

An X-ray of the Brazilian pork industry.



AgroBrasConsult
surveys

A new AgroBrasConsult Survey report.

“An X-ray of the Brazilian Pork industry” is an economic intelligence survey designed to provide all foreign professionals involved in the pork industry (breeders, extension services technicians, meat industry managers, etc...) up to date information, data and forecasts about the future development of this very important Brazilian agribusiness sector. The study has been conducted by Jean-Yves Carfantan, AgroBrasConsult senior consultant, a French born economist who works with Brazilian meat industry companies since the nineties. It provides a detailed analysis of the Pork Meat Farming in Brazil, including key growth trends, statistics, forecasts, the competitive environment and the key issues facing the industry.

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Survey objectives

- ◎ To answer the questions that most foreign pork meat sector professionals and investors are asking about the potential of the Brazil pork industry
 - The future of the domestic market and domestic production
 - The future of exports and how best to benefit from them
 - Whether and when the country will become an important consumer.
- ◎ To describe the sector dynamics in the context of the current situation, including among others:
 - Flowcharting of pig meat product flows
 - profiling all the major producers and processors
- ◎ To give an outlook for the next coming years.
- ◎ To provide strategic recommendations for importers and investors.

Summary

1. Overview of the Brazilian pork industry.

- a. A bit of history.
- b. Hog farming characteristics.
- c. Trends and geography.
- d. Challenges of the recent past.

2. Detailed profile of the pork supply-chain.

- a. Farm structure: integration, farrow-to-finish, weaner producers, finisher producers, multisite production.
- b. Contracting arrangements. Vertical integration by agro-industries (it covers most of the stages of the chain production, including breeder, feed production, farmers, slaughterhouse and processor).
- c. Profiles of the largest pork meat processors and integrators.
- d. Why pork meat processors will play a growing role in the chains coordination?
- e. What will be the consequences of the pork meat industry growing concentration on the overall supply chain?
- f. Inputs industries: genetics, feeds and veterinary products.

3. Brazilian pork industry main markets.

- a. Domestic market prospects. Individual Per capita pork meat consumption has not grown in Brazil in the recent years. Is there a potential for *per capita pork meat consumption* increase in the coming years? Are consumption patterns changing with pork meat gaining in popularity at the expense of others meats?
- b. Exports markets. What are the prospects for exports of pig meat and products? Will Brazilian Pork Meat processors be able to reach new markets?

4. New challenges.

On the ten past years, Brazil has emerged as one of the world's leading pork meat exporter. However Brazil must challenge three main issues and retain its favorable cost position to maintain growth in sales both domestically and on the global market:

- a. Animal health concerns that continue to limit access to some of the world's most lucrative markets.
- b. Pork industry's impact on the environment. There is a growing concern in Brazil over the environmental sustainability of highly concentrated hog farms in southern states (Santa Catarina, Rio Grande do Sul and Parana).
- c. Is the Southern Pork Meat industry economically sustainable? What are the prospects for the traditional small family-farms based production system?

5. Peering into the future.

The study shows why the country will remain the world's fourth-largest pork producer, going from the current 3,19 million tons to roughly 3,8 by 2019. It does not project gains in Brazil's per-capita pork consumption but looks for exports to keep growing. The Brazilian Pork industry will progress moving naturally from less demanding markets, with gains in volume, toward more demanding ones, which have higher returns. Another natural evolution that the study focuses involves adding value, moving from the current focus on carcasses through to boneless cuts to frozen, fresh cuts to chilled cuts and ready-to-eat dishes.

Some of the key questions answered in this study:

What is and what will be the impact of soaring prices for corn, soybean and other meals and inputs of production costs for hogs?

Where will be the new production centers for hog? Will the activity move from Southern to the Middle West states?

What advancements have been made on sanitary programs for pork?

Major players in the pig meat industry: what are their strategic objectives and plans?

What changes are taking place in the value chain?

What are the scenarios for supply forecast in Brazil?

What will be the impact on supply and demand for soybean meal and corn?

What are the input opportunities? Feed, animal health or artificial insemination?

To order the survey report

This survey is offered at a price of \$ 650 (U.S.). It is presented in PDF format. To order it, print this form, fill in the necessary information, and send to Mrs. Marcia Dietrich, AgroBrasConsult Administrative manager:

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Once your payment is confirmed, you will receive the survey report by e-mail.
[The survey is also available in French.](#)

About AgroBrasConsult and the survey report author

AgroBrasConsult is a Brazilian company, highly specialized in agribusiness consultancy and international business support, with offices in the cities of São Paulo and Rio de Janeiro. It has been created in 2008 by Jean-Yves Carfantan and Marcia Dietrich, two consultants who have a long and wide experience of cooperation with different animal products supply-chains professionals, in Brazil.

As an agricultural economist, Jean-Yves Carfantan acted, along the last twenty-five years, as a professor and researcher at ESA, a French agricultural college located in Angers (France). Since 1990, he has also been working as an independent consultant in Brazil. From 1995 and on, he has been invited by some professional bodies (Cooperatives of the Paraná, Santa Catarina, Rio Grande do Sul and Goiás Sates), financial institutions (Banco do Brasil) and local private agribusiness

companies, to perform markets and supply-chains studies and give conferences or seminars. Being ahead of AgroBrasConsult consultant's team since 2008, Carfantan's aim is to provide the foreign customers with up to date and expert information and advices on all economic aspects of the Brazilian animal products industries and markets.

Access our website: <http://www.agrobrasconsult.com.br>