Challenges for Brazilian livestock

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RESEARCH QUESTIONS

- What are the changes in the livestock production face to a globalized agricultural sector?
- What are the trends and paths?

- ❑ Economic
- ❑ Environmental
- ❑ Social
  - ❑ The Livestock Social Agenda versus Intensification

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Literature review and database → Interviews with key actors → Mental maps construction → Validating Event

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FGV

MINISTÉRIO DA AGRICULTURA, PECUÁRIA E ABASTECIMENTO

PÁTRIA AMADA BRASIL GOVERNO FEDERAL

INCRA

Embrapa

idh the sustainable trade initiative

GEPAD AGRICULTURA, ALIMENTAÇÃO E DESENVOLVIMENTO

cepea

MOVIMENTO DOS TRABALHADORES RURAIS SEM TERRA BRASIL

NACIONES UNIDAS

CEPAL

Imazon

UTFPR UNIVERSIDADE TECNOLÓGICA FEDERAL DO PARANÁ

AGROICONE

imaflora®

Cooper Aliança Carnes Nobres

UN environment

WCMC

PNUMA

GTPS Grupo de Trabalho da Pecuária Sustentável

MinervaFoods

CGIAR

RESEARCH PROGRAM ON Climate Change, Agriculture and Food Security

CCAFS

Maria Macia

JBS

ACRIMAT

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Background

Brazilian Pork and Beef Exports 1997-2020

Source: ComexStat

China

2015

~ less than 10% ~

2020

50% beef

60% pork

3.7 MILLION

tons exported in 2030

31% compared to 2021

29% 2030
24.7% 2021

Source: USDA

2006

"2% of farms generate 63% of VALUE ($)"

2017

"2% of farms generate 71% of VALUE ($)"

Source: Censo Agropecuário IBGE

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Dynamics of small and medium farms

Insertion in intensive production chains with low net return per area

Difficulty in economic sustainability

Searching for other activities

Aging + Difficult generational succession

Trends

Land Fragmentation → Loss of productive function

Selling or lending → Production concentration

Gross Value of Agricultural Production family and non-family farming

	Category	2006		2017		DIFFERENCE 2017-2006
		biR$	%	biR$	%	%
CROP PRODUCTION	Family	72	34%	57	19%	-21%
	Non-family	143	66%	250	81%	+75%
	subtotal	215		308		+43%
LIVESTOCK PRODUCTION	Family	29	32%	49	31%	+70%
	Non-family	61	68%	108	69%	+76%
	Subtotal	91		157		+74%
TOTAL GENERAL		**306**		**465**		**+52%**

Source: Censo Agro 2017 (IBGE) VBP in value 2017 (bi de R$)

What is the importance of animal production for family farming?

2017
Family farming
Gross value of production
R$106 bi

New Rural Actors

TOTAL = 2.5 million of farms with cattle in Brazil

→ 2% of farms, 54% gross value, 44% livestock

→ 8% of farms, 25% gross value, 27% livestock

→ 22% of farms, 12% gross value, 17% livestock

→ 66% of farms, 8% gross value, 12% livestock

Sourse: Censo Agropecuário IBGE (2017)

Pathways for Brazilian cattle production

No intensification: extensive cow-calf and rearing
1
Activity Substitution or Relocation
3
Sustainable Cattle ranching (extensive)
Intensification: finishing, rearing and fattening, integration agriculture
4
6
Sustainable intensification: Integrated systems
Large farms 2%
Non-intensification
Intensification
Sustainable Intensification
Medium 8%
Small 90%
Intensification: specialization in cow-calf and dairy farming
7
2
5
Exclusion Deactivation
Non-intensification: pluriactivity; non specialized mixed (dairy and meat)
3
Sustainable Cattle ranching (extensive)
Sustainable small and medium intensification: dairy farming, integrated systems, Agroforestry System

Social

- Intensification can generate negative externalities: productive concentration; exclusion of producers; leakage of production
- Cattle production intensification is a way for a minority of small, medium and large farms and depends of public policies and actions of private sector
- Rural development strategies are necessary for small scale resilient producers

Thank you

Any questions?

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