ITEMS FROM BRAZIL

BRAZILIAN AGRICULTURAL RESEARCH CORPORATION — EMBRAPA
Rodovia BR 285, km 294, Caixa Postal 451, Passo Fundo, RS, Brazil.

Wheat in Brazil – 2012 crop year.

Eduardo Caierão.

In the 2012 crop year, Brazilian wheat production was about 4 x 10^6 tons (Conab 2013), which is enough to supply 40% of the domestic demand (Table 1). The deficit in production makes Brazil the largest wheat importer. The southern region, comprised of the states of Rio Grande do Sul, Santa Catarina, and Paraná, accounts for 94.6% of the national production. Nonetheless, due to the characteristics of the cultivation system, average grain yield in this region is not the highest in the country.

Table 1. Area of cultivation, total production, and grain yield of wheat in Brazil in 2012 (Source: CONAB 2013).

Region	Area (ha x 1,000)	Production (t x 1,000)	Grain yield (kg/ha)
North	—	—	—
Northeast	—	—	—
Central–West	24.8	68.2	2,750.0
Southeast	53.5	162.4	3,036.0
South	1,817.1	4,069.8	2,240.0
Brazil	**1,895.4**	**4,300.4**	**2,269.0**

In 2012, the wheat area cultivated was lower than that in 2011 (1,895.4 against 2,166.2). The total production and average grain yield/ha achieved in 2012 were 25% and 15% smaller than 2011, respectively. High rainfall and frost during grain filling were the main factors that justify these data.

Reference.

CONAB. 2012. Companhia Nacional de Abastecimento. Central de Informações Agropecuárias/Grãos/Trigo. Disponível em: http://www.conab.gov.br/conabweb/index.php?PAG=131

Wheat seed market in Brazil – 2009 to 2012.

Eduardo Caierão.

Few companies hold the wheat seed market in Brazil, characterized primarily by private capital. The percent participation of each company in the seed market between 2009 and 2012 in Brazil (Table 2), versus that in the main cereal producing states of Rio Grande do Sul (Table 3, p. 6) and Paraná (Table 5, p. 6) are given. In terms of Brazil, the percent of the market covered by private companies was 71.20%, 74.78%, 75.70%, and 85.09%, respectively, from 2009 to 2012 (Table 2), indicating increased participation of private

Table 2. The market for wheat in Brazil between 2009 and 2012, Passo Fundo, Brazil, 2013 (Source: Kleffmann 2013, bold values indicate the highest percent in each year).

Company	Type	2009	2010	2011	2012
Biotrigo	Private	0.00%	0.00%	0.12%	6.75%
Coodetec	Private	**25.79%**	22.08%	19.21%	18.38%
Embrapa	Public	25.27%	23.62%	22.11%	13.42%
CCGL TEC	Private	21.17%	12.36%	9.79%	6.72%
OR Sementes	Private	24.23%	**40.34%**	**46.58%**	**53.24%**
Outros	Public	3.53%	1.60%	2.18%	1.49%
Total	Private	71.20%	74.88%	75.70%	85.09%
	Public	28.80%	25.22%	24.30%	14.91%

companies in the seed market. Coodetec (2009) and OR Sementes (2010, 2011, and 2012) were the market leaders. Analyzing the information by state, there are some differences. In Rio Grande do Sul, for example, the participation of private companies in the seed market is even higher, over 90% in 2011 and 2012. However, the leadership still prevailed OR Sementes. In Paraná, public enterprises occupy an area more significant than in Rio Grande do Sul, reaching 37% in 2011, primarily due to the contribution of Embrapa. In this state, Coodetec led the market in 2009, 2010, and 2012. Embrapa had greater participation in 2011. The use of certified seed, saved seed, or breeder seed for each region (Brazil, and the states of Rio Grande do Sul and Paraná) are given (Tables 5, 6, and 7). The highest use of certified seed can be found in Paraná, ranging from 79.45% to 89.67%. The usage profile in Rio Grande do Sul is much lower, reaching a level close to 50% in 2012.

Table 3. The market for wheat in the state of Rio Grande do Sul between 2009 and 2012. Passo Fundo, Brazil, 2013 (Source: Kleffmann 2013. Bold values indicate the highest percent in each year).

Company	Type	2009	2010	2011	2012
Biotrigo	Private	0.00%	0.00%	0.00%	9.18%
Coodetec	Private	1.28%	1.95%	3.02%	0.53%
Embrapa	Public	14.08%	18.26%	8.40%	7.46%
CCGL TEC	Private	**54.39%**	30.66%	21.35%	12.11%
OR Sementes	Private	29.70%	**49.13%**	**67.13%**	**69.74%**
Outros	Public	0.55%	0.00%	0.10%	0.97%
Total	Private	85.37%	81.74%	91.50%	91.56%
	Public	14.63%	18.26%	8.50%	8.44%

Table 4. The market for wheat in the state of Paraná between 2009 and 2012. Passo Fundo, Brazil, 2013 (Source: Kleffmann 2013. Bold values indicate the highest percent in each year).

Company	Type	2009	2010	2011	2012
Biotrigo	Private	0.00%	0.00%	0.02%	3.27%
Coodetec	Private	**45.52%**	**37.29%**	34.30%	**40.94%**
Embrapa	Public	31.76%	26.32%	**34.41%**	20.44%
CCGL TEC	Private	0.21%	0.36%	0.64%	0.63%
OR Sementes	Private	18.54%	34.38%	27.65%	33.27%
Outros	Public	3.98%	1.65%	2.98%	1.45%
Total	Private	64.27%	72.03%	62.61%	78.11%
	Public	35.73%	27.97%	37.39%	21.89%

Table 5. Percent of certified and saved seed in the wheat market in Brazil. Passo Fundo, Brazil, 2013 (Source: Kleffmann 2013. Bold values indicate the highest percent in each year).

Type of seed	2009	2010	2011	2012
Breeder Seed	1.41%	0.06%	2.14%	1.86%
Certified	**79.18%**	**78.82%**	**76.42%**	**64.47%**
Saved	19.41%	21.11%	21.44%	33.67%

Reference.

Kleffmann Group. 2013. Wheat seed's market in Brazil - 2009 to 2012. Available at: http://www.kleffmann.com.

Table 6. Percent of certified and saved seed in the wheat market in the state of Rio Grande do Sul, Brazil. Passo Fundo, Brazil, 2013 (Source: Kleffmann 2013. Bold values indicate the highest percent in each year).

Type of seed	2009	2010	2011	2012
Breeder Seed	0.92%	0.00%	4.49%	2.61%
Certified	**69.25%**	**63.49%**	**65.14%**	**51.59%**
Saved	19.41%	21.11%	21.44%	33.67%

Table 7. Percent of certified and saved seed in the wheat market in the state of Paraná, Brazil. Passo Fundo, Brazil, 2013 (Source: Kleffmann 2013. Bold values indicate the highest percent in each year).

Type of seed	2009	2010	2011	2012
Breeder Seed	1.32%	0.00%	0.22%	0.81%
Certified	**87.36%**	**89.67%**	**86.33%**	**79.45%**
Saved	11.32%	10.33%	13.45%	19.74%