

Brazilian Agriculture Outlook

Blairo Maggi

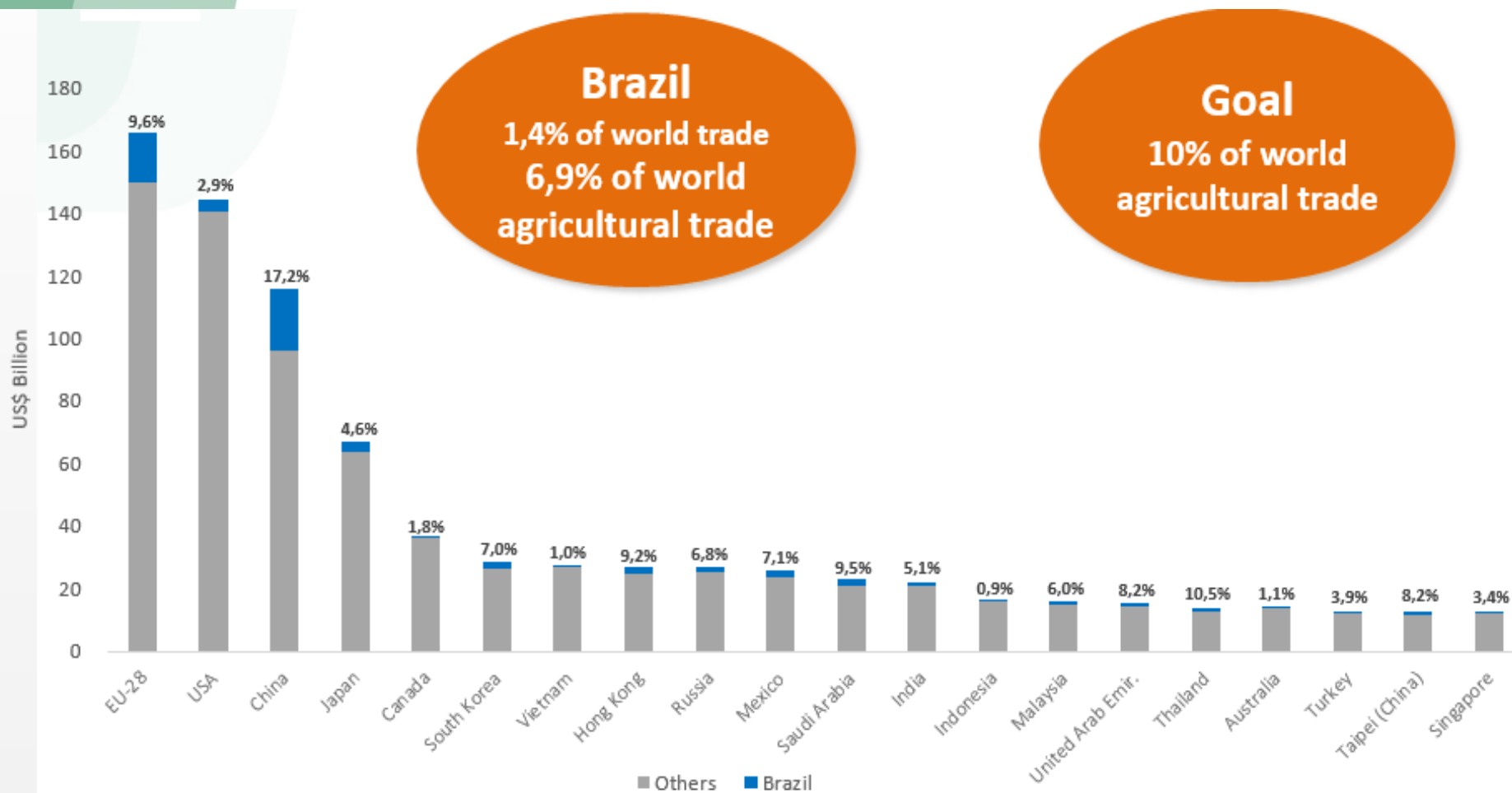
Minister of Agriculture, Livestock and Food Supply

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Brazil in the Global Agricultural Trade

Brazil's share in the Top 20 World Agricultural Markets - 2015



Source: Trademap/CCI, 2015. Made by: SRI/MAPA.
Excludes EU internal trade.
Data extracted in June/2016.

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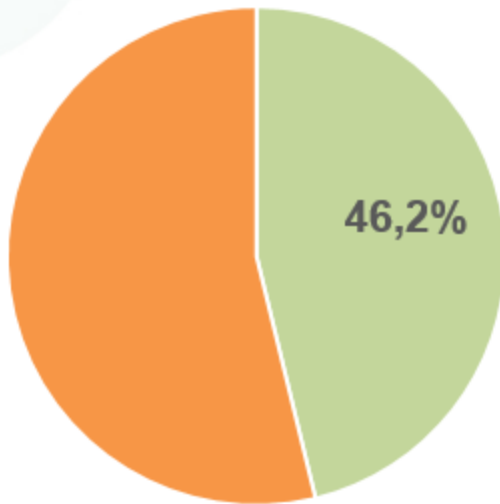
Brazil – World Ranking, 2015

Product	Production	Exports	Market Share
Sugar	1º	1º	47%
Coffee	1º	1º	28%
Orange Juice	1º	1º	46%
Soybeans	2º	1º	38%
Beef	2º	3º	14%
Broiler meat	3º	1º	42%
Corn	3º	2º	20%
Soybean Meal	4º	2º	23%
Soybean Oil	4º	2º	13%
Pork	4º	4º	9%
Cotton	5º	3º	11%

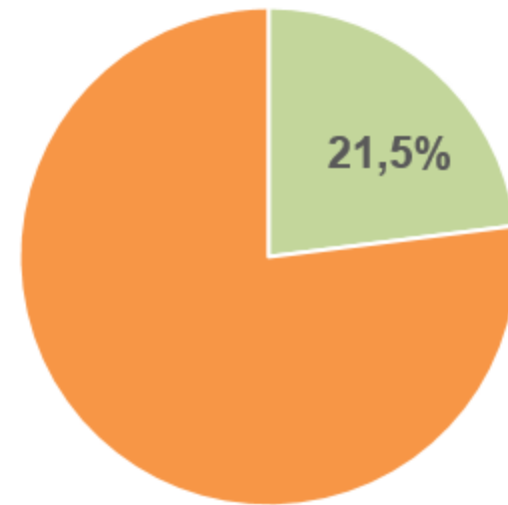
Agriculture in Brazilian Economy

Share of Agribusiness in Brazilian Economy

Exports



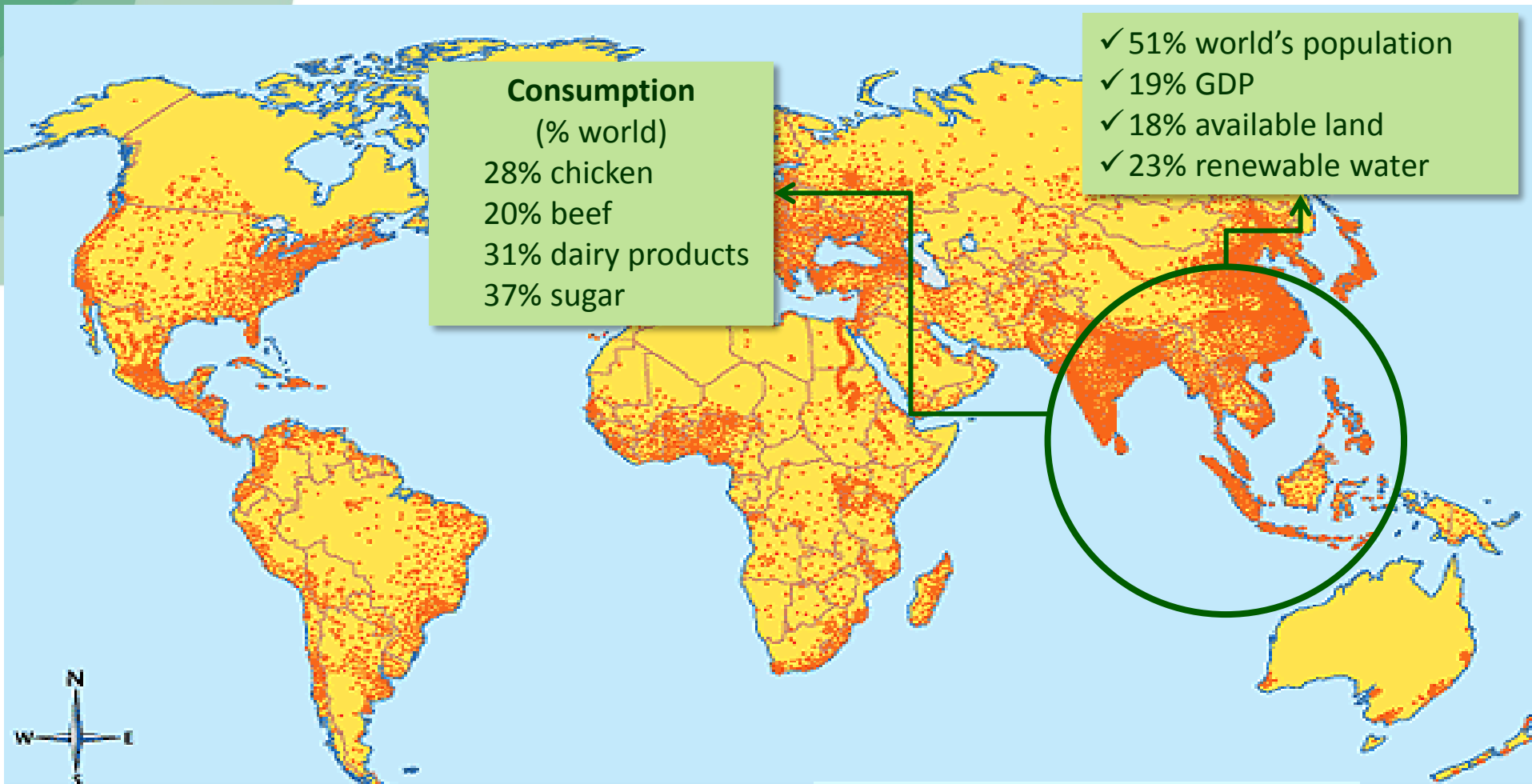
GDP



Source: CEPEA/USP, 2015.

World Demand and Supply Prospects for Food

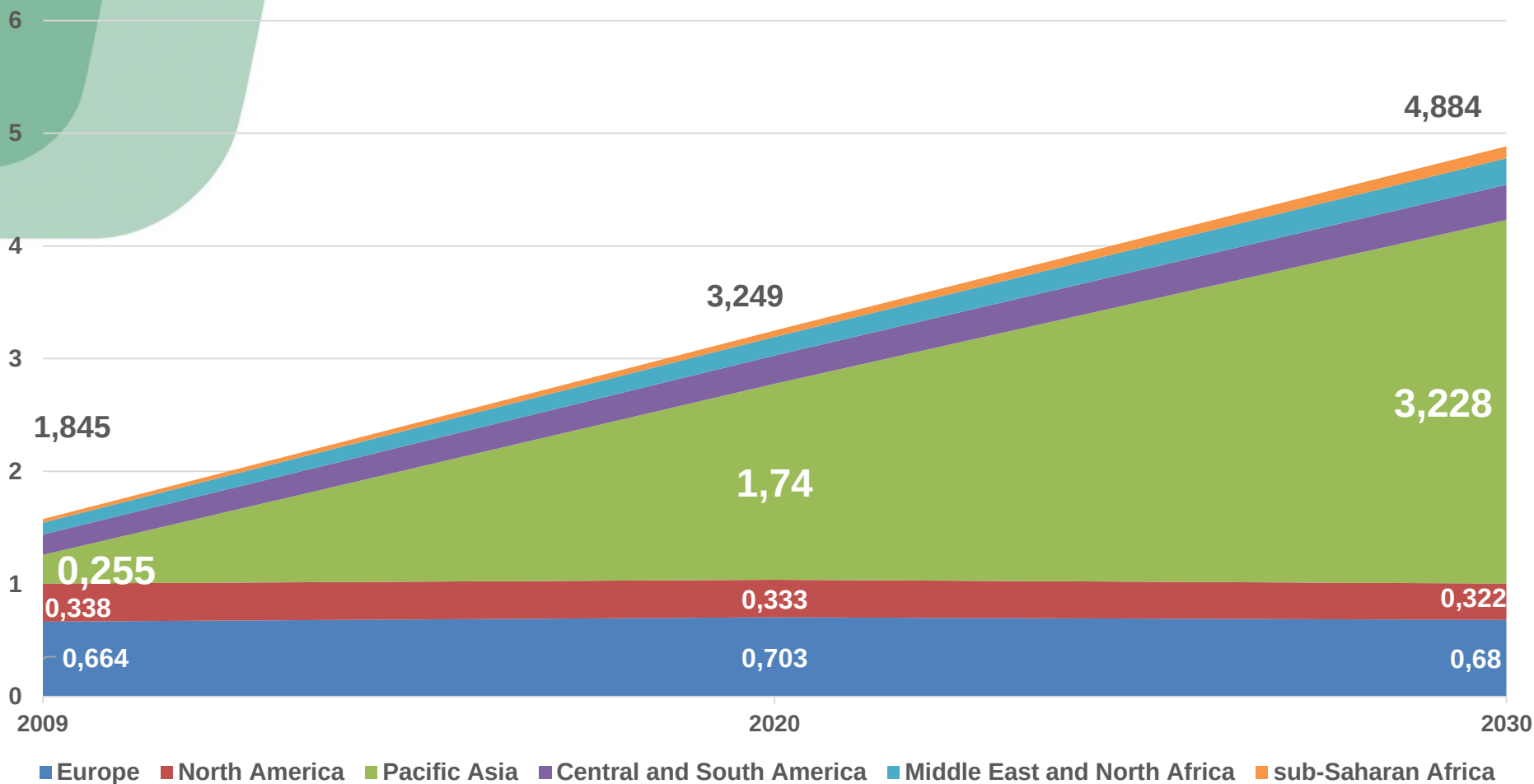
Asia: Future of agriculture exports



SOUTH AND SOUTHWEST : Bangladesh, Bhutan, Brunei, Cambodia, China, Hong Kong, India, Indonesia, Laos, Macau, Malaysia, Myanmar, Nepal, Pakistan, Philippines, Singapore, Sri Lanka, Thailand, East Timor, Vietnam

Global Middle Class evolution

(in billion of people)



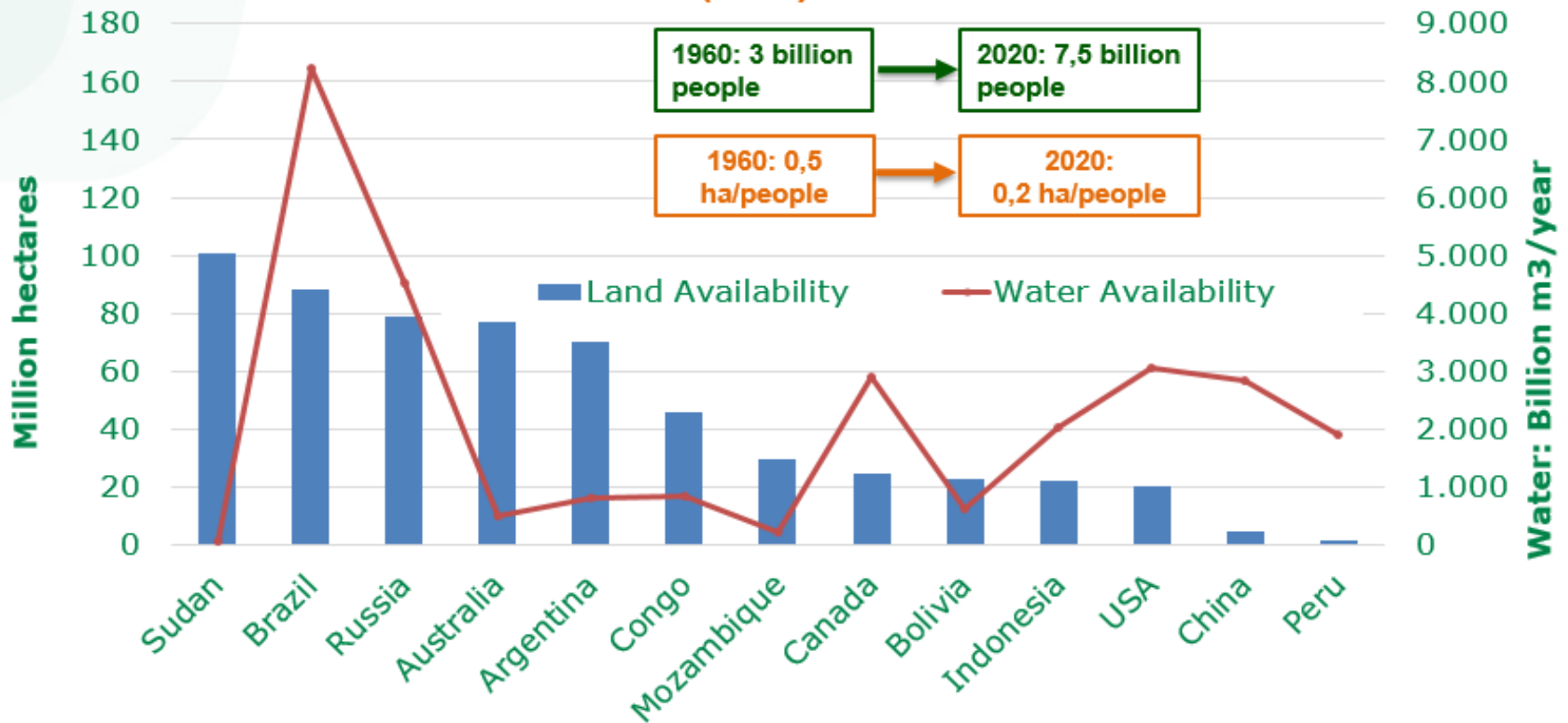
Source: OECD
Elaboration: SRI / MAPA

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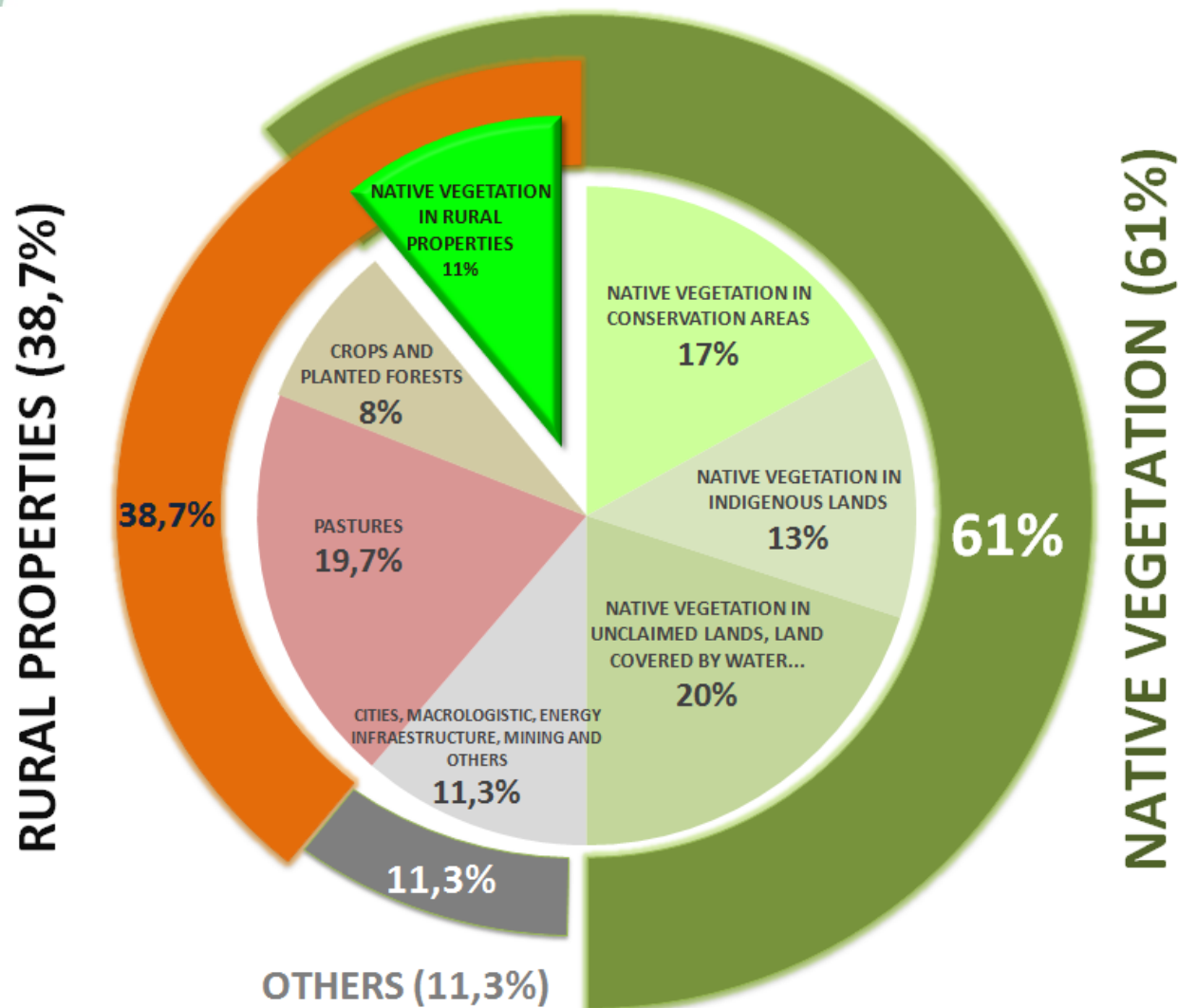
Land and Water Available in the World

“A growing population with a smaller rural area” (FAO)

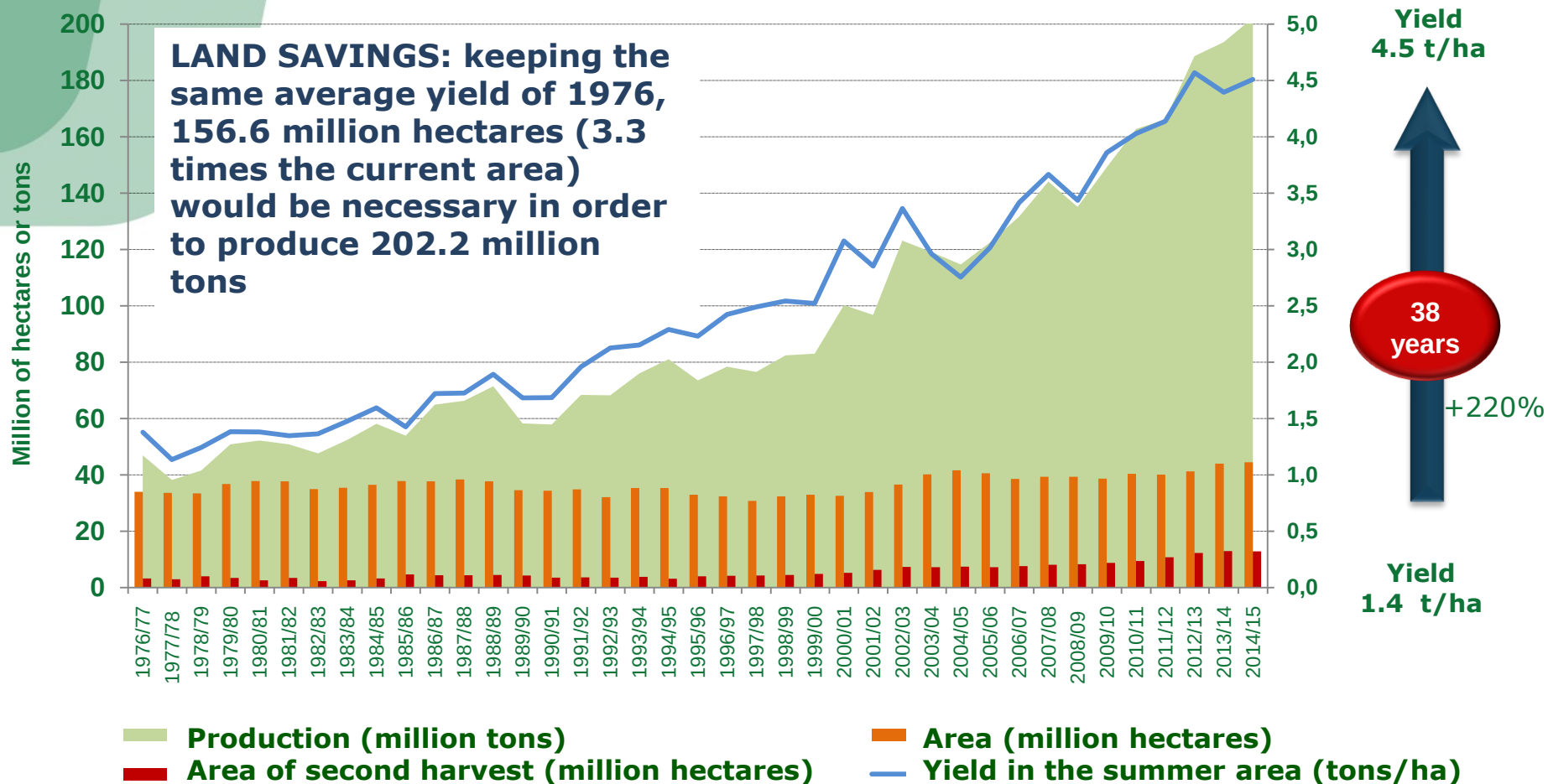


Note: Land – available, not protected (including pastures). Water – total renewable water sources

Land Distribution in Brazil



Brazil: Green Savings - Grains



Source: CONAB

Value adding

Brazilian products feature:

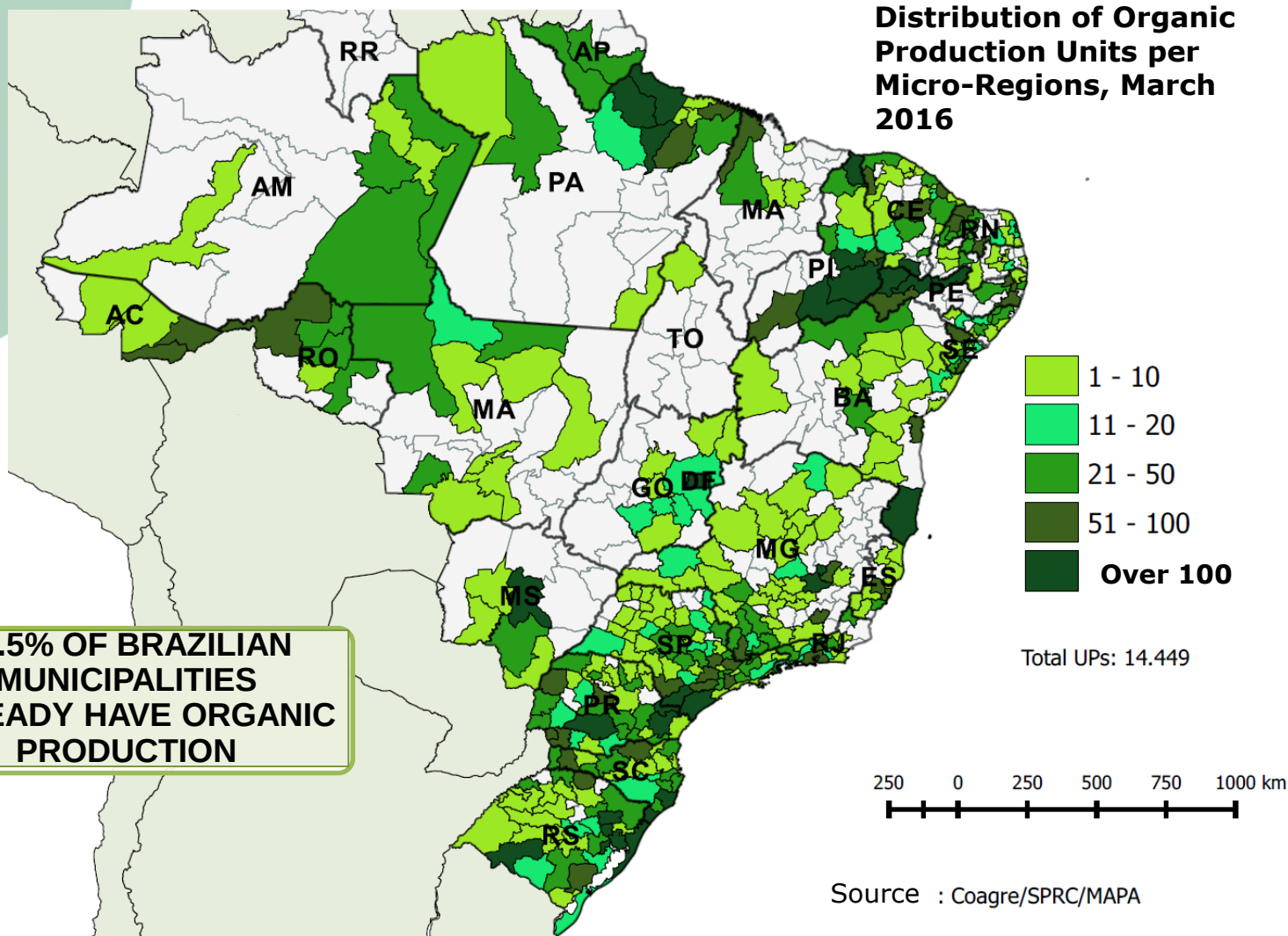
- ✓ Sustainability
 - ✓ Fair work
- ✓ Social responsibility
 - ✓ Traceability
- ✓ Functional foods
- ✓ Geographical indication



AGROECOLOGY AND ORGANIC PRODUCTION



Distribution of Organic Production Units per Micro-Regions, March 2016



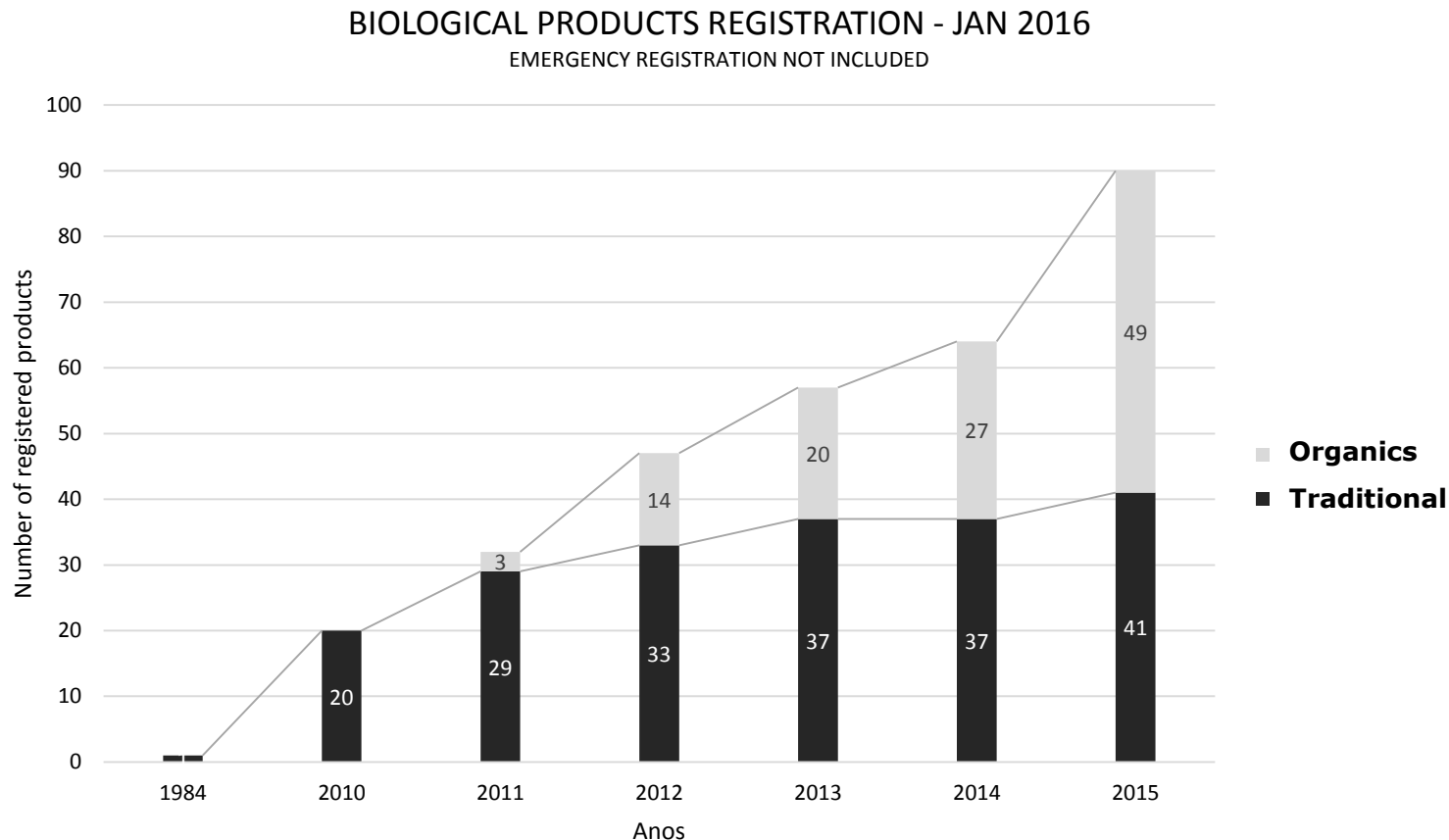
Control Procedures for Guaranteeing Organic Quality

ORGANIC PRODUCTS SEAL



Phytosanitary Products Approved for Organic Agriculture

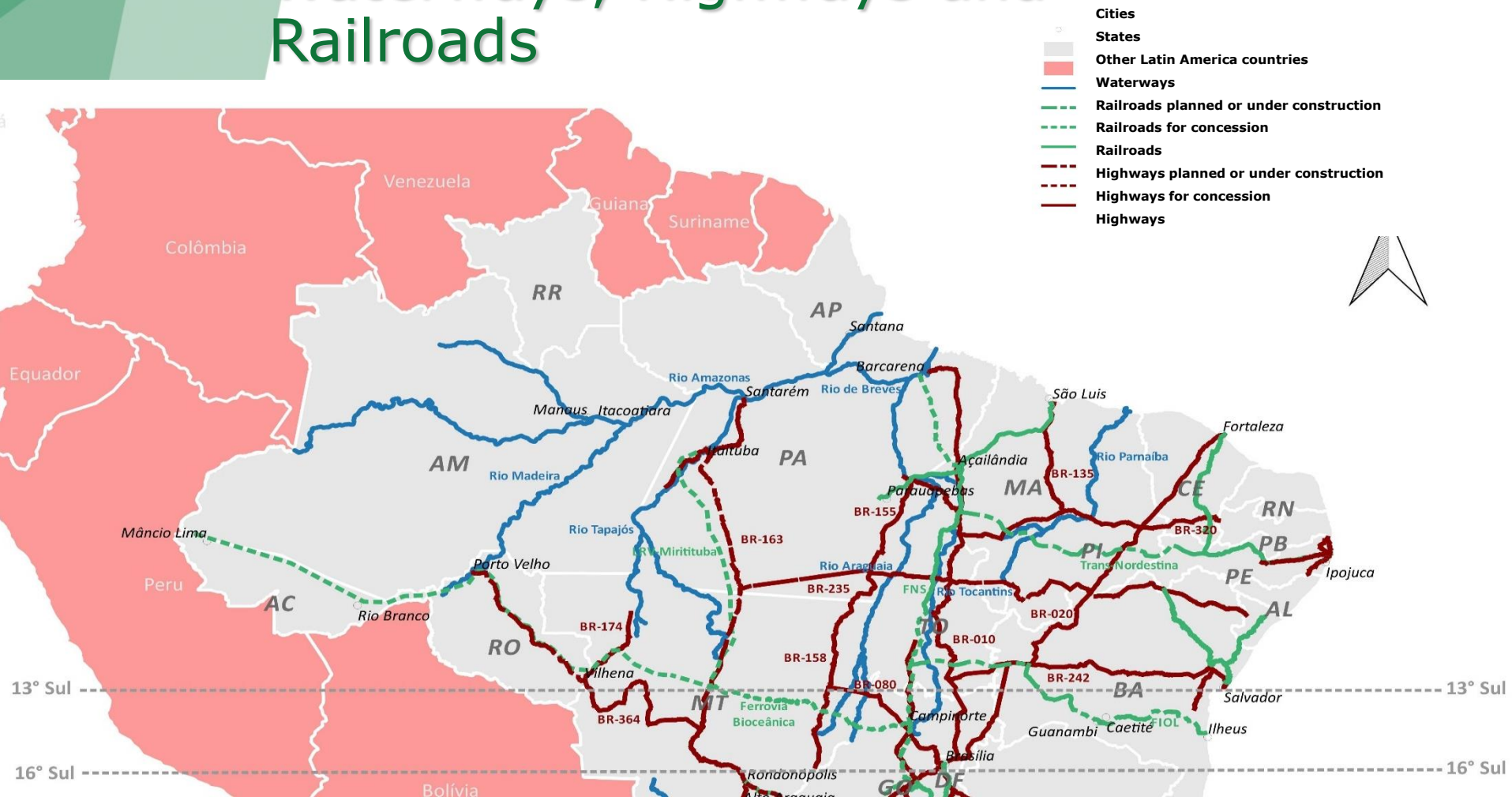
IN 2016 5
BIOLOGICAL
PRODUCTS
HAVE ALREADY
BEEN
REGISTERED
FOR ORGANICS
AND THERE ARE
33
REGISTRATION
APPLICATIONS
UNDER REVIEW



41 biological products have been registered along **31 years** (1984-2015) for traditional agriculture whilst **49** products were registered for organics in a **5 year** period (2010-2015)

Investment Opportunities

Logistics in the "North Arco": Waterways, Highways and Railroads



Infrastructure: Ports

- By July 2016, 180 port facilities have already been authorized by the Federal Government Agencies (ANTAQ):

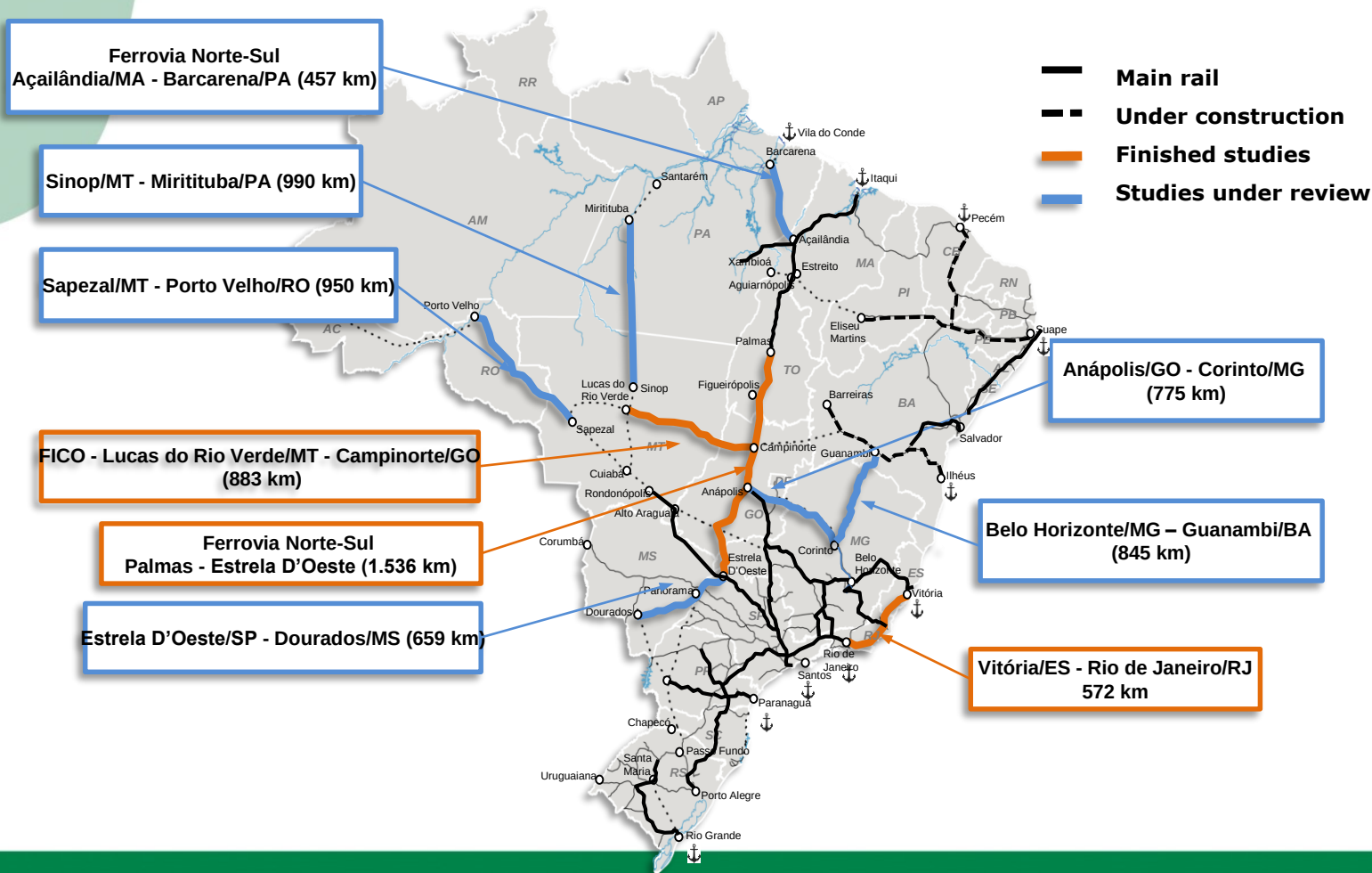


Investments in
ports have
reached US\$ 4.9
billion in 2016

Source: ANTAQ

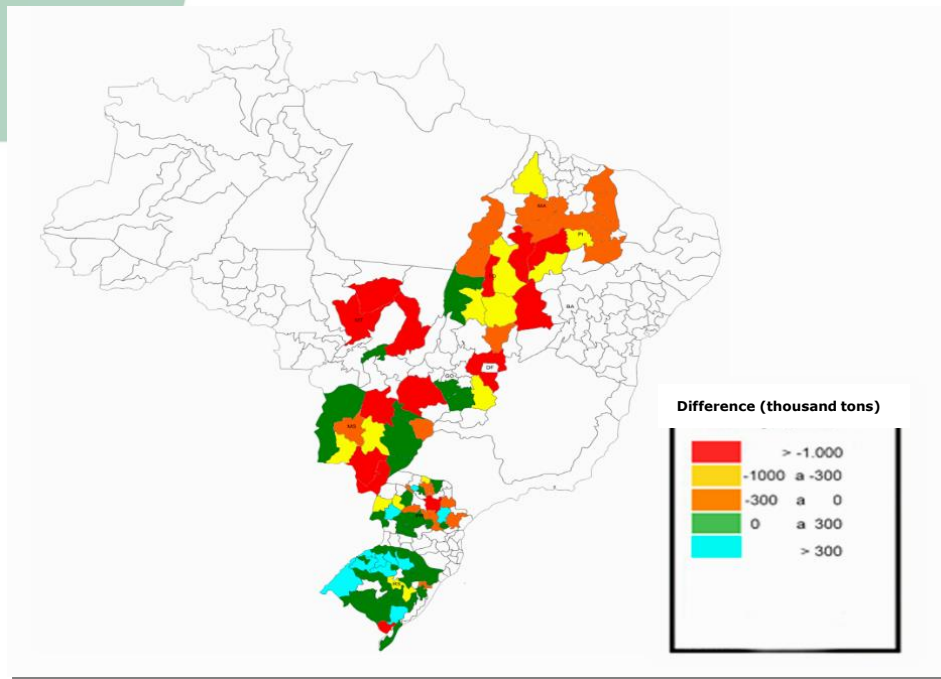
New Concessions for Railroads

- Finished studies for new railroads: 2,991 km
- Studies under review: 4,676 km



Storage Opportunities

Capacity Distribution



- The current static storage capacity is of 145 million tons

Over 45 million tons need investment

States	Production/ Current capacity
PI	0,42
TO	0,50
MA	0,61
BA	0,64
MS	0,65
GO	0,69
MT	0,71
PR	0,87

Source: CONAB

Brazil and the Future of Agriculture

World:



- Growth in global food demand (mainly Asia)

BRAZIL:



- High availability of land and water
- Sustainability
- Technology leader in tropical agriculture
- High level of environmental protection
- Great strides in adding value to Brazilian products (including organic farming)
- Many opportunities for investment in agriculture, particularly in the area of infrastructure and logistics (transport and storage)

Thank you!

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