

## **The Brazilian Poultry Sector**

### **A Multi-Client Study**

#### **Background and Study Objective**

The Brazilian meat sector is classified as one of the most dynamic in the world. Currently, Brazil is the second largest meat producer in the world and number one in international trade. While Brazil's reputation is well known in beef, poultry exports now lead in terms of meat protein exports from Brazil. Brazil's competitive edge lies in the relatively low production costs of important raw materials – corn and soybean meal – and a well developed integrated farming system. Furthermore, the population consumes a large portion – some 70 percent - of poultry meats, a critical factor when considering the development of a domestic industry. Nurturing this meat demand on the domestic side is the fact that Brazil's disposable income level has been increasing and consequently, the country has shown signs of significant meat protein demand growth. This feature has shielded domestic producers from some of the impact of the global recession.

At the industry level, major changes have taken place in the past 12 to 18 months. First, a major consolidation process has taken place. Another important factor is the consolidation of meat production and marketing. Five years back, the meat industry was mainly divided into beef and poultry/pork processors. This situation has drastically changed and traditional chicken (and pork) operations are now avidly processing and marketing beef products. In a similar move, some of the international beef players also have diversified their operations to include pork and poultry meats. The implications of these trends are greater industry concentration and a lesser number of meat traders for export markets.

This report, ready for immediate distribution, was developed to identify some of these market changes, yet it will also develop for you a solid data base of knowledge of Brazilian production, consumption and exports. The intent of this report is to provide a concise picture of the Brazilian poultry segment – from farm level through to exports of meat products – which will enable the reader to take strategic decisions on the attractiveness of the marketplace. Some basic and general trends are covered, yet the purpose of the report is to describe and quantify the poultry segment in Brazil. With a better understanding of the sector, investors and other interested parties can develop “go/ no go” decisions on this dynamic sector.

#### **About AgraFNP:**

AgraFNP, founded in 1989, is a subsidiary of the Informa Economics group. AgraFNP is a leading provider of agricultural, livestock and agribusiness information on the Brazilian market. AgraFNP has over one thousand clients, both based in Brazil and all continents. AgraFNP's services include:

- Publications on the agricultural and livestock sector in Brazil;
- Newsletters on the meat sector and biofuels;
- Ad hoc consulting services; and,
- Market research services in Brazil.

## Study Methodology

The report is based on AgraFNP's extensive data and information base on the Brazilian poultry segment. The report relied on extensive desk research by the study team as well as select interviews with specialists in the field.

**Report Content:** The report is completed and consists of 72 pages of text, tables and charts. Seven major company profiles are included. The report is available for immediate distribution.

## Who Should Buy this Report?

This study is designed to bring value to all players involved in the value chain for meat and poultry products. Some of the players which may require data and information on this important sector include:

- Foreign investors and financial institutions involved in global investment strategies in the food chain;
- Industrial players looking at global expansion of their meat/poultry operations;
- Companies looking to expand their operations in feed and other related business;
- Manufacturers of feed equipment;
- International meat/poultry traders;
- International companies involved in the logistics of poultry trade;
- Animal health companies interested in expanding operations in Latin America and Brazil; and
- Companies providing services to the meat and poultry segment.

## Study Outline

1. Introduction
2. Symbols and Abbreviations
3. Measures and General Data on Brazil
4. Maps
5. Overview of Agriculture and Livestock Sector
6. Global Benchmarking – Quick Reference
7. Global Competition Index
8. Poultry Sector Analysis
  - A. Livestock Activities
  - B. Flock size Data
  - C. Production Systems and Contractual Relationship
  - D. Breeds
  - E. Productivity Indicators
  - F. Government Role in poultry sector
  - G. Production Costs
  - H. Corn and Other Poultry Feed Ingredients

- I. Live Poultry Prices
- J. Trends
- 8.1 Slaughter & Industrial Segment
  - A. Slaughter Inspection Systems and Importance
  - B. Slaughter Systems and Cuts
  - C. Slaughter Evolution
  - D. Apparent Consumption
- 8.2. Market Share for Major Players
- 8.3. Profiles of Major Players
- 8.4. Government Role in Slaughter and Exports
- 8.5. Trade Association Roles
- 8.6. Export & Import Data and Information
  - A. Introduction
  - B. Export Evolution
  - C. Chicken Exports – 2007 / 08
  - D. Major Export Players
  - E. Poultry Meat Imports
- 8.7. Trends in Poultry Segment
- 9. Key Success Factors
- 10. Risk Factors

**Price:** The cost is US\$1,200. Upon full payment the hard copy and CD will be delivered to the client.

**Final Product:** One hard copy plus CD.

**ENROLLMENT FORM**

<input type="checkbox"/> Yes, I want to purchase the multi-client study entitled “ <i>The Brazilian Poultry Sector.</i> ” The cost of the study is US\$1,200.
<input type="checkbox"/> Please have someone contact me to provide further information.

**FAX to Informa Economics at (901) 766-8158**

Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Title: \_\_\_\_\_

Company: \_\_\_\_\_

Street Address: \_\_\_\_\_

City, Province/State, Code: \_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

**PAYMENT METHOD**

Check Enclosed     VISA     MasterCard     American Express

Card Number: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

Signature: \_\_\_\_\_

Mr. Tom Scott  
President and Chief Operating Officer  
Informa Economics, Inc.  
775 Ridge Lake Blvd., Suite 400  
Memphis, TN 38120  
Phone: (901) 766-4586  
Fax: (901) 766-8158  
Email: tom.scott@informaecon.com

Mr. Richard Brostowicz  
Business Intelligence Lead  
AgraFNP, Brazil  
Rua Bela Cintra, 967 11. Floor  
01415-000 São Paulo SP Brazil  
Phone: + 55 11 4504-1414  
Fax: + 55 11 4504-1411  
Email: richard.brostowicz@agrafnp.com.br