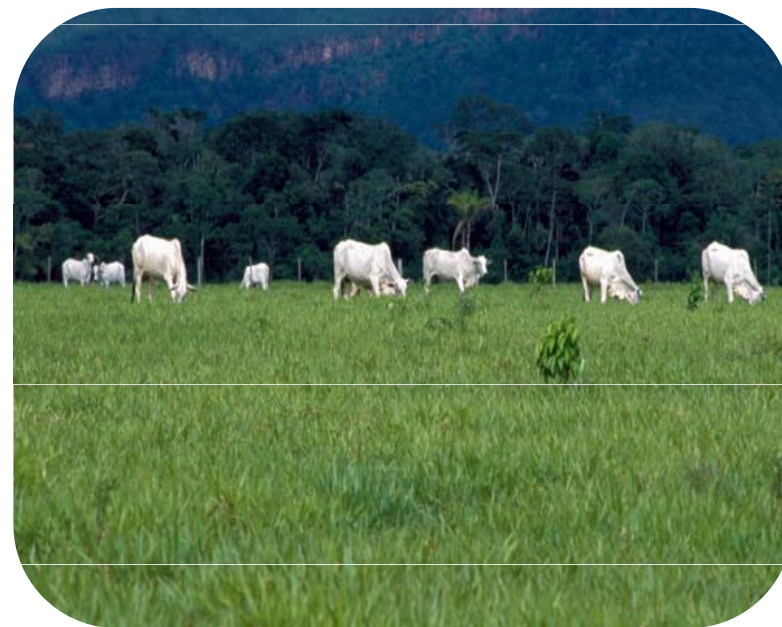


A Carne Bovina Brasileira

Passado

Presente

Futuro



PART I

PAST



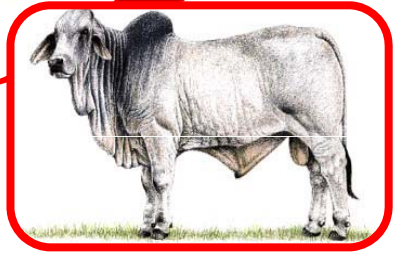
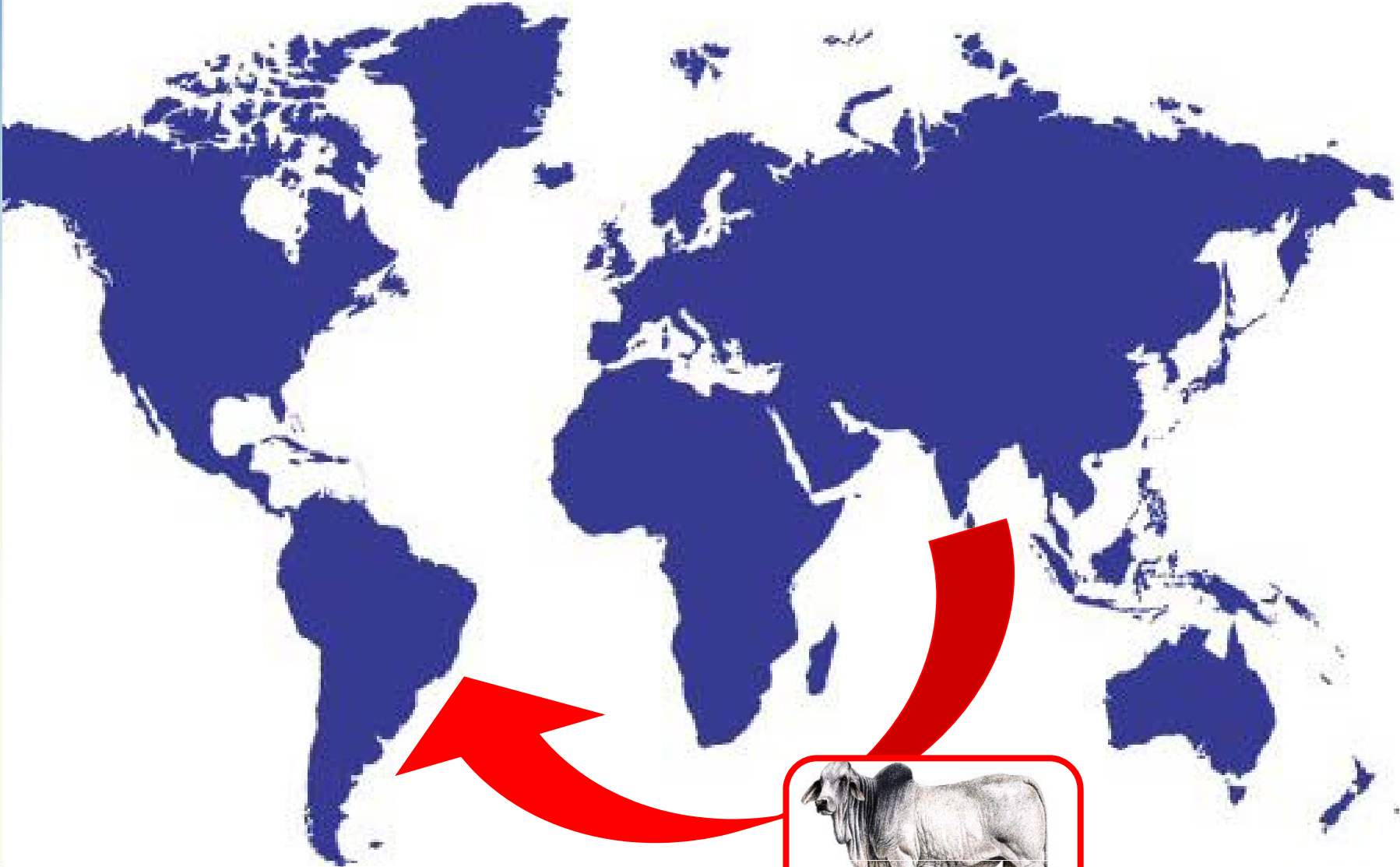


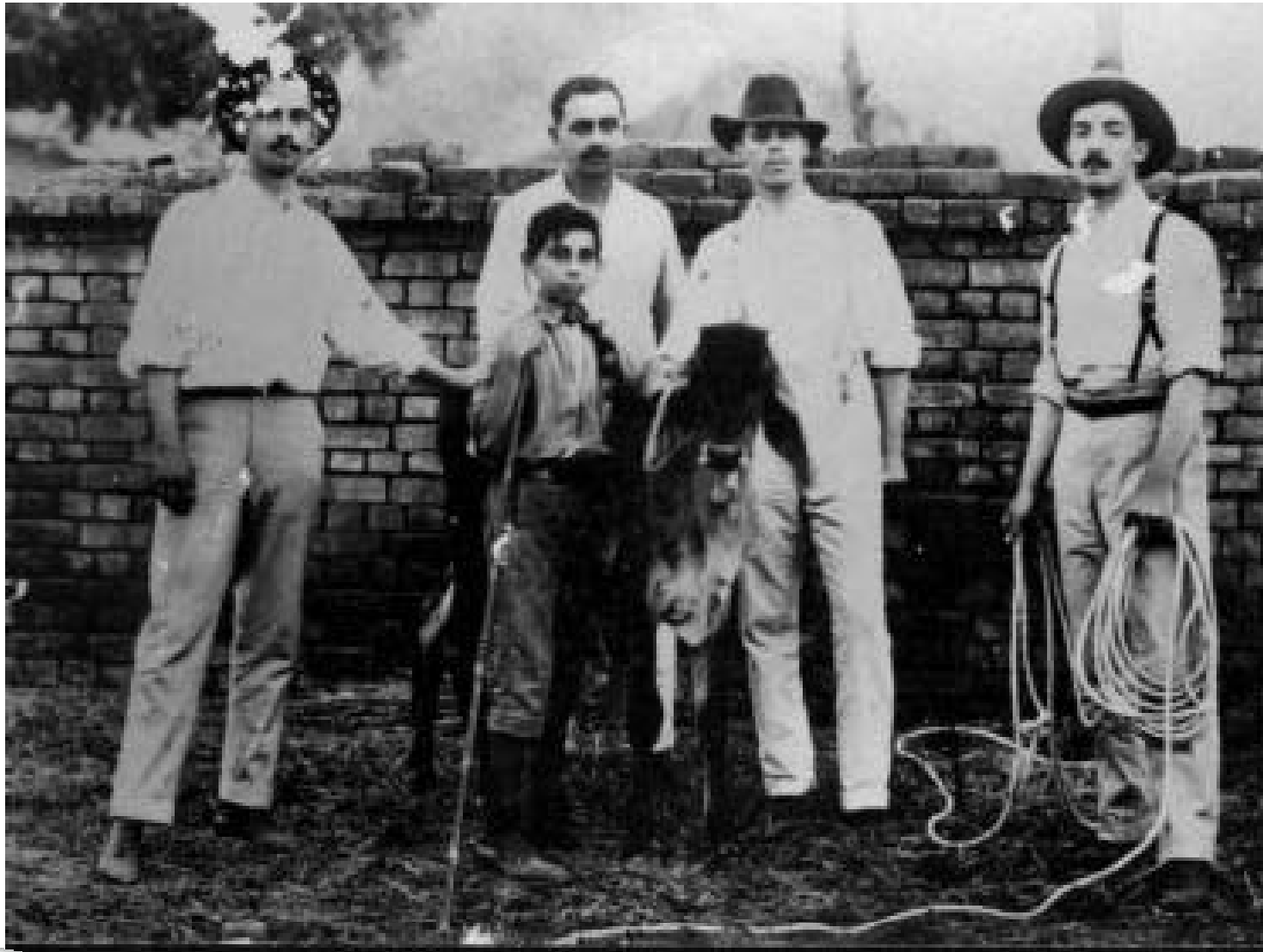
1600's
1700's





1800's





1898



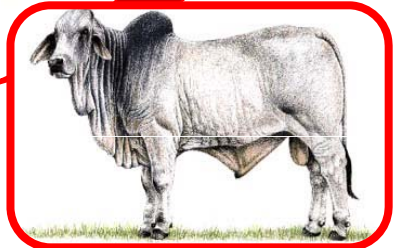
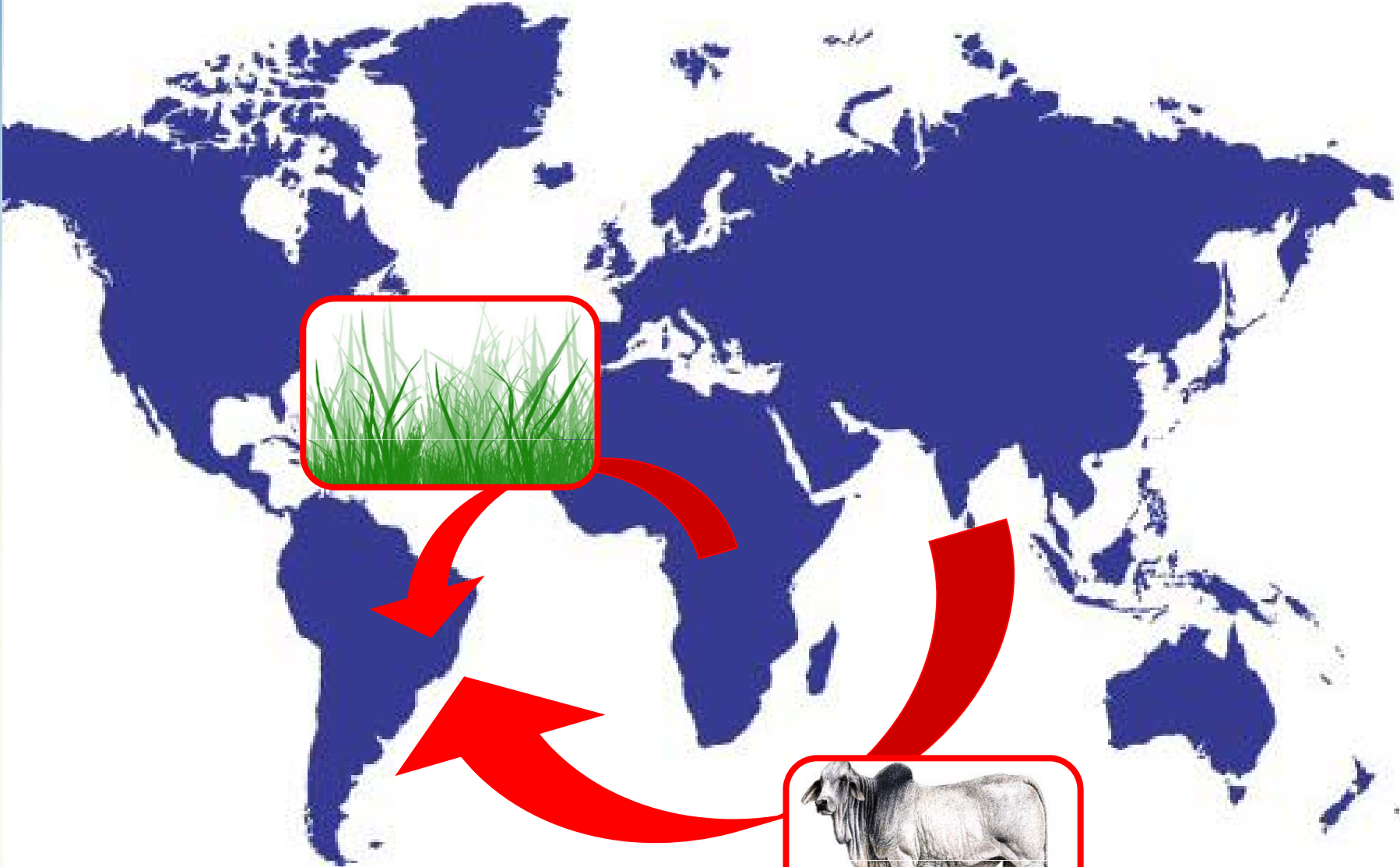
1910



Ca



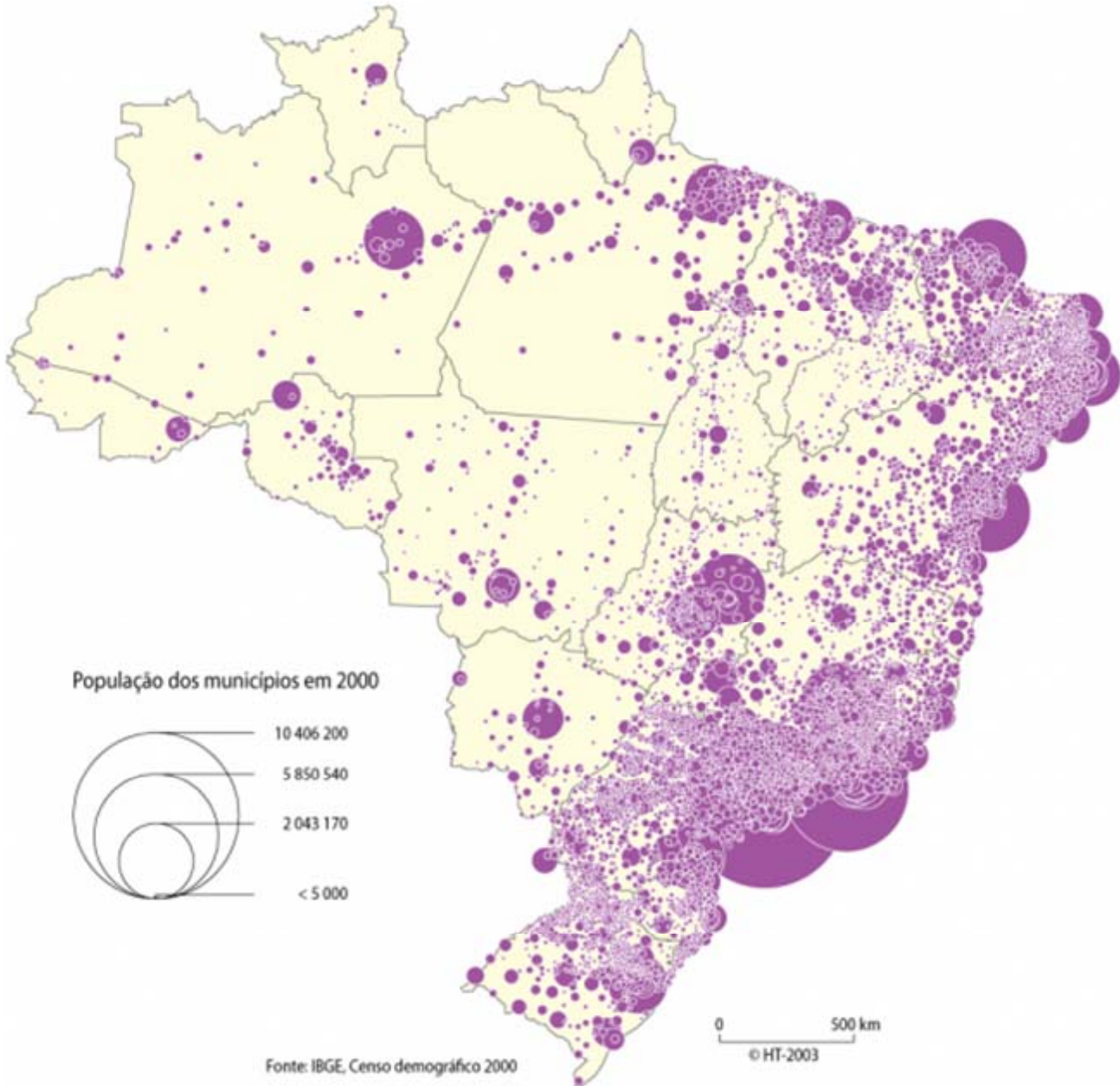
1960



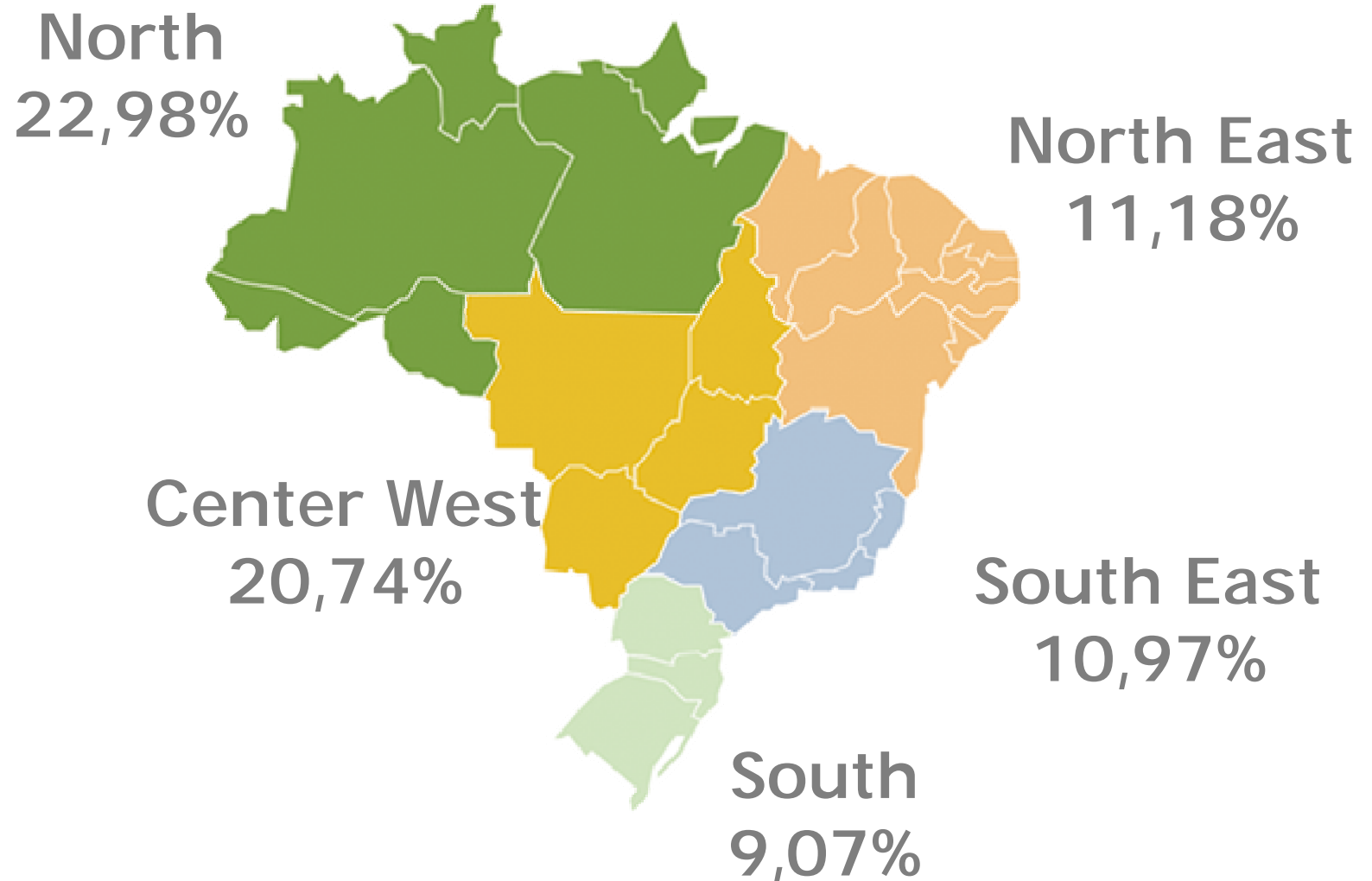


1973

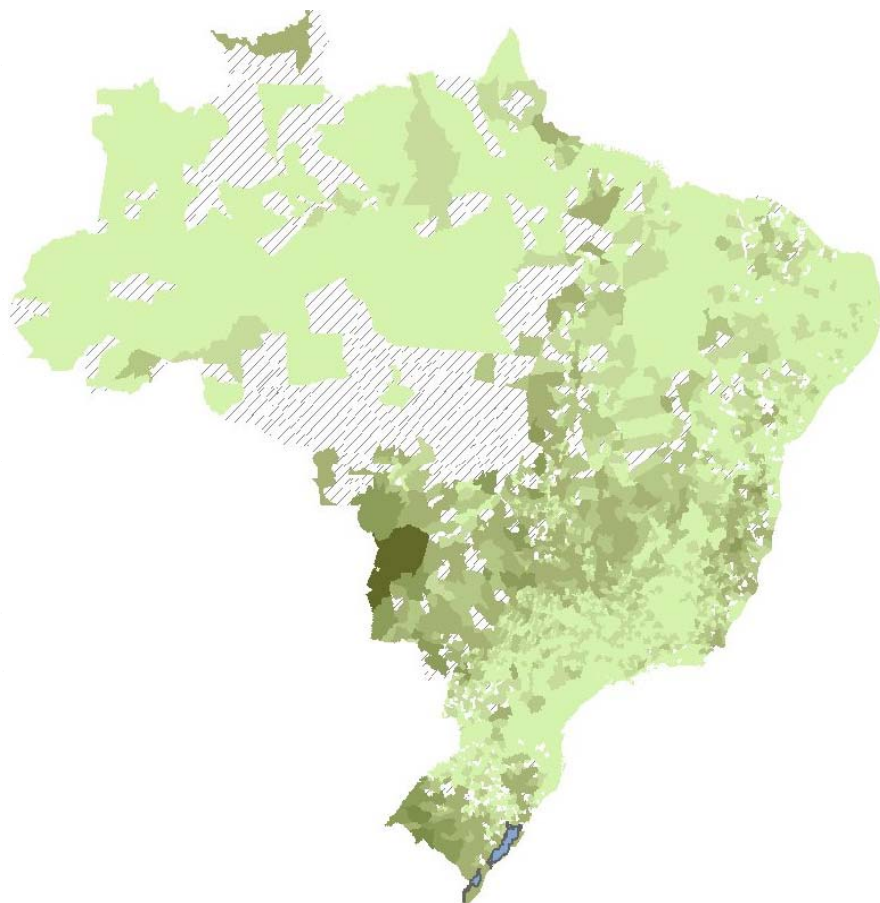
Brazilian Population Distribution 2010 Census



Brazilian Population Growth 2000 - 2010



1975



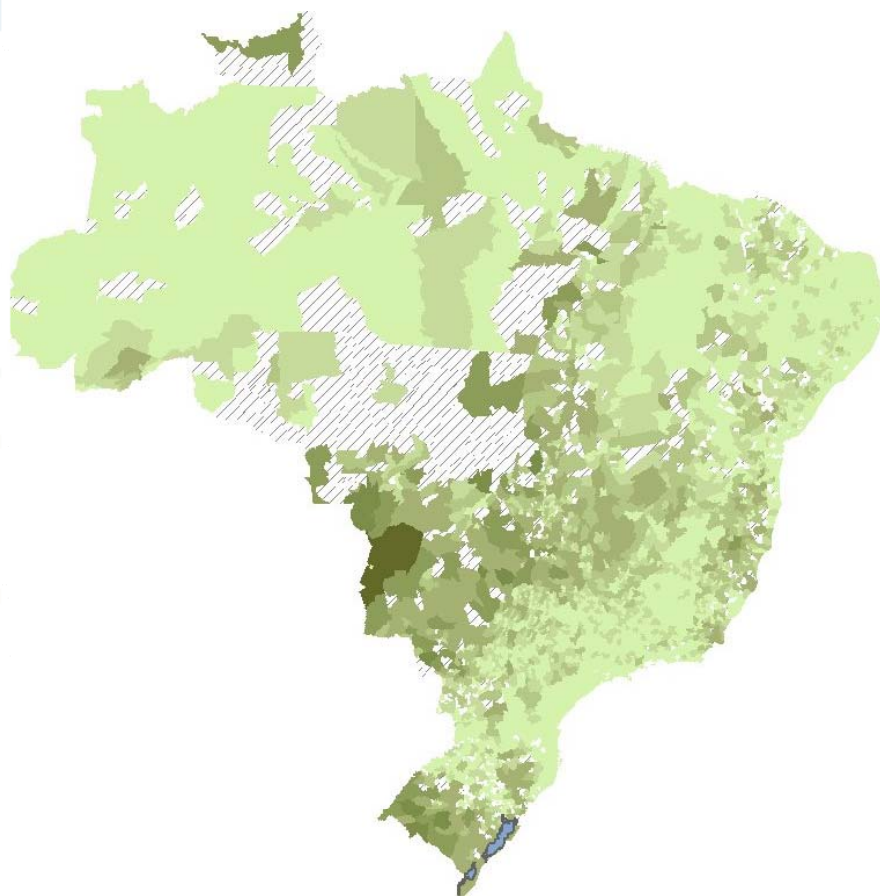
Livestock



Slaughterhouses



1980



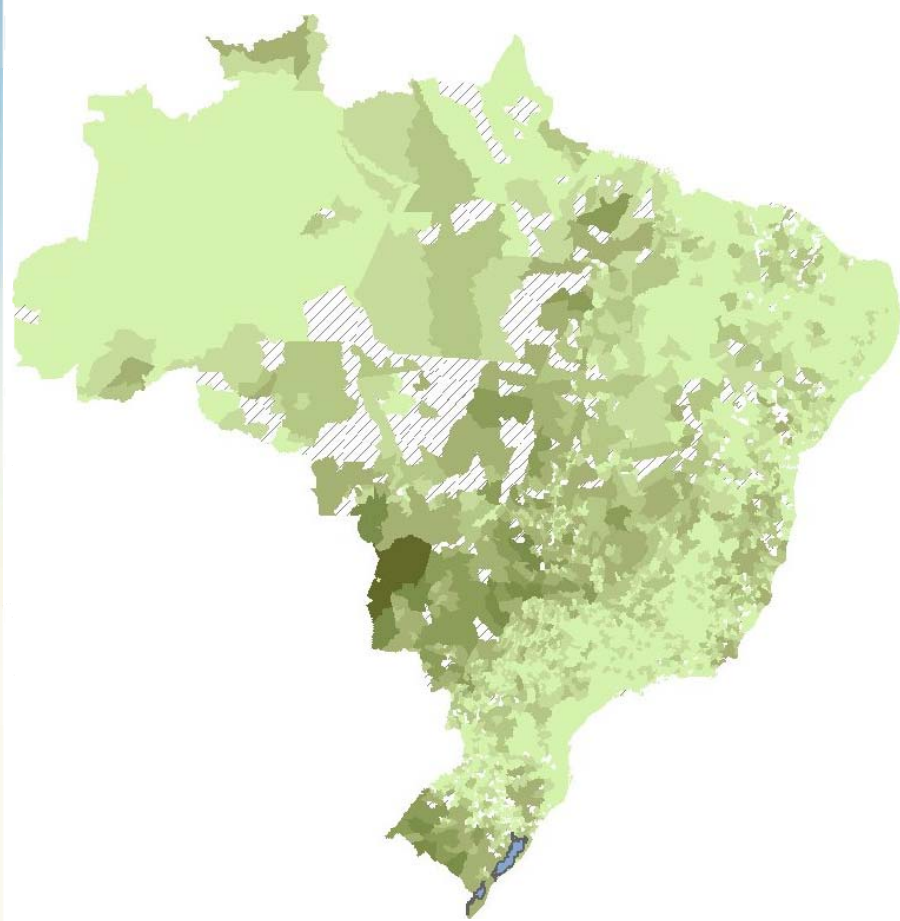
Livestock



Slaughterhouses



1985



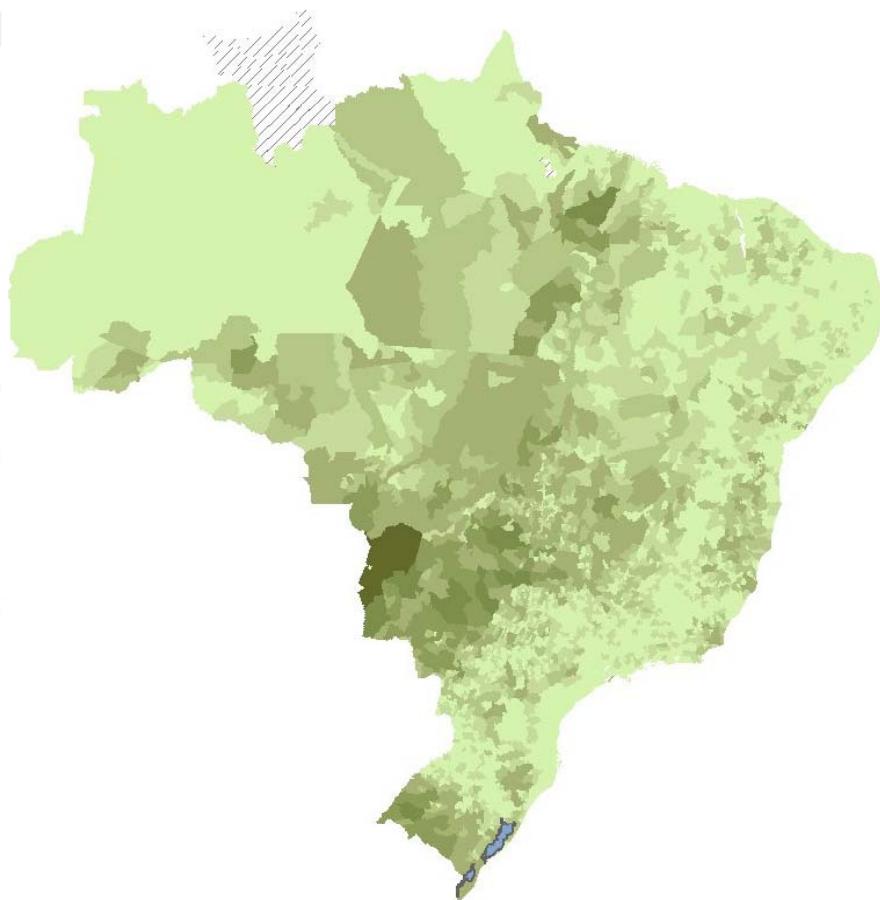
Livestock



Slaughterhouses



1990



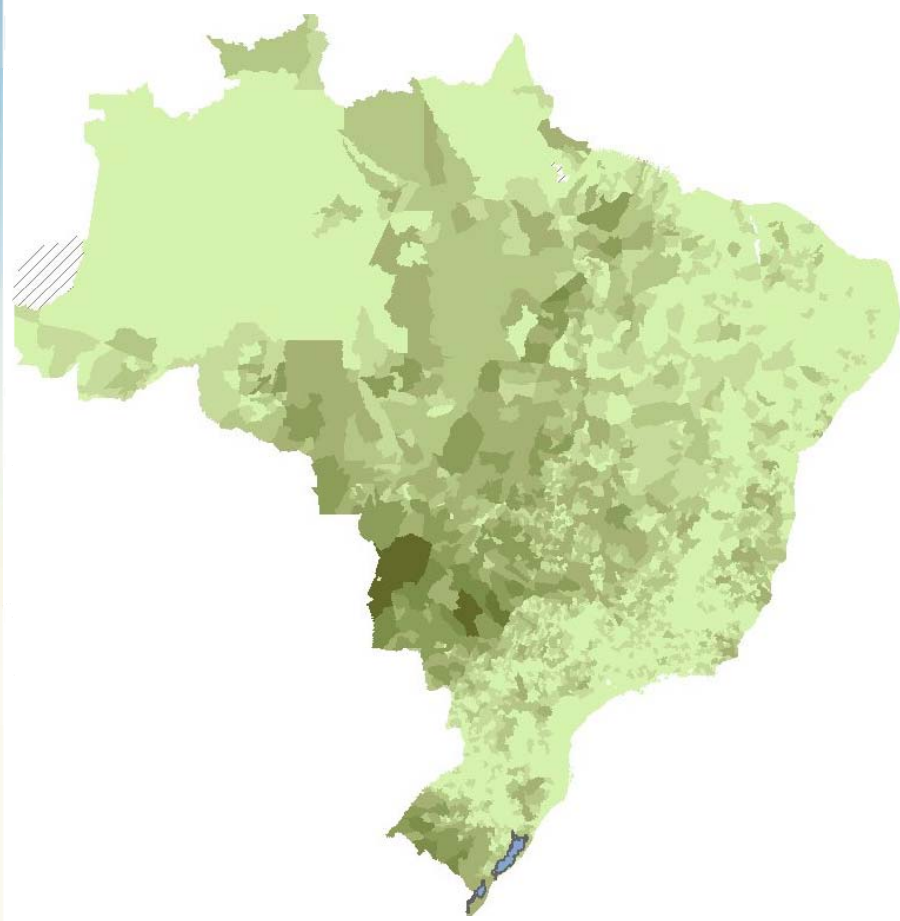
Livestock



Slaughterhouses



1995



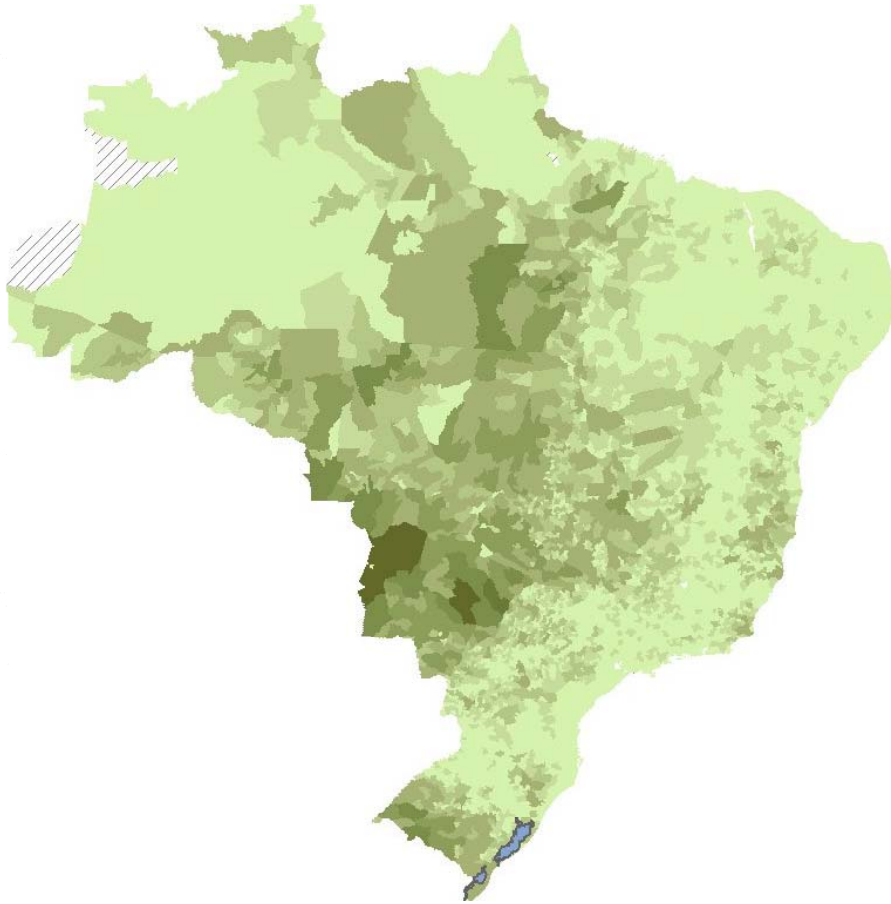
Livestock



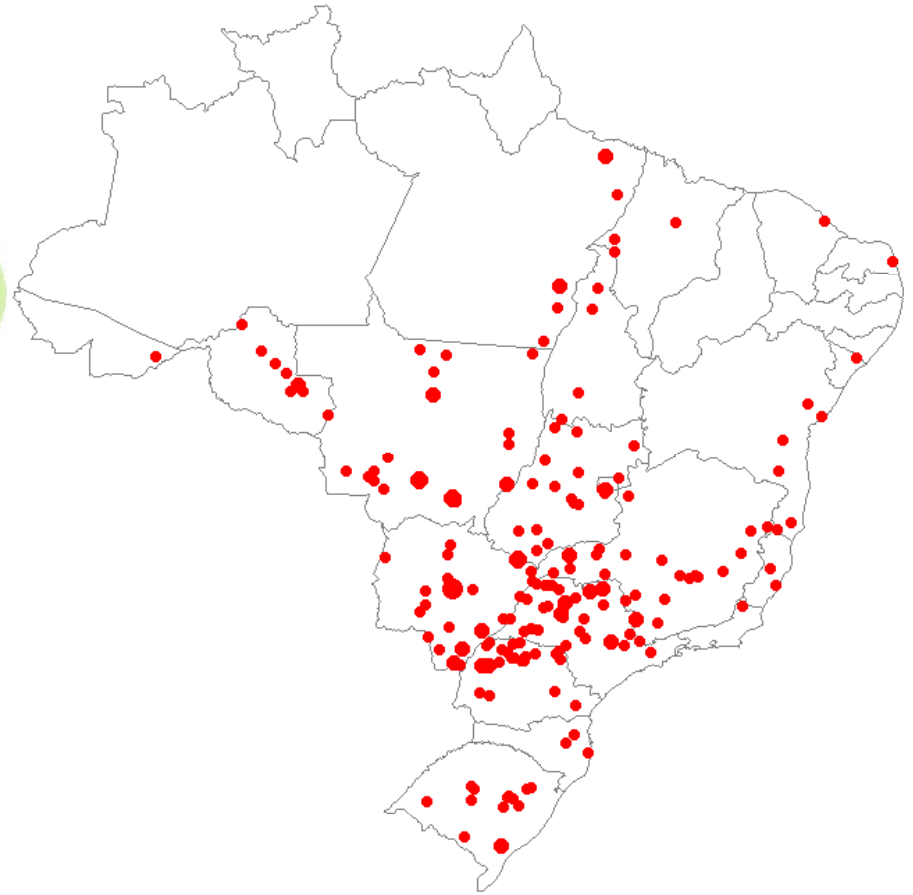
Slaughterhouses



2000



Livestock

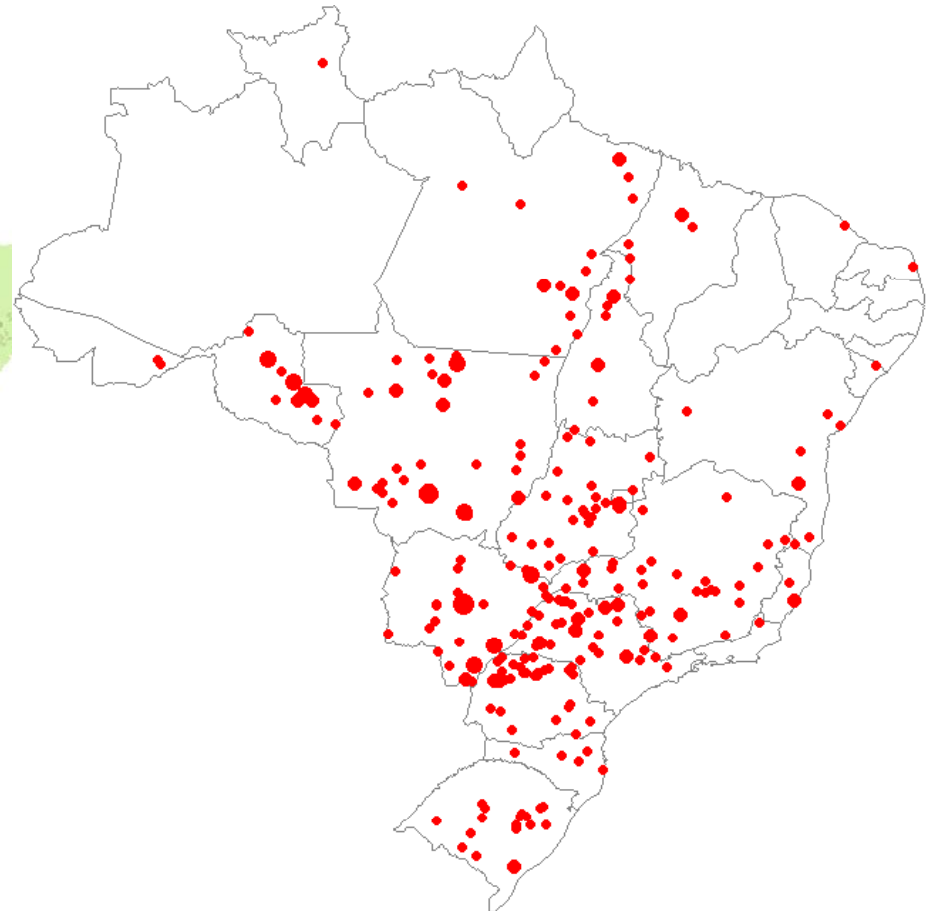
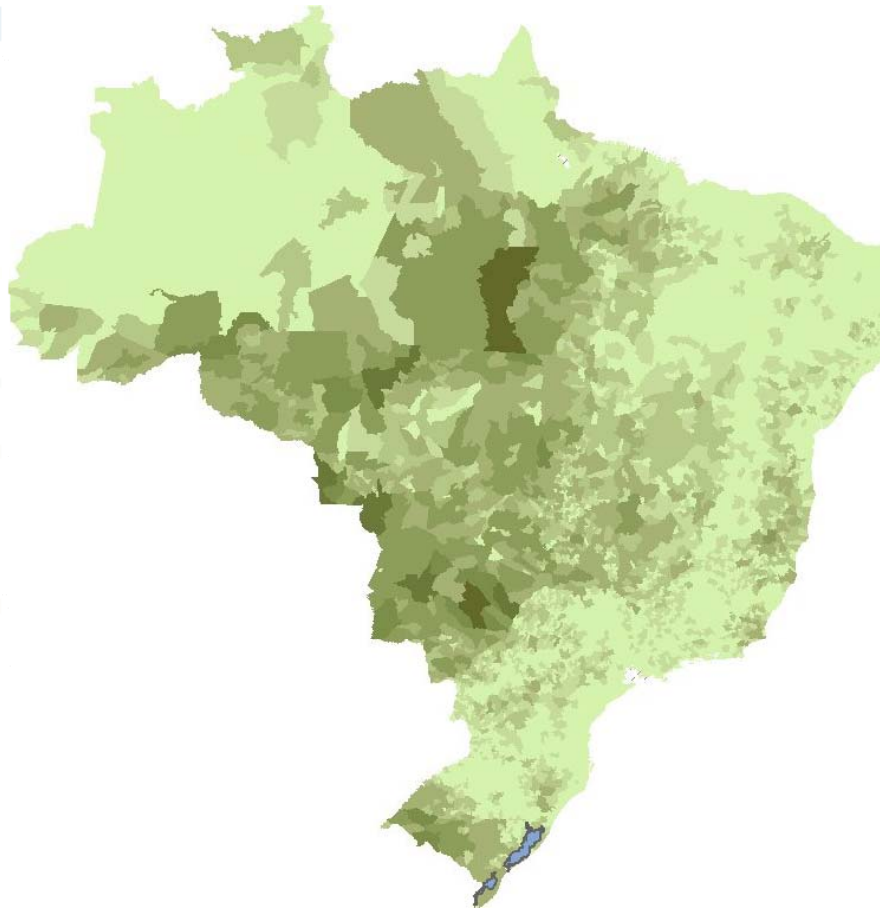


Slaughterhouses



2008

2009

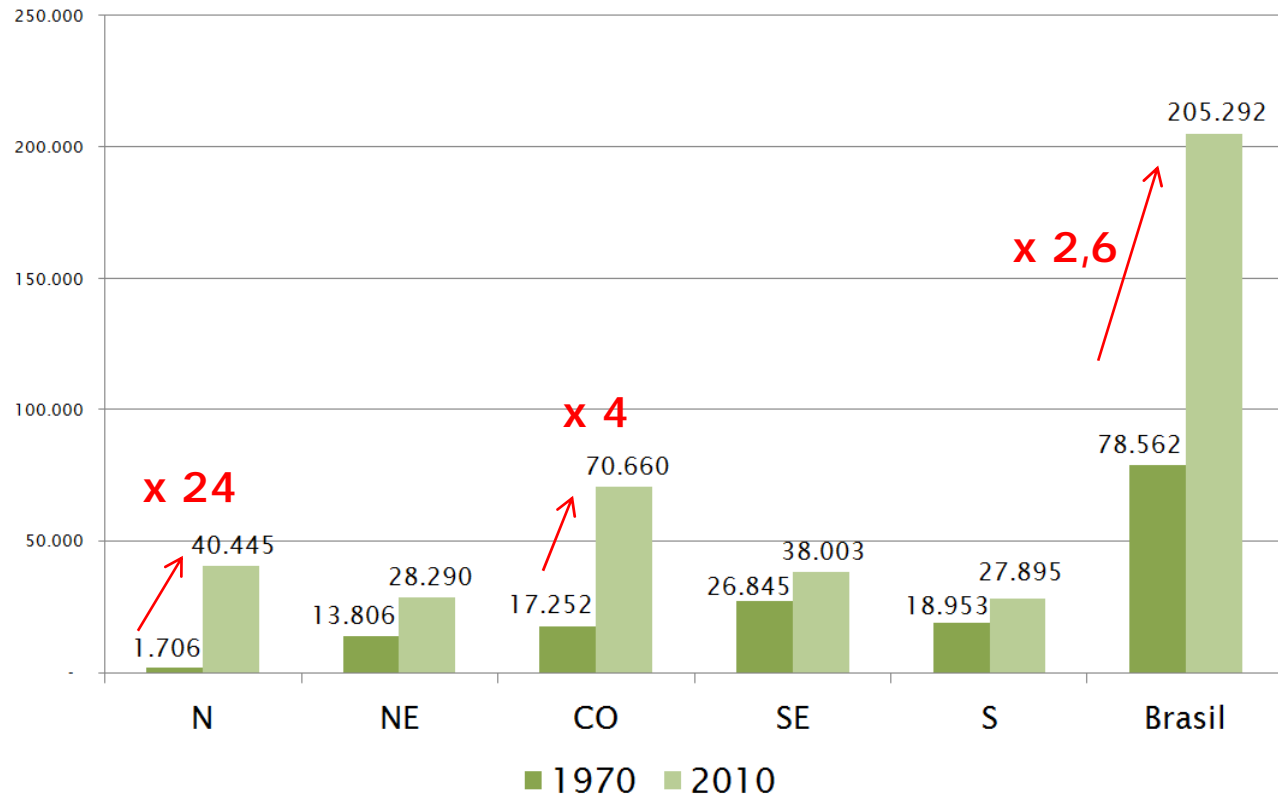


Livestock

Slaughterhouses



Brazilian Livestock per Region x1.000 heads



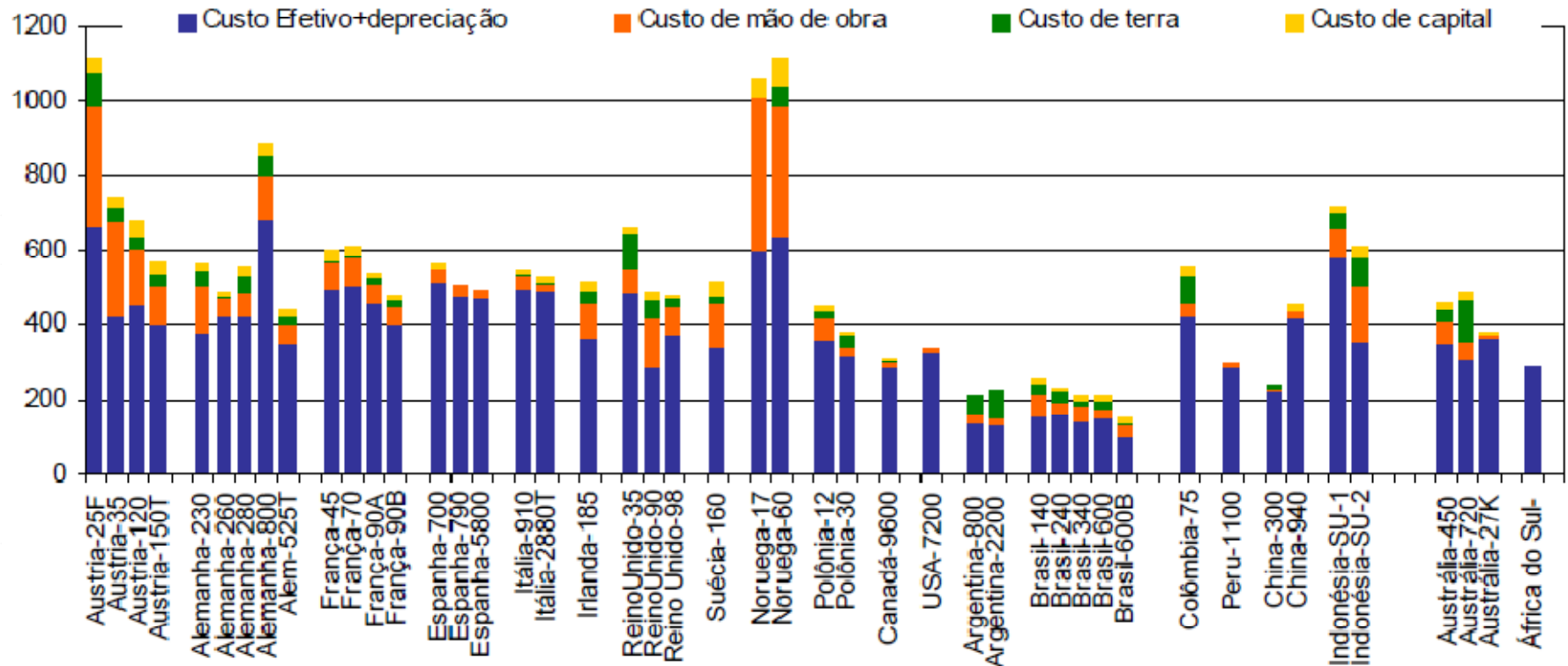
N North
 NE North-East
 CO Center West
 SE South East
 S South





Production Costs

US\$ per 100kg carcass weight



Source:
Agri Benchmark Beef Report 2008



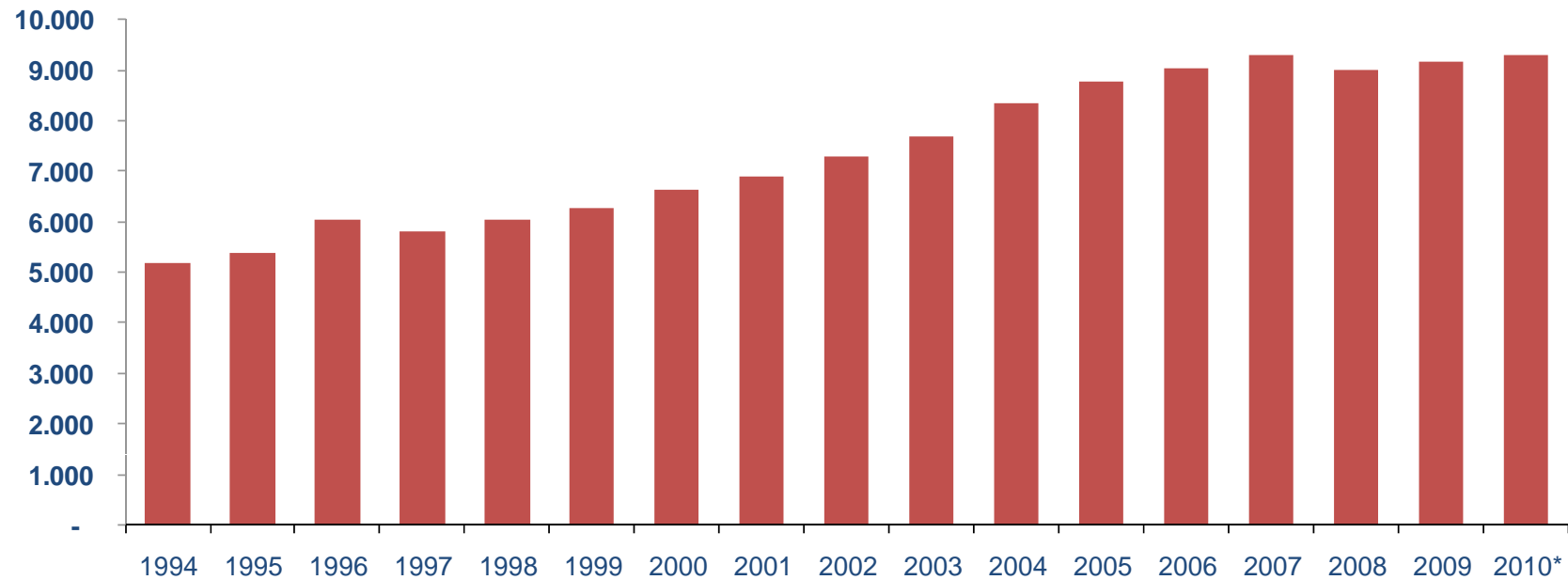
PART II

PRESENT



Brazilian Beef Production

x1.000 T cwe

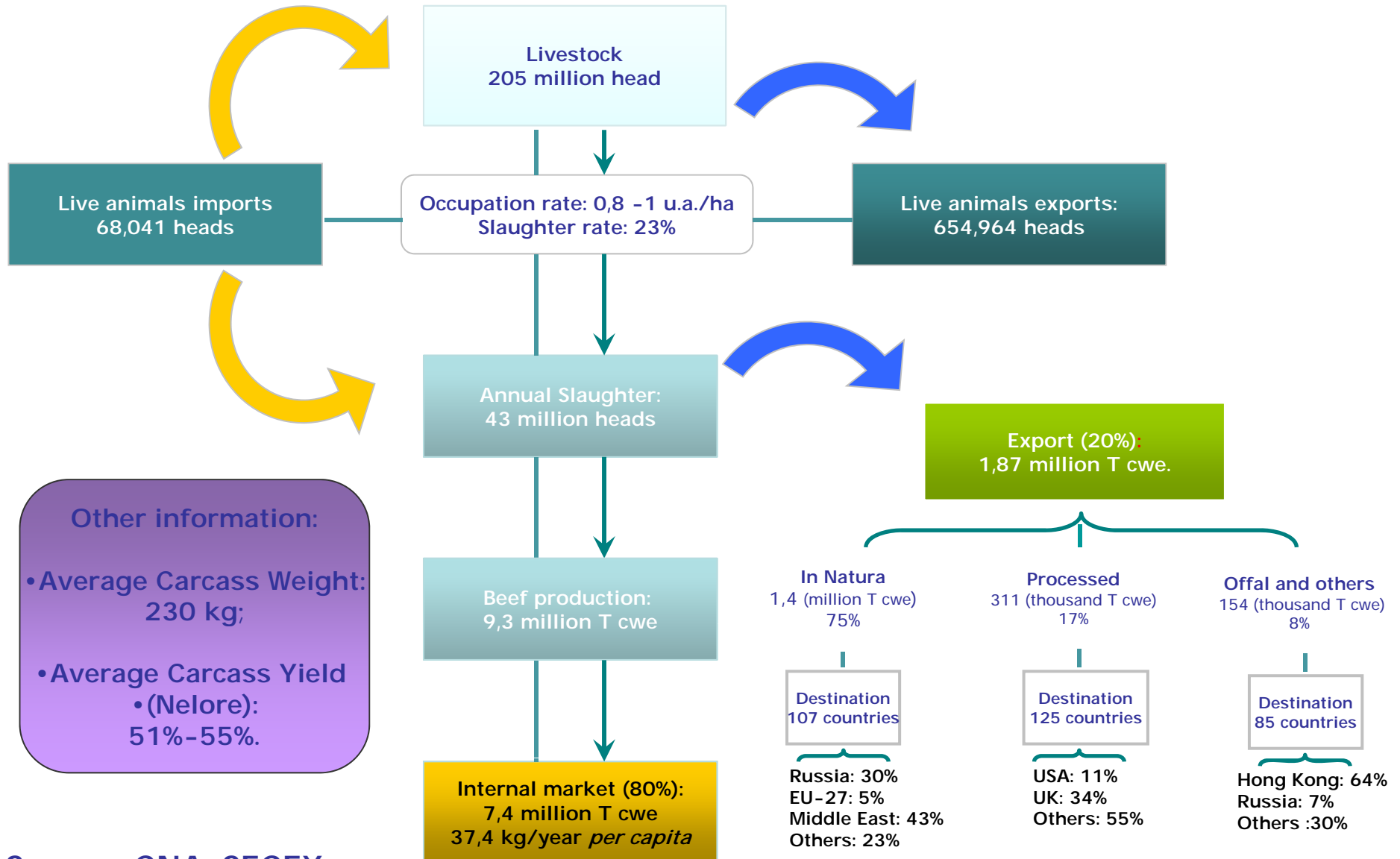


* Estimativa ABIEC



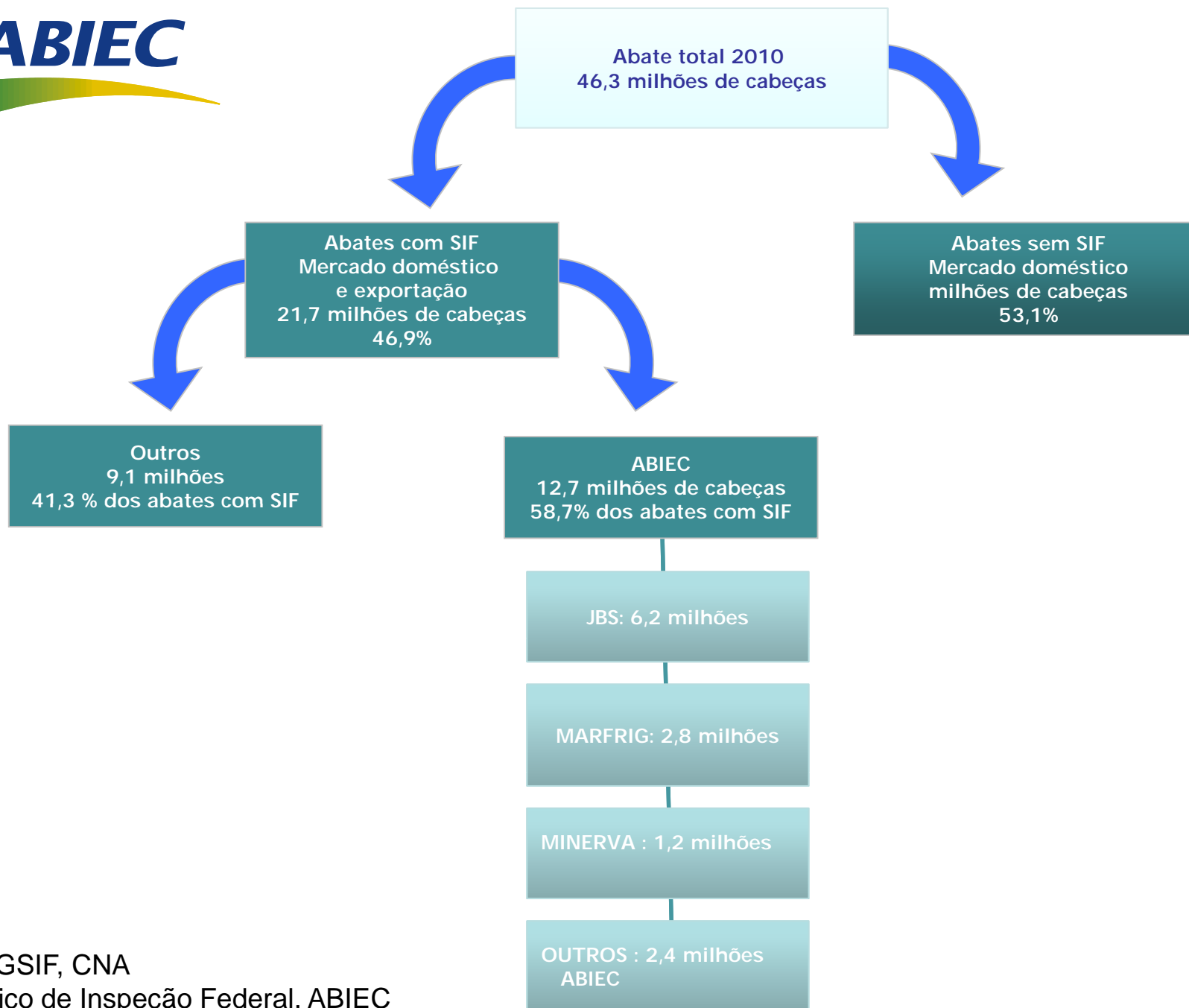
Source: CNPC

Brazilian Beef Profile (2010)

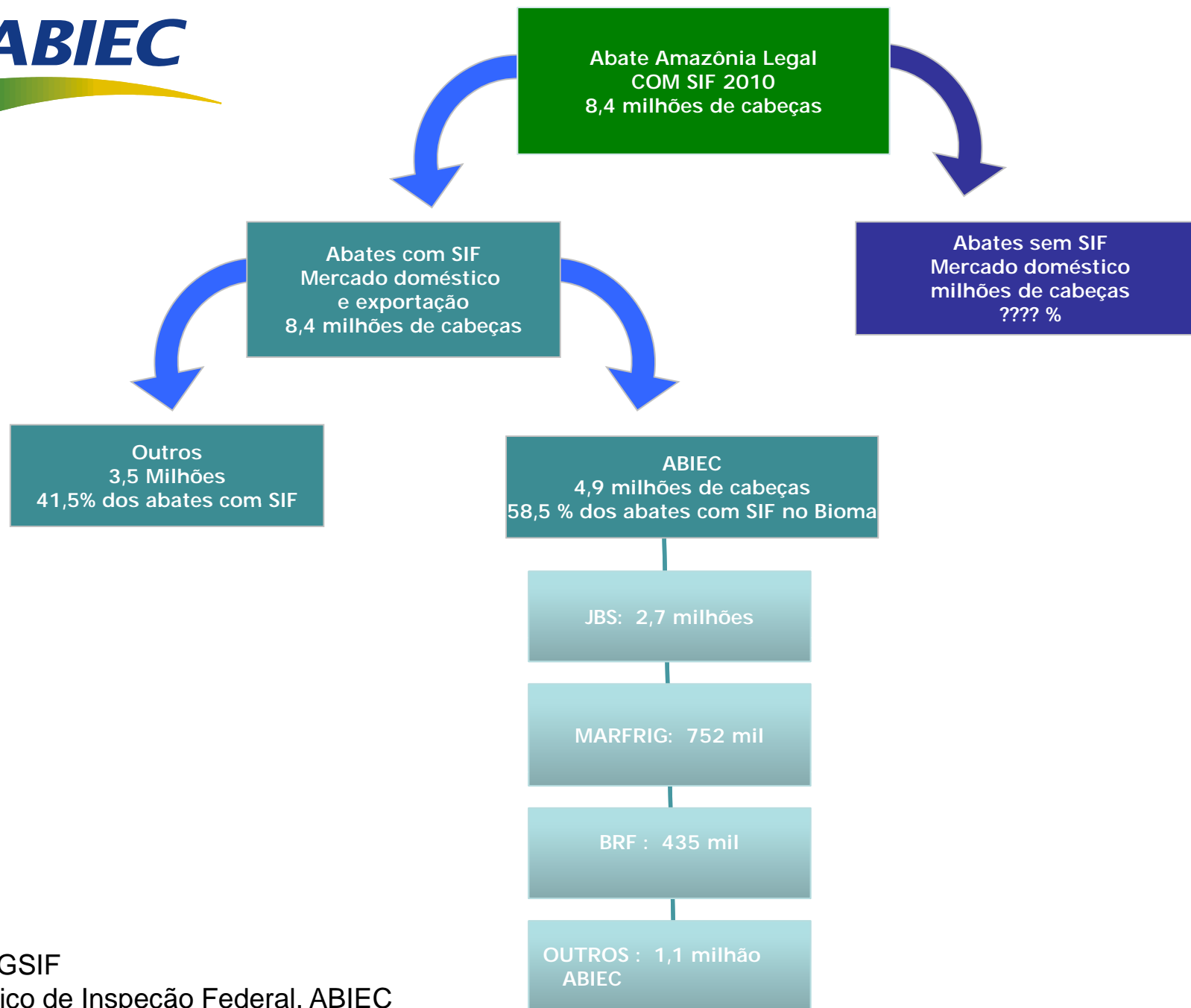


Other information:

- Average Carcass Weight: 230 kg;
- Average Carcass Yield (Nelore): 51%-55%.

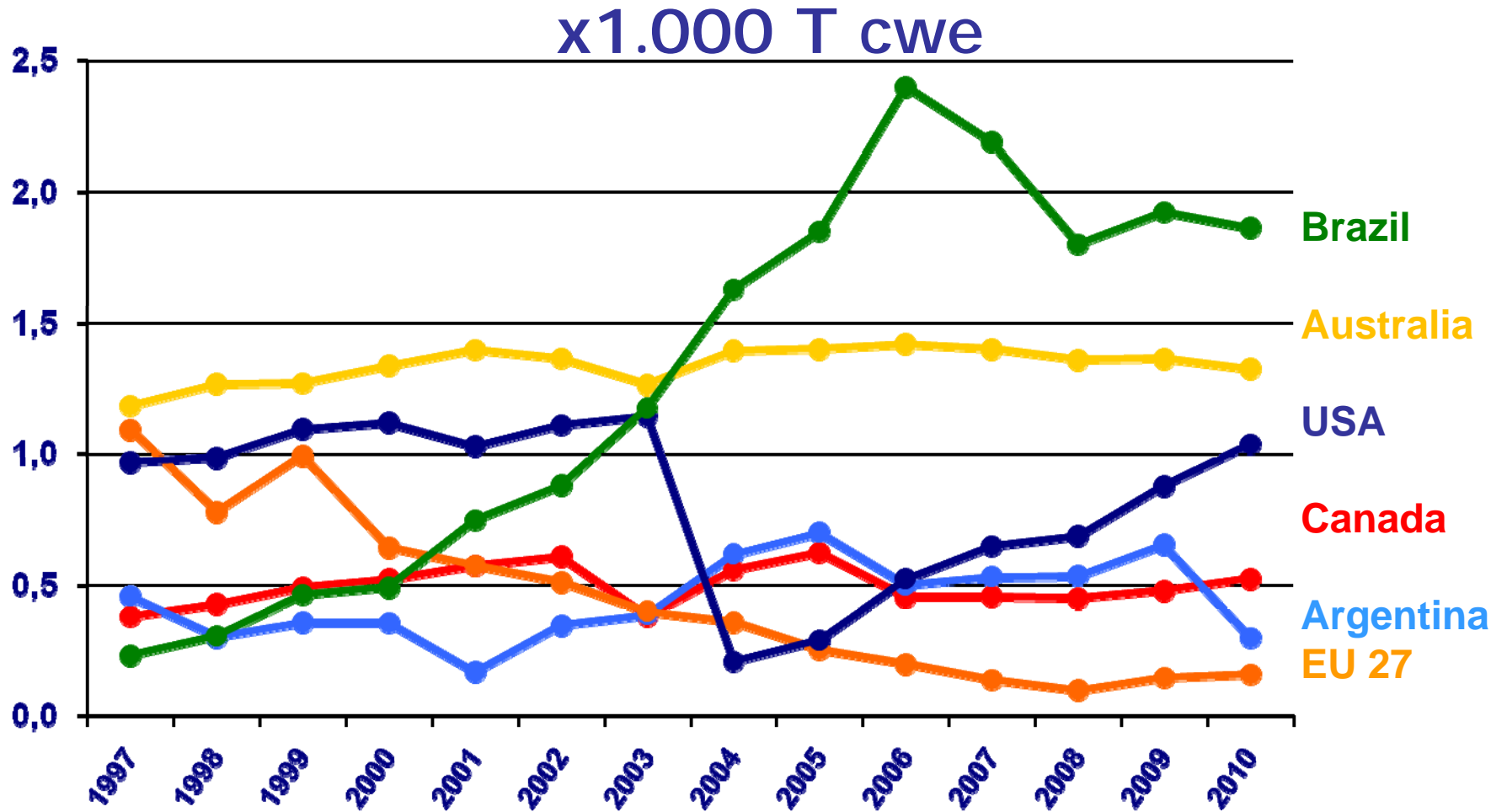


Fonte: SIGSIF, CNA
SIF: Serviço de Inspeção Federal, ABIEC



Fonte: SIGSIF
SIF: Serviço de Inspeção Federal, ABIEC

World's Beef Exports Evolution

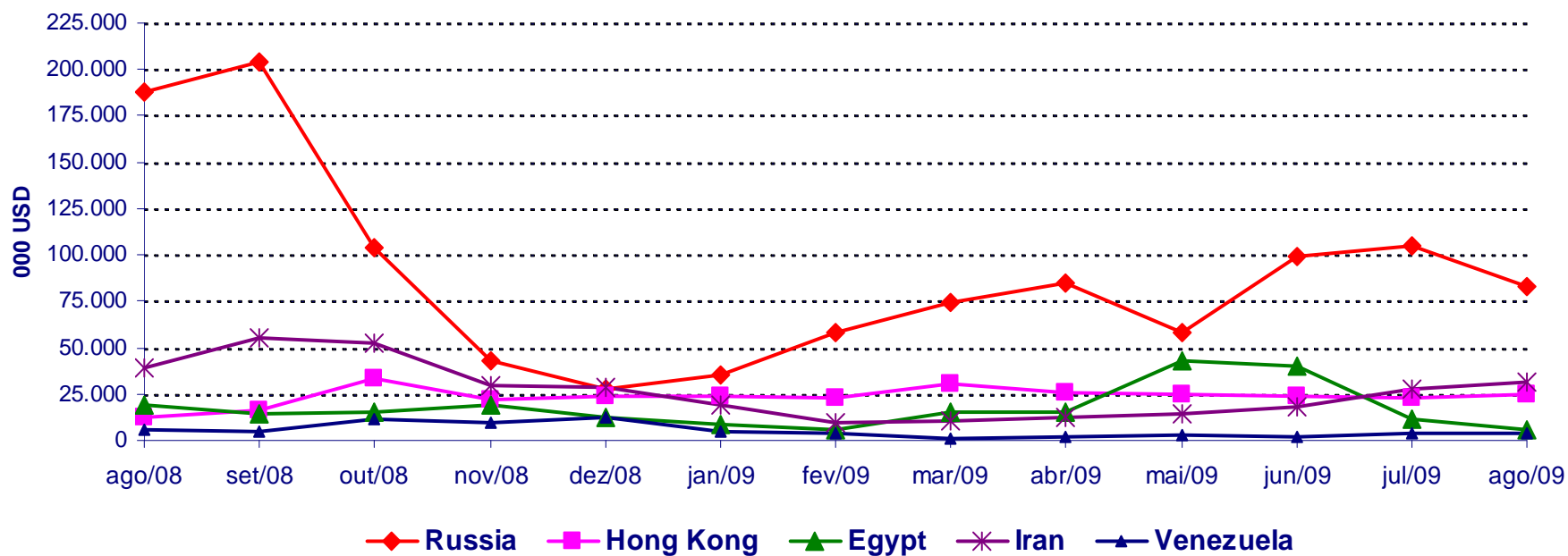


Source: USDA



Financial Crisis Impact

Main markets of Fresh Beef Evolution 000 US\$



Source: MDIC

Trends: Fusions and Acquisitions



Trends: Internacionalization



Argentina: Swift
 USA: Swift and Co., National Beef Packers, Smithfield, Pilgrim's Pride (chicken);
 Australia: Swift, Tasman, Tatiara Meat
 Europe: Inalca
 Uruguay: Canelones
 Paraguay: Quality Meat and San Antonio



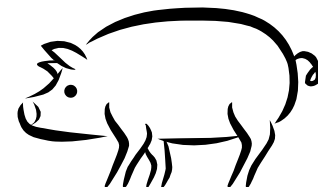
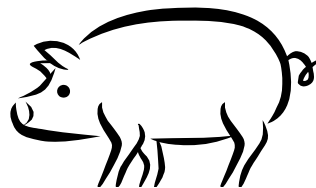
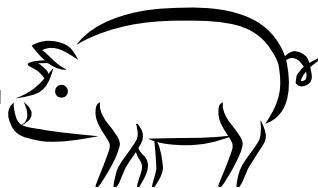
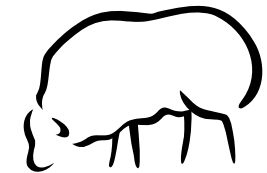
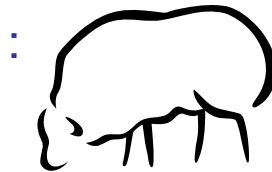
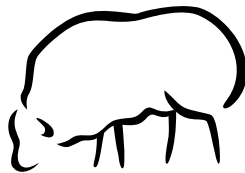
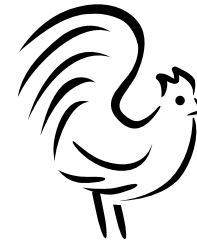
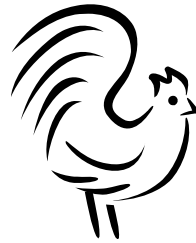
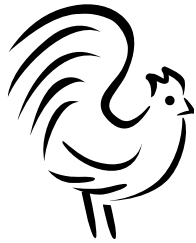
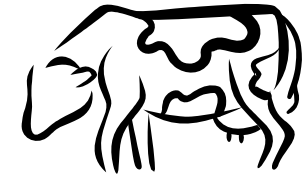
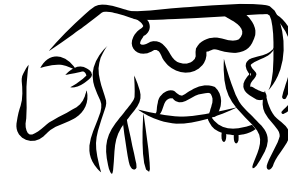
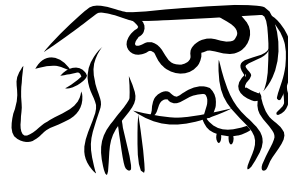
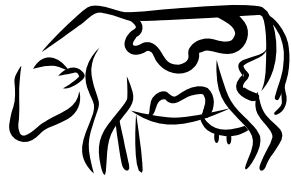
Paraguay: Friasa
 Uruguay: PUL



Argentina: AB&P, Estancias del Sur, Quickfood, Best Beef, Mirab
 Uruguay: Tacuarembó, Inaler, Colonia
 Chile: Quinto Cuarto, Patagonia
 UK: CDB Meats, Weston, Kitchen Ham Packers
 Northern Ireland: Moy Park, Dungannon Protein
 Netherlands: Albert van Zoonen
 France: Moy Park France



Trends: Multi-Protein

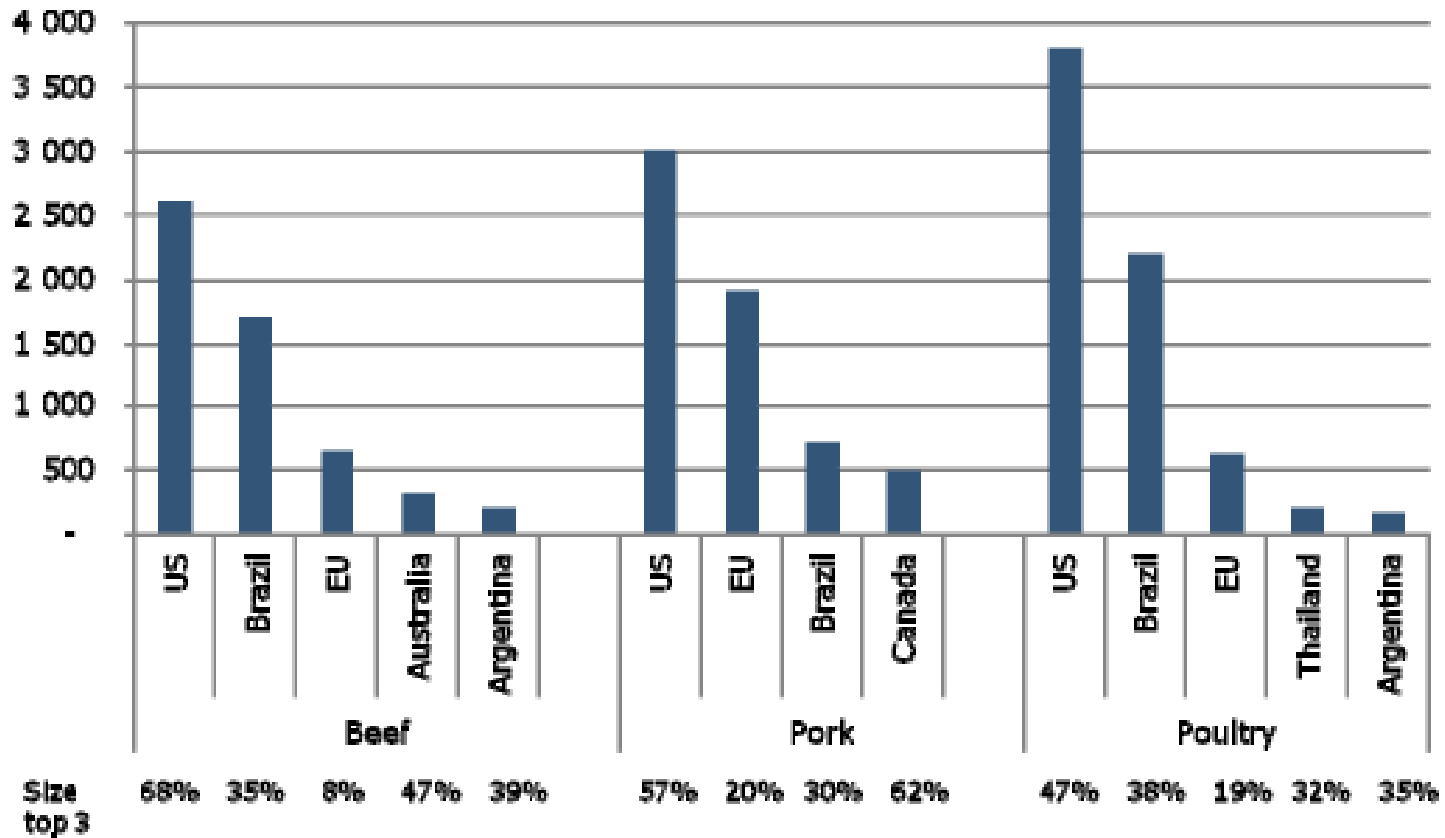


Key Global Animal Protein Issues

Intra-country consolidation

Size of top three firms

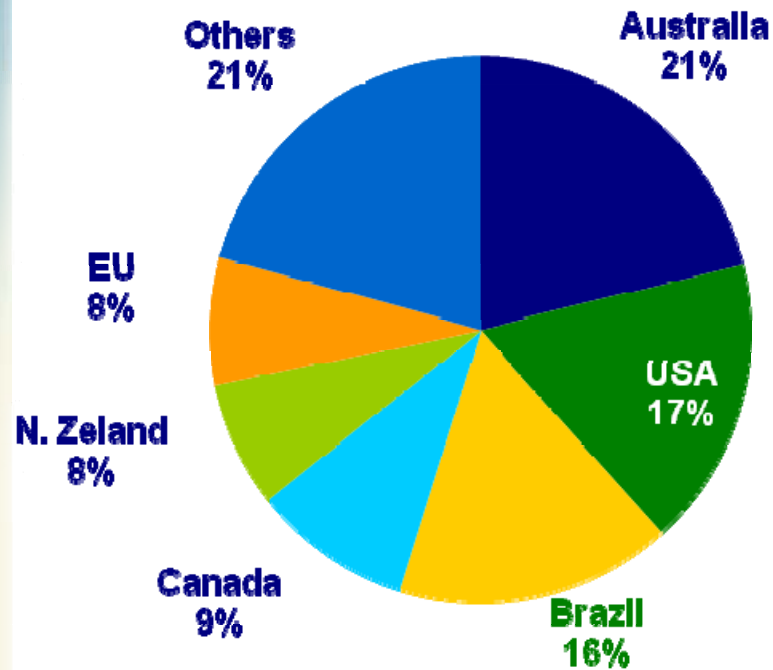
Most markets are fragmented compared to the US



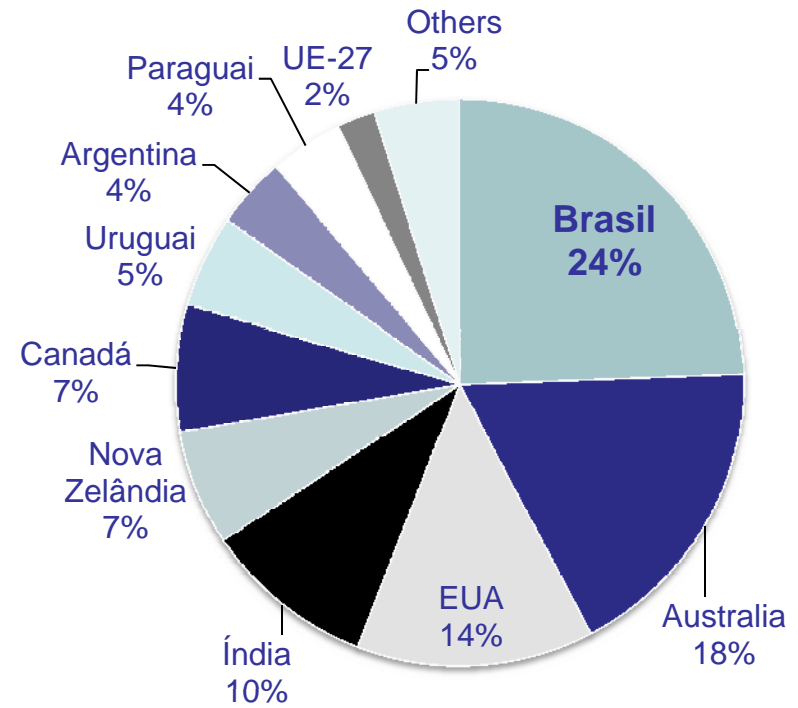
Source: Rabobank

World Beef Market

2002

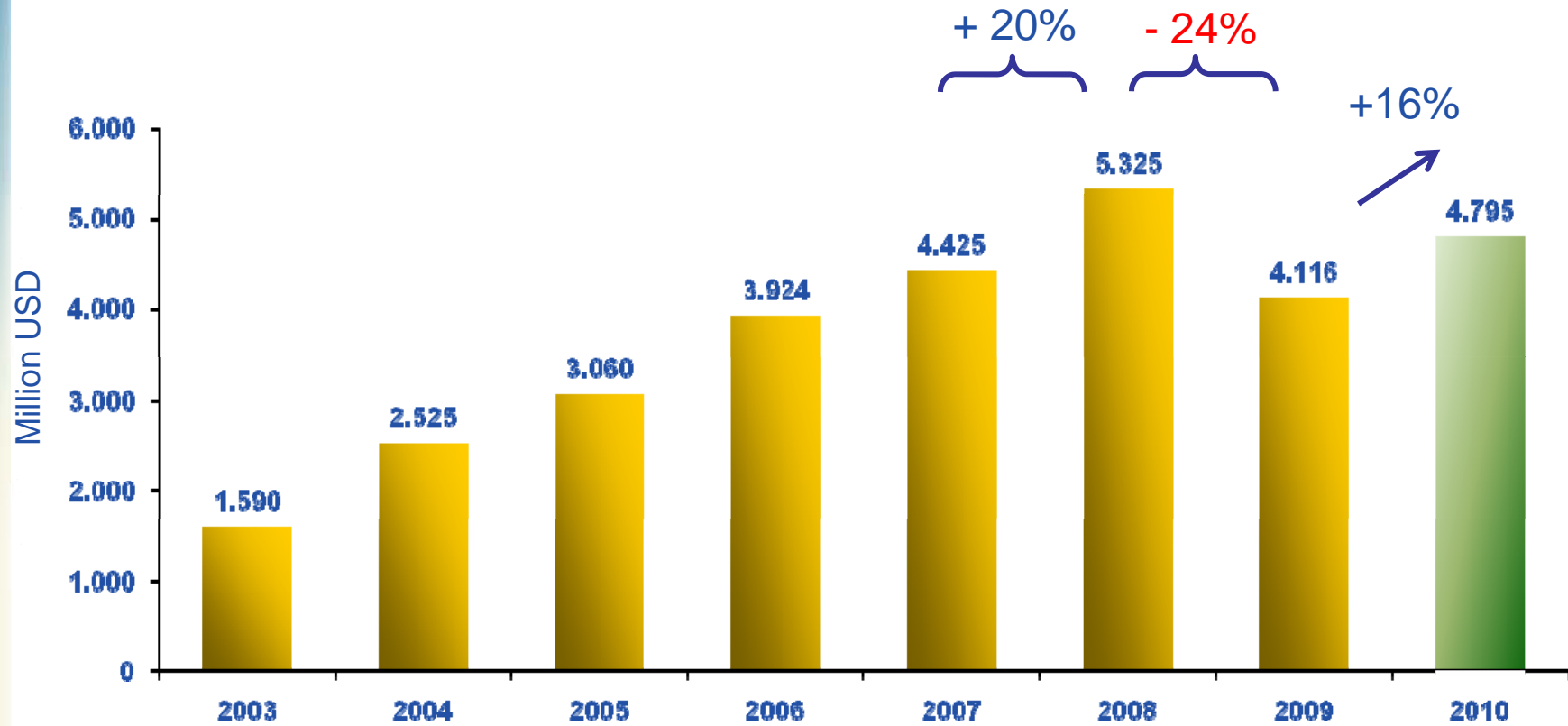


2010



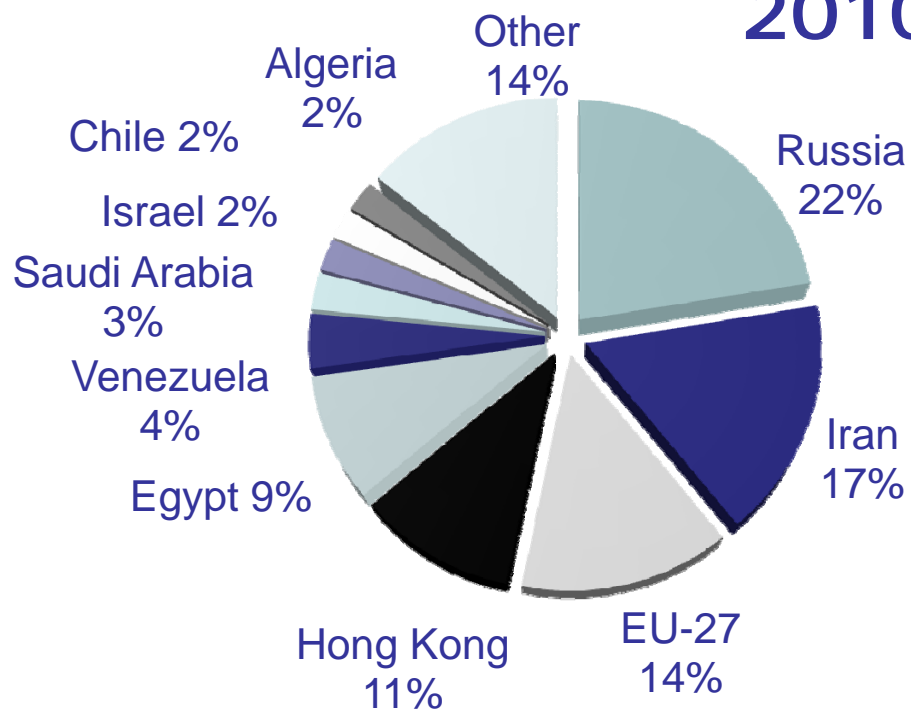
Source: USDA

Brazilian Beef Exports USD Million



Source: MDIC

Brazilian Beef Exports 2010



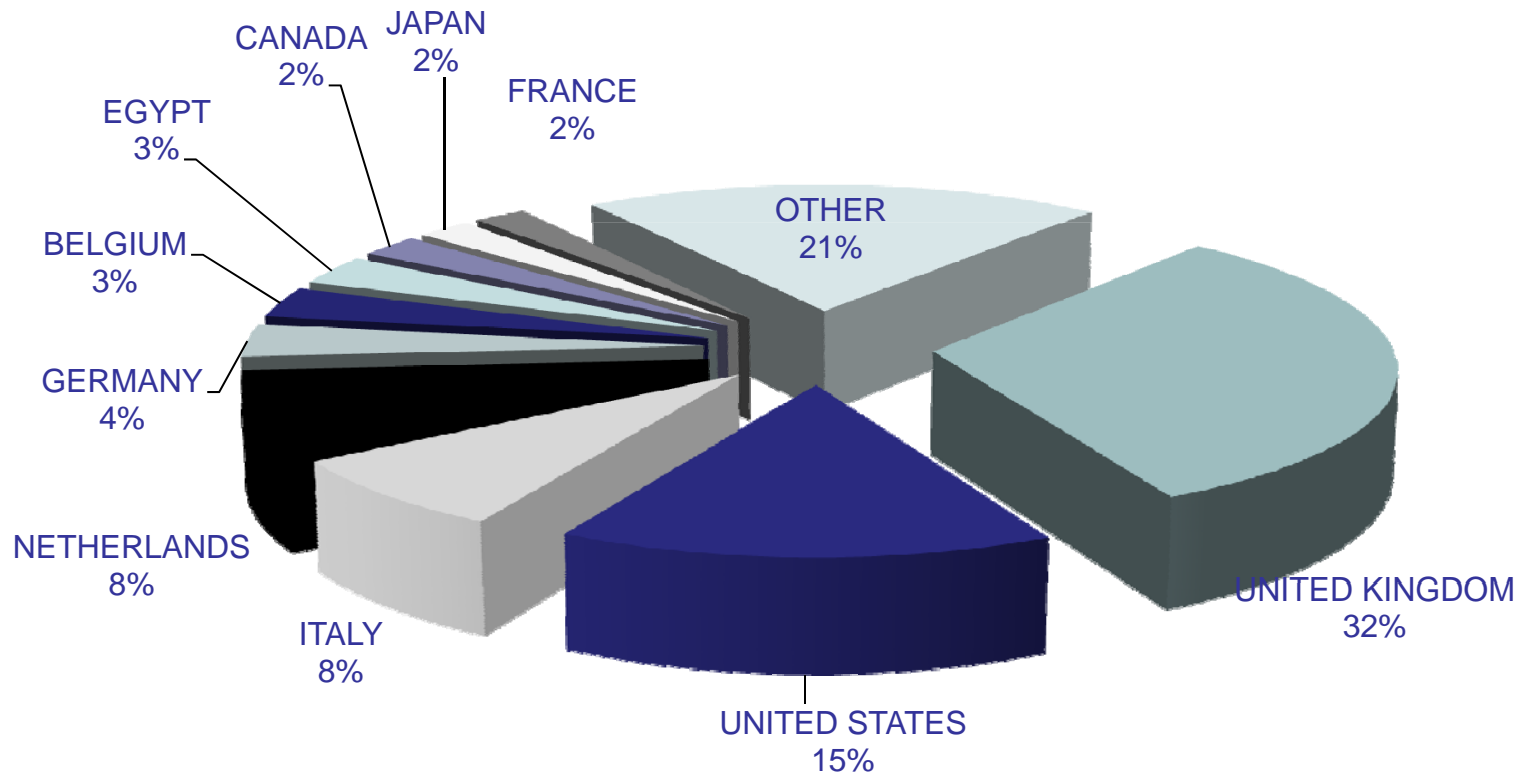
**US\$ 4.79
billion**

PRODUCT	2010			2009			Δ% 2010 x 2009		
	USD (000)	TON CWE	USD/TON	USD (000)	TON CWE	USD/TON	USD (000)	TON CWE	USD/TON
Fresh/Chilled/Frozen Beef	3,861,060	1,397,223	4,058	3,022,565	1,360,299	3,263	28%	3%	24%
Processed Beef	498,224	311,005	4,005	649,071	408,406	3,973	-23%	-24%	1%
Offal	194,975	85,161	2,289	195,068	87,616	2,226	0%	-3%	3%
Casings	231,078	67,798	3,408	228,743	64,277	3,559	1%	5%	-4%
Salted Beef	10,017	1,953	5,129	23,033	3,799	6,063	-57%	-49%	-15%
TOTAL	4,795,355	1,863,144	3,897	4,118,480	1,924,401	3,308	16%	-3%	18%



Source: MDIC

Brazilian Beef Exports Processed 2010



US\$ 498.224.000



Source: MDIC

PART III

FUTURE



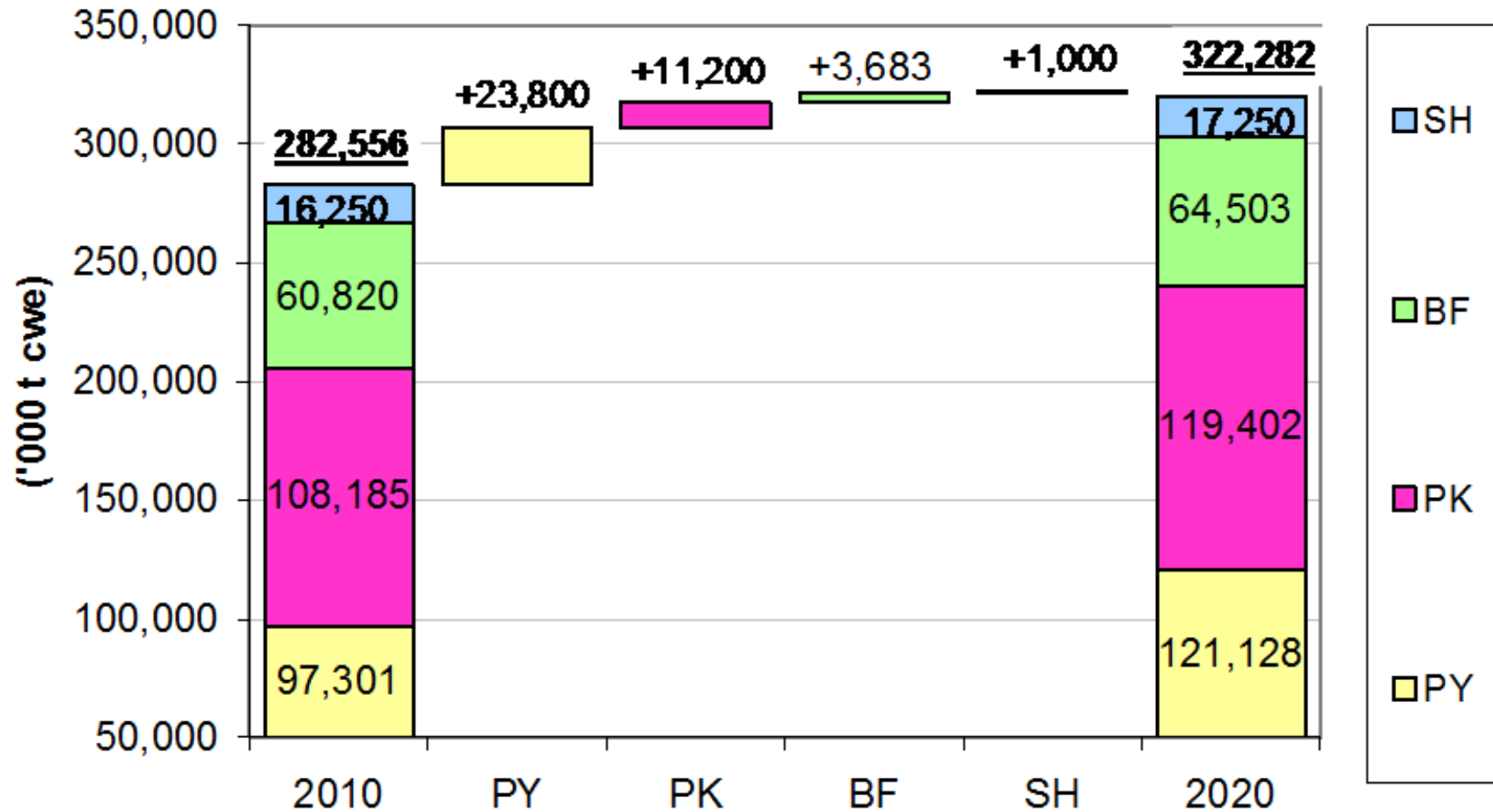
World Facts

- In 2007 the world's urban population surpassed the rural population
- In 2050, the world population will be of about 9 billion people (UN)
- In 2014, the GDP of developing countries will surpass the GDP of developed countries (IMF)
- In 2009, about 1 billion people were living in some degree of sub nutrition (FAO)

"Food production must expand by 70% in the world and double in developing countries, to meet the food needs of a world population expected to reach 9.1 billion in 2050"

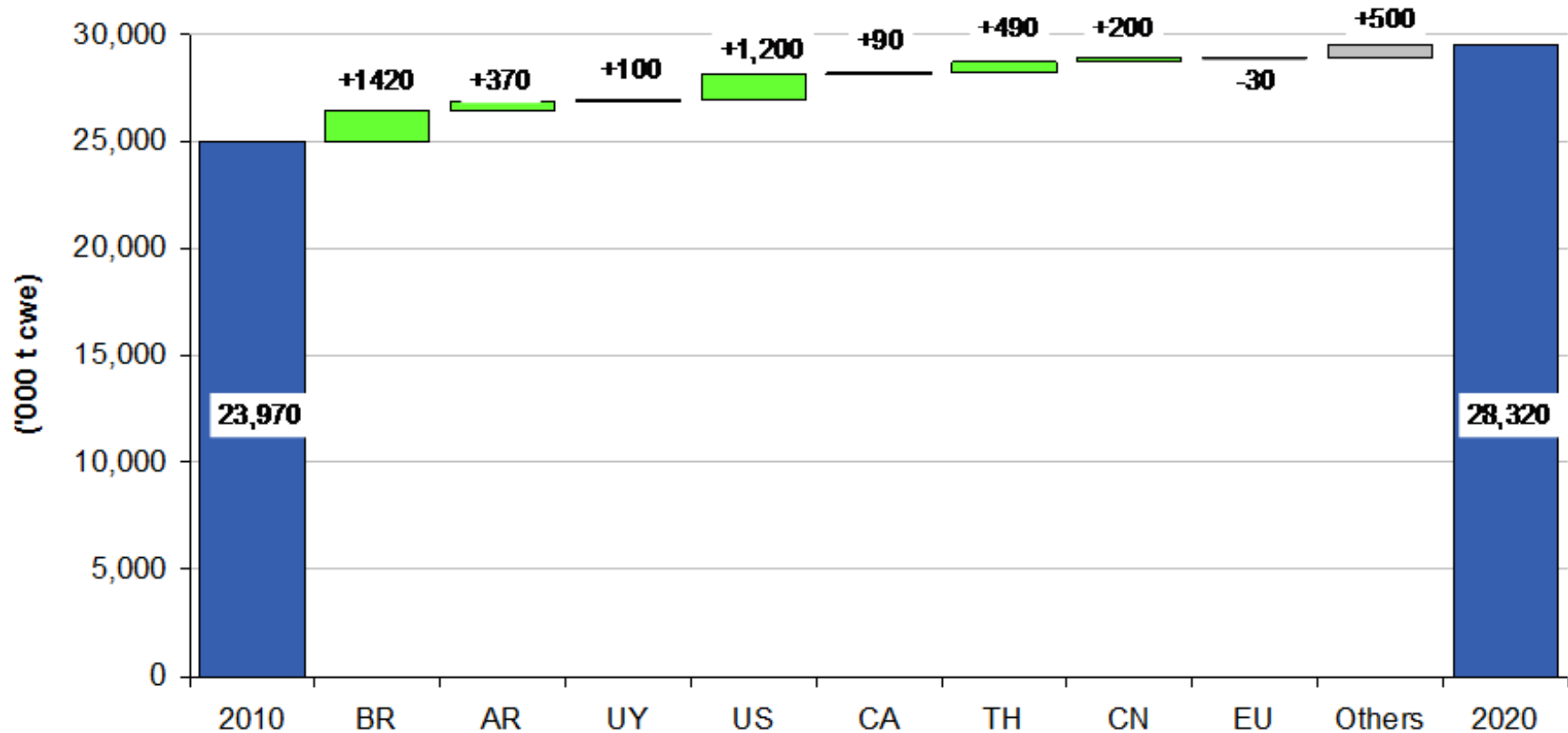


World's Meat Consumption Growth by Species

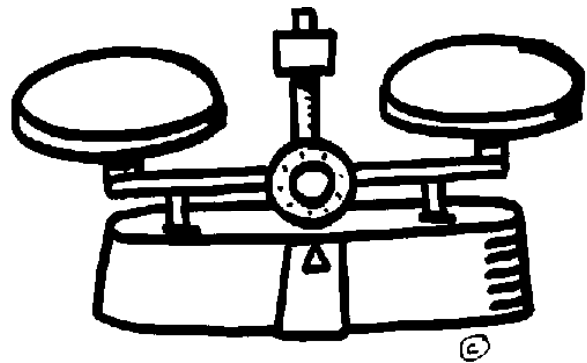


Source: GIRA Long Term Meat Studies

World's Meat Exports Growth by Region



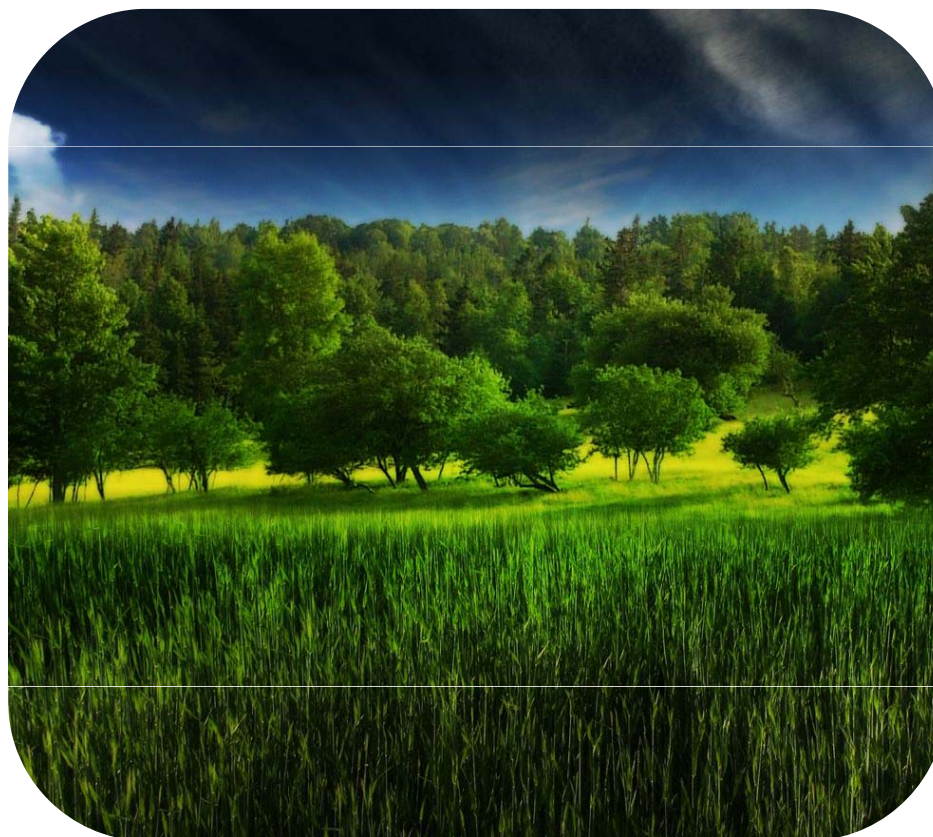
Source: GIRA Long Term Meat Studies



Addressing the Sustainability Challenges

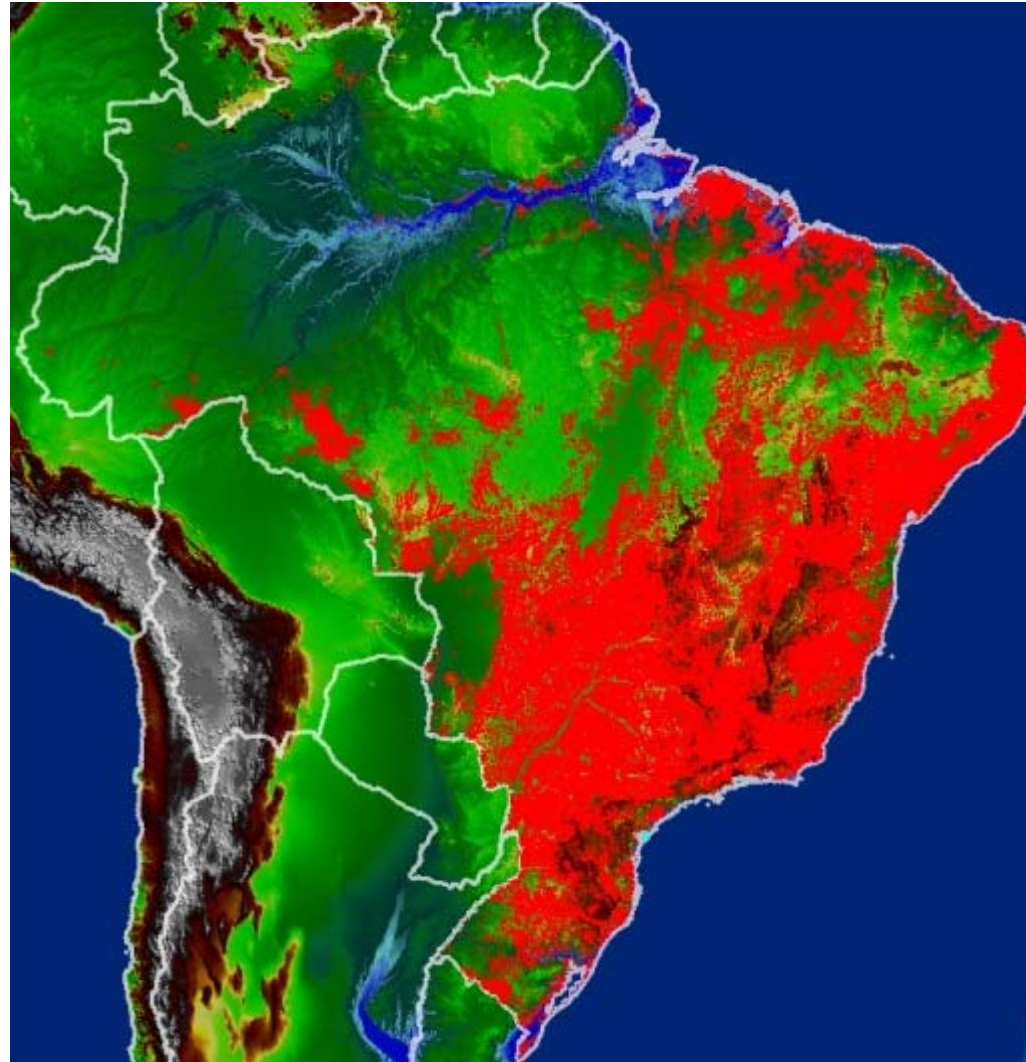


LAND USE AND FORESTS



Brazil

Antropic Occupation



Original Biomes Remaining Areas



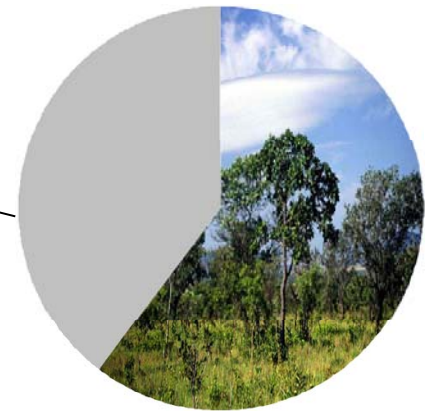
85%



63%



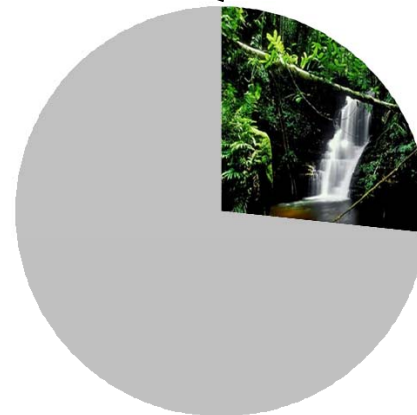
87%



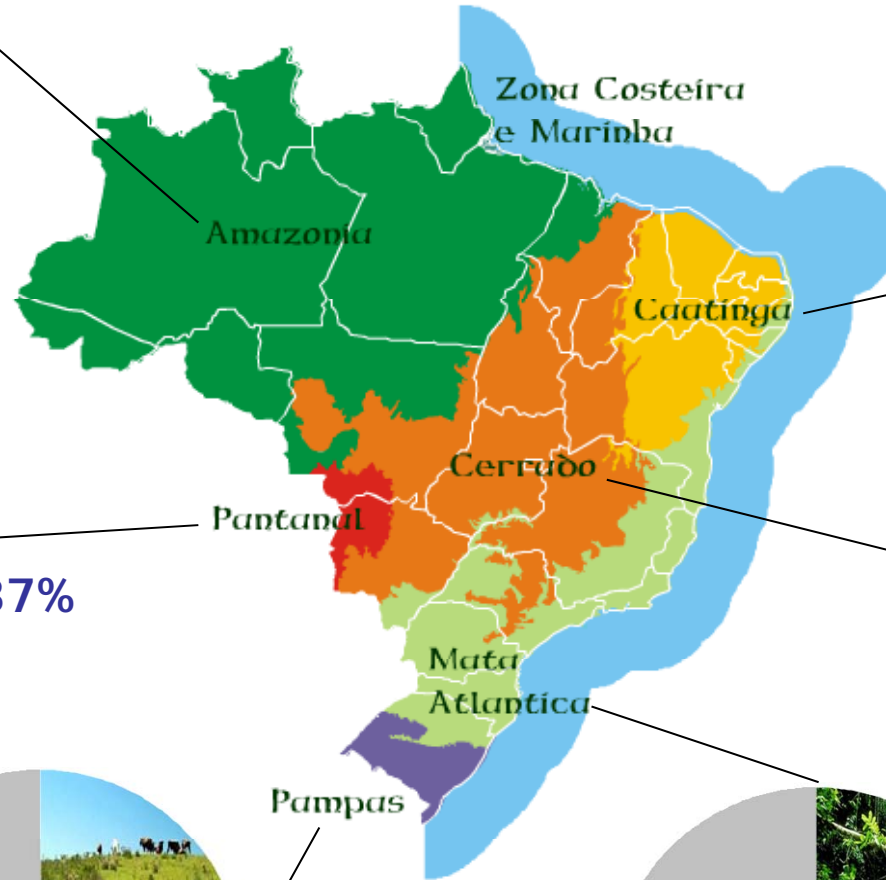
60%



41%



27%



LAND USE (hectares)



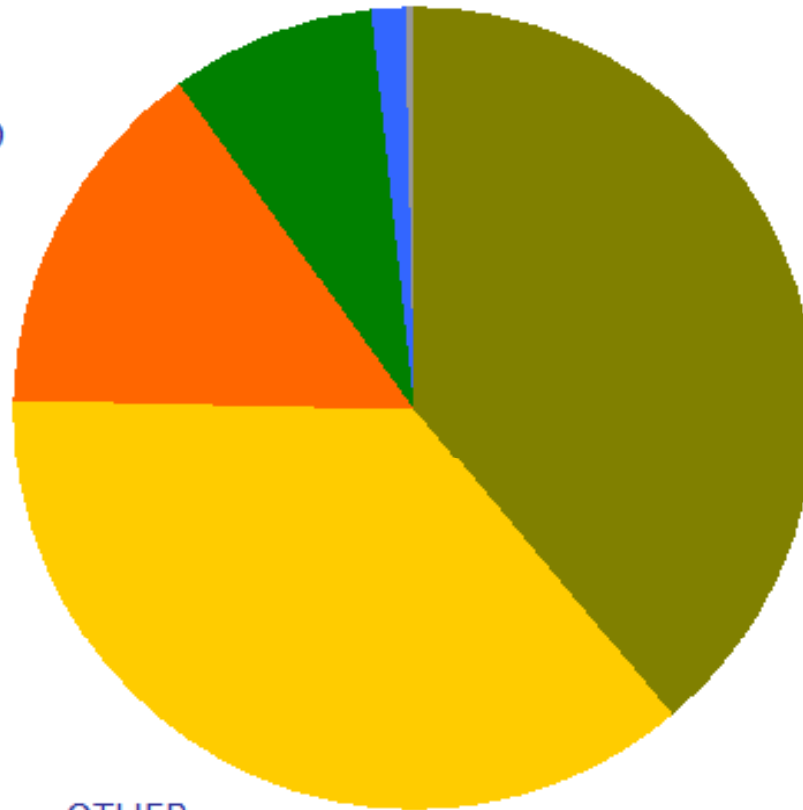
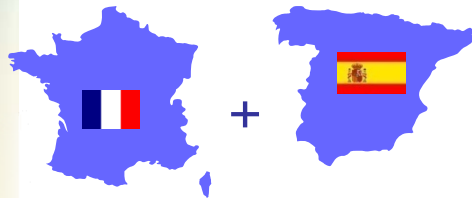
CONSERVATION
72.099.864
8,5%

WATER
11.455.300
1,3%

CITIES
2.073.700
0,2%



INDIAN LAND
125.545.870
14,8%



FARMS
329.941.393
38,8%

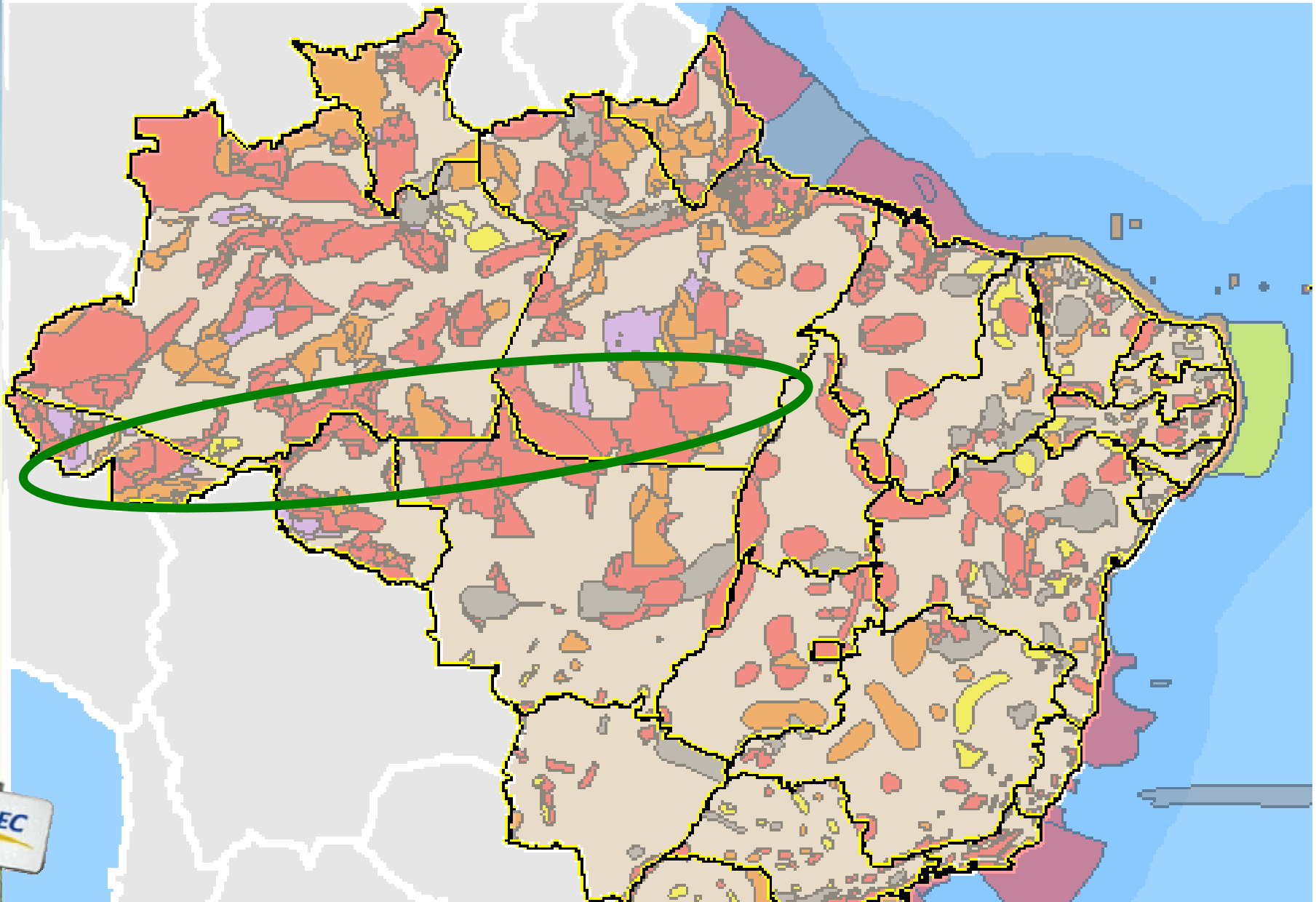


BRAZIL
851,4 million ha

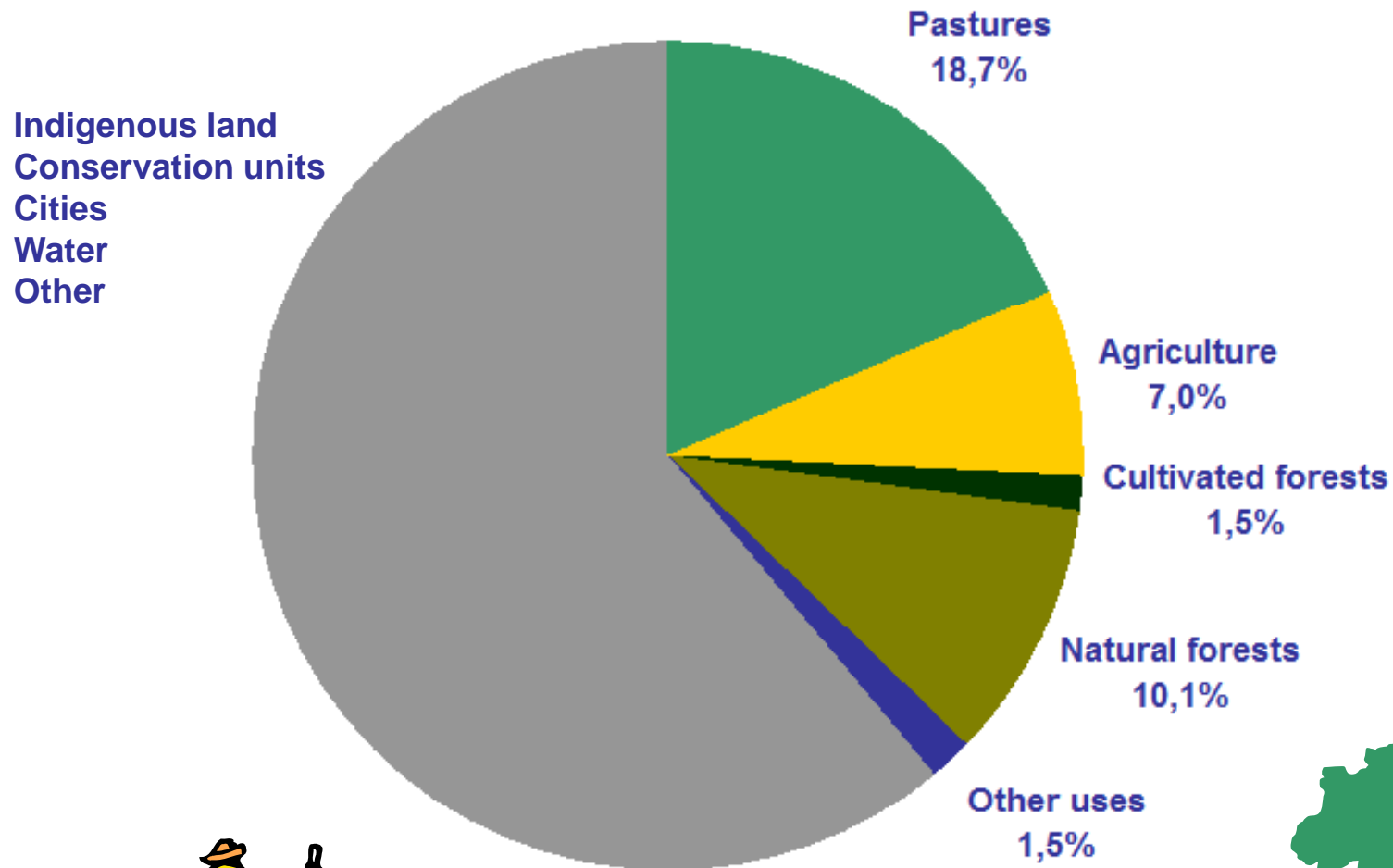


IBGE 2006

Indian Lands, Conservation Units and the Green Wall



FARMLAND USE (million hectares)



IBGE 2006



Private Protection Areas

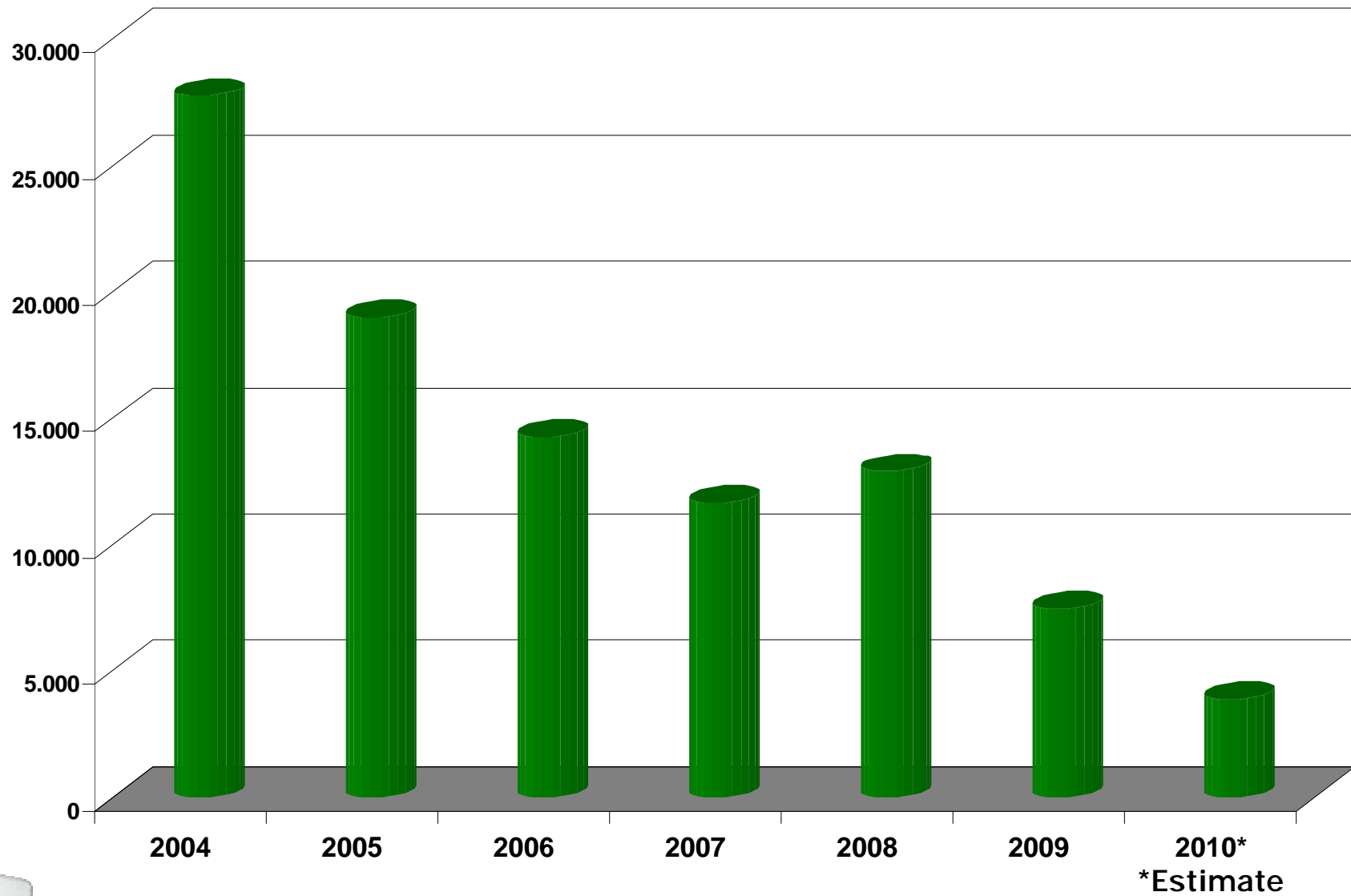


Legal Reserve
80% Amazon region
35% Cerrado in the
Amazon region
20% Others

**Permanent
Protection Areas**
Alongside rivers and
lakes and water
Hill sides and tops



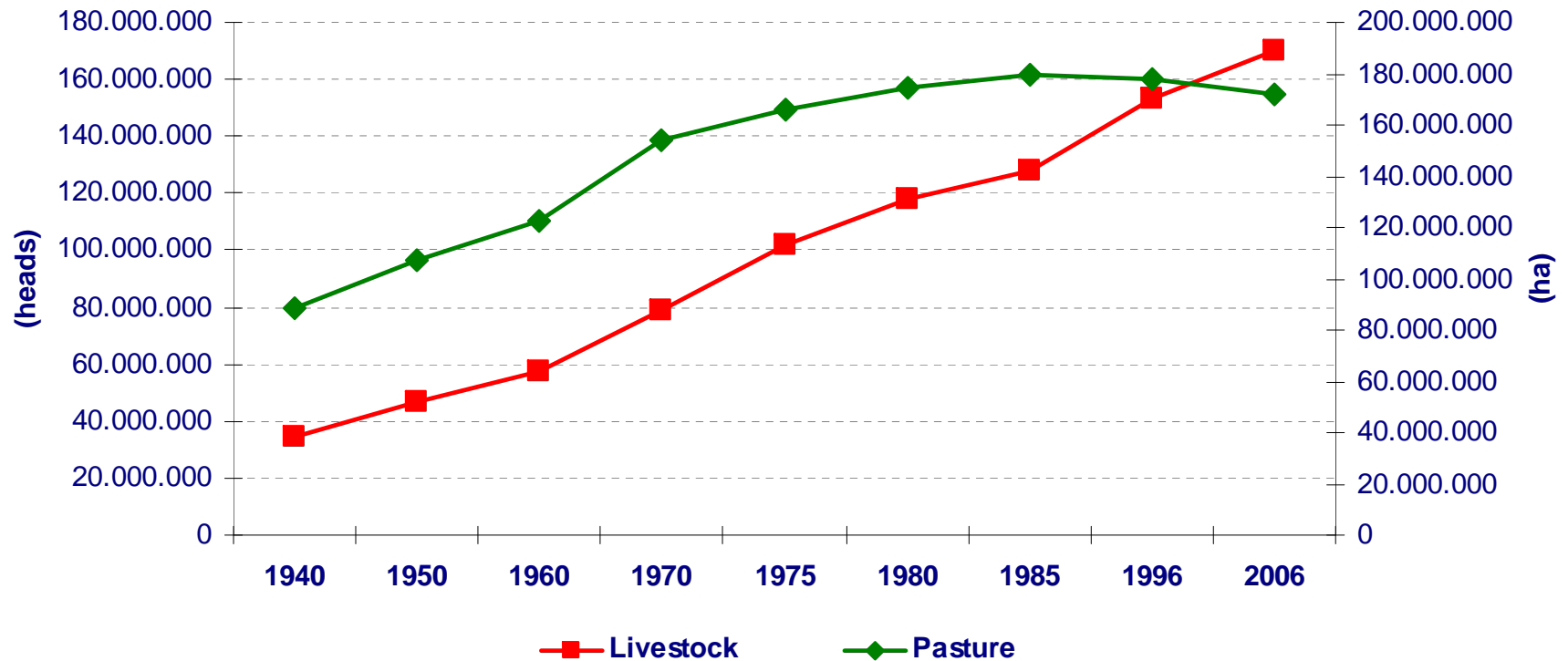
Deforestation Rates in the Amazon Region Km²/year



Source: INPE

Productivity Evolution

Livestock X Pasture area



**1996 - 2006
+ 25,5% heads/ha**

Source: IBGE, MAPA



Productivity



	Meat Production Million ton			Pasture area Million ha		
	1975	2007	Increase	1975	2007	Increase
BRAZIL	2,16	7,05	+ 227%	165,63	171,85	+ 4%
WORLD	43,73	59,85	+ 37%	3.193,32	3.378,17	+ 6%



Source: FAO



TECHNOLOGY



**PRODUCTIVITY, EFFICIENCY,
SUSTAINABILITY**



ciência

28/07/2010 - 09h42

Ciência rural turbina publicação no país

Se todos os pesquisadores brasileiros produzissem como os da área de ciências agrárias, o peso científico do país hoje seria equivalente ao da França. Já campos como psicologia, economia e ciências sociais, bem inferiores à média nacional, puxam a produtividade para baixo.

Os dados que permitem essas conclusões foram apresentados pelo presidente do CNPq (Conselho Nacional de Desenvolvimento Científico e Tecnológico), Carlos Aragão, na reunião da Sociedade Brasileira para o Progresso da Ciência, em Natal (RN).

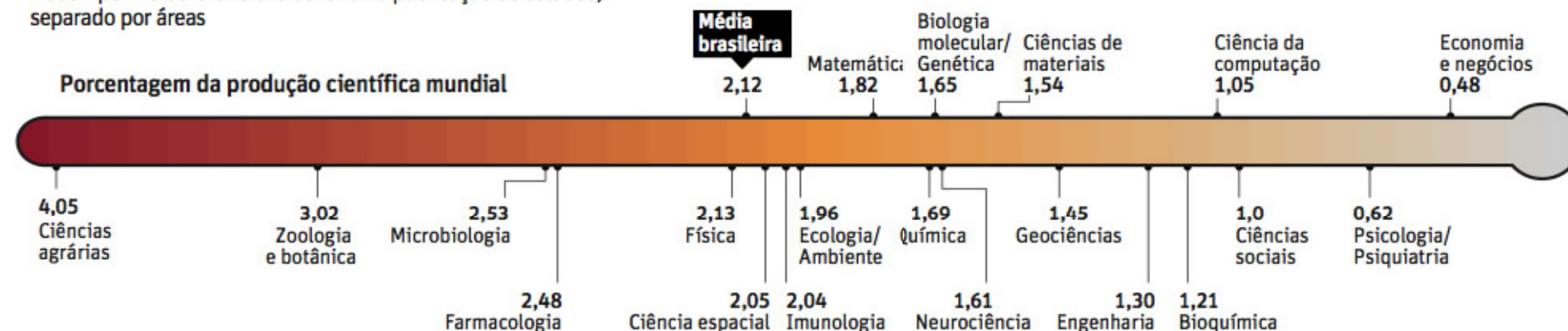
A medida usada nas estatísticas é o número de artigos publicados em revistas científicas mundo afora, indexados (cadastrados) em bases de dados internacionais.

Fatias do país na produção científica mundial, em %

1º	EUA	23,74
2º	China	7,86
3º	Alemanha	6,09
4º	Japão	5,54
5º	Inglaterra	5,47
6º	França	4,50
7º	Canadá	3,71
8º	Itália	3,51
9º	Espanha	2,92
10º	Índia	2,69
11º	Austrália	2,56
12º	Coreia do Sul	2,48
13º	Brasil	2,12

TERMÔMETRO DA PRODUTIVIDADE

Desempenho da ciência brasileira na publicação de estudos, separado por áreas



LAND USE AND LIVESTOCK *Possibilities*

Brazil/World

19,95% of total livestock
5,06% of pasture area
14,70% of beef production

USA/World

9,60% of total livestock
7,03% of pasture area
20,90% of beef production



The Economist

Brazil's agricultural miracle

How to feed the world

The emerging conventional wisdom about world farming is gloomy. There is an alternative.

Aug 26th 2010



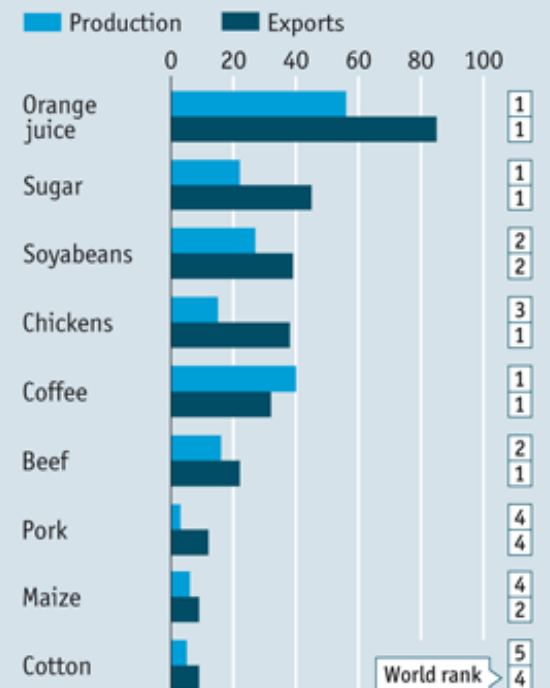
1 Going with the grain



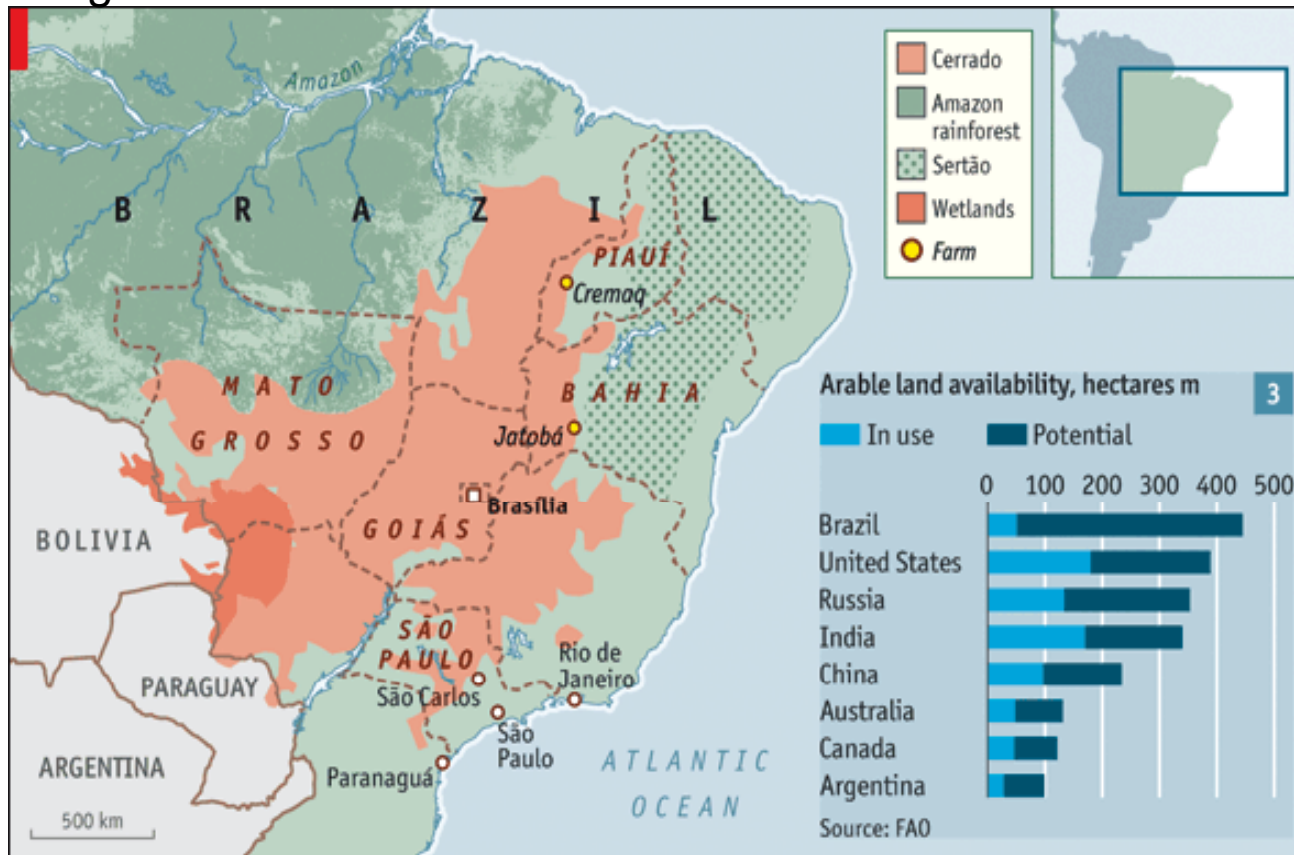
Source: Brazilian Ministry of Agriculture

2 Big portions

Brazil's agriculture, world share 2009, %



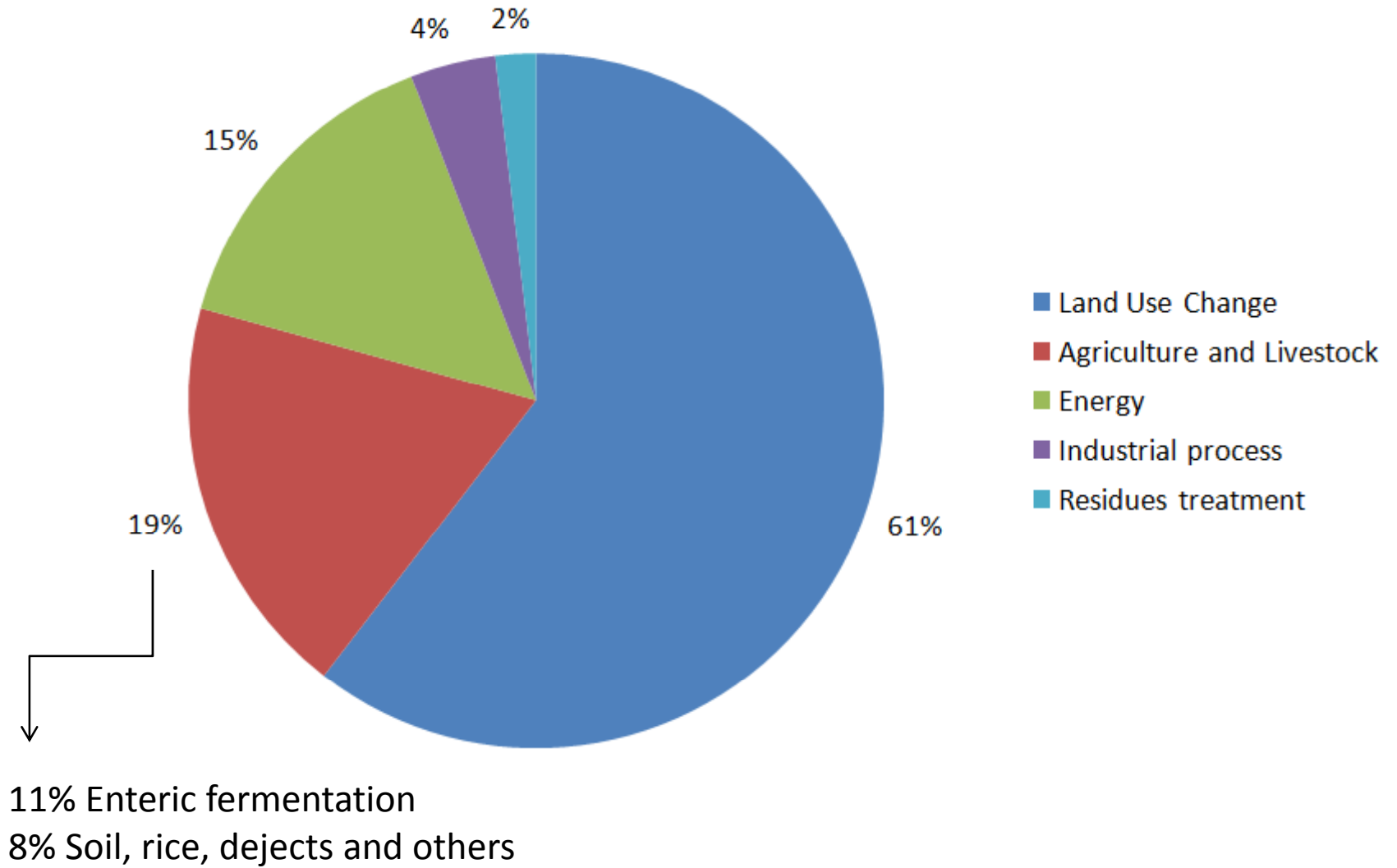
Source: United States Department of Agriculture



EMISSIONS

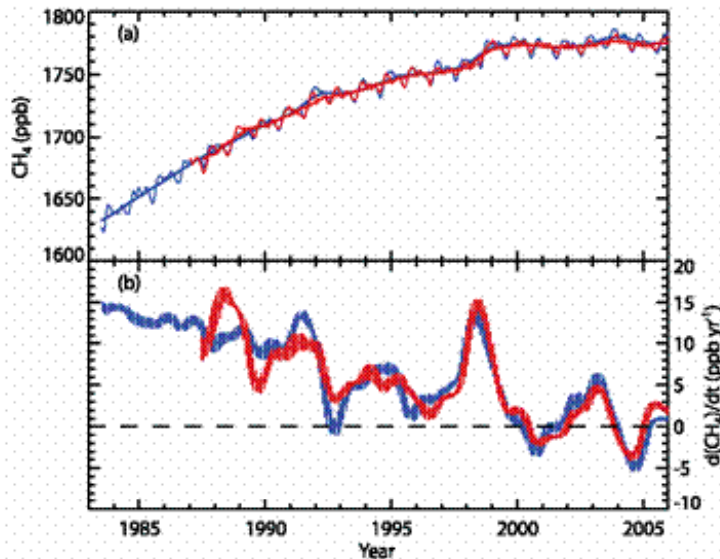


Brazilian Emissions per Sector 2005

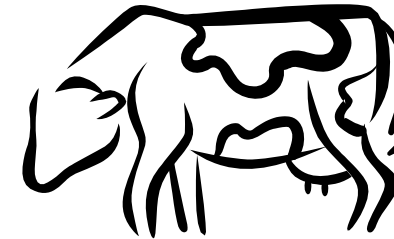


Scientific Uncertainties?

Methane Concentration in the Atmosphere and Annual Growth of Concentration



Source: Fourth Assessment IPCC Report



GWP
25 x CO₂

x

GTP
5 x CO₂

Brazilian N₂O

2%
IPCC

0,1-0,4%
Brazilian
publications



Livestock Longshadow
FAO

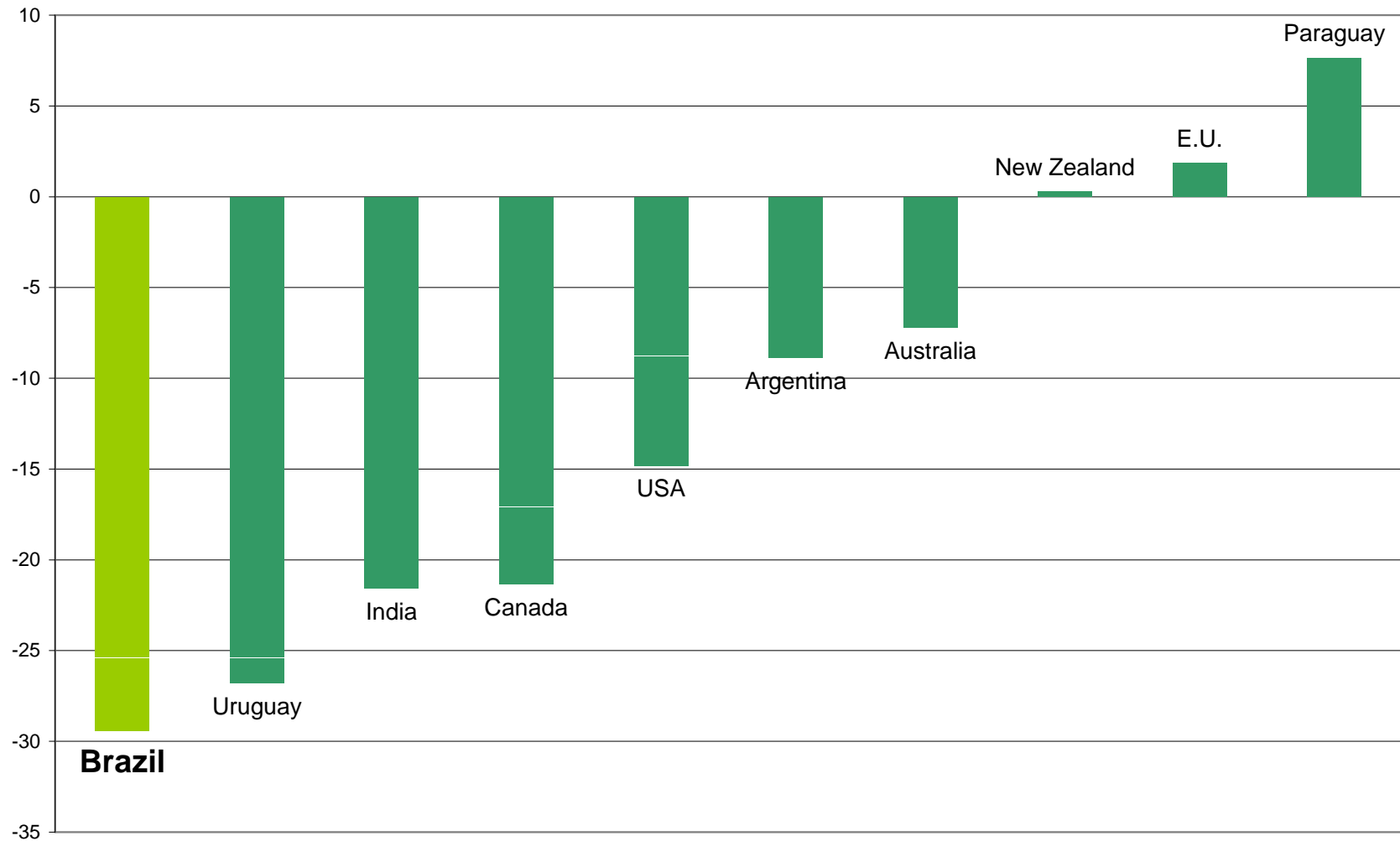
x

Clearing The Air
Frank Mitthoener/UC Davis



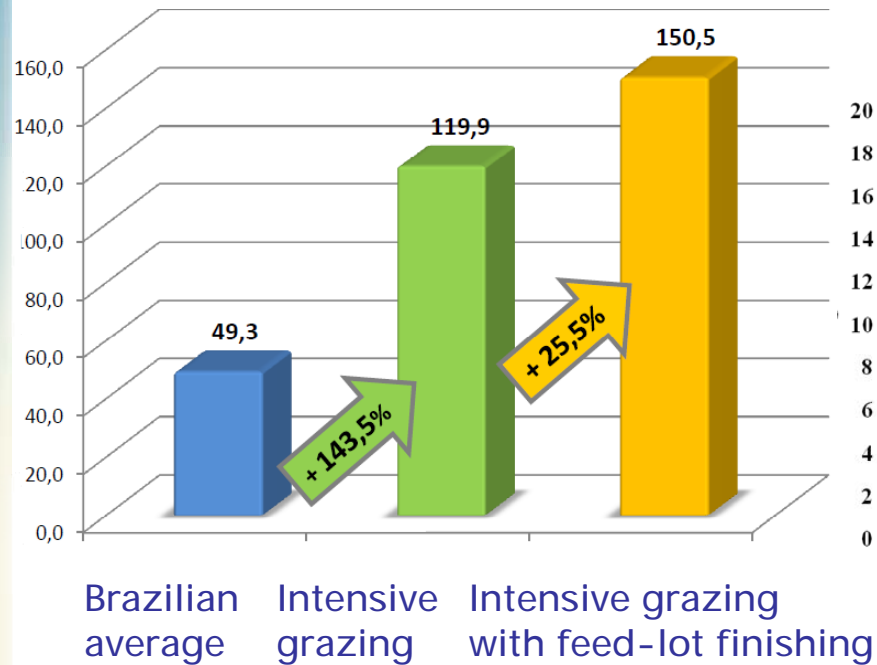
Greenhouse Gases Emissions

Reduction on CH₄ emissions between 1988 and 2007
% of emissions reduction of CH₄/kg of beef

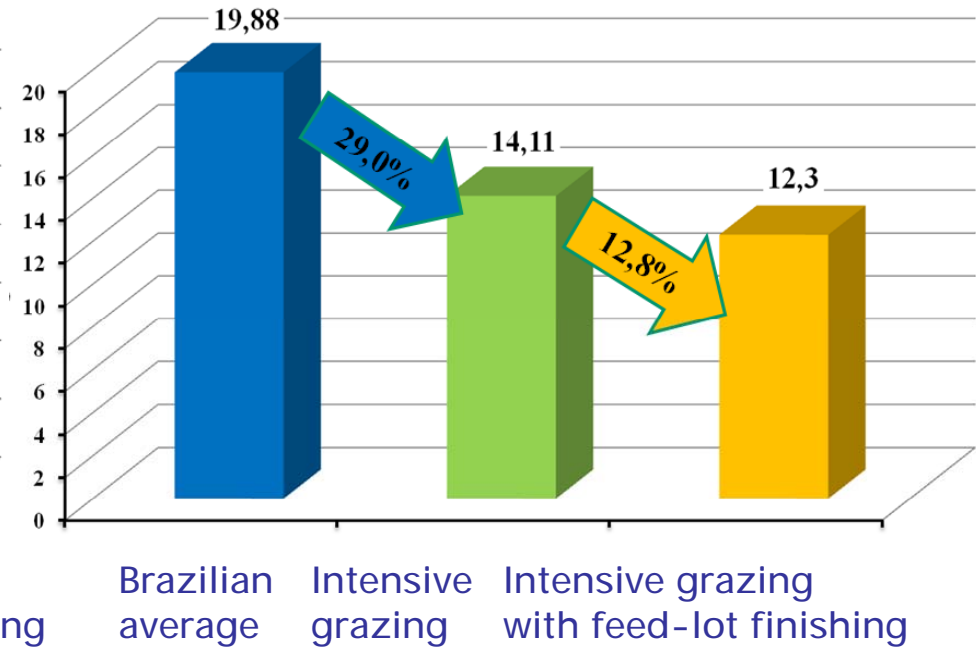


Source: Mazza, FMVZ/USP, 2009

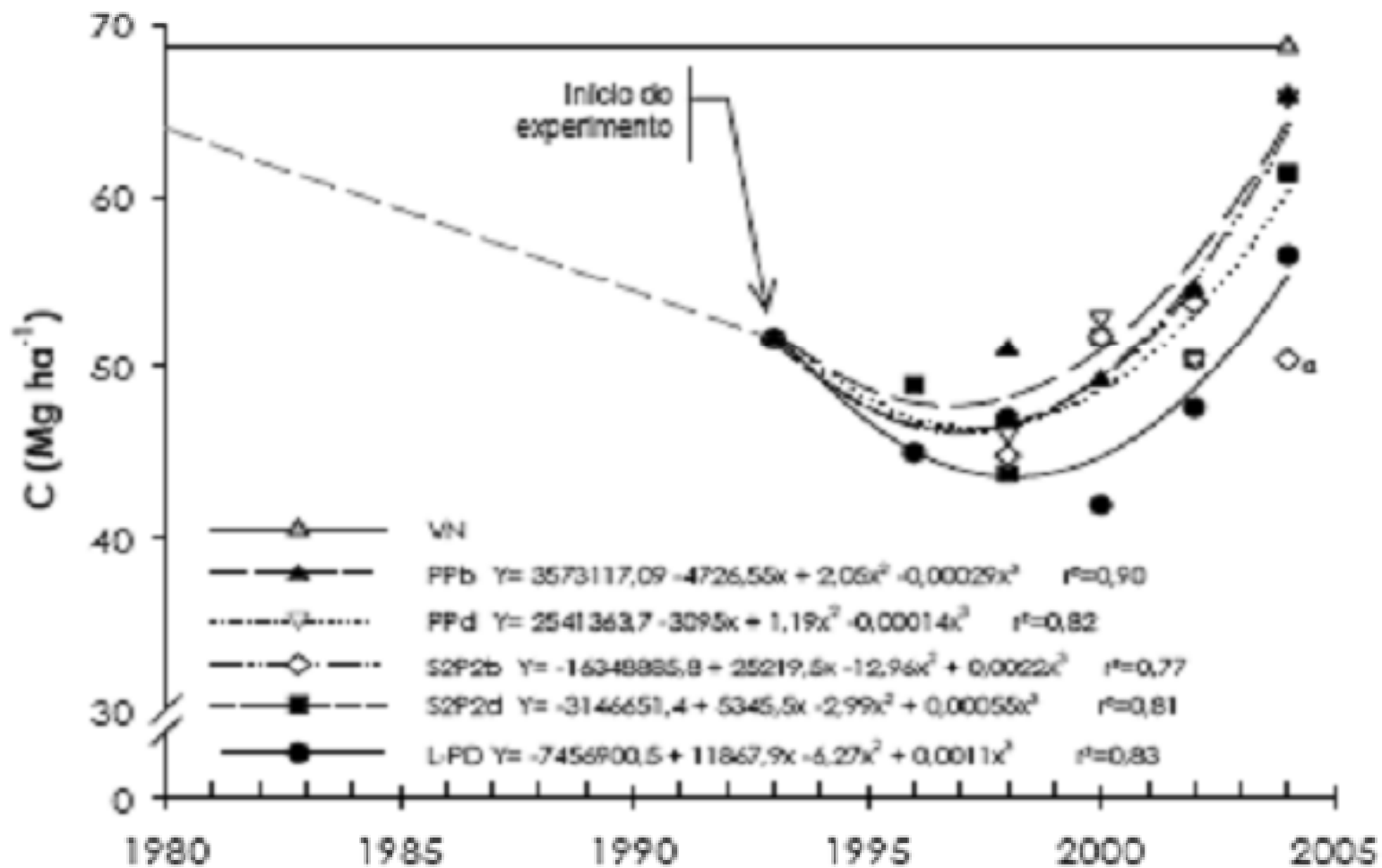
Beef carcass production kg per ha



Final CO2 balance Kg CO2 eq. / kg beef carcass

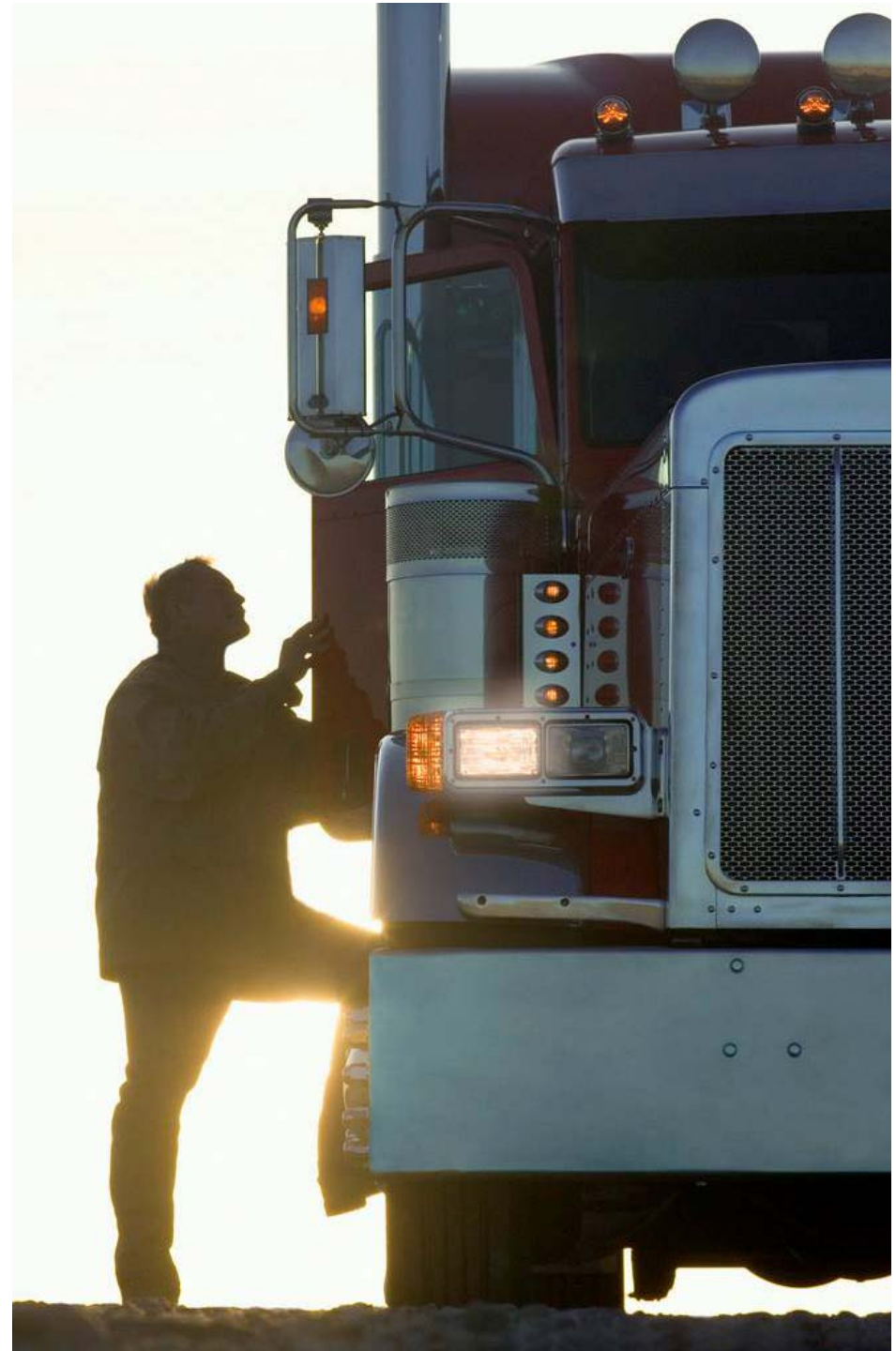


Carbon Stock in the Soil on Livestock-Agriculture integration farming



Biofuels

About 17%
of Brazilian
biodiesel
is made of
Beef
tallow/fat

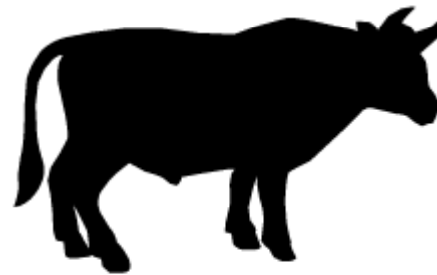
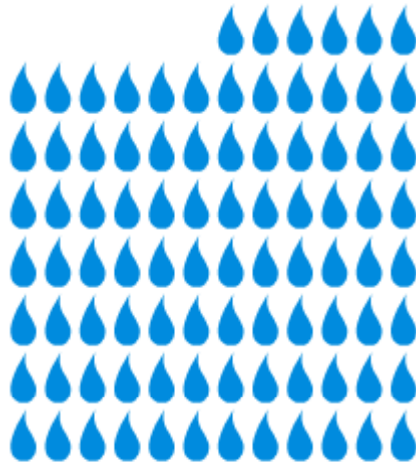


WATER



Beef Water Footprint

VIRTUAL
WATER

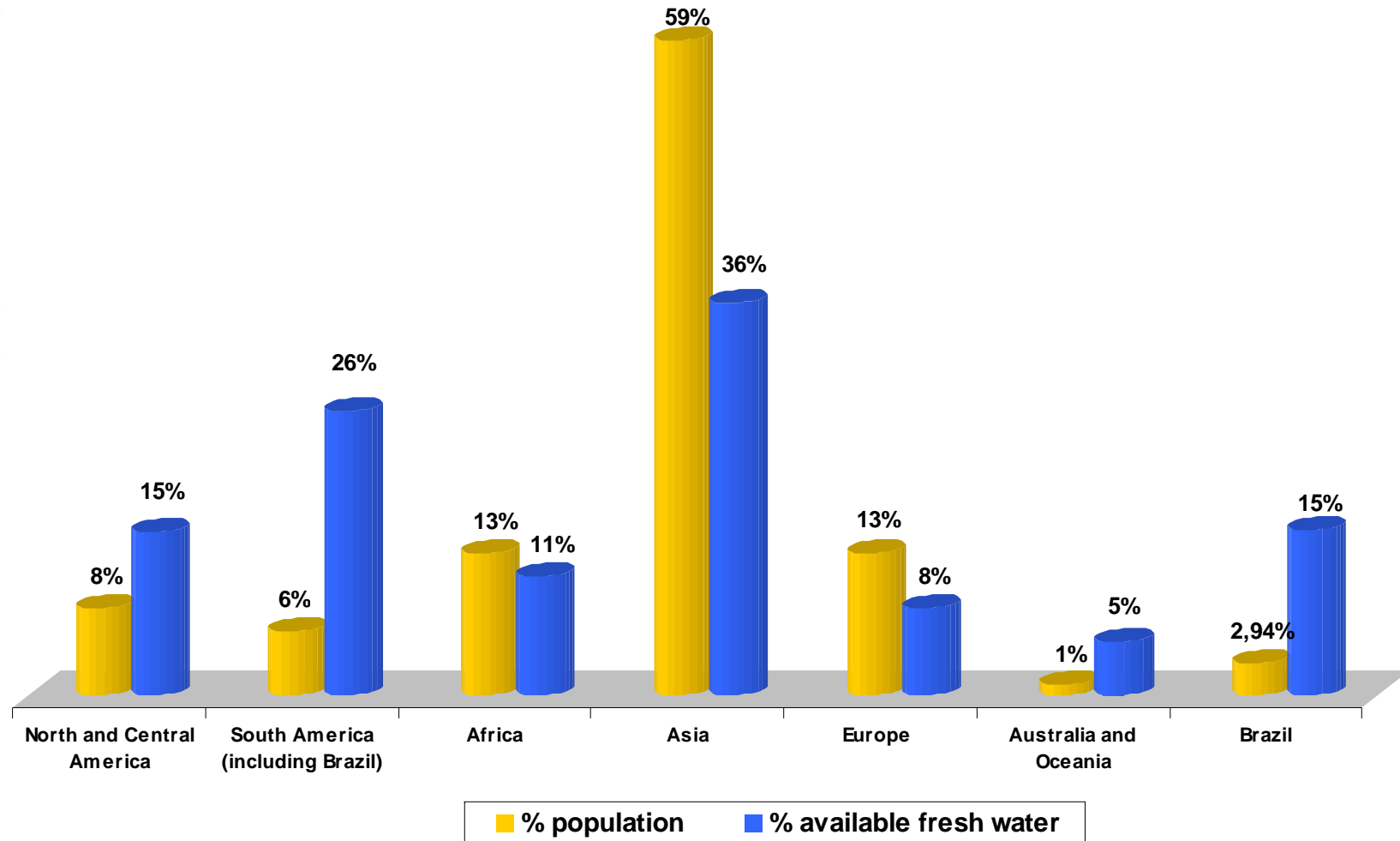


4500

*litres of water for
one steak (300g) of
Beef*



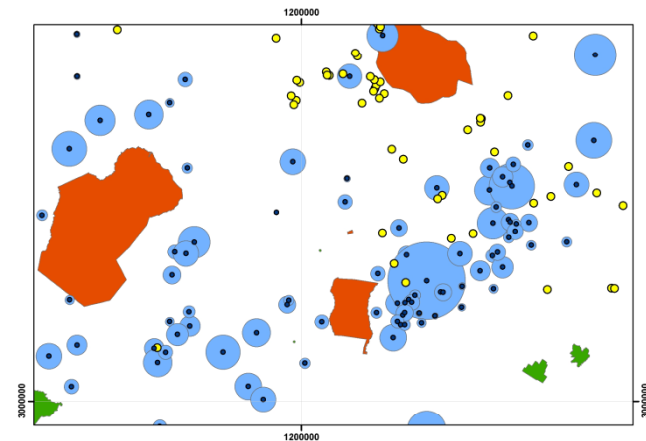
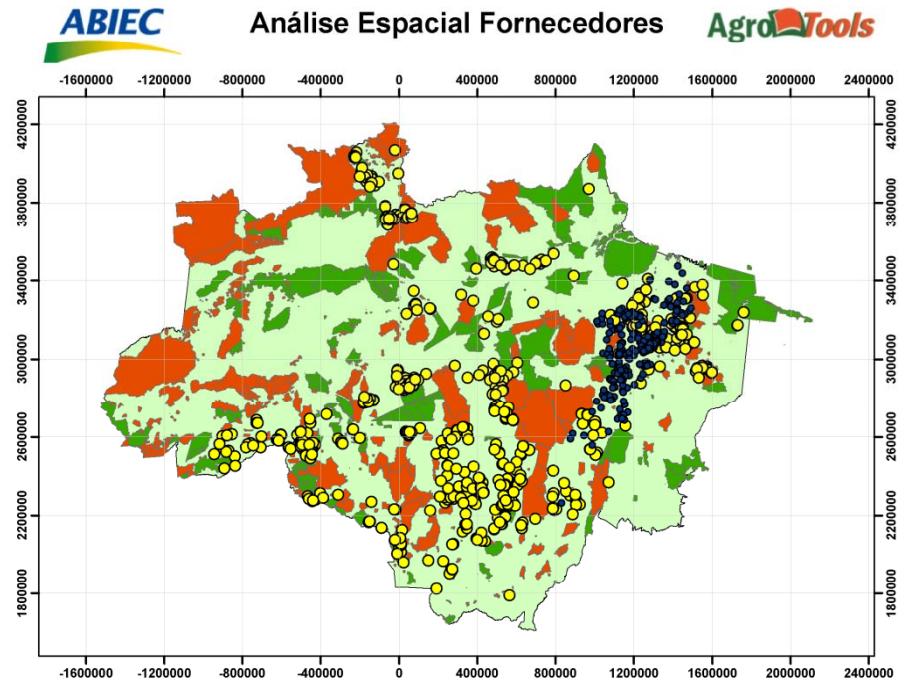
World's Water and Population



Source: ONU Water Report 2006 / OD Consulting / Bigma Consultoria

BRAZILIAN BEEF INDUSTRY INITIATIVES

- Satellite monitoring of cattle suppliers in the Amazon
- Environmental and social criteria on cattle purchasing
- Quality programs for better farm practices
- Water treatment
- Waste management
- Industry certifications (ISO, BRC, HACCP...)
- Traceability initiatives



Legenda

- FORNECEDORES
- PTOS_CENTRAIS_DESMATAMENTOS_20091001_a_20100431
- TERRAS_INDIGENAS_AMAZONIA_LEGAL
- UCS_AMAZONIA_LEGAL
- FORNECEDORES_POL_R3





Obrigado!

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ASSOCIADOS

