

Brazilian Agriculture Outlook

Blairo Maggi

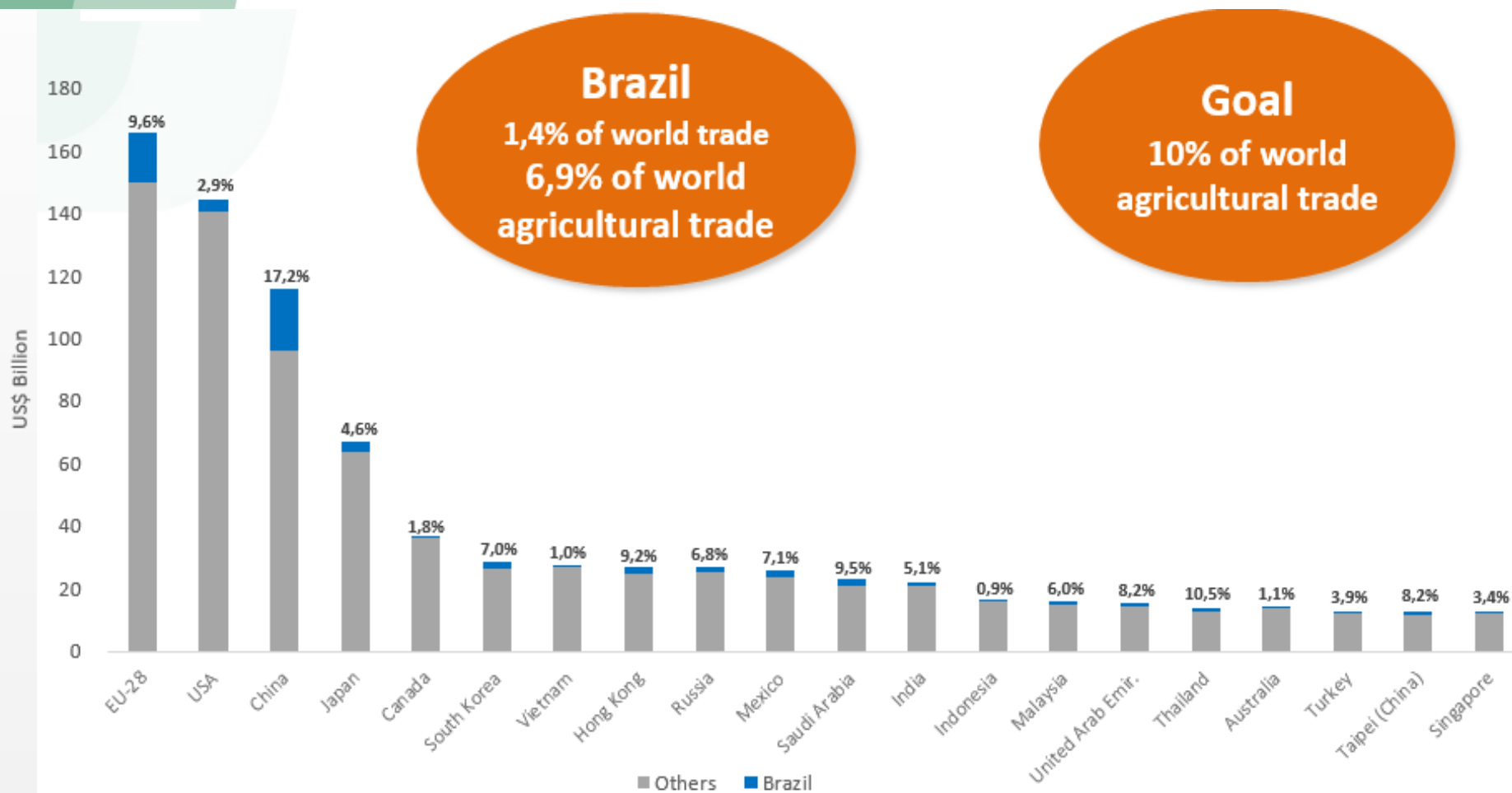
Minister of Agriculture, Livestock and Food Supply

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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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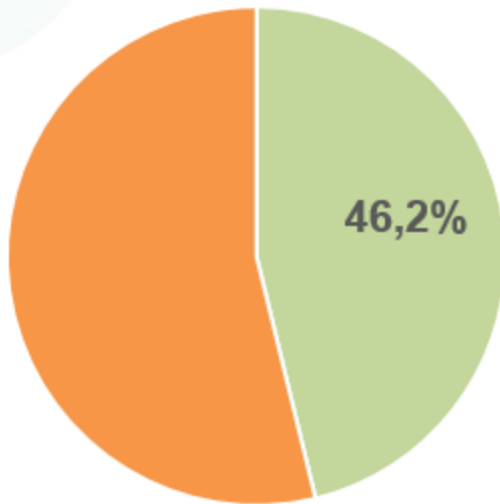
Brazil – World Ranking, 2015

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%

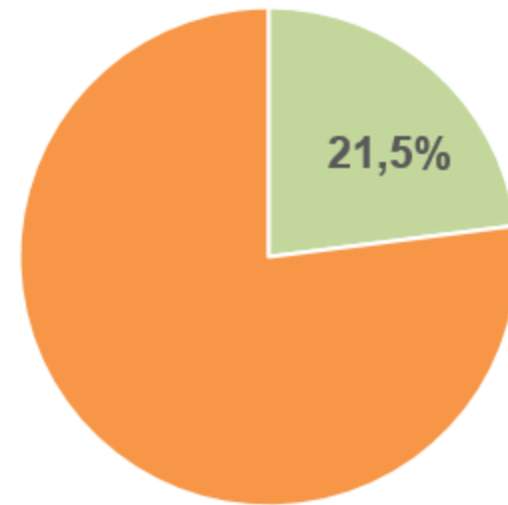
Agriculture in Brazilian Economy

Share of Agribusiness in Brazilian Economy

Exports



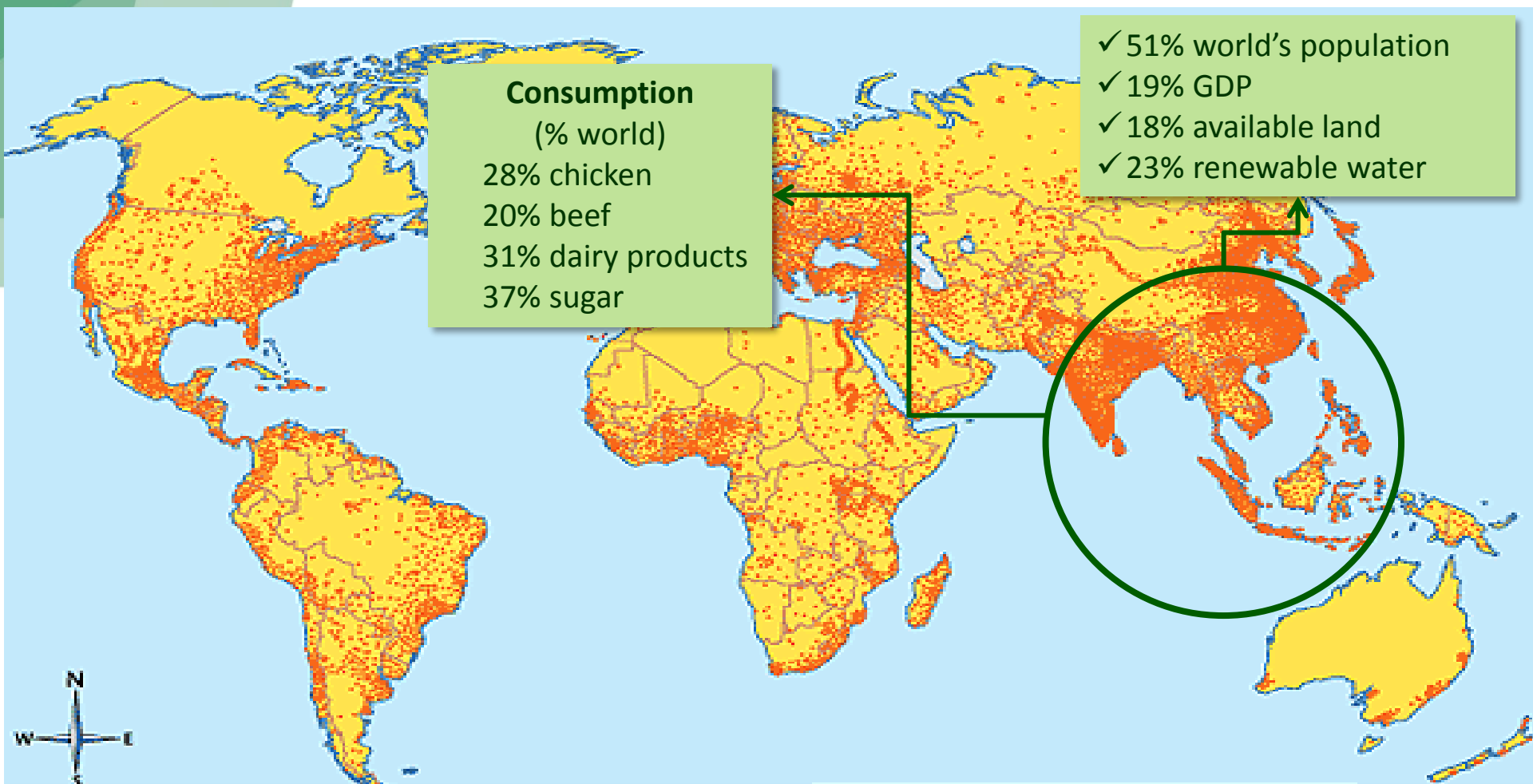
GDP



Source: CEPEA/USP, 2015.

World Demand and Supply Prospects for Food

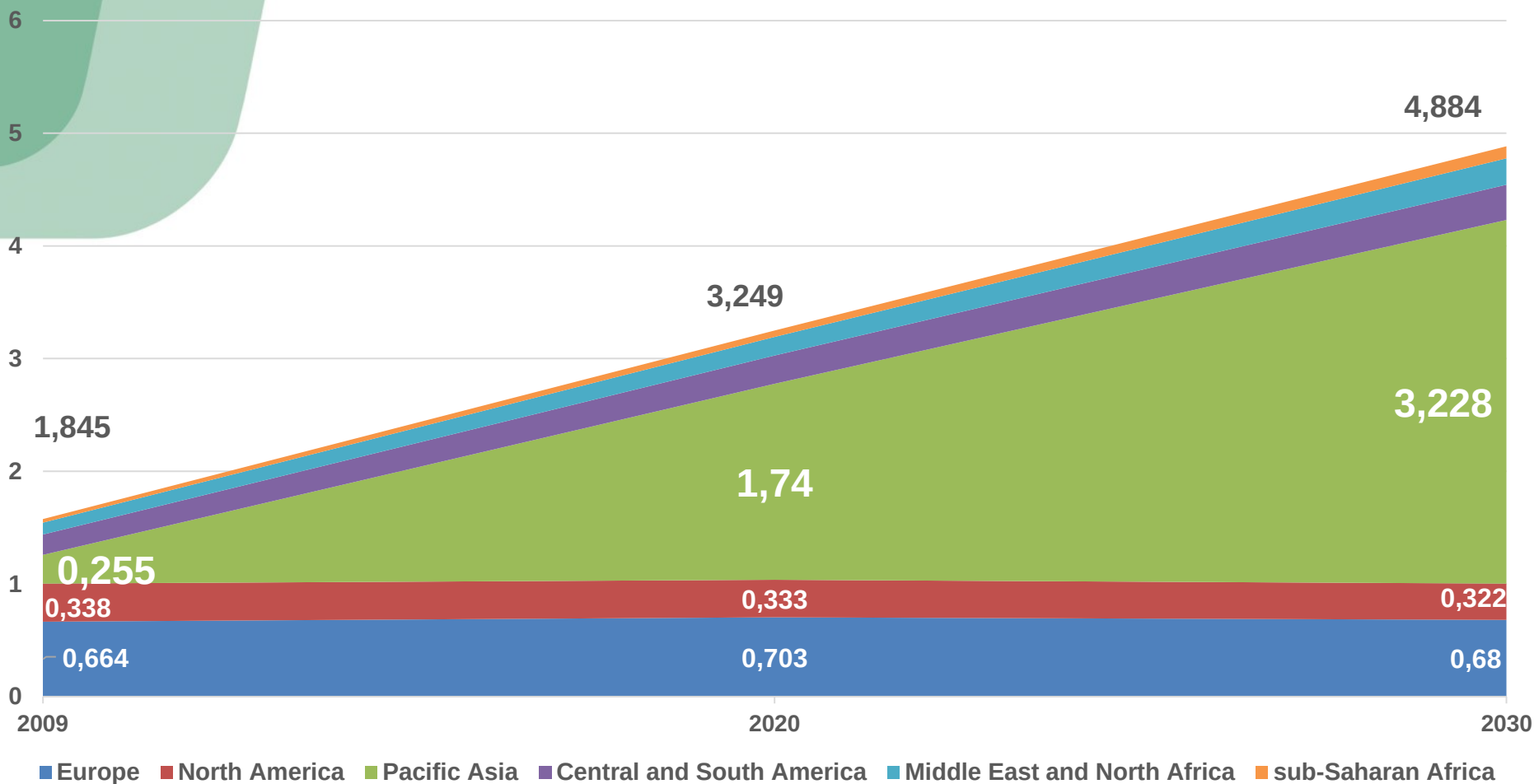
Asia: Future of agriculture exports



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

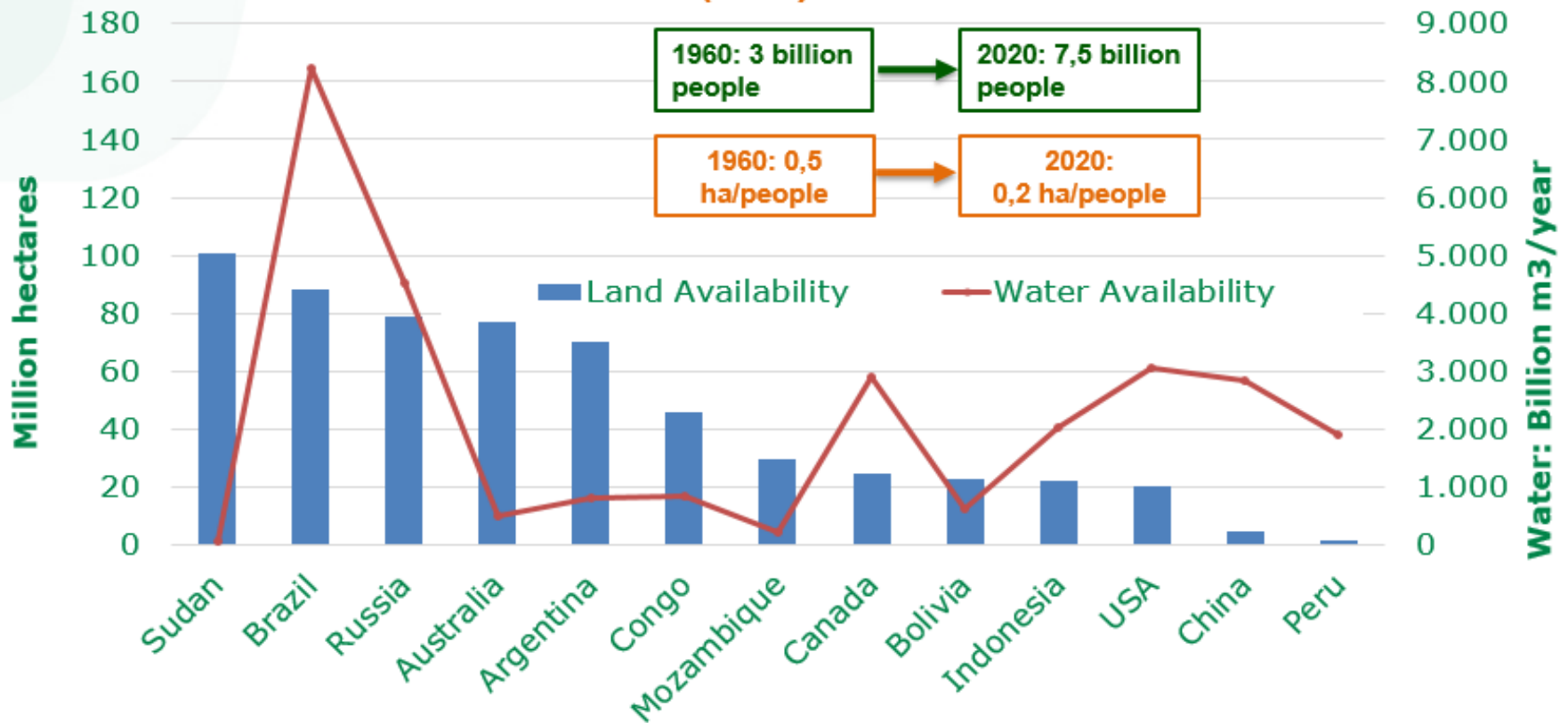
Global Middle Class evolution

(in billion of people)



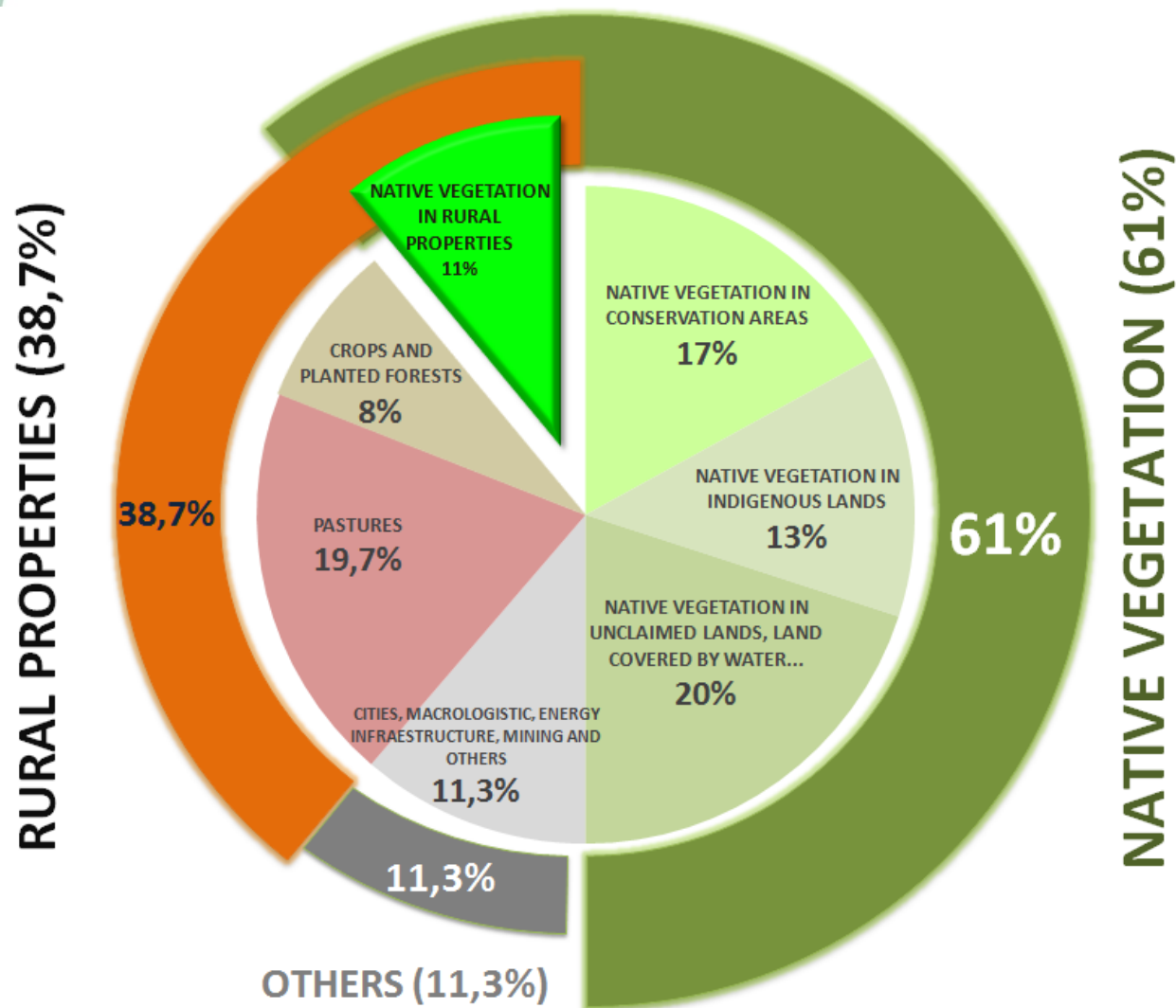
Land and Water Available in the World

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

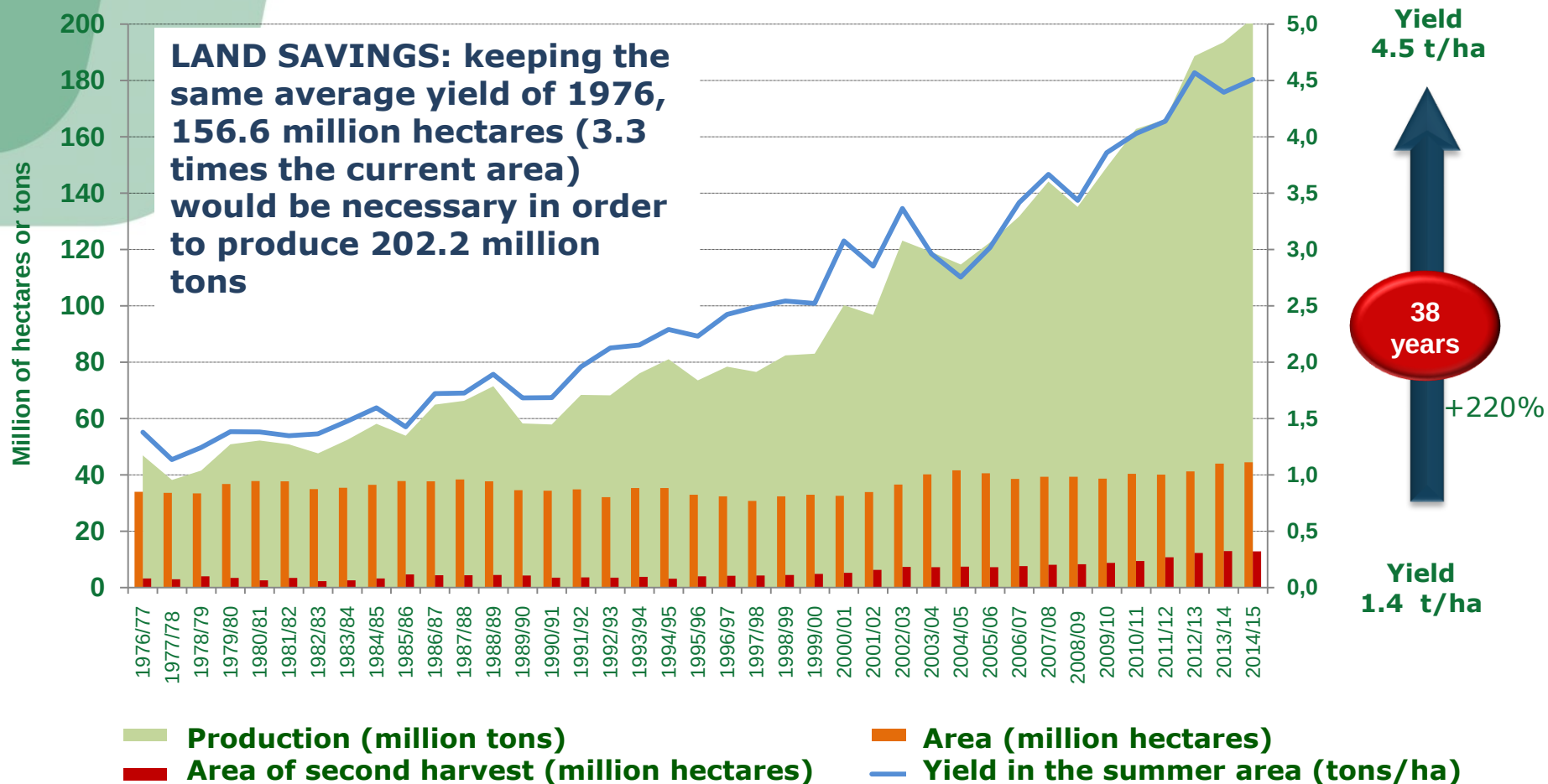


Note: Land – available, not protected (including pastures). Water – total renewable water sources

Land Distribution in Brazil



Brazil: Green Savings - Grains



Source: CONAB

Value adding

Brazilian products feature:

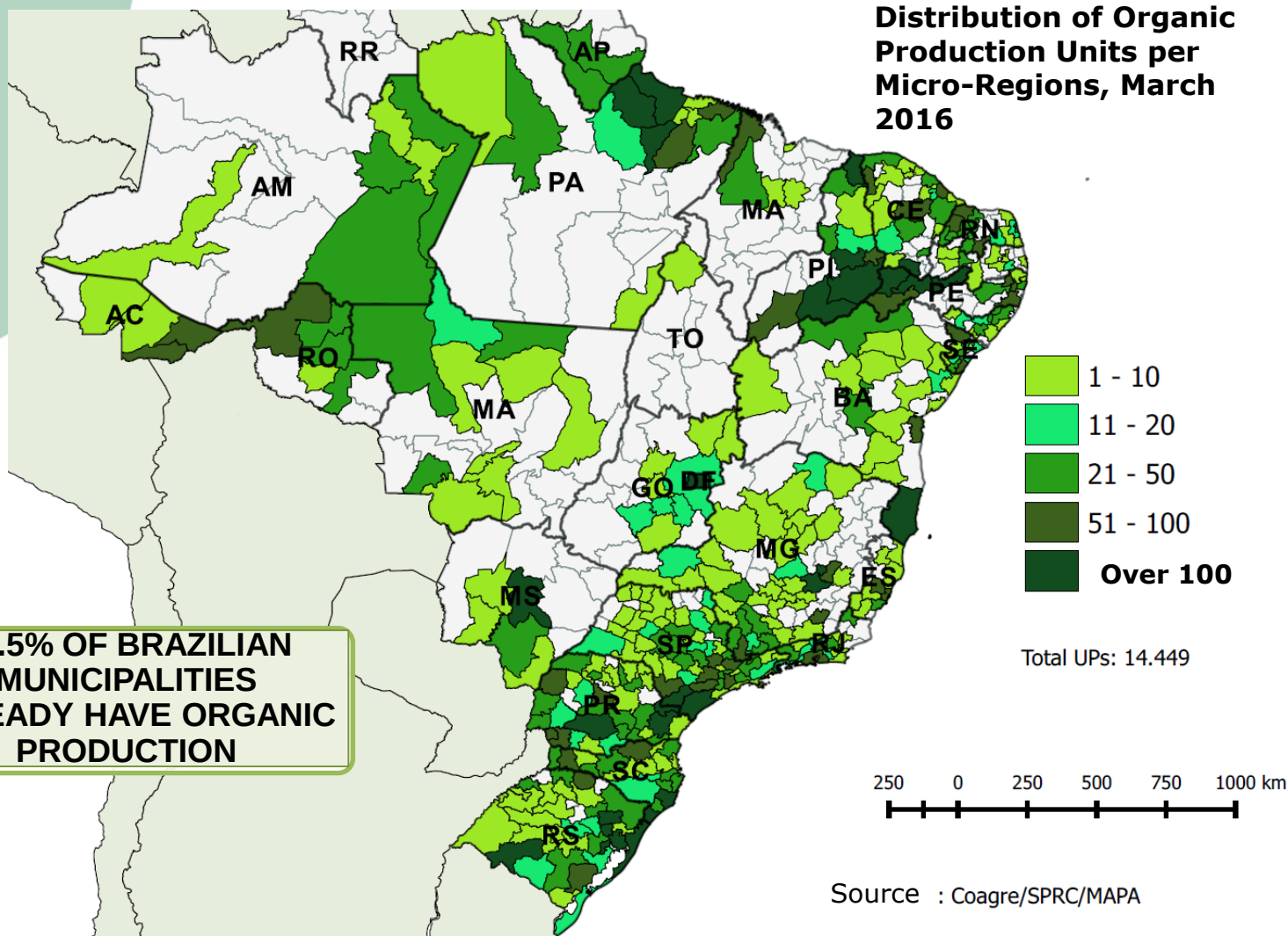
- ✓ **Sustainability**
 - ✓ **Fair work**
- ✓ **Social responsibility**
 - ✓ **Traceability**
- ✓ **Functional foods**
- ✓ **Geographical indication**



AGROECOLOGY AND ORGANIC PRODUCTION



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



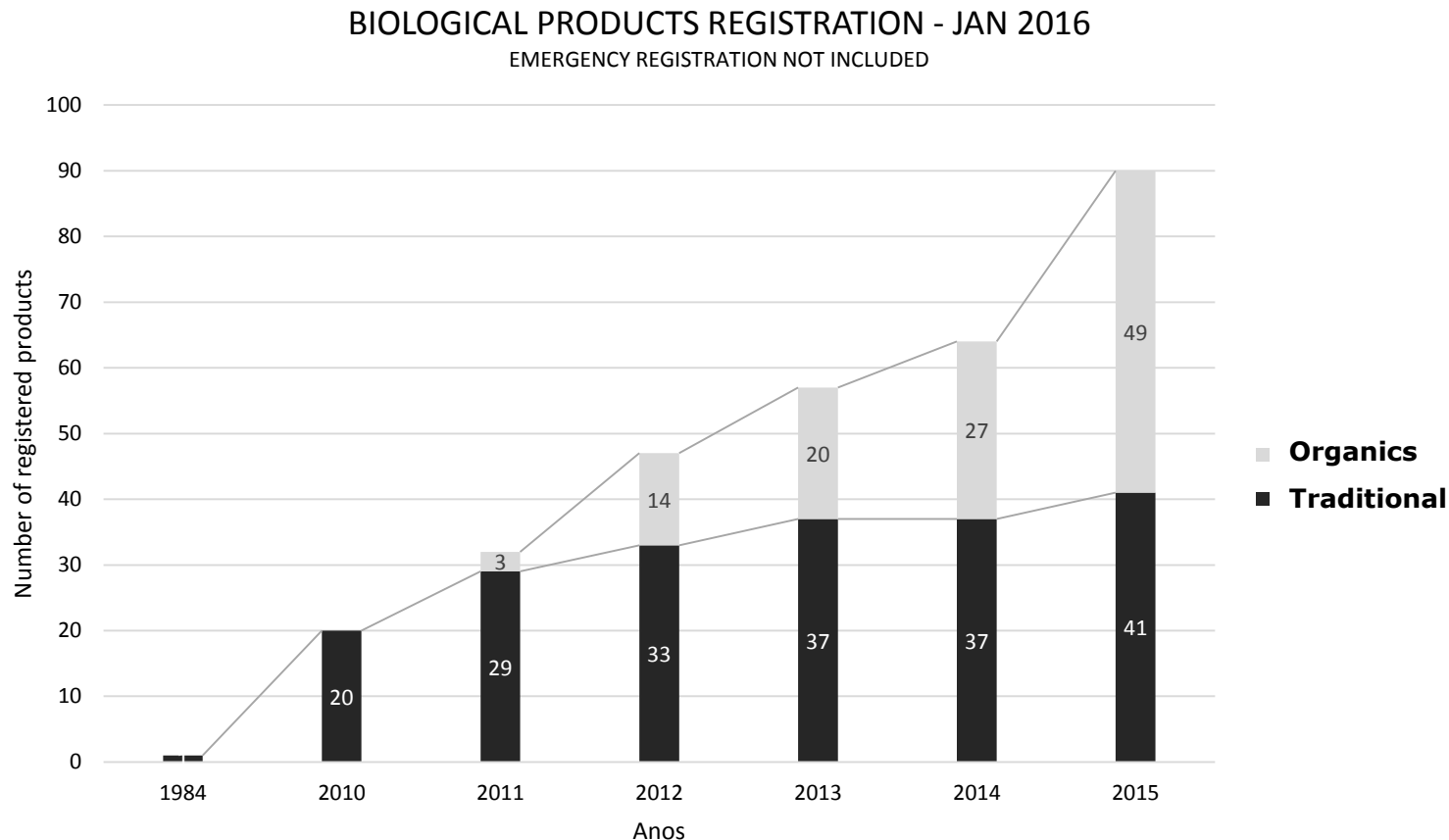
Control Procedures for Guaranteeing Organic Quality

ORGANIC PRODUCTS SEAL



Phytosanitary Products Approved for Organic Agriculture

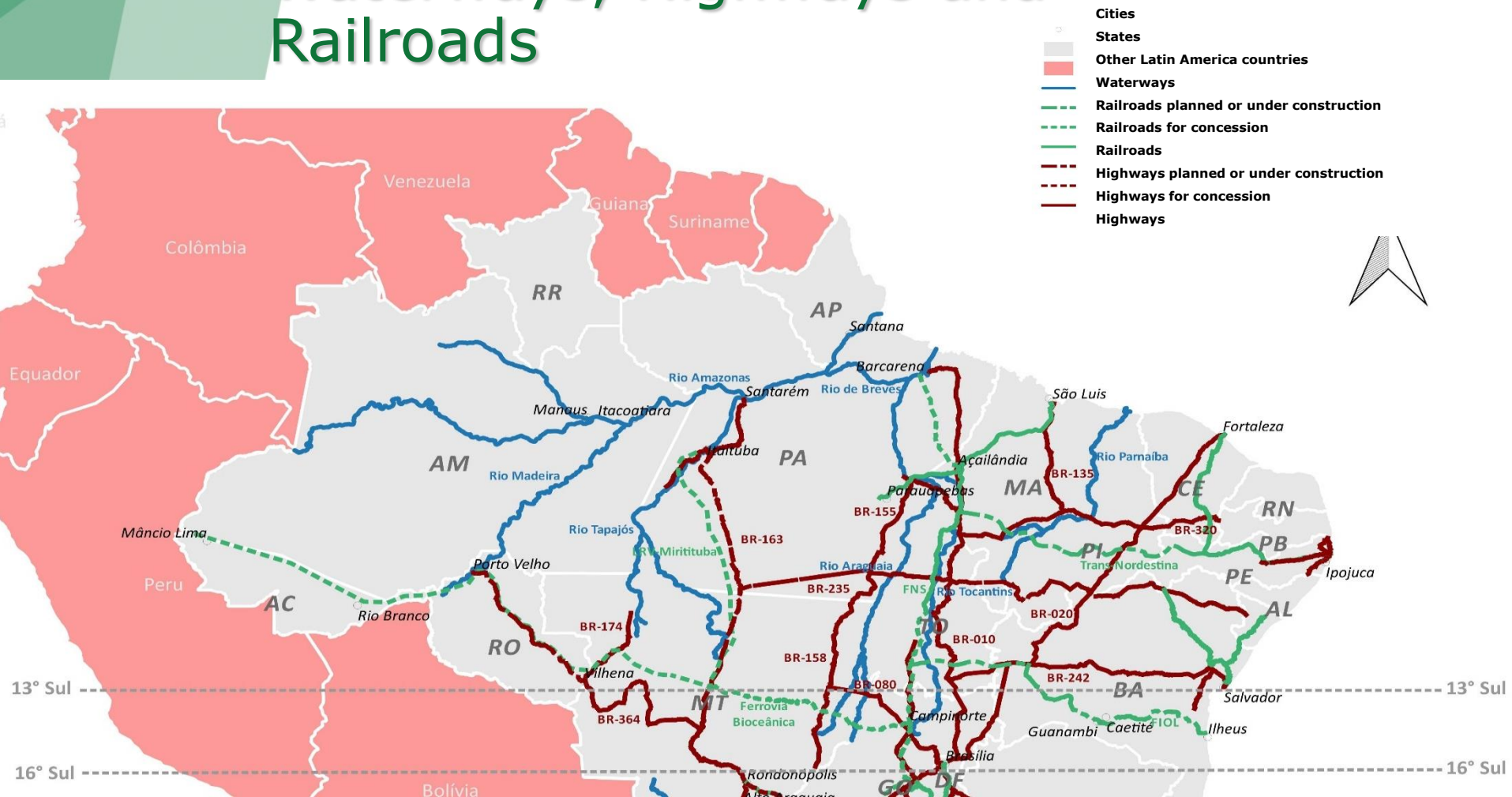
IN 2016 5
BIOLOGICAL
PRODUCTS
HAVE ALREADY
BEEN
REGISTERED
FOR ORGANICS
AND THERE ARE
33
REGISTRATION
APPLICATIONS
UNDER REVIEW



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):

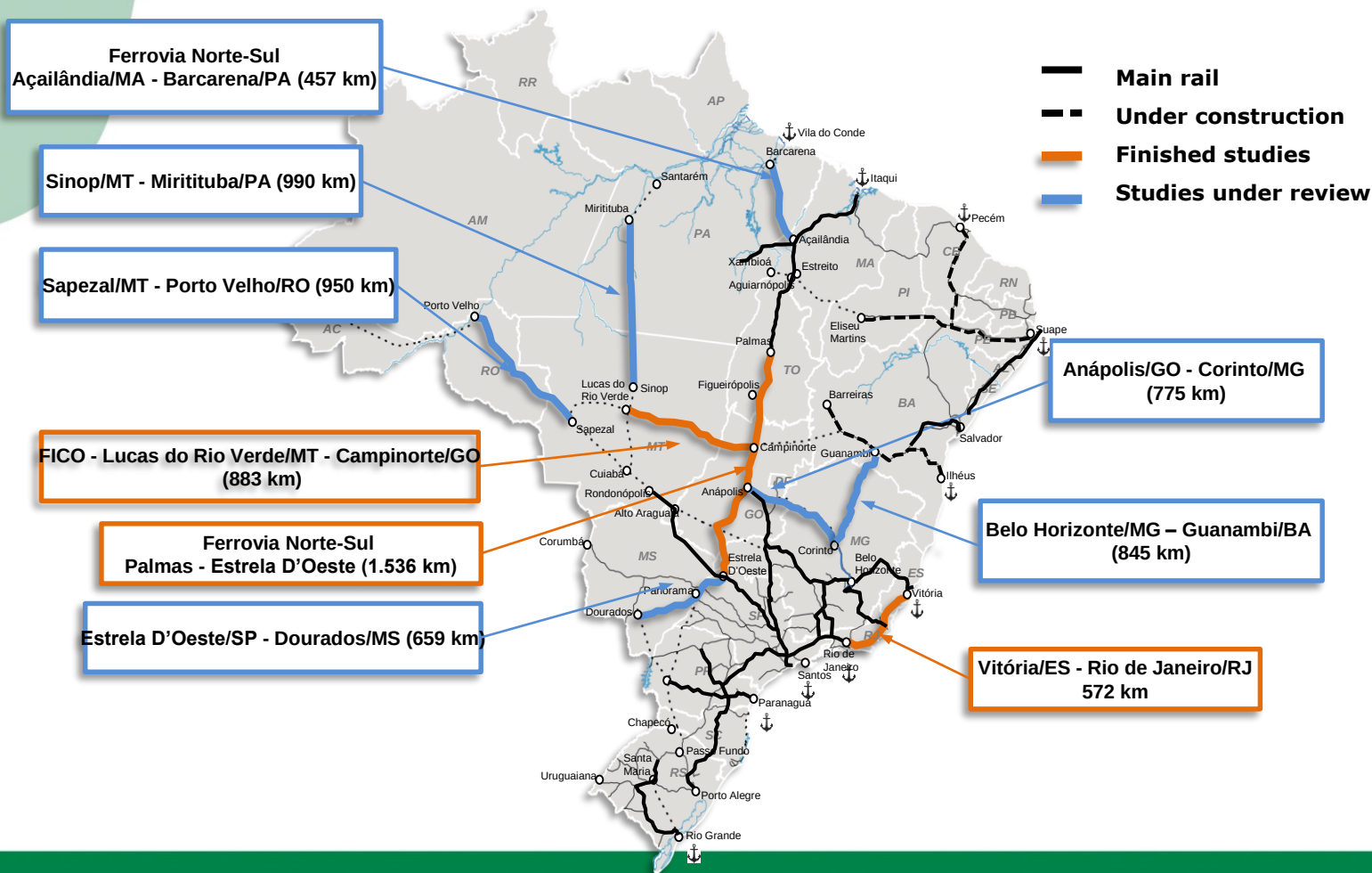


Investments in
ports have
reached US\$ 4.9
billion in 2016

Source: ANTAQ

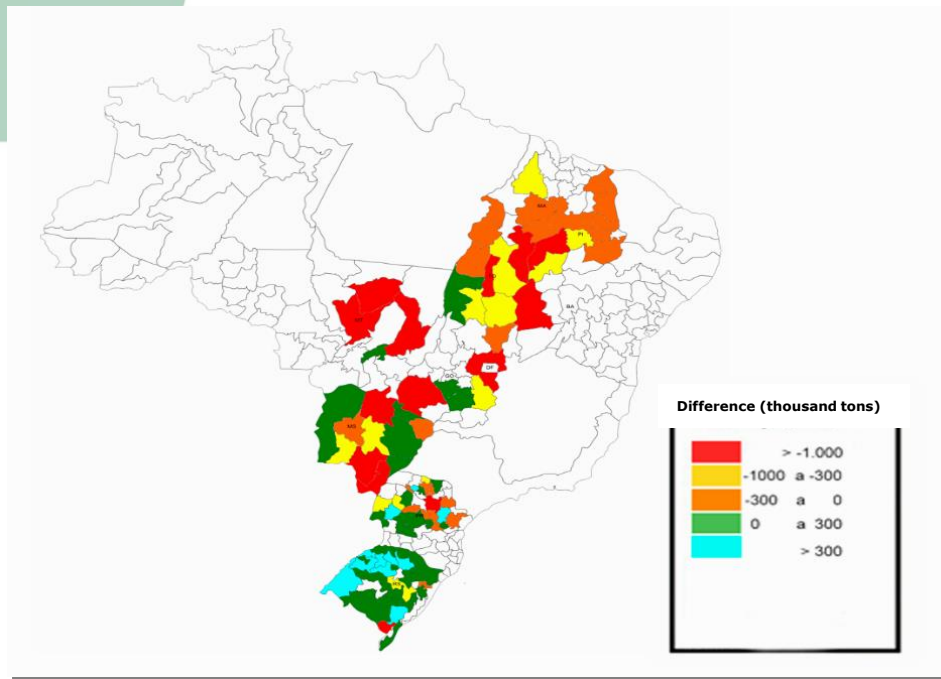
New Concessions for Railroads

- 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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