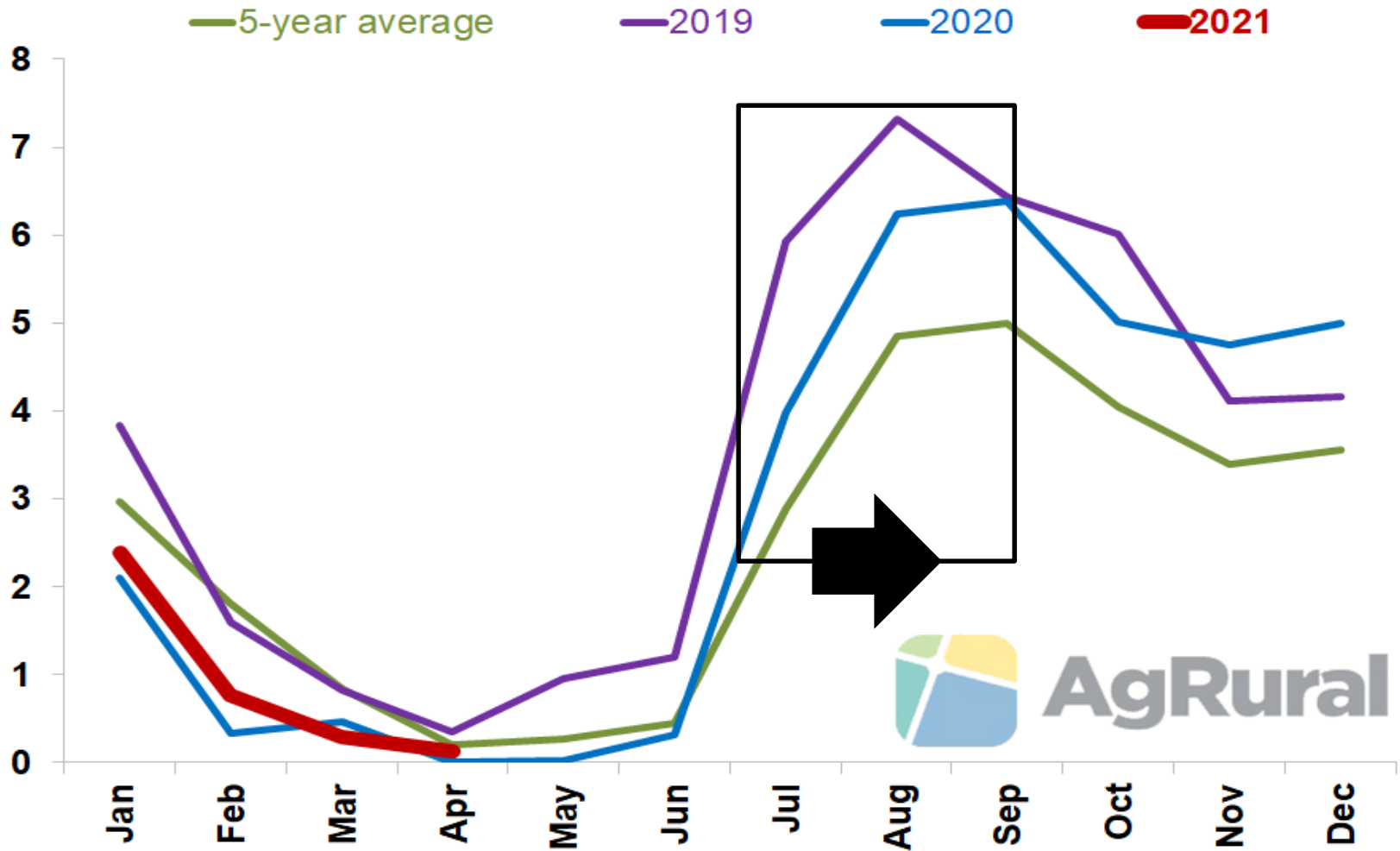
Brazil

Corn **exports** by calendar year (Jan-Dec)
(million metric tons)



Brazil

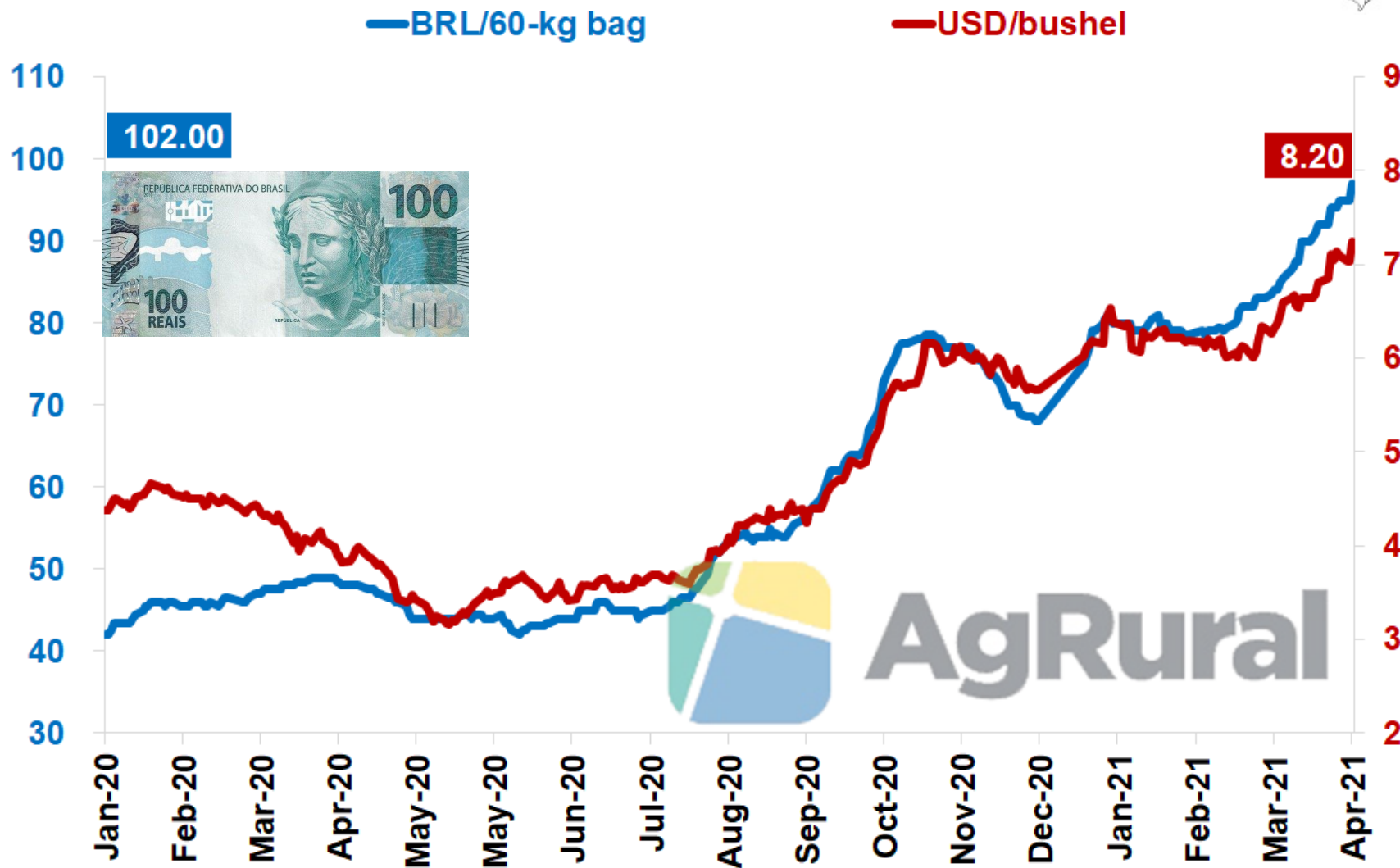
Monthly corn exports by calendar year (Jan-Dec)
(million metric tons)



PRICES ON FIRE!

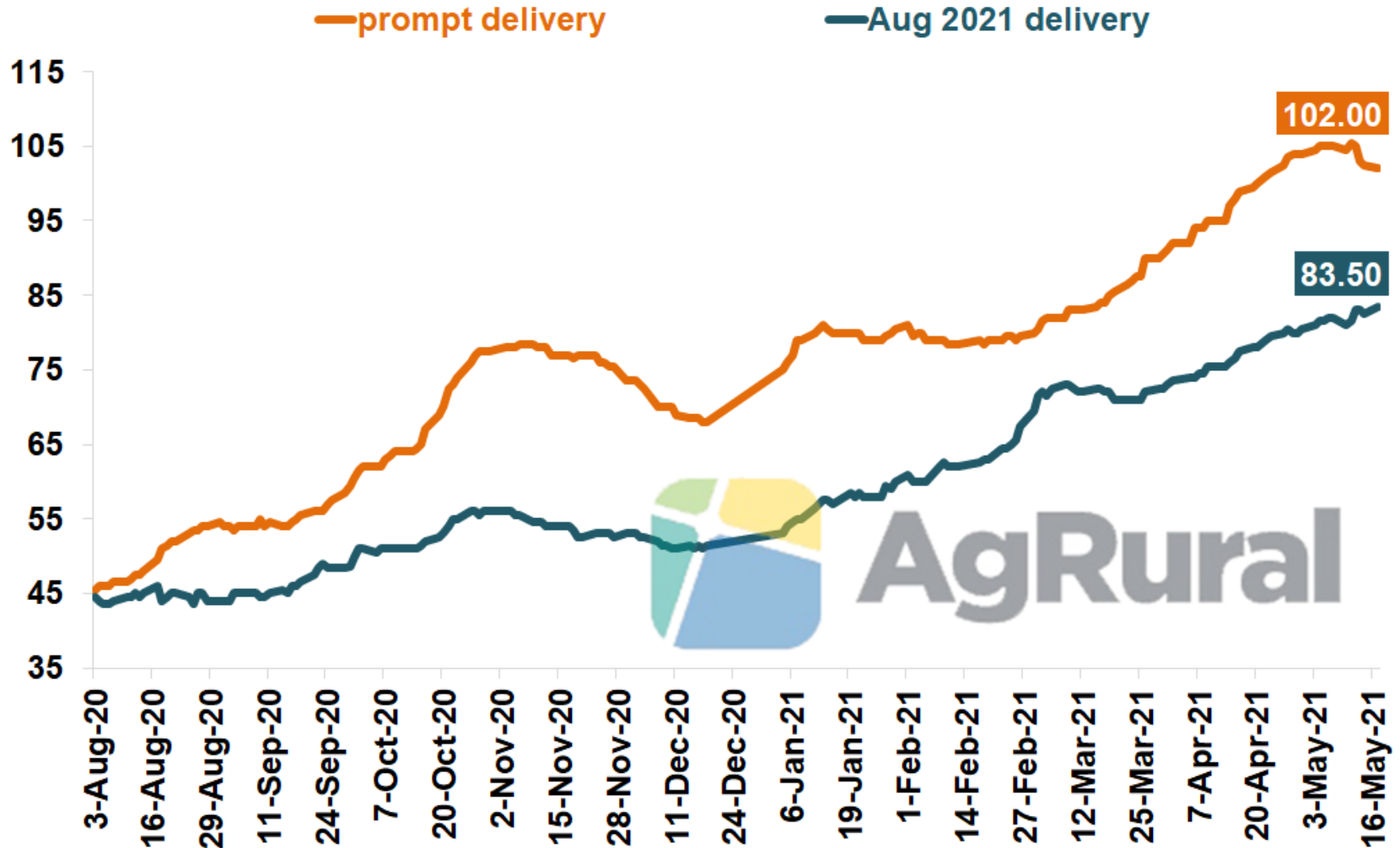
Cascavel, Paraná

Corn cash prices



Cascavel, Paraná

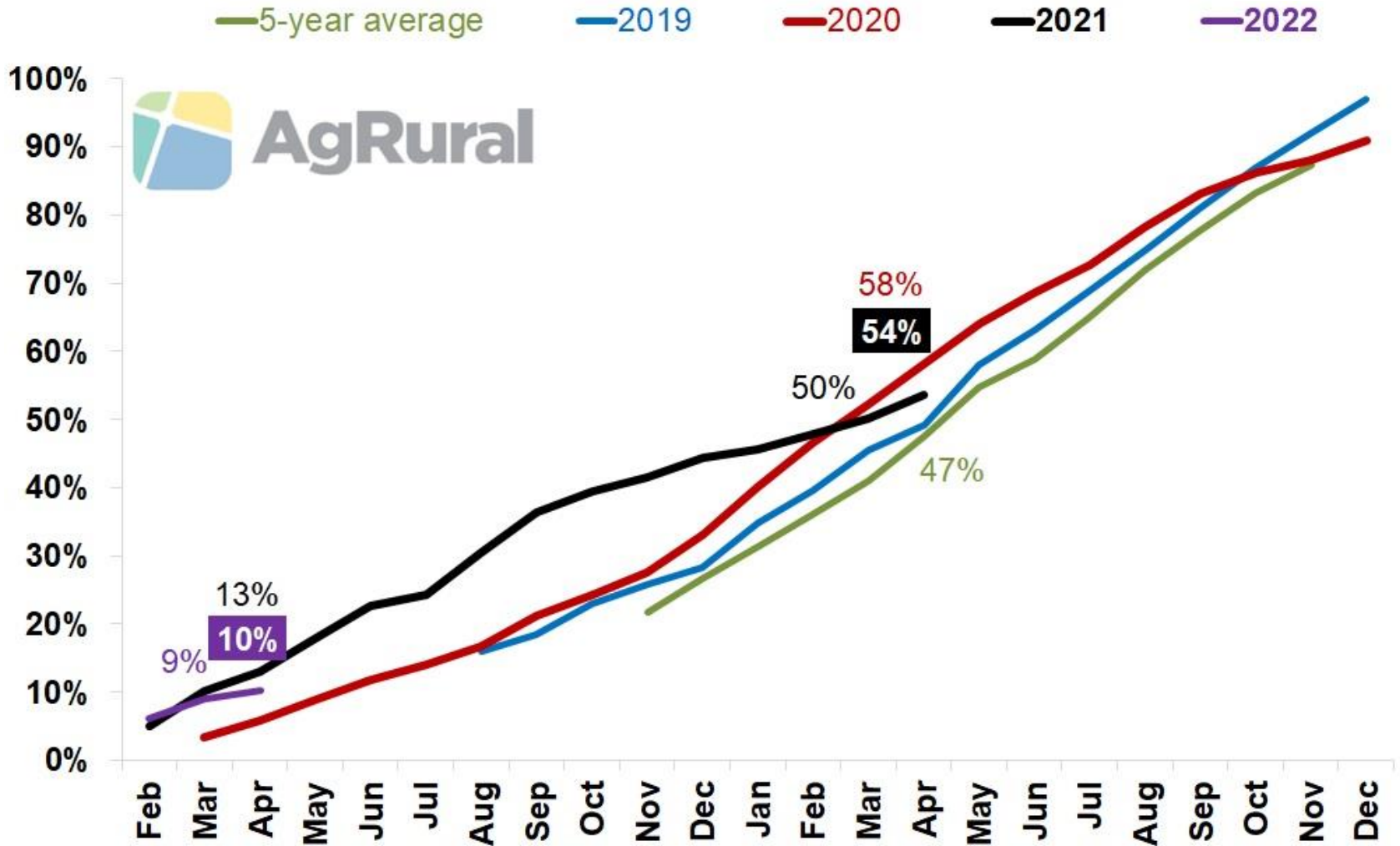
Corn cash prices x prices for delivery in Aug 2021
(BRL/60-kg bag, not adjusted for inflation)



South-Central Brazil

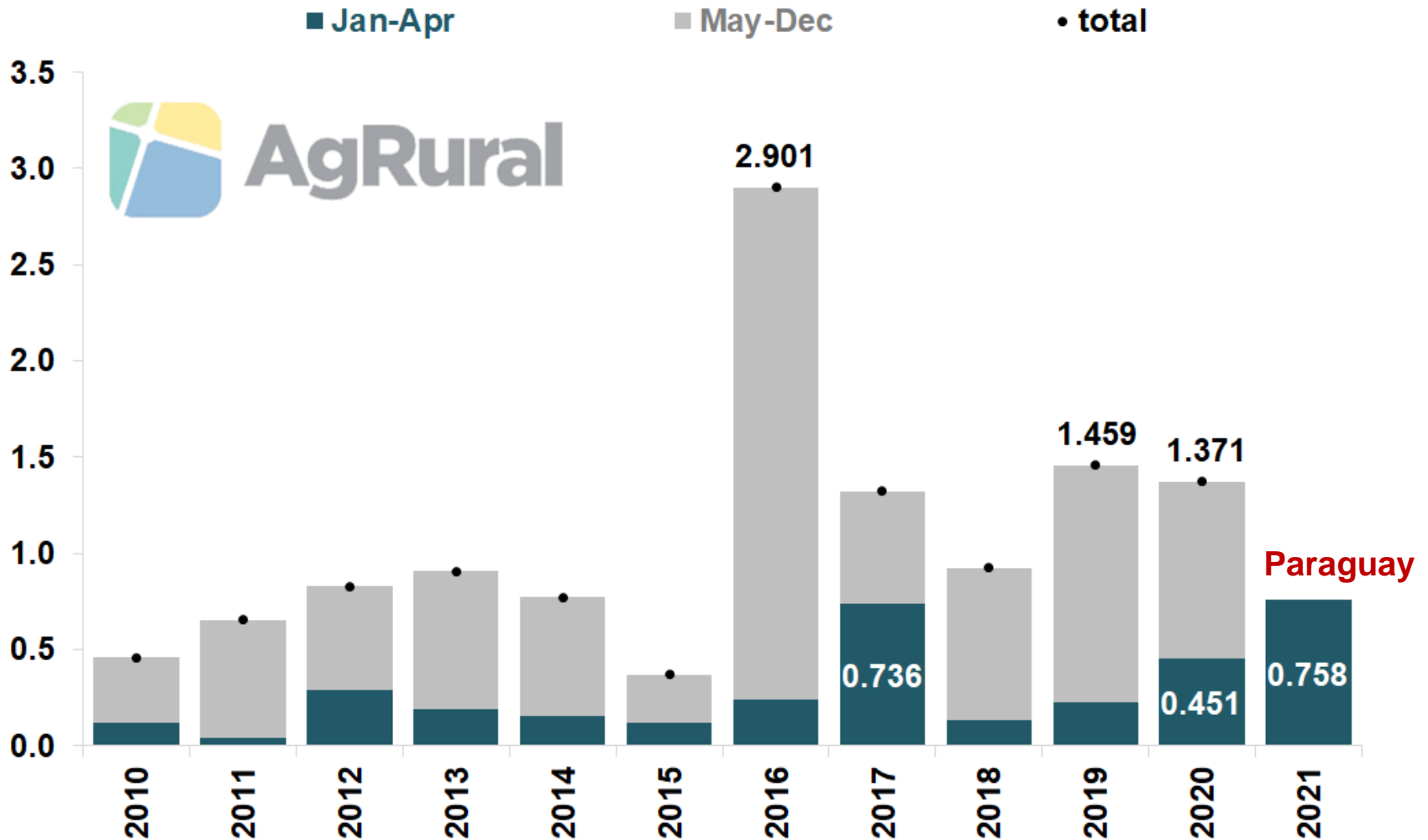
2nd corn crop **farmer selling**

(as a % of the total estimated or potential production)



Brazil

Corn imports by calendar year (Jan-Dec)
(million metric tons)



THANK YOU!

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BRAZILIAN UPDATE

AGRURAL'S SERVICE IN ENGLISH

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