

Global Agenda of Action in Support of Sustainable Livestock Sector Development

Restoring Value to Grasslands



Animal Production & Policies: a Global Perspective

Andre Nassar
ICONE

Brasilia
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Setting the State of This Presentation

- Balancing the new and the old agenda
 - Are they completely independent? I do not think so...
- New agenda
 - Climate change and carbon sequestration
 - Above trend productivity increase
 - Less intense natural resources demanding production systems
 - Sustainability, certification, moratoriums, self-enforced initiatives
 - Biomass: increasing competition of different uses
- Old agenda (forgotten agenda, hibernating agenda)
 - International market stuffs
 - Protection policies, subsidies oriented to increase production
 - Bad allocation of resources
- I do not see how to promote the new agenda, neglecting the old agenda

<http://www.fiesp.com.br/outlookbrasil/>



Federação das Indústrias do Estado de São Paulo



Instituto de Estudos do
Comércio e Negociações
Internacionais

Outlook Brasil 2022

PROJEÇÕES PARA O AGRONEGÓCIO

02 de maio de 2012



Projeções | Carnes

Em mil toneladas

Produto	Produção			Consumo Doméstico			Exports. Líquidas		
	2011	2022	Var.%	2011	2022	Var.%	2011	2022	Var.%
Carne bovina	9.662	11.996	24,1%	8.213	9.281	13,0%	1.450	2.715	87,2%
Carne de frango	13.036	16.810	29,0%	8.982	10.896	21,3%	4.054	5.914	45,9%
Carne suína	3.324	4.072	22,5%	2.750	3.372	22,6%	546	700	28,4%

Fonte: Outlook Brasil. * Grãos: inclui soja, milho (todas as safras), algodão (base pluma), arroz (base casca), feijão (todas as safras), trigo e cevada. Para o cálculo da área plantada considerou-se as lavouras de 1ª safra. ** safras 2010/11 e 2022/23.

Dinamismo das exportações | Brasil e Mundo

Legenda:

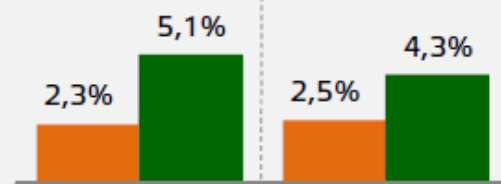
Mundo Brasil

Crescimento Anual

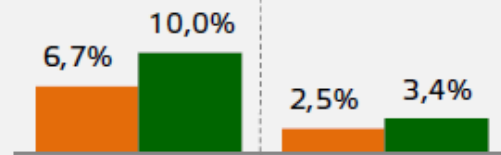
2002 - 2011

2012 - 2022

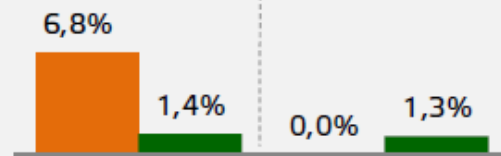
Carne bovina



Carne de frango



Carne suína



Market share do Brasil

2011

2022

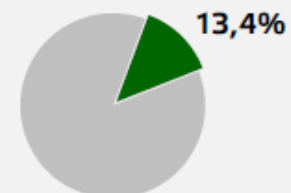
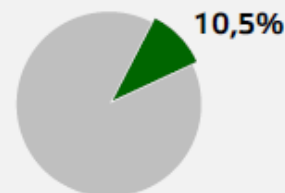
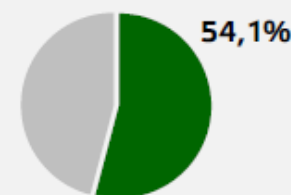
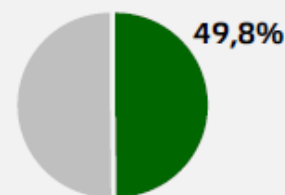
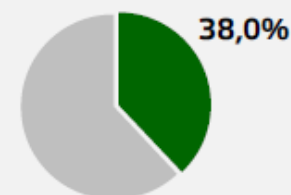
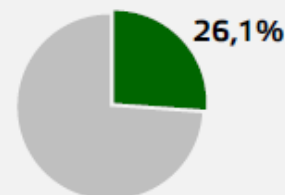
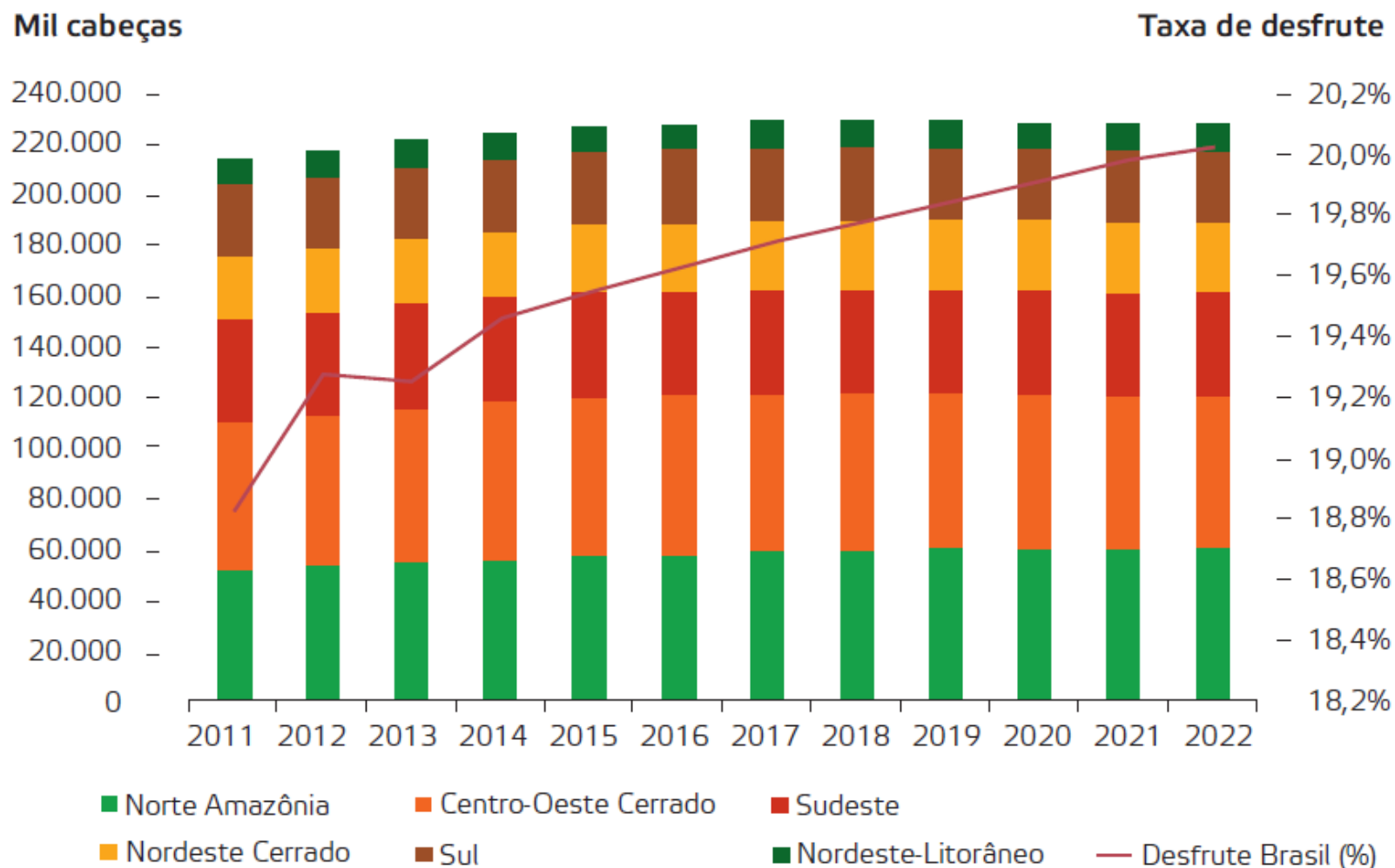


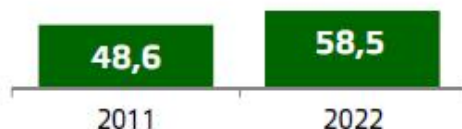
Gráfico 28 - Taxa de desfrute e rebanho por região



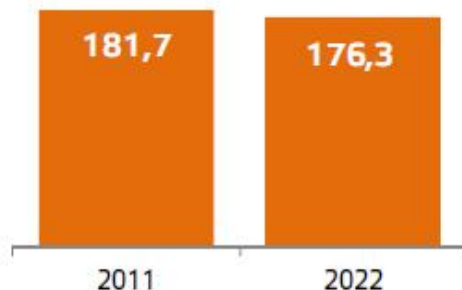
Dinâmica do uso da terra

Em milhões de hectares

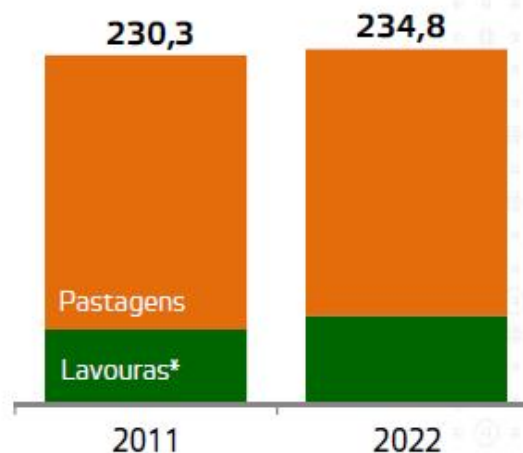
Lavouras* (+9,9)



Pastagens (-5,4)



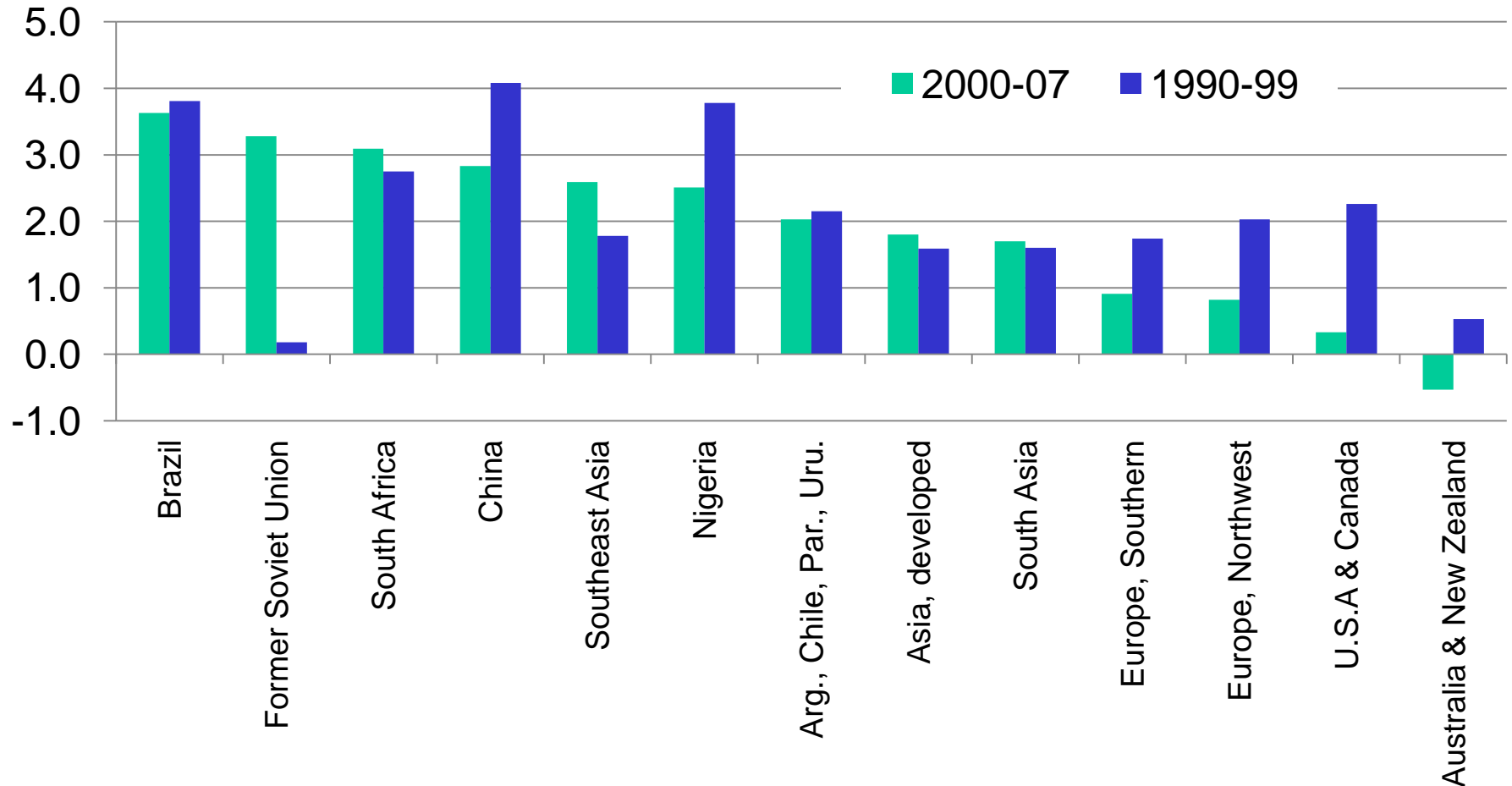
Agropecuária (+4,5)



- As lavouras de 2ª safra ampliarão sua importância e serão responsáveis por 19% da produção total de grãos em 2022.

AGRICULTURAL TFP GROWTH

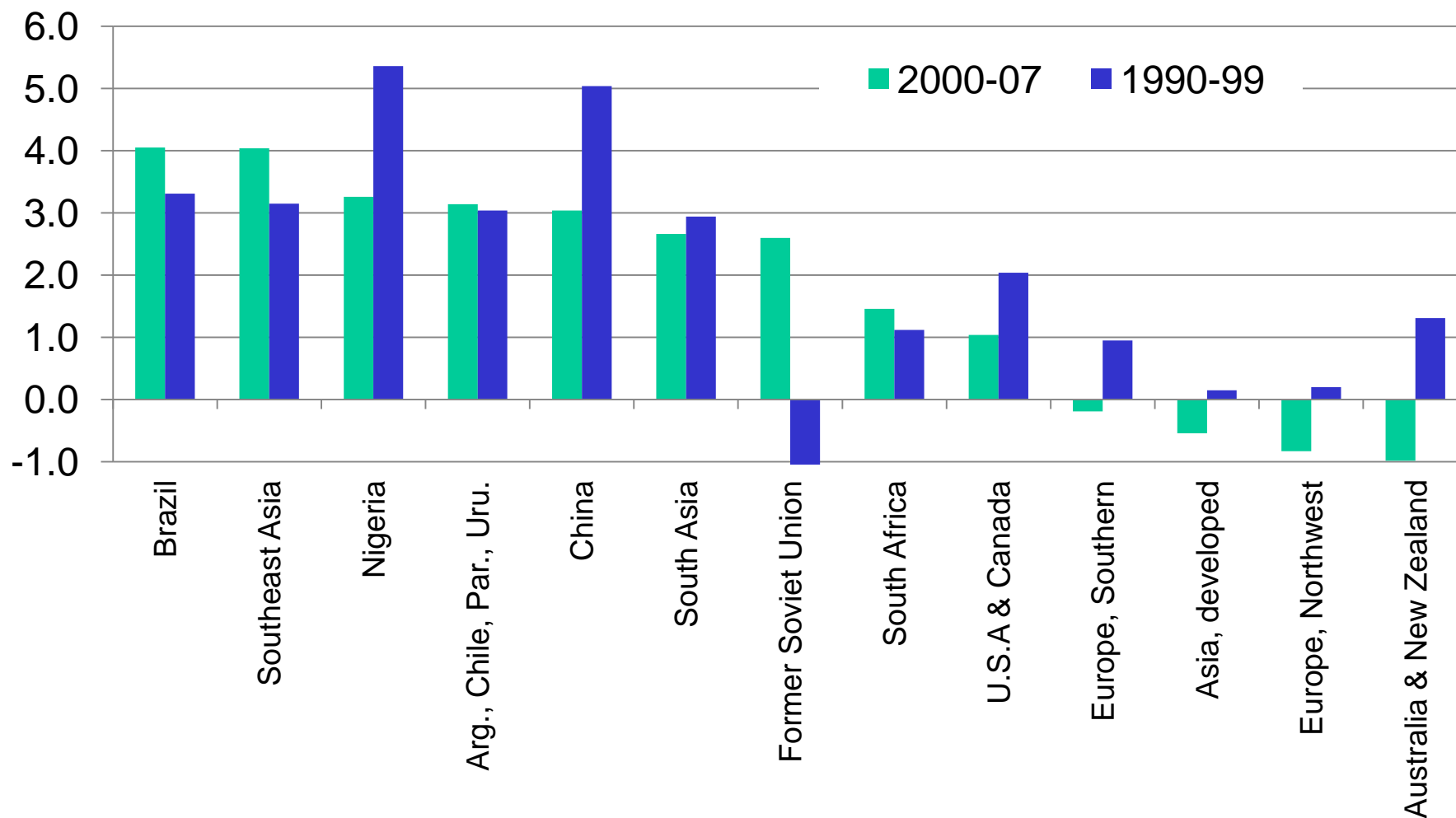
(average annual % over period)



TFP (Total factors productivity): represents resources efficiency (such as labour, capital and land). The bigger the TFP growth the more efficient the production become.

AGRICULTURAL OUTPUT GROWTH

(average annual % over period)

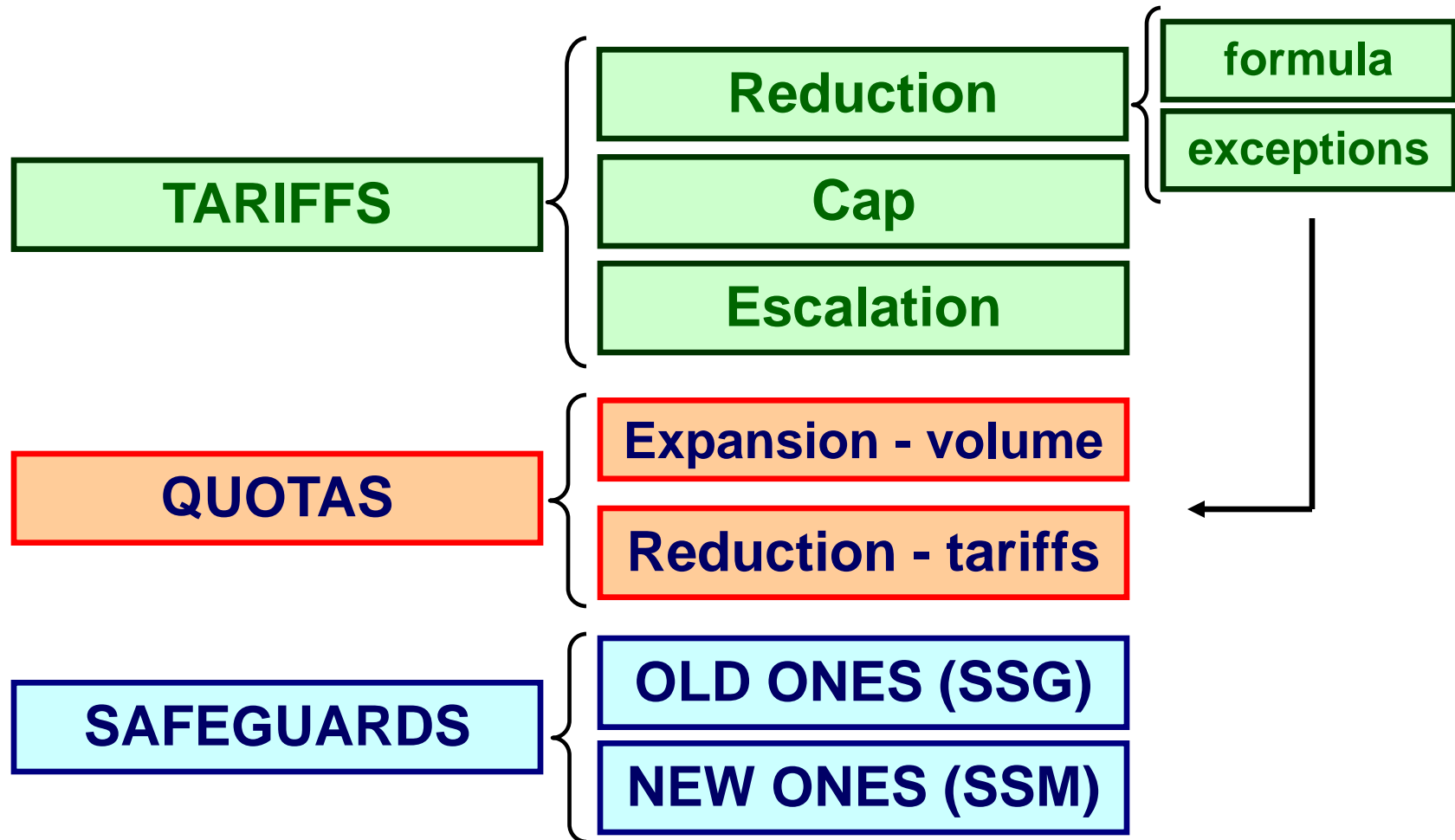


The Evolution of Ag Protectionism

WTO Doha Round

- 
1. Tariffs (peaks, escalation, specific tariffs,...)
 2. Tariff Rate Quotas, Special Safeguards, antidumping
 3. Subsidies and export credits, food aid, state trade firms
 4. Domestic Subsidies
 5. Sanitary barriers (dioxin, hormones, BSE, foot and mouth, avian influenza, newcastle, regionalisation...
 6. Technical barriers: process and production methods, labeling, packing, traceability, animal welfare...
 7. Certifications and Private Standards (EurepGap, British Retail Consortium, etc)
 8. Environmental restrictions: GMOs, deforestation...
 9. Social and labor standards
 10. Multifunctionality

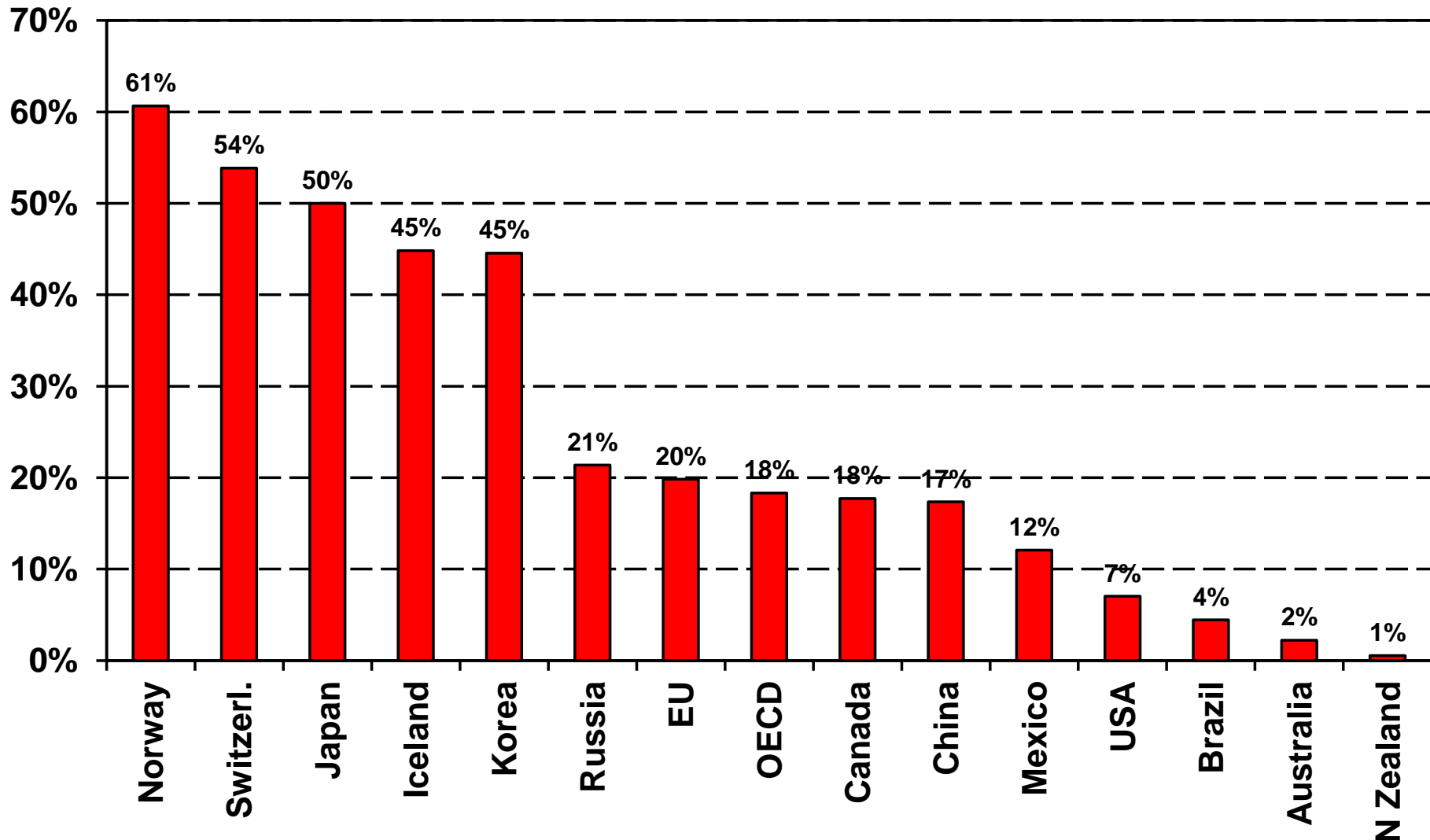
Market Access: Main Issues



Special and Differential Treatment

Overview of Domestic Subsidies 2010

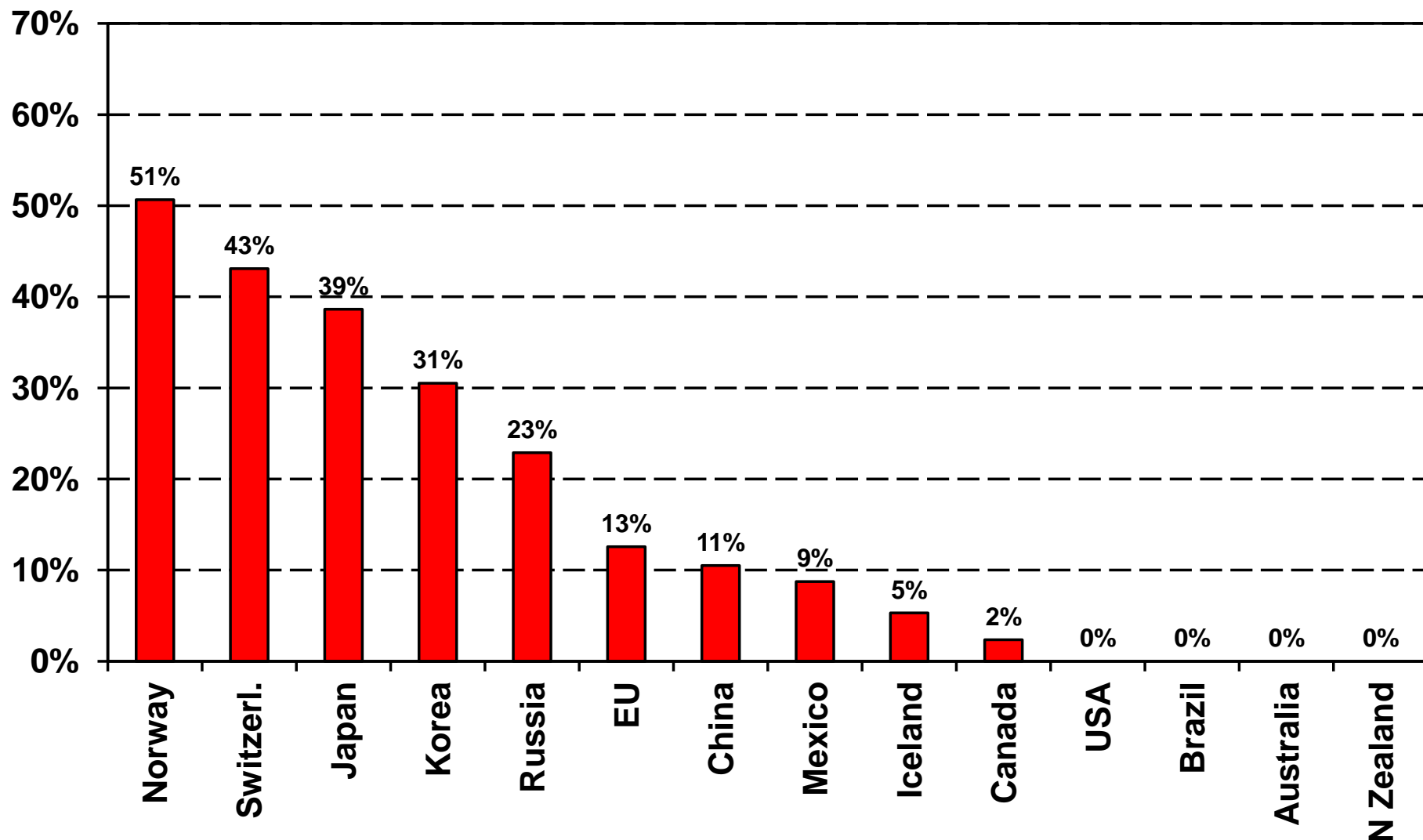
OECD - Producer Support Estimate (%PSE)



Notes: The %PSE expresses the total producer support as a percentage of gross farm receipts, measured by the value of total production (at farm gate prices) plus budgetary support. Source: OECD PSE/CSE databases, 2011.

OECD - Producer Single Commodity Transfers (%PSE)

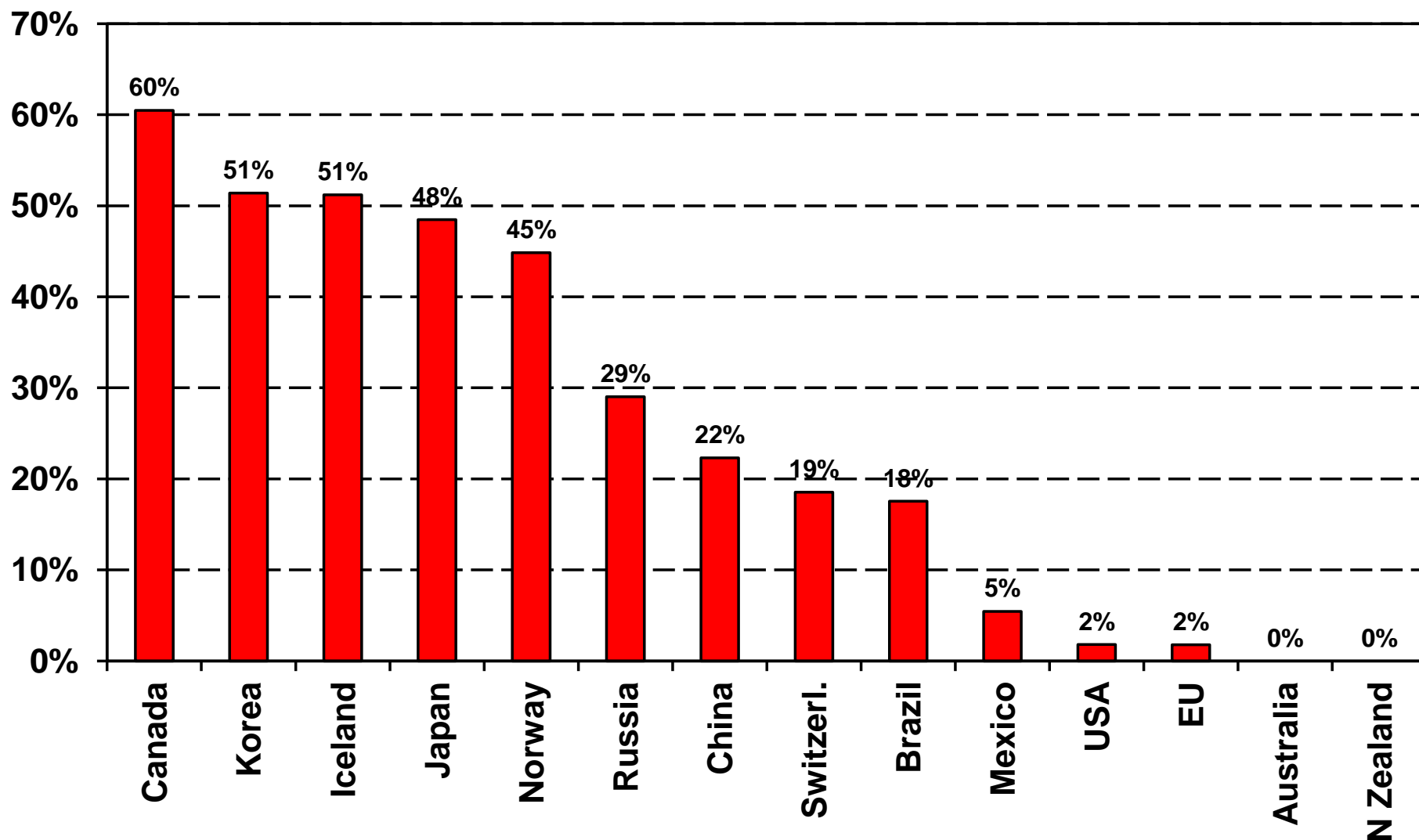
Beef and Veal



Notes: The %PSE expresses the total producer support as a percentage of gross farm receipts, measured by the value of total production (at farm gate prices) plus budgetary support. Source: OECD PSE/CSE databases, 2011.

OECD - Producer Single Commodity Transfers (%PSE)

Milk



Notes: The %PSE expresses the total producer support as a percentage of gross farm receipts, measured by the value of total production (at farm gate prices) plus budgetary support. Source: OECD PSE/CSE databases, 2011.