

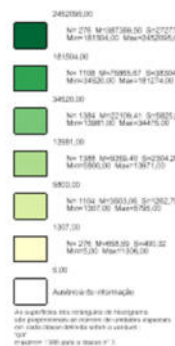
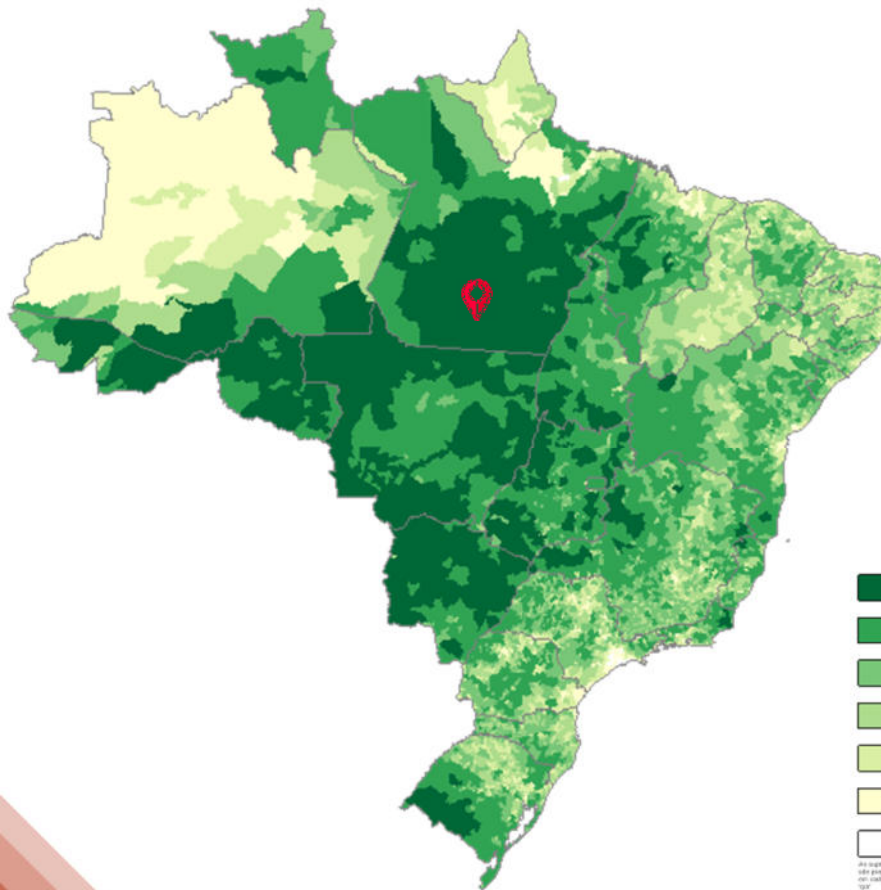


# Beef Special Focus: Brazil

*Agri Benchmark Conference  
June 2025, Sankt Pölten, Austria*



# Spatial Distribution of the Herd



- Largest cattle herd in the world (up to 200 million head);
- Beef is produced nationwide;
- The Central-West region leads in production;
- The Northern region also has significant production, especially in the state of Pará;
- São Félix do Xingu stands out, holding the largest cattle herd in Brazil – 2.5 million head

Source: IBGE, 2023

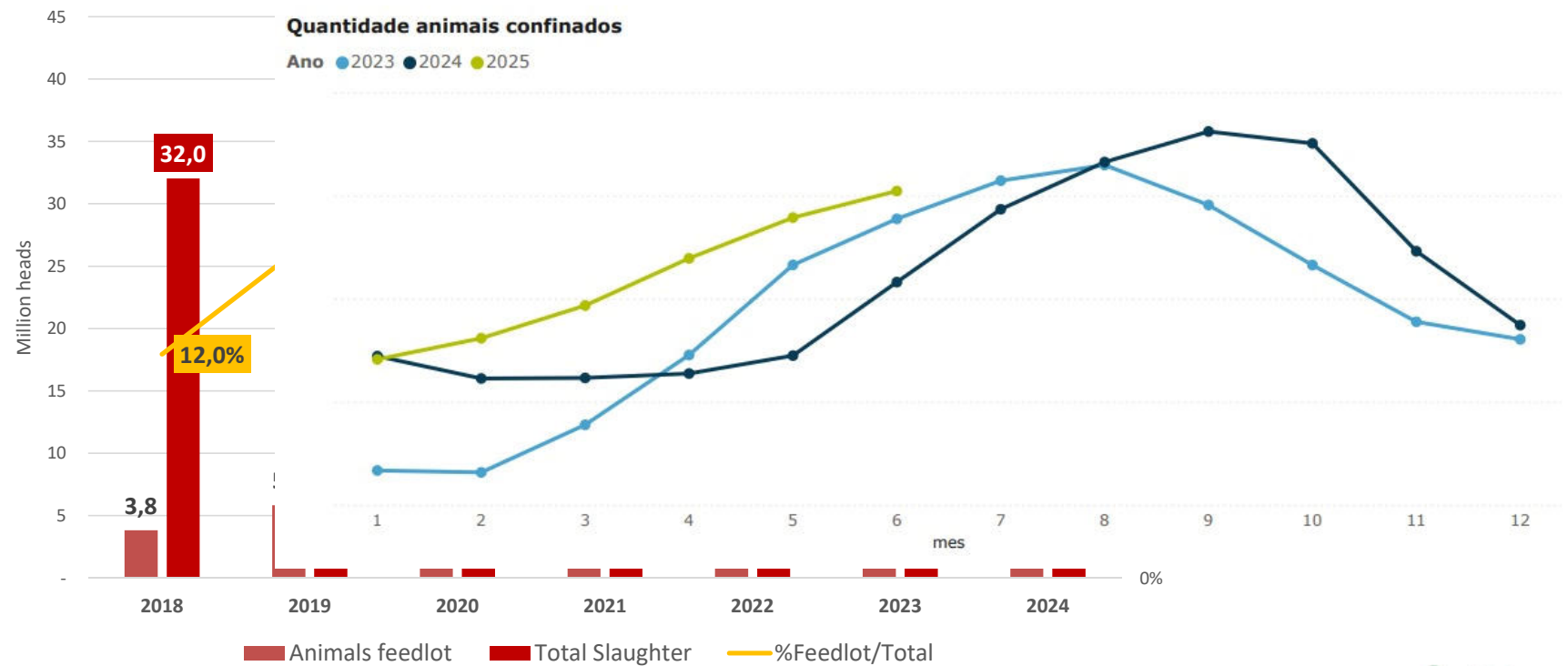


## Most of the production is pasture-based...

- High-yield tropical grasses (e.g., *Brachiaria spp.*)
- Improved pasture management techniques, such as rotational grazing
  - Increased forage availability and better land use efficiency
  - Increasing in productivity per area
- Integrated Crop-Livestock Systems (ICLS): Climate goals and Sustainability Commitments
  - Efficient land use
  - Improved soil and carbon sequestration
  - Lower GHG emissions

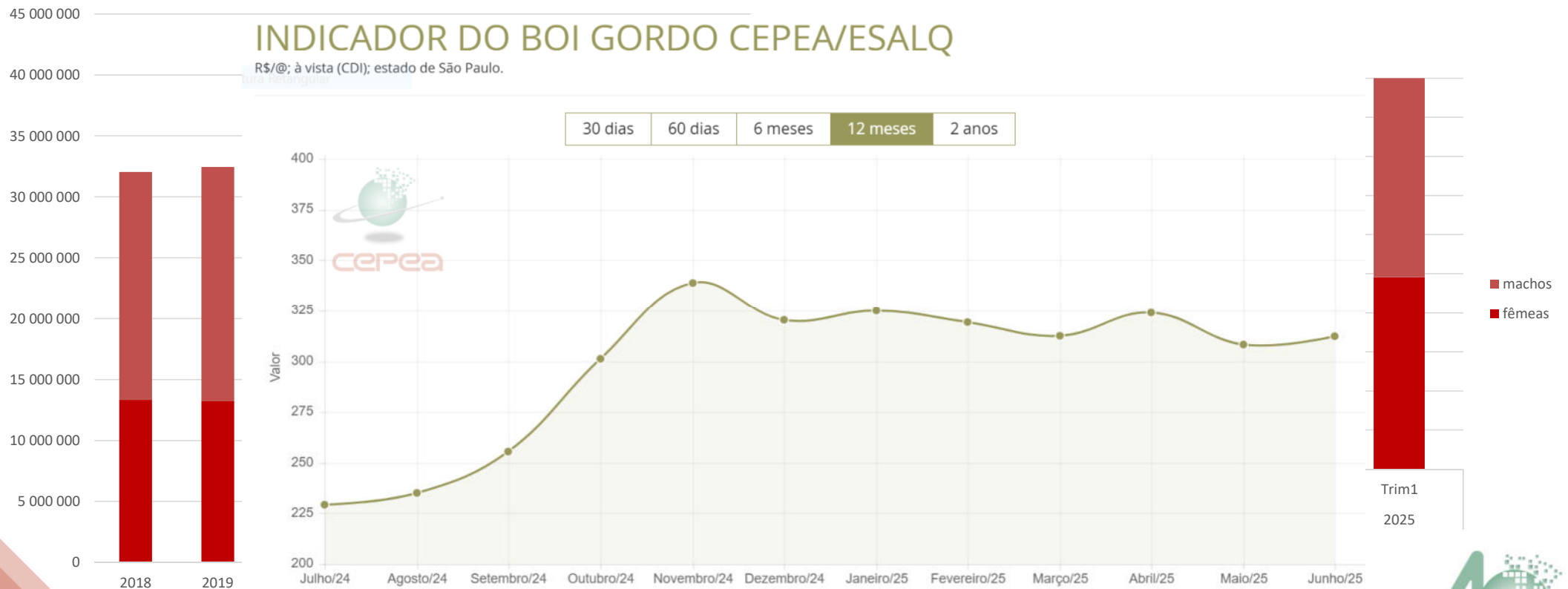


## However, feedlot finishing is representative!



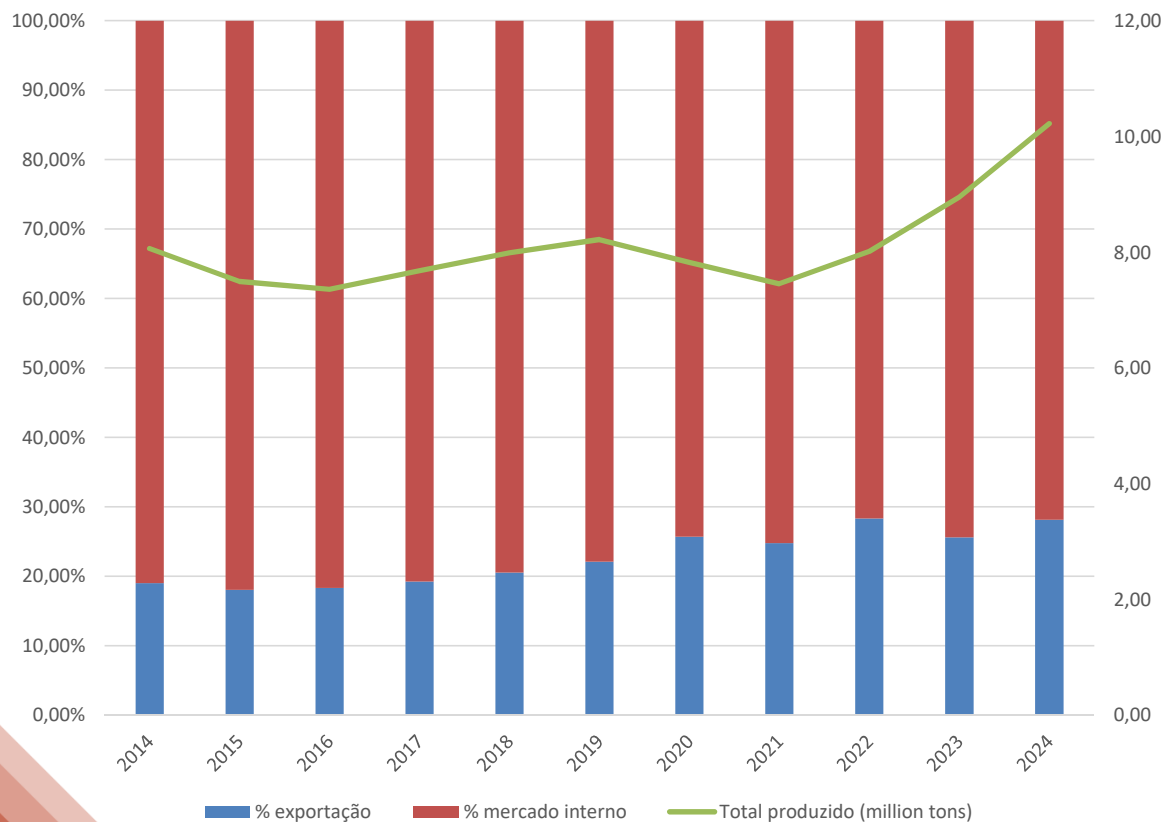
Source: DSM-Firmenich feedlot census (Animals in feedlot) and IBGE (total slaughter), 2025.

# Beef slaughter trends



Source: IBGE, 2025

## Domestic Market x Exports



- The second most consumed animal protein in Brazil;
- 20-30% of the production goes to exports;
- 2.87 million tons exported;

Source: Secex, 2025



## Competitiveness of Brazilian Beef: Cost, Quality and Market Opportunities

- Cost advantage
- Carcass standards are not yet premium, but produce in higher volumes
- Favorable exchange rate: the depreciation of the Brazilian real enhances price competitiveness

# Global Trade Situation

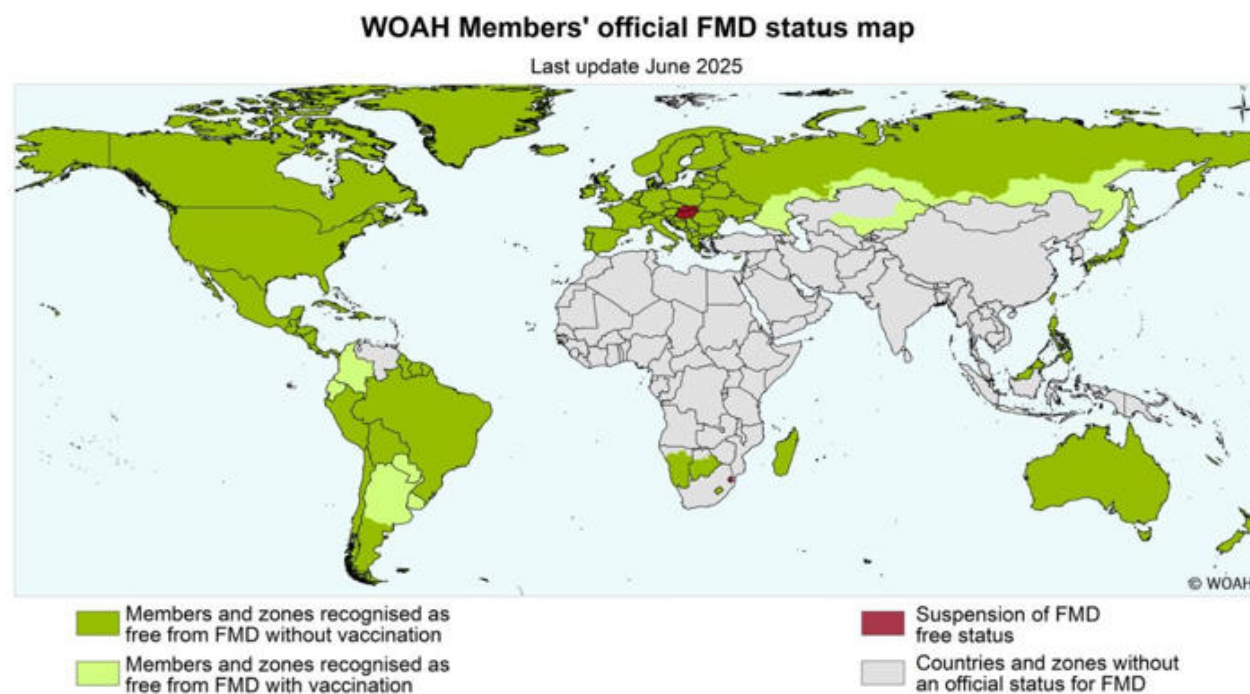
- Trade Agreement between Mercosur and the European Union
  - Did not observe a significant increase in export volumes
  - Intention in increase the number of trading partners
- Unites States Tariffs
  - Indirectly favored the acceptance of Brazilian beef in the American market.





# Positive Impacts on the Beef Sector

Achieving FMD-free status without vaccination (May 2025)



Source: World Organisation for Animal Health, 2025

# Positive Impacts on the Beef Sector

## Advances in Traceability

Currently cattle traceability is carried out by batches;  
Strategic Plan 2025-2032 – National Plan for Individual  
Identification of Cattle and Buffalo (PNIB)



## Negative Impact on the Beef Sector

- Climate Changes – El Niño phenomena
  - Severe droughts
  - South Floods
  - Southeast Wildfires
- Atypical mad cow disease cases

## Where is the Brazilian Beef Industry Heading in the next 10 years?

- Growing production
  - High demand for exports
  - Keep increasing productivity per area
  - Advances in Technology Packages – Investments in Genetic Improvement
- The world relies on our beef — we produce to feed!





# Thank you! Obrigada!

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