2012 Edition

BRAZILIAN AGRICULTURAL FOREIGN TRADE

MAIN MARKETS AND PRODUCTS

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Ministry of Agriculture, Livestock and Food Supply

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2012 Edition

Brazil

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Introduction

1. Introduction

Brazilian grain production increased 33% between the 2005/2006 and 2010/2011 harvests, from 122.5 million tonnes to 163.0 million tonnes. During this period, the planted area increased 4.3%, while the average yield increased from 2.6 tonnes per hectare to 3.3 tonnes per hectare (+27.5%). In fact, the productivity gains achieved in recent years were the main reason for the record harvest of 2010/2011.

In addition to the record production, the high prices of agricultural products increased 43.5% in the gross value of agricultural production between 2006 and 2011, from US$ 86.2 billion to US$ 124.0 billion in the period. Moreover, the record production has expanded the country's export capacity. Foreign sales of agricultural and livestock products increased in volume from 79.4 million tonnes to 103.3 million tonnes in the last five years (+30.1%), while exports grew from US$ 36.9 billion to US$ 81.4 billion[1] (+120%).

Analysis of the figures above reveals the good phase of national agriculture and livestock production, with strong growth in productivity, income, and associated expansion of export capacity. Despite these figures, the country's agricultural and livestock export portfolio is still concentrated on a few products. The four main exporting sectors - soybean ,sugar and ethanol, meat and coffee - participated with 78.7% of total exports in 2006, and increased this concentration to 79.4% in 2011.

[1] Data extracted on 2012/January. Don't include CAMEX nº 94 Resolution, from 2011/12/08, which modified the Mercosur common nomenclature, according to HS - 2012.

Regarding agricultural exports destination, The Netherlands, which where Brazil's main market for agricultural and livestock exports in 2006 with a share of 9.2%, were surpassed by China, whose share in agricultural exports rose from 7.6% to 18.0% between 2006 and 2011. Despite the strong increase of concentration in main destination markets, agricultural and livestock exports underwent de-concentration regarding the ten main destination countries. In 2006, the top ten destination countries participated with 54.5%, dropping to 53.4% in 2011.

This information will be analyzed in detail throughout this publication, enabling the reader to understand the expansion of Brazilian agricultural and livestock production and exports by product, as well as learn about the destination markets for these exports. Therefore, the aim is to provide an overview of the Brazilian agriculture and livestock production for the reader with a focus on foreign sales.

2

Income and Agricultural Production in Brazil

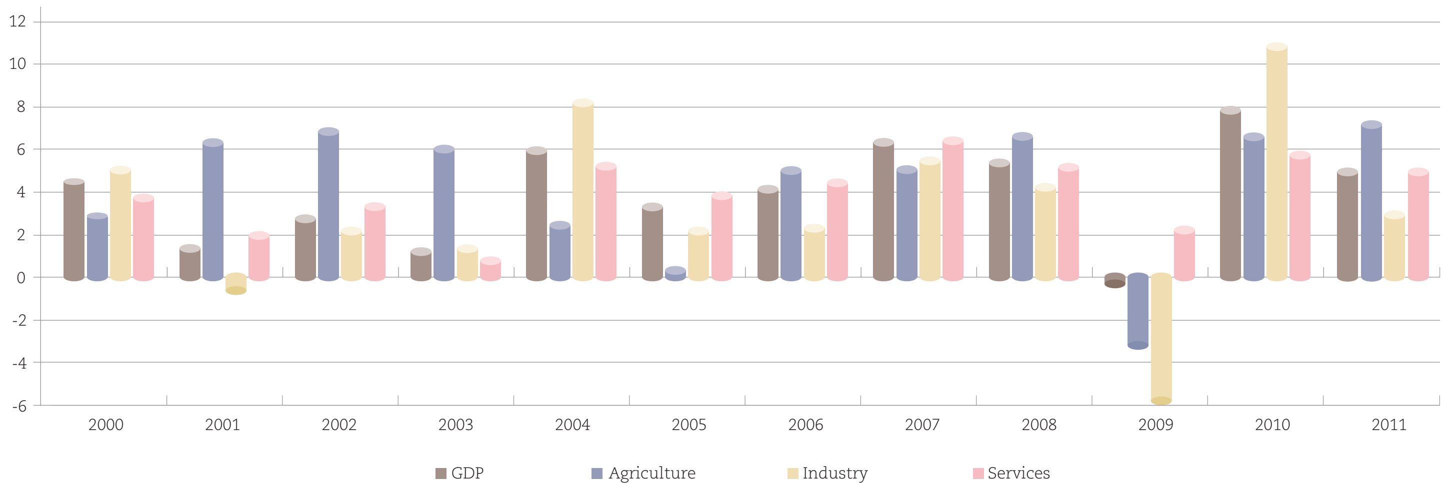
2. Income and Agricultural Production in Brazil

Agricultural GDP

After agricultural GDP expansion between 2000 and 2008, there was a 3.1% drop in GDP sector in 2009. The decline was due mainly to the severe international crisis that abruptly brought down the international prices of agricultural commodities in 2009. In 2010, with the recovery of international prices, the agricultural GDP expanded 6.3%, recovering from the last years. In 2011 there was a cumulative growth of 3,9% in agricultural GDP, which is higher than other sectors increase (industry and services). This growth on agriculture was due to the production and productivity increase, according to the Brazilian Institute of Geography and Statistics - IBGE

Graph 2.1

Growth rate of GDP by Component: 2000-2011(%)



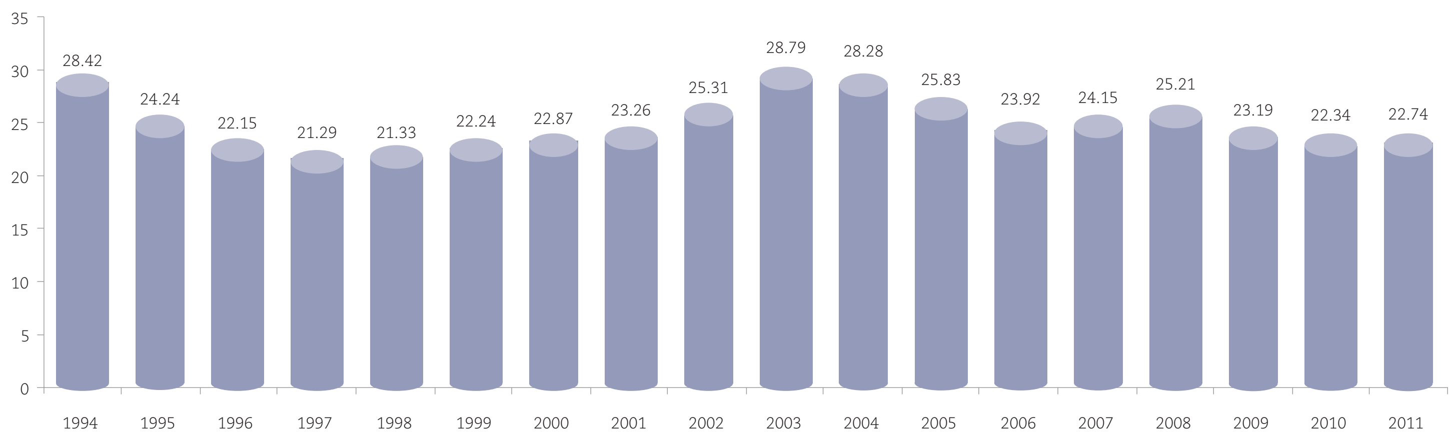
Source: IBGE.

Agribusiness GDP

The Center for Advanced Studies in Applied Economics of the University of São Paulo (CEPEA/Esalq-USP) publishes the participation of agribusiness in Brazilian GDP. This participation varies depending on the sector's performance and in 2003 reached 28.8% of the Brazilian GDP. In 2011, agribusiness was responsible for 22.7% of Brazil's GDP, or US$ 552 billion. The Center's calculation includes, in addition to agricultural and livestock activities, research activities, industry and distribution related to agriculture and livestock production.

Graph 2.2

Agribusiness GDP in the GDP of Brazil - 2011 (%)



Source: CEPEA/Esalq-USP.

Gross Value of Agricultural Production

Agriculture's Gross Value of Production (GVP) was US$ 124.0 billion in 2011, representing an increase of 12.3% over the 2010 GVP, which was US$ 110.4 billion. The increase is much higher than the last decade's average, which rose 3.5% per year, and was relevant, due to the record harvest and strong rise in commodity prices in 2011.

The product with the highest participation was soybean grain, with US$ 32.2 billion, or 26% of GVP. Sugarcane ranked second, with US$ 20,55 billion, followed by corn and coffee, with US$ 14,8 billion and US$ 11,6 billion respectively. It should be noted that these four products were responsible for 63.8% of total gross value of agricultural production in 2011. In 2002, the four major sectors participated with 60.8% of GVP, demonstrating concentration among the major sectors.

The GVP of products such as rice and beans declined between 2002 and 2011, from US$ 9.0 billion in 2002 to US$ 8.2 billion. Thus, the participation of the two products in GVP fell from 10.1% to 6.6% in the period. This decrease is the result not only of rising international prices of products such as soybean, but mainly due to the sharp increase of area occupied by the product. In the case of soybean, the area occupied increased from 16.3 million hectares in the 2001/2002 harvest to 24.2 million hectares in the 2010/2011 harvest, which represented an increase of 48.5% in area occupied by the product. In the same period, the area occupied by rice fields fell from 3.2 million hectares to 2.8 million (-12.5%), while the area used in the production of beans declined from 4.3 million hectares to 4.0 million (-7.0%).

Table 2.1

Gross Value of Production – Main Agricultural Products – Brazil

Values in million US$*

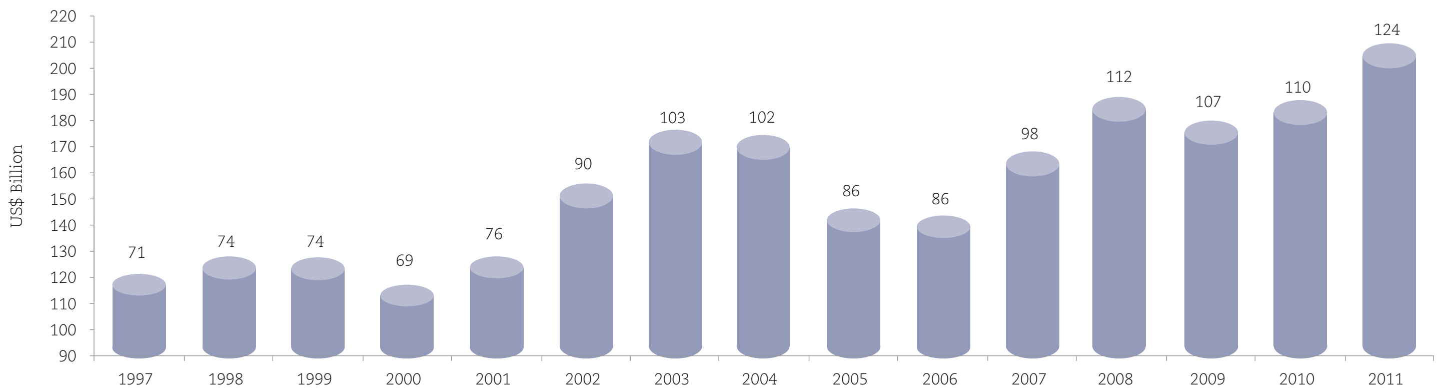
CROPS	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Soybean (grains)	25,154	31,356	29,313	20,935	18,300	23,206	30,332	29,190	28,690	32,201
Sugarcane	11,343	11,661	10,577	11,322	14,890	16,099	14,648	17,777	20,046	20,575
Corn (grain)	11,156	14,988	11,316	8,553	9,300	13,763	16,597	11,324	11,088	14,758
Coffee beans	6,725	5,638	7,993	8,472	8,916	7,478	8,605	7,449	9,845	11,561
Orange	7,519	6,349	5,672	5,417	6,460	6,088	6,217	5,714	7,360	7,704
Banana	3,785	4,147	4,084	4,175	4,327	4,576	4,593	4,701	4,971	5,070
Herbaceous cottonseed	1,807	2,385	4,250	3,069	2,261	3,130	2,927	2,046	1,946	4,890
Rice (in husk)	4,854	5,921	7,537	5,498	4,348	4,363	5,624	5,968	4,673	4,546
Manioc (cassava)	2,146	3,057	4,029	3,768	3,608	3,361	3,559	3,849	3,674	3,698
Beans	4,188	4,377	3,063	3,331	3,420	3,271	5,861	4,023	3,643	3,647
Tomate	2,188	2,627	2,880	2,727	2,364	2,642	2,977	3,390	3,107	3,628
Tobacco (leaf)	2,138	2,335	3,435	3,374	3,443	3,571	3,510	3,536	2,884	2,876
Grapes	816	1,075	1,983	807	706	1,568	764	2,436	1,909	2,545
Potato - white	1,895	1,813	1,480	1,728	1,625	1,754	1,780	2,202	2,381	2,024
Apple	-	-	-	-	-	-	-	-	-	1,513
Wheat (grain)	1,377	2,742	2,136	1,361	702	1,436	2,129	1,481	1,653	1,454
Cocoa	1,089	918	753	633	561	597	698	896	869	751
Onion	756	682	782	573	545	584	878	784	1,224	503
Peanut (in husk)	182	215	248	260	197	248	336	249	185	-
Castor bean	87	53	98	95	43	54	62	-	-	-
Black pepper	229	242	177	185	176	209	199	175	176	-
TOTAL	**53,432**	**102,579**	**101,807**	**86,284**	**86,190**	**97,998**	**112,297**	**107,189**	**110,322**	**123,946**

Source: IBGE - Systematic Survey of Agricultural Production - (LSPA in portuguese), Feb. 2012; FGV
Prepared by: AGE/MAPA
Note: * Values deflated by IGP-DI (FVG) - Feb. 2012

** Prices Received by producers. Annual average for the complete years. For 2011 average prices from January to November/2011; for 2012, prices from November/2011; for coffee and apple were employed average prices from Cepea/Esalq/USP, annual average for the complete years; and for 2012, average prices from January to February/2012; apple refers to the gala type and coffee refers to Arabic coffee type 6 "hard liquor for the better", and robusta coffee type 6, sieve 13 above, with 86 defects.

Graph 2.3

Gross Value of Production



Source: IBGE/FGVDADOS.
Prepared by: AGE/MAPA.

Grain and Sugarcane Production in Brazil

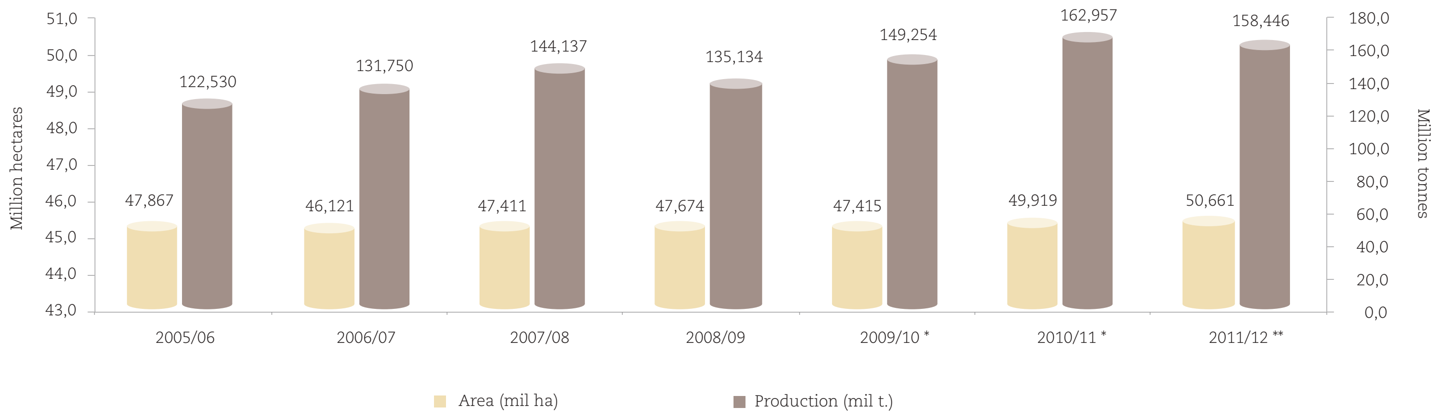
Grain production in Brazil underwent strong growth in the latest harvests, from 122.5 million tonnes in 2005/2006 to 163.0 million tonnes in 2011/2012, which represents a 33% increase in grain production over the past five years, or an average annual increase of 5.9% in production. This increase is the result of two factors: increased planted area and productivity.

The grain-cultivated area in the country in the 2010/11 harvest totaled 49.92 million hectares, that is +5.3% or 2.50 million hectares greater than the previous harvest, which totaled 47.42 million hectares. Furthermore, it is estimated that in the 2011/2012 harvest the cultivated area has reached 50.6 million hectares, continuing the process of increasing the planted area. Despite that, a longer-term analysis shows that the increase in planted area over the past five years was of 4.3%, while the grain harvest had a 33% increase in production, as already mentioned. That is, just the increase of the area does not account for the increase of grain production in Brazil. So, it's necessary to analyze the second factor that enabled the production record: productivity.

Brazilian productivity per hectare increased 27.5% between 2005/2006 harvest and 2010/2011 harvest , from 2.6 tonnes per hectare in the 2005/2006 harvest to 3.3 tonnes per hectare in the 2010/2011 harvest. Therefore, most of the increase in Brazilian production was due to the increased productivity. The increase in productivity may be the result of several factors, such as new production methods, improved seeds, increased use of fertilizers, favorable weather, etc. In the last years in Brazil, all these variables together, resulted in an average productivity of 3.3 tonnes per hectare.

Graph 2.4

Area and Production – Grains



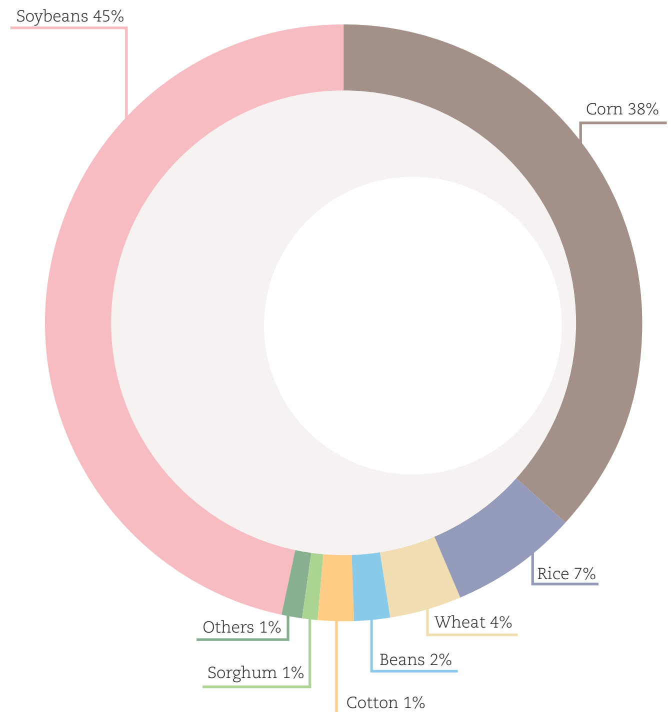
Source: CONAB.
* Preliminary Data: subject to changes.
** Estimated Data: subject to changes

The Brazilian grain production is concentrated on two types of grain: soybean, with 45% of total production (71.8 million tonnes in the 2011/2012 harvest), and corn, with 38% (59.2 million tonnes in the 2011/2012 harvest). These two grains represent 83.0% of the total national production of 158.5 million tonnes forecast for the 2011/2012 harvest. In the 2005/2006 harvest, the share of these two grains was 79.6%. Therefore, there has been an increased concentration in the production of these two grains. The production of beans and rice, otherwise, decreased from 12.4% of total production in the 2005/2006 harvest to the estimated 9.4% in the 2011/2012 harvest.

Examining the area occupied by certain type of grain, it can notice that there was a strong expansion of the soybean planted area (+1.89 million hectares) and corn area (+ 1.59 million hectares) between the 2005/2006 and 2011/2012 harvests. The expansion of soybean and corn crops exceeded the increase in the area occupied by all grains, which was 2.79 million hectares in the period. As a result, there has been a reduction of the total planted area with other grains in recent years. They occupied 12.2 million hectares in the 2005/2006 harvest and were reduced to 11.5 million in the estimated 2011/2012 harvest.

Graph 2.5

Products share in the 2011/2012 grain harvest*



Source: CONAB
* Estimated Data: subject to changes.

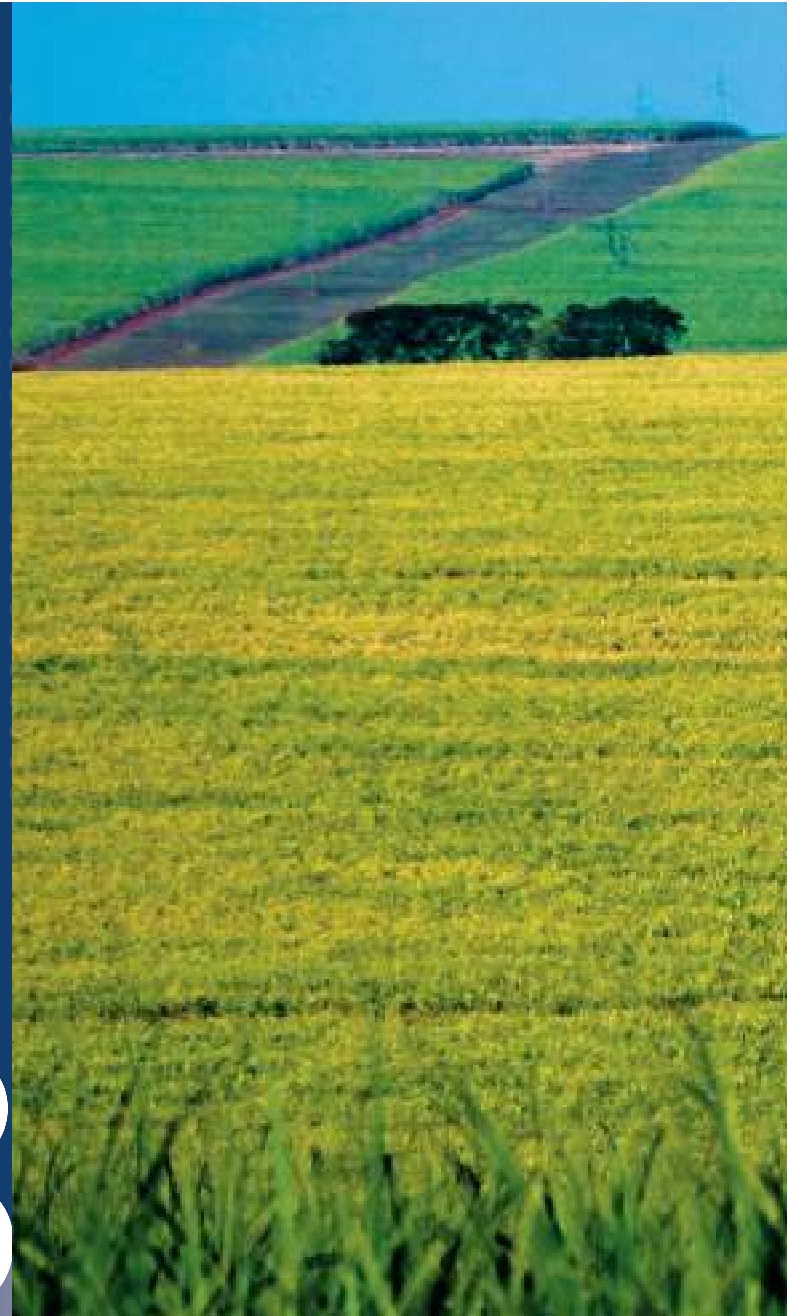
Despite the significant growth of the Brazilian grain harvest in recent years, it is still small compared to other from major producing countries. The US corn harvest alone was 332.5 million tonnes in 2009, almost double the total grain harvest in Brazil. The Chinese corn harvest of 2009 was 164.1 million tonnes, equivalent to the record harvest in Brazil.[2]

Besides grain production, Brazil will use an area of 8.0 million hectares in the 2011/2012 harvest for sugarcane production, which corresponds to 16% of the total grain-planted area.

The area cultivated with sugarcane increased 1.9 million hectares in the last five years, a 30.3% expansion. This figure reveals strong growth when compared to the 4.3% expansion of the area occupied by grains. The crushed production grew from 468 million tonnes in the 2006/2007 harvest to the estimated 571 million tonnes in 2011/2012 harvest. Although the crushing of the current harvest were 22% greater than the 2006/2007 harvest, sugarcane crushing has already reached 624 million tonnes in the 2010/2011 harvest. This decline is occurring due to weather conditions, such as drought in major producing regions in the second half of 2011.

The milling of sugarcane allows the production of sugar and ethanol. In the 2011/2012 harvest, it is estimated that 283.9 million tonnes of sugarcane will be crushed to produce sugar, while 287.6 million tonnes will be used to produce ethanol. With this performance, ethanol production will reach 22.9 billion liters, or -17.2% compared to the 2010/2011 harvest. Sugar production will reach 36.9 million tonnes, a 3,4% drop compared to the previous harvest. This production directly affects the lives of fuel consumers, once between 2006 and 2010 hydrous ethanol consumption at gas stations rose 144%, according to the National Agency of Petroleum, Natural Gas and Biofuels - (ANP), and the fall in supply can affect consumers' choice between gasoline or ethanol.

[2] Data obtained from FAO (http://faostat.fao.org/).



3

Brazilian Agricultural Trade Balance

3. Brazilian Agricultural Trade Balance

Considering European Union countries as a single market, in 2010 Brazil came third in the world ranking[3] of export markets for agricultural products. Almost 300 products[4] were sold to more than 200 countries in this period.

The table beside shows the country's position in the ranking of world production and exports. Brazil stands out as the largest producer of sugar, coffee and orange juice, and is the main exporter of these products, as well as of soybean grain and chicken meat. However, even being the leading global supplier of these products, the country still reserves, on average, 42.5% of its production to supply the domestic demand. In the case of chicken meat, only 25.5% of production is exported, whereas regarding orange juice, most of the production (84%) is allocated to foreign sales. Over the last decade, Brazil's agricultural exports set constant records for exported values. The exception occurred in 2009 when there was a 6% drop over the previous year, due to the international crisis. Nevertheless, there was an average growth of 17.2% per year in the period.

Table 3.1

Brazil's position in world production and exports of agricultural products

PRODUCTS	PRODUCTION	EXPORTS	% exported production
Sugar	1	1	66.6
Coffee	1	1	58.9
Orange juice	1	1	84.0
Soybean grains	2	1	52.7
Beef	2	2	14.9
Chicken meat	3	1	25.5
Soybean oil	4	2	23.5
Soybean meal	4	2	52.1
Corn	4	4	13.9
Pork	4	4	17.3

Source: USDA.
Prepared by: MAPA/SRI/DPI.

[3] Source: Trandemap / CCI. Data extracted on 02/02/2012. Subject to alteration. Excludes EU-27 intra-trade.
[4] Source: AgroStat (level 3).

In 2011 exports totaled US$ 81.4 billion in agricultural products (27.7% increase over 2010), while imports in the sector totaled US$ 11.6 billion (29.7% increase over 2010). As a result, Brazil's agricultural trade balance achieved a surplus of US$ 69.8 billion. The sector provided an important contribution to the positive outcome of the total trade balance, since other products accounted for a US$ 39.7 billion deficit in the same year.

Agriculture and livestock products accounted for 32% of the country's total exports in 2011, while their share in total imports was of 5% in the same period. As it can be observed in the chart below, over the analyzed period there were no significant changes in terms of participation of agricultural products in the Brazilian trade balance.

Graph 3.1

Brazilian Trade Balance - Historical Series (US$ billion)

Source: AgroStat Brasil based on data from SECEX/MDIC
Prepared by: MAPA/SRI/DPI.

4

Agricultural Foreign Trade - Main Products

4. Agricultural Foreign Trade - Main Products

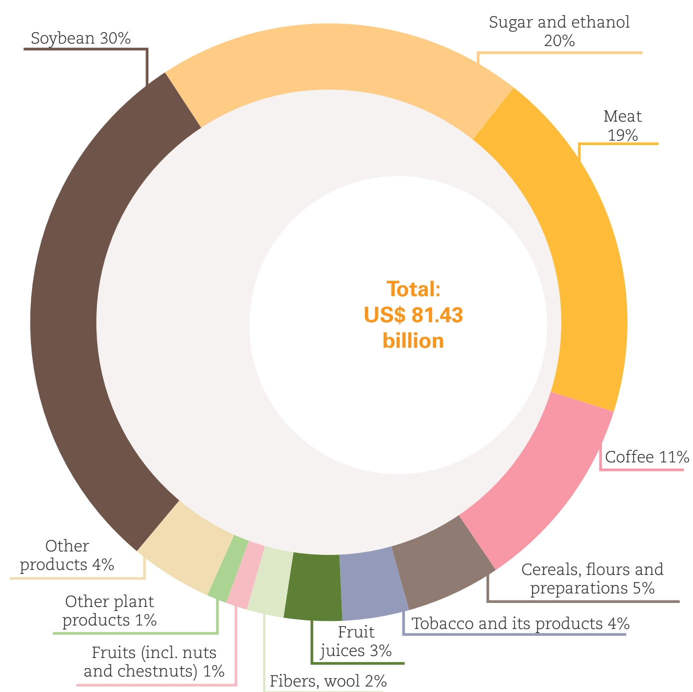
Exports of agricultural products reached a record figure of US$ 81.4 billion in 2011, mainly due to the high international prices of agricultural commodities registered that year. Agricultural exports more than doubled in the last five years, growing from US$ 36.9 billion in 2006 to the aforementioned US$ 81.4 billion. There was an increase of US$ 44.5 billion in exports of these products in the last five years, or an average annual growth of 17.1%. In 2011, exports increased above the average of the last five years, rising 27.7%.

During this period, soybean remained the leading sector in exports, reaching a 29.6% share in the total export portfolio. Soybean exports accounted for 25.2% of total exports in 2006, with US$ 9.3 billion, and amounted to US$ 24.1 billion in 2011. Sugar and ethanol ranked second with 19.9%. Therefore, the top two sectors alone accounted for almost 50% of total agricultural exports in 2011. Adding meat and coffee to these two sectors, it totals 79.4% of Brazilian agricultural exports, which shows the high dregree of concentration of the export portfolio on a small number of products. In 2006, the four main agricultural export sectors were also the same: soybean, meat, sugar and ethanol and coffee which were responsible for 78.7% of total exports.

Other sectors with a participation of more than one percent in the export portfolio in 2011 were: cereals, flour and preparations (5.1%), tobacco and its products (3.6%), fruit juices (3.2%), fibers, wool (2.0%) and fruit (1.2%).

Graph 4.1

Brazilian agricultural exports - main products share - 2011 (%)



Source: AgroStat Brasil based on data from SECEX/MDIC
Prepared by: MAPA/SRI/DPI.

Table 4.1
Main Brazilian Agricultural Products Exports

	2010			2011			RELATIVE VARIATION %		
	VALUE	QUANT.	AVE. PRICE	VALUE	QUANT.	AVE. PRICE	2010/2011		
	US$	t	US$/t	US$	t	US$/t	VALUE	QUANT.	AVE. PRICE
TOTAL	**63,750,590,723**	-	-	**81,425,456,888**	-	-	**27.73**	-	-
Soybean	**17,107,048,096**	**44,296,851**	**386**	**24,139,420,261**	**49,069,750**	**492**	**41.11**	**10.77**	**27.38**
Grain	11,035,209,981	29,064,451	380	16,312,232,213	32,973,107	495	47.82	13.45	30.30
Meal	4,719,409,068	13,668,639	345	5,697,918,293	14,355,230	397	20.73	5.02	14.96
Oil	1,352,429,047	1,563,761	865	2,129,269,755	1,741,413	1,223	57.44	11.36	41.38
Sugar and Ethanol	**13,775,943,538**	**29,524,157**	**467**	**16,179,892,001**	**26,704,765**	**606**	**17.45**	**-9.55**	**29.85**
Sugar	**12,761,682,665**	**27,999,821**	**456**	**14,940,115,258**	**25,356,973**	**589**	**17.07**	**-9.44**	**29.27**
Raw	9,306,850,558	20,938,703	444	11,548,785,770	20,152,913	573	24.09	-3.75	28.93
Refined	3,454,832,107	7,061,119	489	3,391,329,488	5,204,060	652	-1.84	-26.30	33.19
Ethanol	**1,014,260,873**	**1,524,336**	**665**	**1,239,776,743**	**1,347,792**	**920**	**22.23**	**-11.58**	**38.25**
Meat	**13,629,852,660**	**5,910,873**	**2,306**	**15,638,833,630**	**5,816,570**	**2,689**	**14.74**	**-1.60**	**16.60**
Beef	**4,795,356,990**	**1,230,571**	**3,897**	**5,348,770,021**	**1,095,669**	**4,882**	**11.54**	**-10.96**	**25.27**
Fresh	3,861,061,382	951,255	4,059	4,169,285,494	820,239	5,083	7.98	-13.77	25.23
Processed	498,224,182	124,403	4,005	615,338,344	102,728	5,990	23.51	-17.42	49.57
Offal	436,071,426	154,913	2,815	564,146,183	172,702	3,267	29.37	11.48	16.04
Chicken	**6,254,377,196**	**3,629,601**	**1,723**	**7,496,903,142**	**3,707,492**	**2,022**	**19.87**	**2.15**	**17.35**
Fresh	5,789,272,946	3,460,760	1,673	7,063,213,913	3,569,903	1,979	22.01	3.15	18.28
Processed	465,104,250	168,842	2,755	433,689,229	137,589	3,152	-6.75	-18.51	14.43
Turkey	**424,498,283**	**157,820**	**2,690**	**444,628,200**	**141,173**	**3,150**	**4.74**	**-10.55**	**17.09**
Fresh	155,252,147	78,062	1,989	172,690,188	72,661	2,377	11.23	-6.92	19.50
Processed	269,246,136	79,758	3,376	271,938,012	68,512	3,969	1.00	-14.10	17.58
Pork	**1,339,622,156**	**539,584**	**2,483**	**1,433,043,048**	**515,833**	**2,778**	**6.97**	**-4.40**	**11.90**
Fresh	1,226,581,317	463,700	2,645	1,286,258,758	436,128	2,949	4.87	-5.95	11.49
Processed	31,418,738	11,667	2,693	41,012,702	12,541	3,270	30.54	7.49	21.44
Offal	81,622,101	64,217	1,271	105,771,588	67,165	1,575	29.59	4.59	23.90

Continues

Continued

	2010			2011			RELATIVE VARIATION %		
	VALUE	QUANT.	AVE. PRICE	VALUE	QUANT.	AVE. PRICE	2010/2011		
	US$	t	US$/t	US$	t	US$/t	VALUE	QUANT.	AVE. PRICE
Coffee	**5,764,620,108**	**1,877,443**	**3,070**	**8,732,836,900**	**1,879,844**	**4,646**	**51.49**	**0.13**	**51.30**
Grains (green and toasted)	5,204,093,078	1,795,334	2,899	8,026,395,497	1,794,803	4,472	54.23	-0.03	54.28
Soluble	535,038,237	77,156	6,934	674,476,876	80,076	8,423	26.06	3.78	21.46
Tobacco and its products	**2,762,245,963**	**505,620**	**5,463**	**2,935,186,975**	**545,603**	**5,380**	**6.26**	**7.91**	**-1.53**
Corn	**2,136,821,755**	**10,792,581**	**198**	**2,624,526,081**	**9,459,471**	**277**	**22.82**	**-12.35**	**40.13**
Orange juices	**1,774,758,880**	**1,977,645**	**897**	**2,376,170,174**	**2,006,504**	**1,184**	**33.89**	**1.46**	**31.96**
Cotton	**821,633,035**	**512,510**	**1,603**	**1,590,951,264**	**758,668**	**2,097**	**93.63**	**48.03**	**30.81**
Fruits (includes nuts e chestnuts)	**906,137,855**	**839,518**	**1,079**	**940,451,261**	**748,988**	**1,256**	**3.79**	**-10.78**	**16.33**
Fresh fruit	**610,712,226**	**760,658**	**803**	**634,514,756**	**682,040**	**930**	**3.90**	**-10.34**	**15.87**
Mango	119,929,762	124,694	962	140,910,324	126,431	1,115	17.49	1.39	15.88
Mellon	121,969,814	177,829	686	128,353,767	169,576	757	5.23	-4.64	10.36
Grapes	136,648,806	60,805	2,247	135,782,857	59,391	2,286	-0.63	-2.32	1.73
Cashew nuts	229,571,712	42,175	5,443	226,657,809	26,302	8,618	-1.27	-37.64	58.32
Sub-total	**58,679,061,890**	-	-	**75,158,268,547**	-	-	**28.08**	-	-
Other products	**5,071,528,833**	-	-	**6,267,188,341**	-	-	**23.58**	-	-

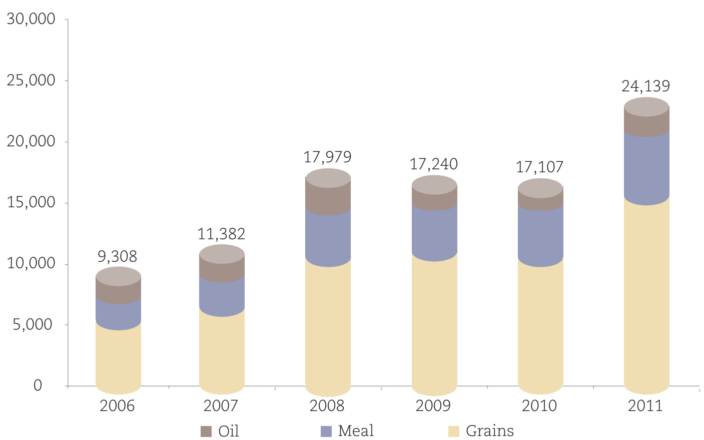
Source: AgroStat Brasil based on data from SECEX/MDIC
Prepared by: MAPA/SRI/DPI.

Soybean

Soybean is the main sector in Brazil's agricultural exports, as mentioned above. The sector's exports increased from US$ 9.3 billion in 2006 to US$ 24.1 billion in 2011, with an average annual growth of 21.0% in value over the past five years. The amount exported, however, was not the main factor that contributed to the increase in foreign sales in the period, with an average increase of 4.3% between 2006 and 2011 (from 39.7 million tonnes to 49.0 million tonnes). Export prices provided the largest contribution to the expansion of the sector's sales, with average annual increase of 16.0% for the three products that comprise the sector (grains, meal and oil). The average price of soybean grains, for example, increased from US$ 226 per tonne in 2006 to US$ 494 per tonne in 2011, a 118% increase in five years.

Graph 4.2 (a)

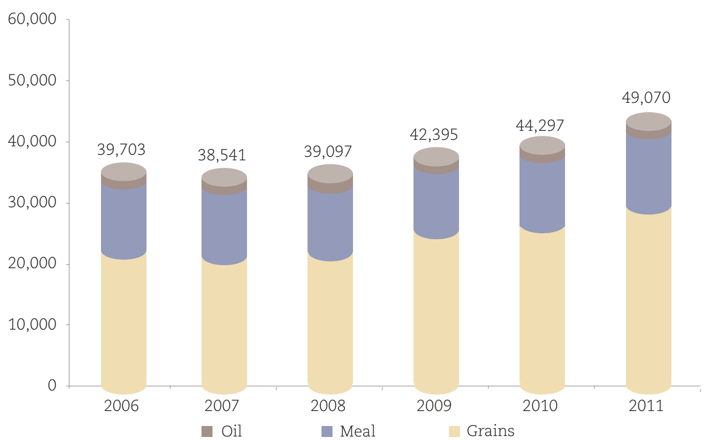
Soybean exports 2006-2011
Subsectors (US$ millions)



Source: AgroStat Brasil based on data from SECEX/MDIC
Prepared by: MAPA/SRI/DPI.

Graph 4.2 (b)

Soybean exports: 2006-2011
Subsectors (thousand tonnes)



Source: AgroStat Brasil based on data from SECEX/MDIC
Prepared by: MAPA/SRI/DPI.

Soybean grains participated with 60.8% of the sector's value of exports in 2006, increasing to 67.6% in 2011. This increase occurred at the expense mostly of the participation of soybean oil, whose participation in the sector dropped from 13.2% to 8.8%.

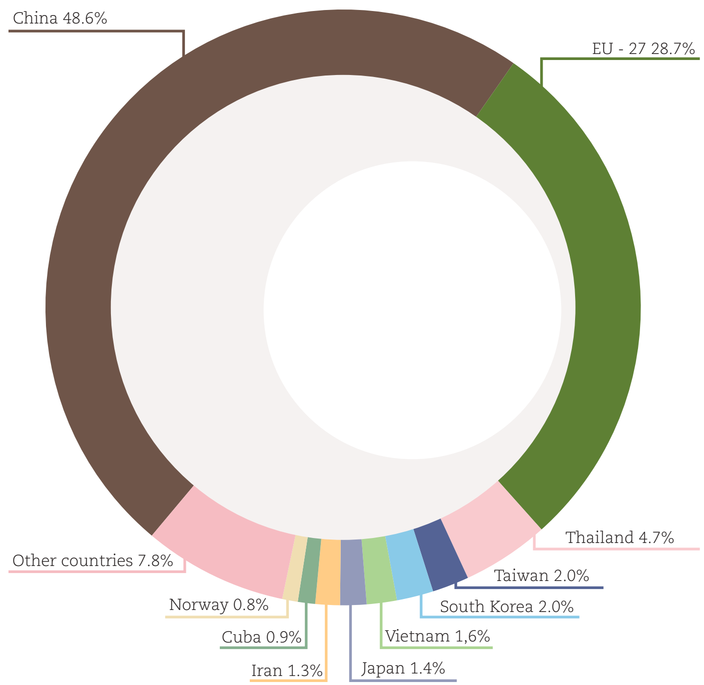
China was the main destination market for Brazilian soybean products, accounting for almost half of what was sold abroad. Sales to that country grew sharply, reaching 22.8 million tonnes in 2011. It is important to mention that the 2012 forecast is that China will import 56 million tonnes of soybean grains, an amount that represents about 60% of total sales of soybean grains in the world. Hence, the strong Chinese participation in Brazilian soybean exports is in line with Chinese participation in the global market.

Other important markets for soybean products were: European Union (28.7%), Thailand (4.7%), Taiwan (2%), South Korea (2%) and Vietnam (1,6%).

Graph 4.2 (c)

Soybean exports

Main Destinations - 2011



Source: AgroStat Brasil based on data from SECEX/MDIC
Prepared by: MAPA/SRI/DPI.

Sugar and ethanol

Sugar and ethanol rank second among the leading agricultural export sectors, a position it has occupied since 2010, when it exceeded, in terms of value, meat exports. The sector's exports totaled US$ 16.2 billion in 2011, an increase of 17.5% over the previous year. Within the sugar and ethanol sector, sugar accounted for 92.3% of total exports, leaving the remaining 7.7% to ethanol.

The sector's positive performance was achieved due to the increase in prices that rose 29.9% on average. On the other hand, the quantities shipped by the sector dropped 9.5% in 2011. This performance accounted for 20% of the shipments of agricultural products and 6.3% of all Brazilian exports (US$ 256 billion).

Sugar

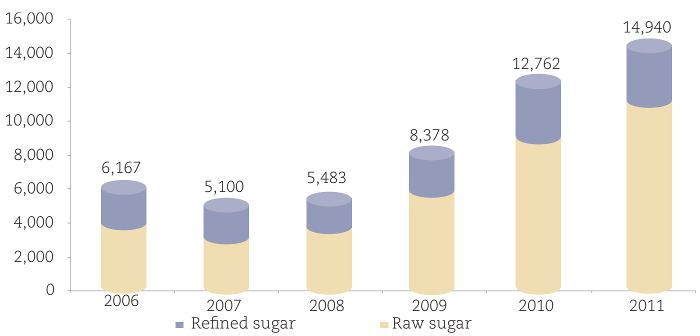
Brazilian sugar exports reached US$ 14.9 billion in 2011, a 17.1% increase compared with 2010. The average export price of the product increased 29.3%, while the volume shipped decreased 9.4%. Hence, there has been set an export value record in 2011, although the volume shipped, 25.4 million tonnes, has been lower than that of 28 million tonnes of 2010.

In 2011, sales of raw sugar accounted for 77% of the value of exports, while refined sugar participated with 23%. The participation of raw sugar in the portfolio has been concentrating in recent years. In 2008, the participation of raw sugar in total sugar exports was 64%, with refined sugar accounting for 36% of the total amount.

Graph 4.3 (a)

Sugar exports: 2006-2011

Subsectors (US$ millions)

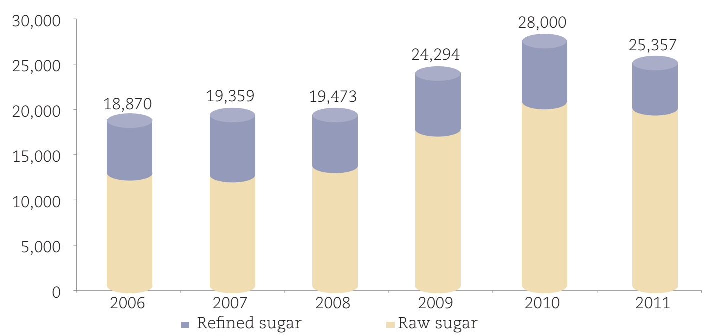


Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 4.3 (b)

Sugar exports: 2006-2011

Subsectors (thousand tonnes)

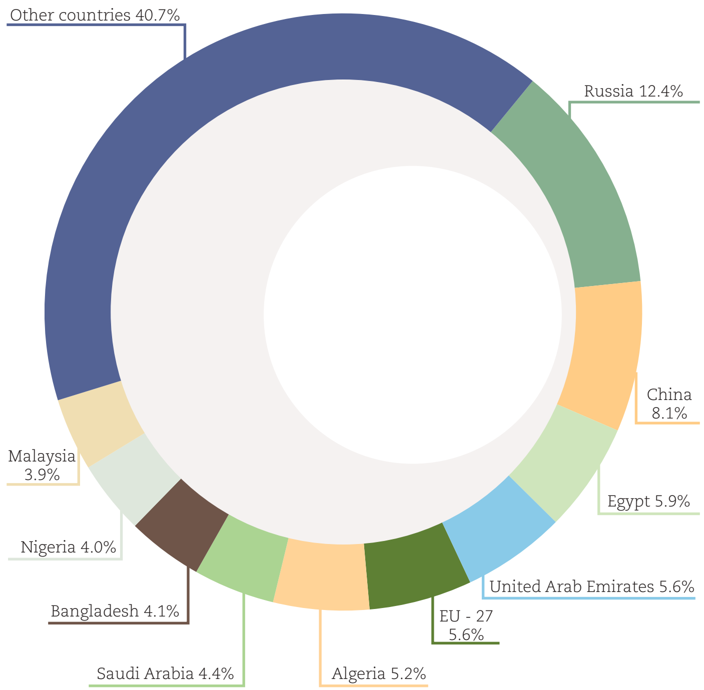


Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

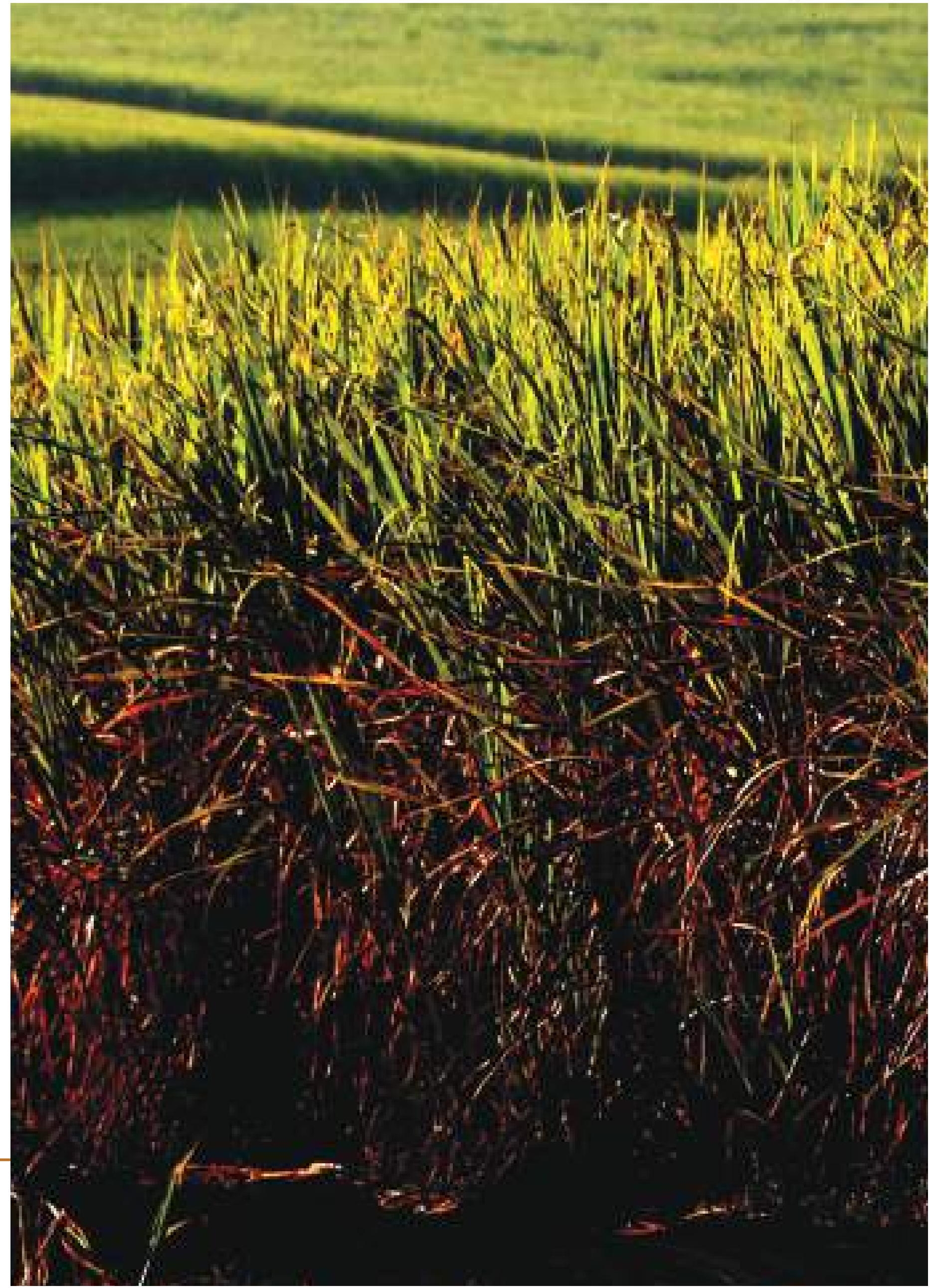
Foreign sales of sugar were diversified in 2011, with the five major partners accounting for 37% of total purchases of the product. The five main markets were: Russia (12.4%), China (8.1%), Egypt (5.9%), United Arab Emirates (5.6%) and European Union (5.6%). It should be noted that China participated with 0.9% of total sales of Brazilian sugar in 2006, increasing to the current 8.1% in five years.

Graph 4.3 (c)

Sugar exports - Main destinations - 2011



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prerpared by: MAPA/SRI/DPI.



Ethanol

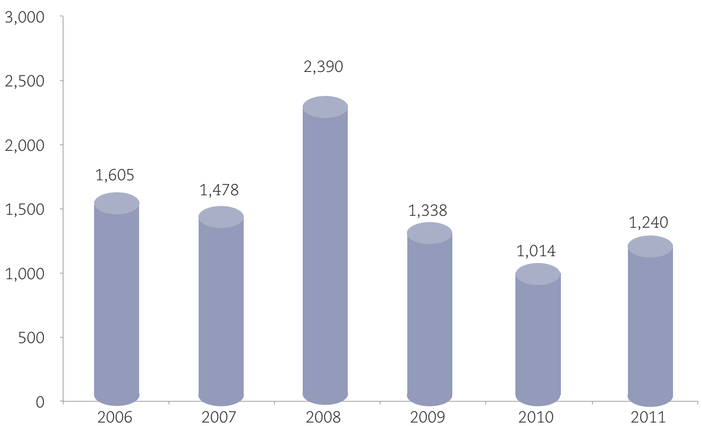
Ethanol exports reached US$ 1.2 billion in 2011, a figure 22.2% higher than the US$ 1.0 billion sold abroad in 2010. In 2011 the volume shipped was 1.7 billion liters (1.4 million tonnes), far below the record achieved in 2008, when exports reached 5.1 billion liters (4.1 million tonnes). During this period, there was an increase of the average price per tonne exported, from US$ 0.46 per liter in 2008 to US$ 0.74 per liter in 2011.

It should be noted that, besides the reduction in the amount exported, there was a significant increase in ethanol imports. In 2011, Brazil

Graph 4.3 (d)

Ethanol exports: 2006-2011

(US$ millions)

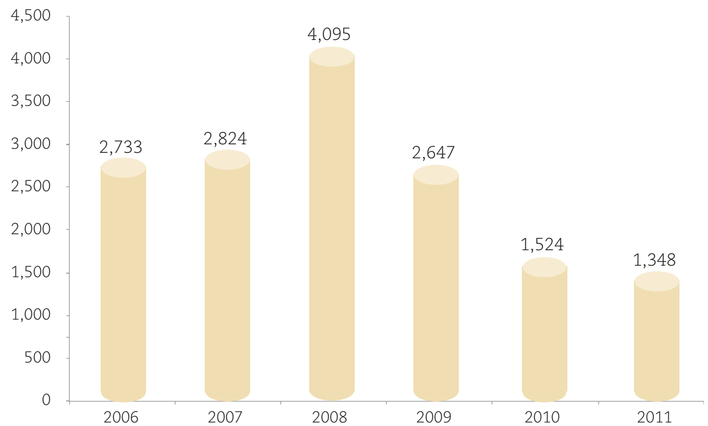


Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 4.3 (e)

Ethanol exports: 2006-2011

(thousand tonnes)



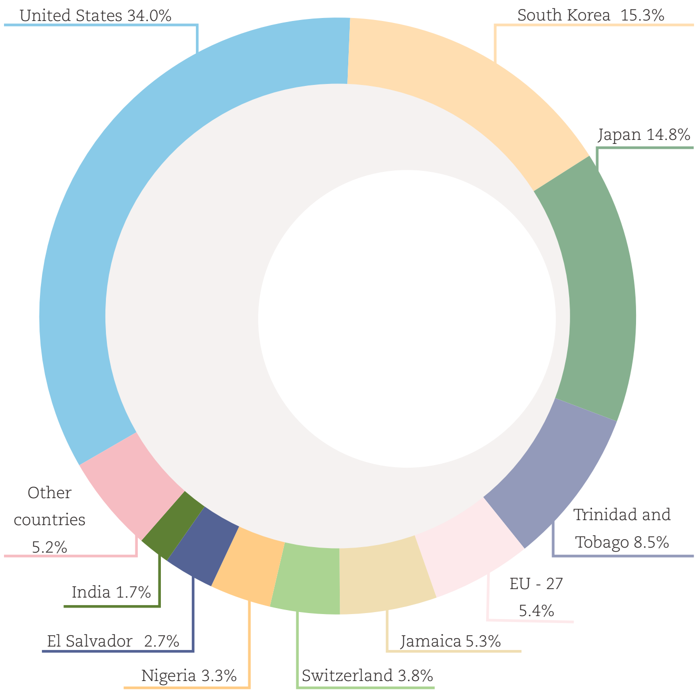
Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

purchased US$ 433.7 million in ethanol from abroad or the equivalent to 570.5 million liters. The main destination of Brazilian ethanol exports is the United States, which purchased 34% of total exports in 2011. Other importing countries, in order of importance, were: South Korea (15.3%), Japan (14.8%), Trinidad and Tobago (8.5%), European Union (5.4%), Jamaica (5.3%), Switzerland (3.8) and Nigeria (3.3).

Graph 4.3 (f)

Ethanol exports

Main destinations - 2011



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

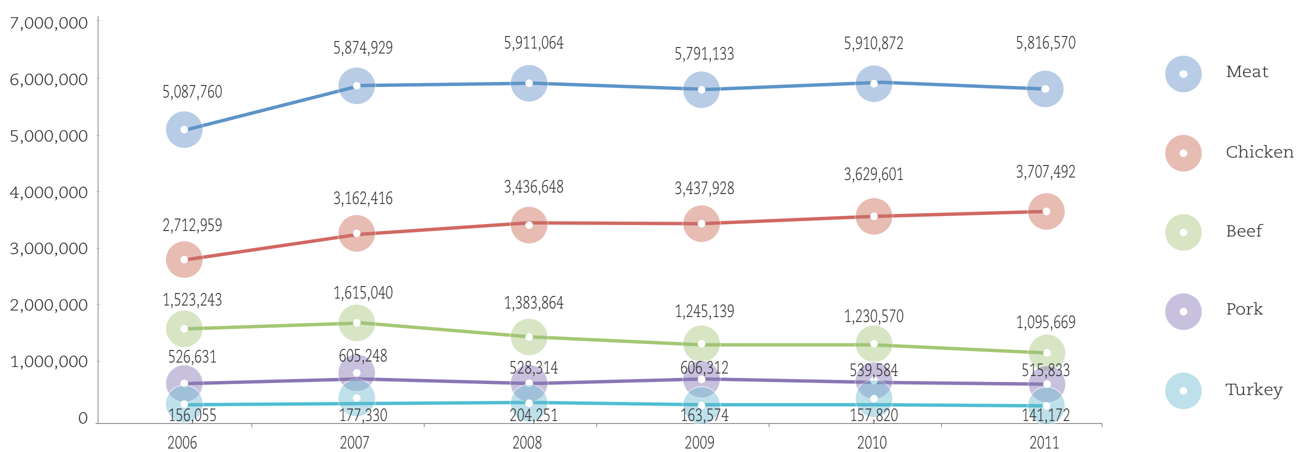
Meat

The exports in this sector totaled US$ 15.6 million in 2011, an increase of 14.7% in relation to 2010. There was a 1.6% decrease in the quantity shipped, while the average export price of meat had an average increase of 16.6%. Chicken meat contributed with 48% of the sector's total sales. Beef, in turn, accounted for 34.0%, while the remaining types of meat accounted for 18%.

Brazilian meat exports have stabilized at a level of about six million tonnes since 2007. This exported amount has remained at that level due to the persistent decline in the volume of shipped beef, which, in turn, is being offset by the increase in foreign sales of chicken meat.

Graph 4.4

Meat exports evolution: 2006-2011 (tonnes)



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

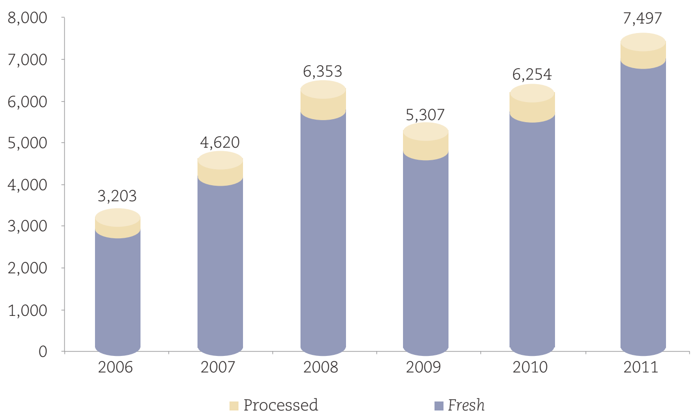
Chicken meat

Foreign sales of chicken meat increased 19.9% in 2011, reaching the record amount of US$ 7.5 billion. Among meat sector, it was the only product that had a positive variation in quantities shipped overseas (+2.1%) in 2011, which, added to the increase in prices (+17.3%), resulted in this positive variation of almost 20%.

Chicken meat exported quantity increased from 2.7 million tonnes in 2006 to 3.7 million in 2011. It means that in last five years there was an average annual increase of 6.5% . But the value of exports rose from US$ 3.2 billion in 2006 to the aforementioned US$ 7.5 billion in 2011, which represented an average increase of 18.5% a year. Therefore, exports international prices have greatly contributed to increase the value of exports, since they had an annual rise of 11.4% on average. The value of the exported chicken meat rose from US$ 1,180 a tonne in 2006 to US$ 2,022 a tonne in 2011.

Graph 4.5 (a)

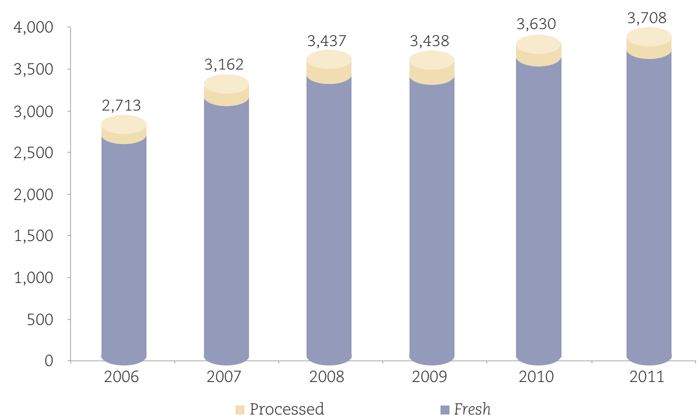
Chicken meat exports: 2006-2011
Subsectors (US$ millions)



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 4.5 (b)

Chicken meat exports: 2006-2011
Subsectors (thousand tonnes)



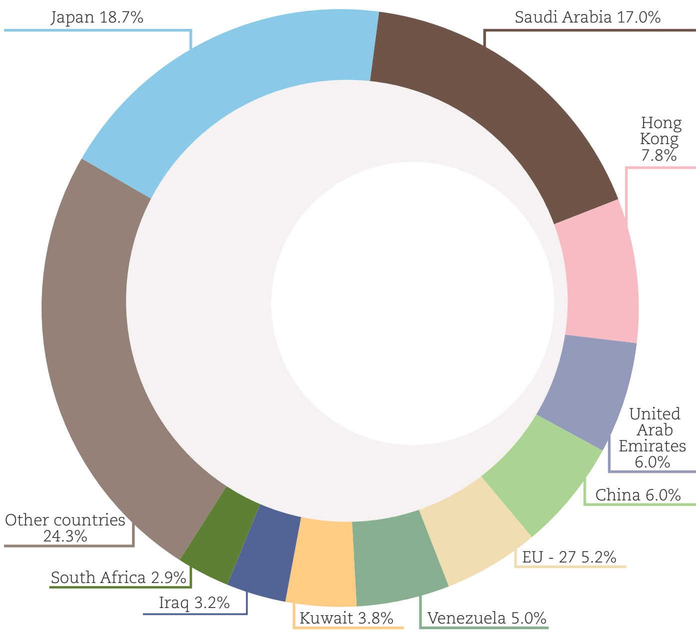
Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

The largest importer of Brazilian fresh chicken meat in value is still Japan, with a market share of 18.7%, having imported 443 thousand tonnes in 2011. However, attention should be drawn to China due to the increase in the amount imported, which rose from 27,5 thousand tonnes purchased in 2006 to 195,8 thousand tonnes in 2011. Besides the countries mentioned above, the following stand out: Hong Kong (7.6%), United Arab Emirates (6.0%), European Union (5.2%), Venezuela (5.0%) and Kuwait (3.8%).

Processed chicken meat exports represented 5.8% of total chicken exports in 2011. The main partners were: E.U. (83.2%), Saudi Arabia (2.9%), Chile (2.5%), Switzerland (1.7%) and Kuwait (1.4%).

Graph 4.5 (c)

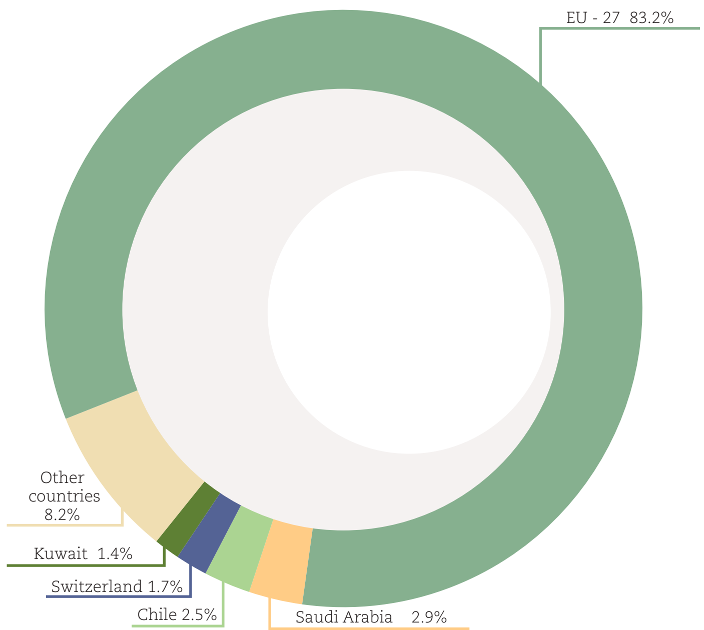
Fresh chicken meat exports
Main destinations - 2011



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 4.5 (d)

Processed chicken meat exports
Main destinations - 2011



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Beef

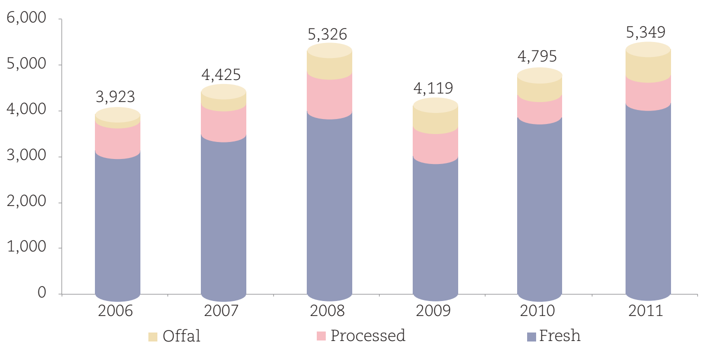
Brazilian beef production has been stagnated around 9.0 million tonnes (carcass weight equivalent - cwe)[5] for the last years. However domestic consumption increases, going from 7.14 million tonnes (cwe) in 2007 to 7.75 million tonnes (cwe) in 2010. Given the growing domestic demand, the exportable surplus has reduced from 1.8 million tonnes (cwe) in 2006 to 1.2 million tonnes (cwe) in 2011. Indeed, Brazil which was the leading beef exporter, got outscored by Australia as the lead exporter of fresh beef.

Despite the 33.3% drop in the exported quantity of fresh beef and nearly 50% of processed beef in the last five years, the value of these products exports reached a record of US$ 4.88 billion in 2011. This value was achieved due to the increase in fresh beef average export price, which rose from US$ 1,740 per tonne (cwe) in 2006 to US$ 3,457 per tonne (cwe) in 2011, almost 100% rise in the average export price.

Graph 4.6 (a)

Beef exports: 2006-2011

Subsectors (US$ millions)

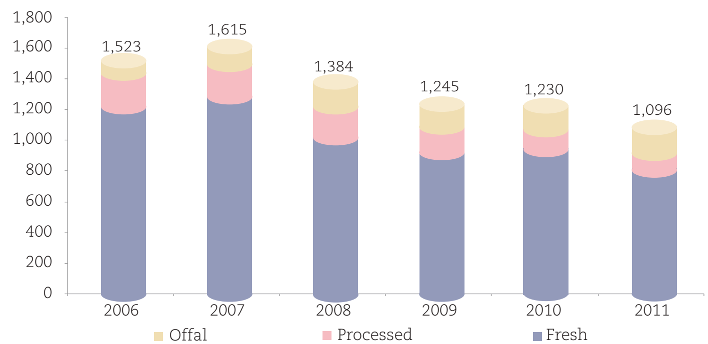


Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 4.6 (b)

Beef exports: 2006-2011

Subsectors (thousand tonnes)



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

[5] According to the US Department of Agriculture: Foreign Agricultural Service – USDA – Livestock and Poultry: World Markets and Trade. (October 2010)

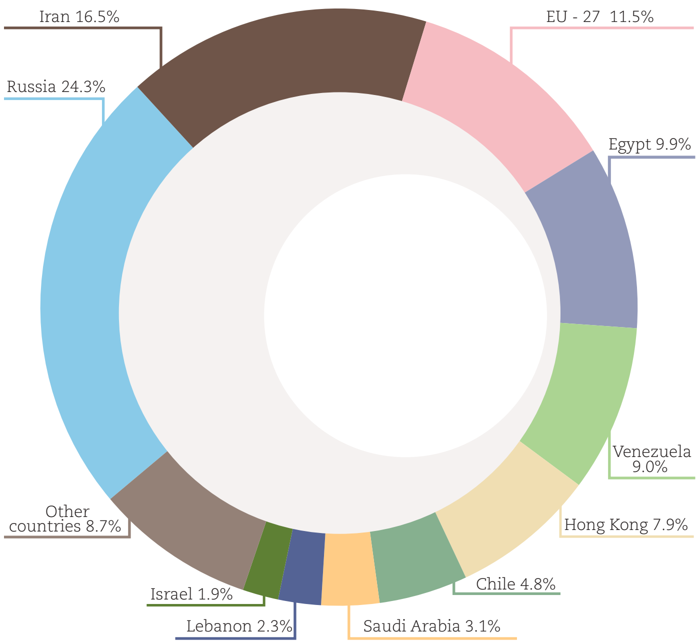
Russia remains the main destination market for Brazilian fresh beef exports with a participation of 24.3% in total exports, despite the embargo promoted in 2011. The amount of fresh beef exports to Russia fell about 50% between 2007 and 2011, from 658 thousand tonnes (cwe) to 336 thousand tonnes (cwe). In contrast, countries such as Iran, Venezuela and Hong Kong substantially increased the amounts purchased in the last five years.

Regarding processed beef, there is a large concentration in the consumer markets of the Brazilian product. The European Union purchased half the value exported by Brazil and the United States other 26.4%. These two markets accounted for 76.4% of Brazilian exports. Other purchasing markets were: Egypt (3.0%), Japan (2.5%), Jamaica (2.5%), Canada (1.4%), Chile (1.3%) and Jordan (1.2%).

Graph 4.6 (c)

Fresh beef exports

Main destinations - 2011

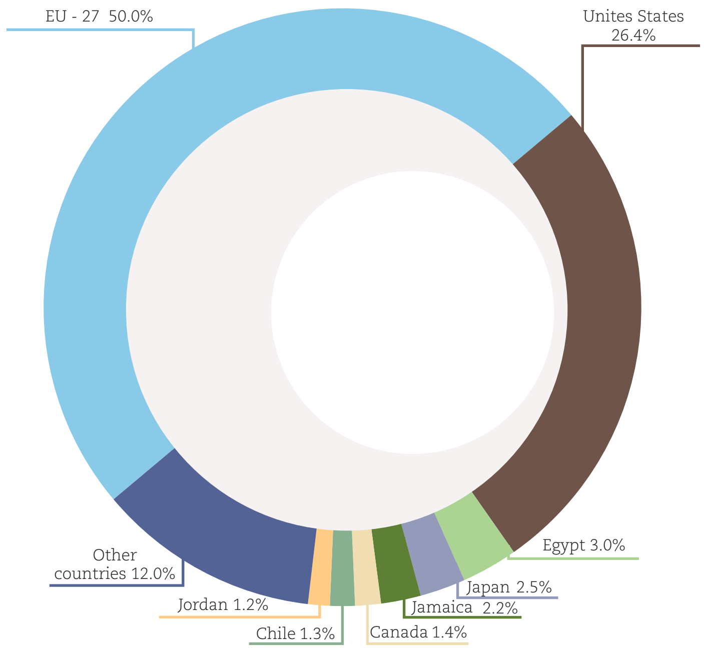


Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 4.6 (d)

Processed beef exports

Main destinations - 2011



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Pork

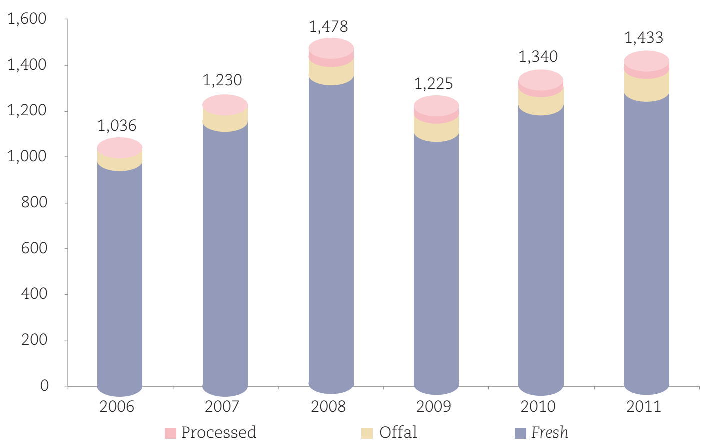
Brazilian pork exports in 2011 totaled US$ 1.43 billion, close to the historical record achieved in 2009 (US$ 1.48 billion). However, the exported amount of 516 thousand tonnes was below the ones registered in 2007 and 2009, respectively 605 and 606 thousand tonnes. The amount shipped in 2011 was the lowest since 2006, due mainly to the embargo imposed by Russia, the largest Brazilian pork importer. Exports to Russia decreased from 278,7 thousand tonnes in 2007 to 126,5 thousand tonnes in 2011, a 152,2 thousand tones reduction. That is, excluding Russia as a brazilian pork importer, we should have an increase in the amount exported to other countries.

Similarly to other types of meat, there was an increase in the product international prices, rising from US$ 1,967 per tonne in 2006 to US$ 2,778 per tonne in 2011, a 41% expansion over the past five years. The exported value, therefore, remained around US$ 1.4 billion, despite the reduction in the quantity.

Graph 4.7 (a)

Pork exports: 2006-2011

Subsectors (US$ millions)

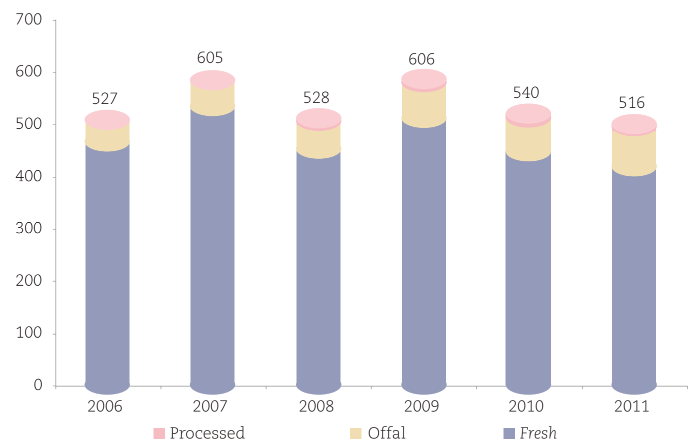


Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 4.7 (b)

Pork exports: 2006-2011

Subsectors (thousand tonnes)



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

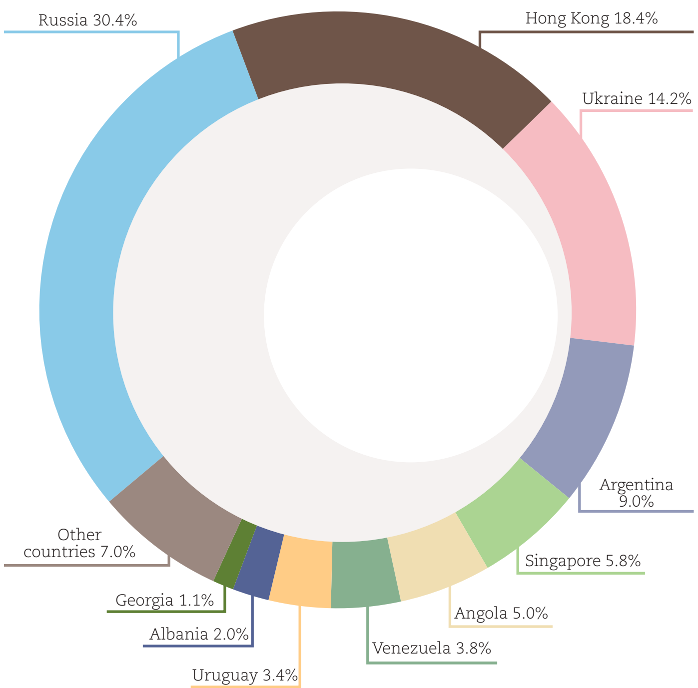
As already mentioned, Russia still ranks first with 30.4% of total exports, followed by Hong Kong (18.4%), Ukraine (14.2%) and Argentina (9.0%). These four markets alone accounted for 72% of total sales. Other markets with a share of more than 1% were Singapore (5.8%), Angola (5.0%), Venezuela (3.8%), Uruguay (3.4%), Albania (2.0%), and Georgia (1.1%).

The processed pork exports reached US$ 41 million, or 2.8% of total pork exports. These sales are concentrated in two markets: Hong Kong, with 46.1% of exports, and Argentina, with 23.4%. In addition to the mentioned markets, there were sales to Angola (9.2%), Uruguay (6.1%), Japan (5.3%), Paraguay (5.2%), Panama (2.2%) and South Africa (1.4%).

Graph 4.7 (c)

Fresh pork exports

Main destinations - 2011

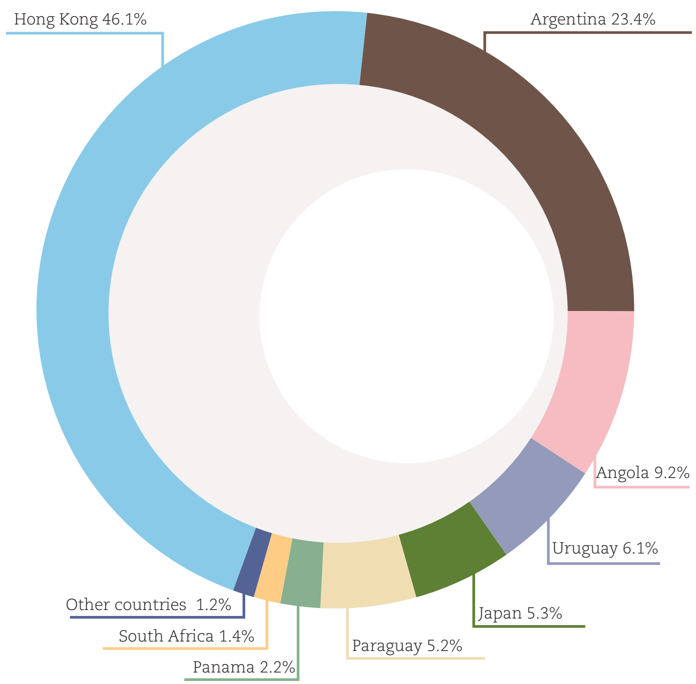


Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 4.7 (d)

Processed pork exports

Main destinations - 2011



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Turkey Meat

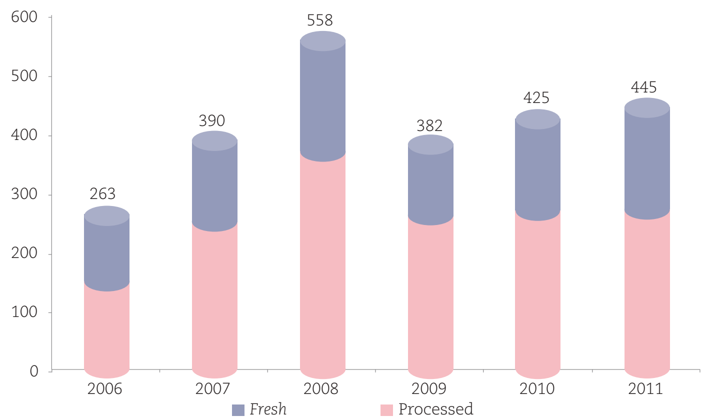
Turkey meat exports totaled US$ 445 million in 2011, an increase of 4.7% in relation to 2010. Quantity exported, however, decreased 10.8% in 2011. In fact, the increase in the exported value was only achieved due to the 17.1% increase in average export prices.

Turkey meat sales, similarly to beef and pork, also have fallen in recent years. The record quantity sold abroad was set in 2008, when shipments volume reached 204 thousand tonnes, 42.6% above the amount exported in 2011. The increase in export prices made it possible to maintain the value of exports at a high level. Between 2006 and 2011, prices of turkey meat increased by 87%.

Graph 4.8 (a)

Turkey meat exports: 2006-2011

Subsectors (US$ millions)

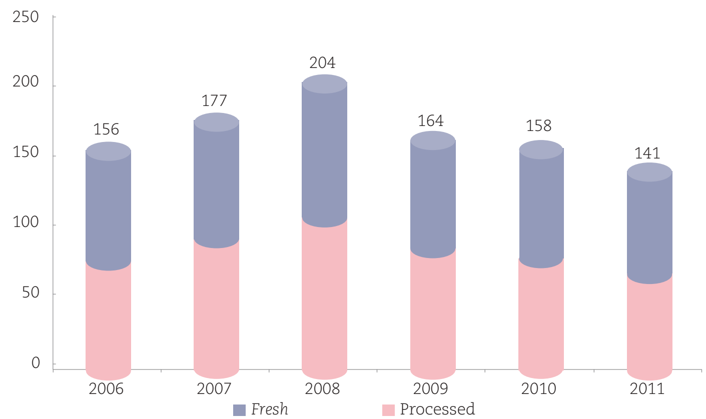


Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Gráfico 4.8 (b)

Turkey meat exports: 2006-2011

Subsectors (thousand tonnes)



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

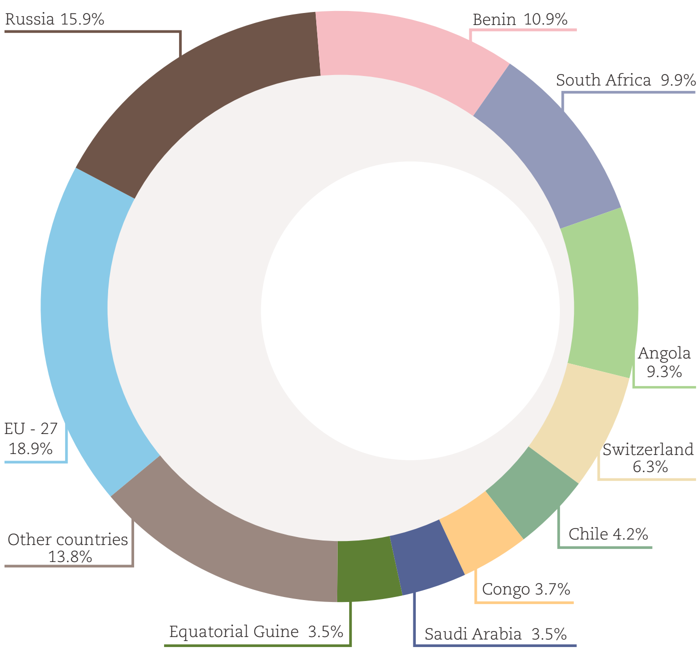
Fresh turkey meat and fresh chicken meat have one of the most diversified destination market. The European Union was the greatest fresh turkey buyer from Brazil, accounting for 18.9% of total exports. Russia ranked second with 15.9%. Other markets that purchased Brazilian turkey meat in 2011 were: Benin (10.9%), South Africa (9.9%), Angola (9.3%), Switzerland (6.3%), Chile (4.2%), Congo (3.7%), Saudi Arabia (3.5%) and Equatorial Guinea (3.5%).

As for exports of processed turkey meat, European Union is almost the only buyer, with 97.7%.

Graph 4.8 (c)

Fresh turkey meat exports

Main destinations - 2011

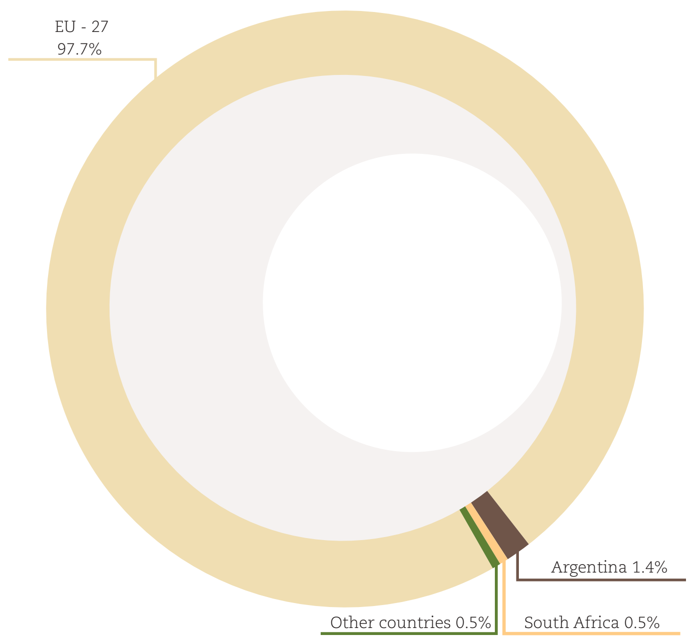


Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 4.8 (d)

Processed turkey meat

Main destinations - 2011



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Coffee

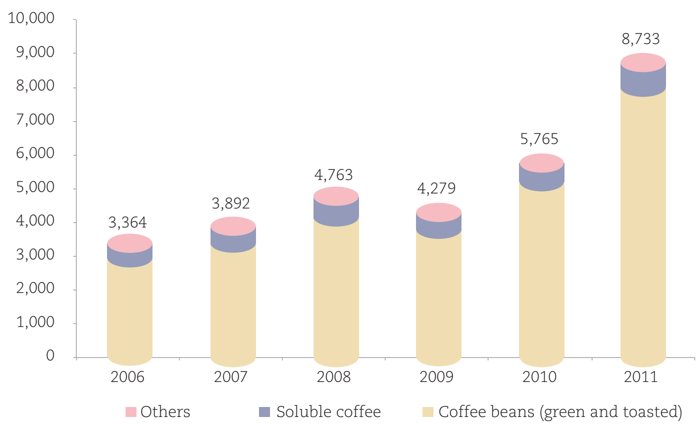
Brazilian coffee consumption rose from 980 thousand tonnes (16.3 million 60 kilogram bags) in 2006 to 1.15 million tonnes in 2010 (19.1 million bags)[6], an increase of 17.1% in the last five years. At the same time, coffee beans exports went from 1.6 million tonnes (24.6 million bags) to 1.9 million tonnes (29.9 million bags), + 21.5%. Production attended to the increased domestic and international demand, rising from 39.3 million bags in the 2004/2005 harvest to 48.1 million bags in the 2010/2011 harvest (+22.4%).

Between 2006 and 2011, the average international price of Brazilian coffee beans increased from US$ 119 per bag to US$ 268 per bag. Coffee international prices had a 124% rise in the last five years. Therefore, the increase in exported quantities and in international prices made the value of exports reach a US$ 8.7 billion record in 2011, a almost US$ 3.0 billion rise in foreign sales only last year or a 51.5% increase.

Graph 4.9 (a)

Coffee exports: 2006-2011

Subsectors (US$ millions)

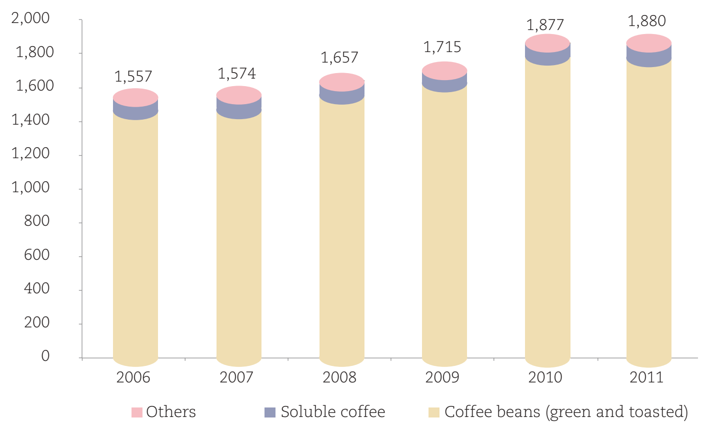


Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 4.9 (b)

Coffee exports: 2006-2011

Subsectors (thousand tonnes)



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

[6] Data from the International Coffee Organization.

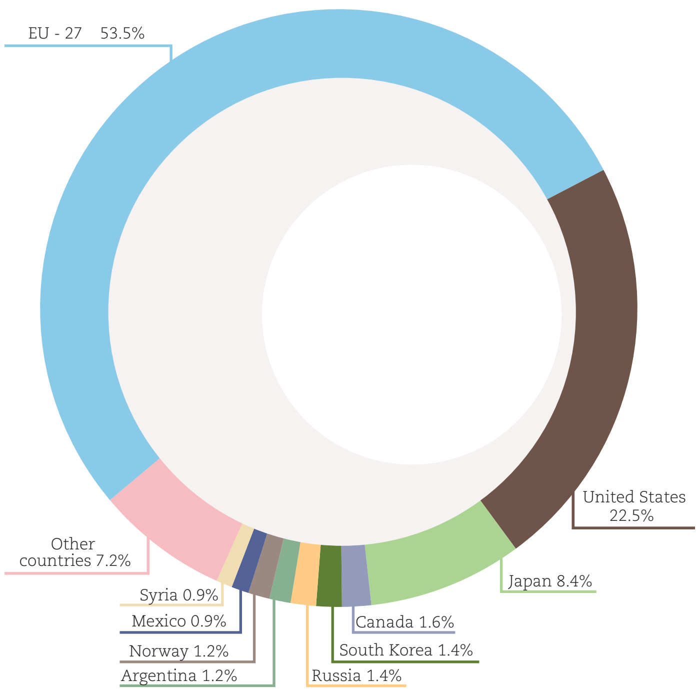
Coffee exports are concentrated in three major markets: European Union (53.5%), United States (22.5%) and Japan (8.4%). Consumption in these three markets accounted for 84.4% of the total coffee beans value exported by Brazil.

Soluble coffee sales are otherwise, more diversified. The main consumer market is the European Union, with 16.9%. Other relevant markets were: United States (14.6%), Russia (11.1%), Ukraine (7.6%), Japan (5.9%), Argentina (5.4%) and South Korea (4.0%).

Graph 4.9 (c)

Coffee beans exports (green and toasted)

Main destinations - 2011

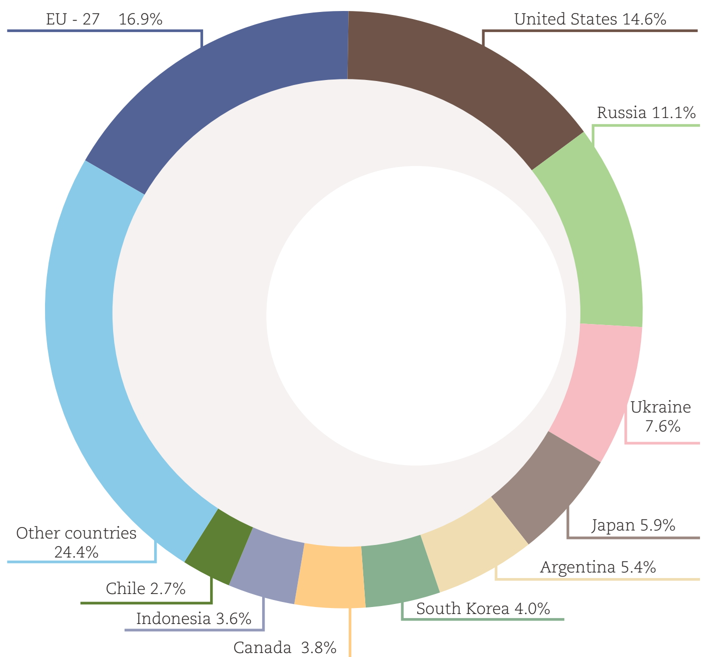


Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 4.9 (d)

Soluble coffee exports

Main destinations - 2011



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

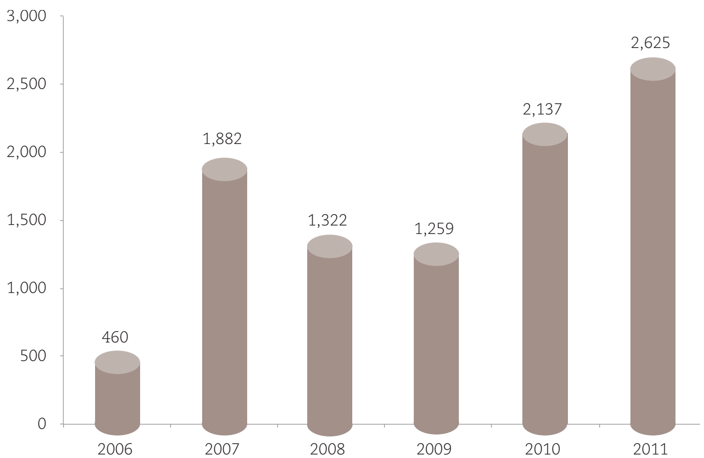
Corn

Brazilian corn production went from 42.5 million tonnes in the 2005/2006 harvest to 57.5 million tonnes in the 2010/2011 harvest, a 35.3% increase over the past five years. Unlike soybean, most of this production remains in the domestic market. The 3.9 million tonnes exports in 2006 represented 9.2% of the total production that year, while the 9.5 million tonnes shipped abroad in 2011 accounted for 16.5% of the total produced.

The expansion of the quantity shipped in the last five years was one of the factors that allowed for the exports record in 2011. Corn exports went from US$ 460 million in 2006 to US$ 2.6 billion in 2011 (+470%). Another reason that led to set the exports record was the rise in corn international prices. Between 2006 and 2011, international prices went from US$ 117 per tonne to US$ 277 per tonne (+136%).

Graph 4.10 (a)

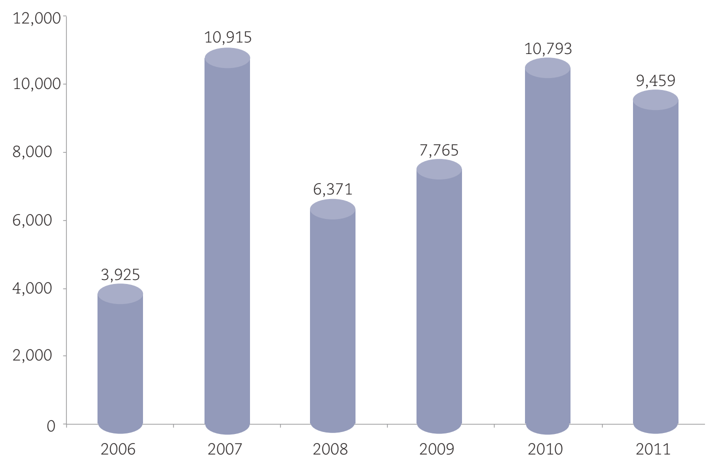
Corn Exports: 2006-2011
(US$ millions)



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 4.10 (b)

Corn Exports: 2006-2011
(thousand tonnes)



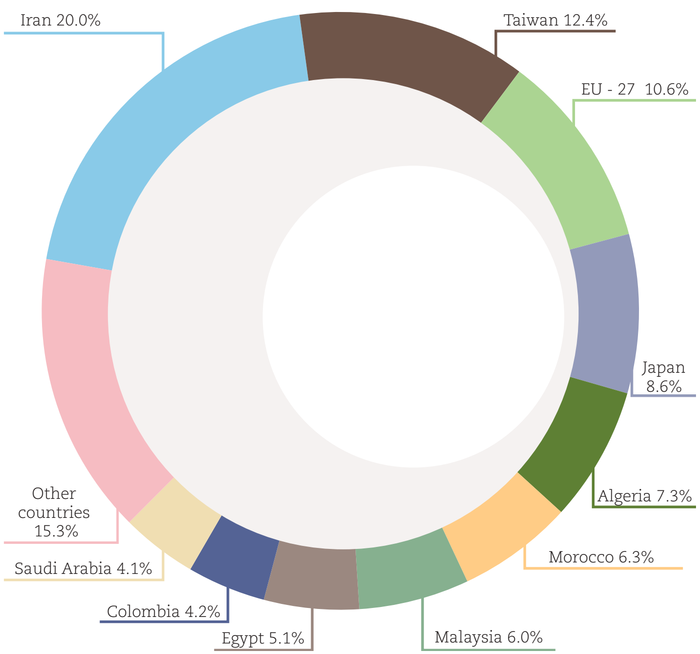
Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

The main Brazilian corn importer was Iran, which purchased 20% of all exports. Other importing markets were Taiwan (12.4%), European Union (10.6%), Japan (8.6%), Algeria (7.3%), Morocco (6.3%), Malaysia (6.0%), Egypt (5.1%) and Colombia (4.2%).

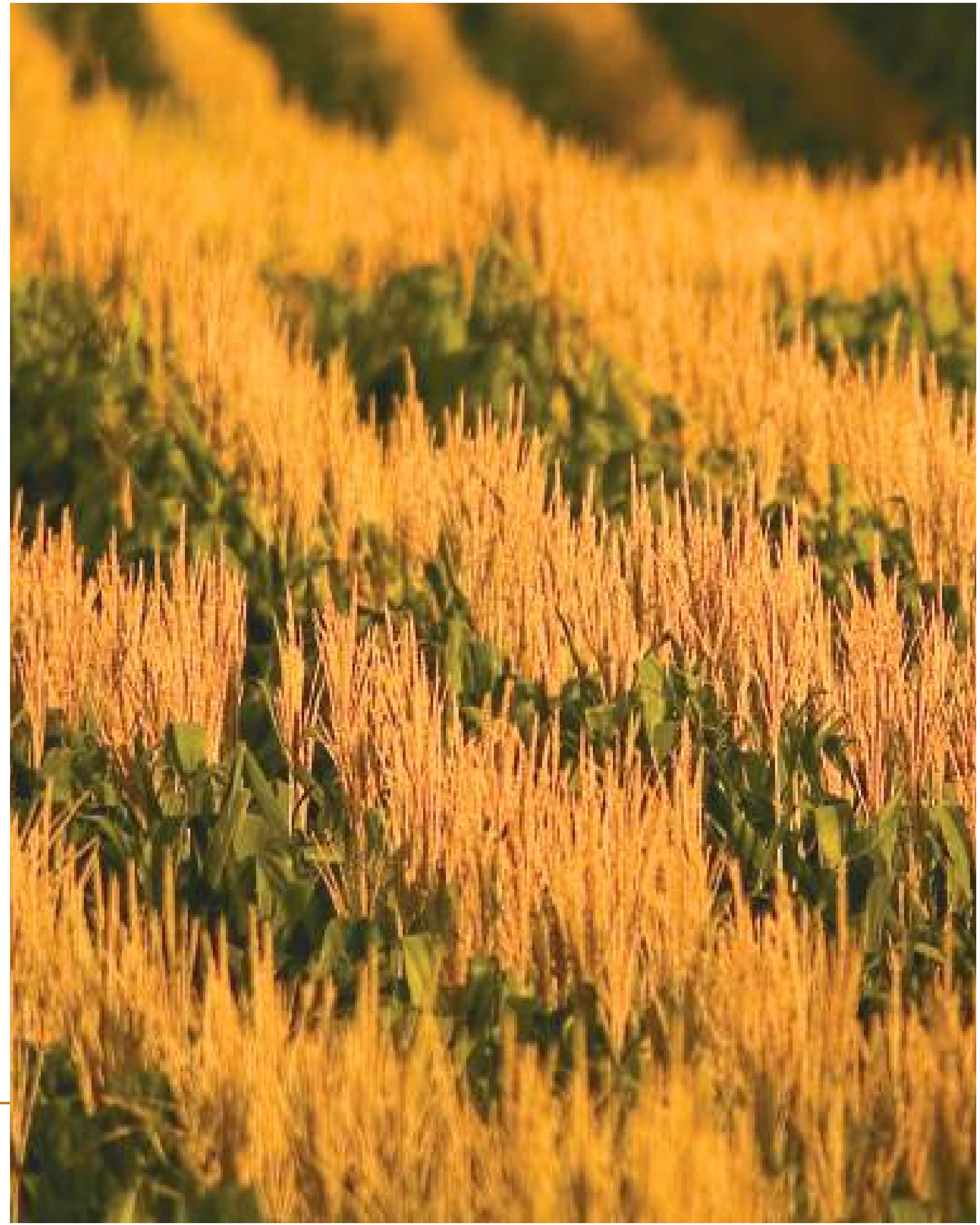
Graph 4.10 (c)

Corn Exports

Main Destinations - 2011



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.



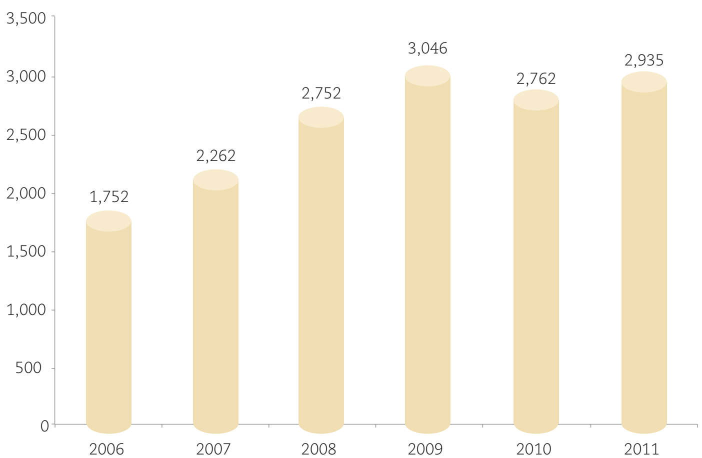
Tobacco and its products

Brazil exported US$ 2.9 billion in tobacco in 2011, of which 98% represented non-manufactured tobacco. In other words, Brazil is barely able to participate in exports of manufactured tobacco (this includes cigarettes, cigars, cigarillos and manufactured tobacco products), which totaled approximately US$ 14.1 billion in 2010. Brazil had a market share of 26.4% of non-manufactured tobacco global trade, which reached US$ 10.9 billion in 2010.

The exported amount of non-manufactured tobacco ranged from a maximum of 710 thousand tonnes in 2007 to 546 thousand in 2011, 2010 being the year with the lowest amount exported by Brazil in recent years, with 506 thousand tonnes. Export prices, like other commodities, rose from US$ 2,993 per tonne to US$ 5,395 per tonne in the last five years (+80.3%).

Graph 4.11 (a)

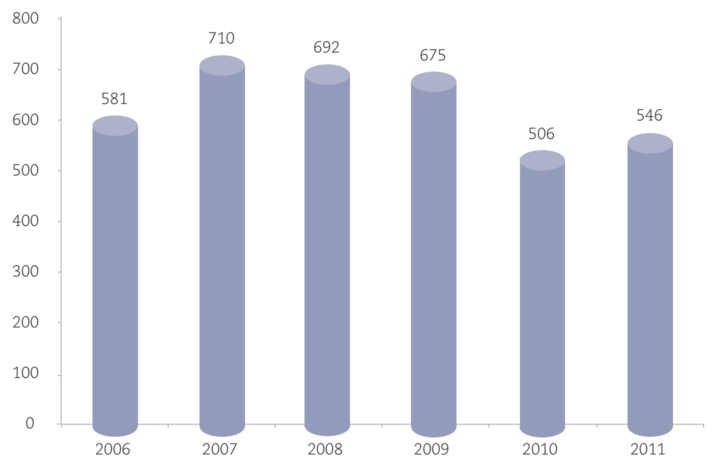
Exports of Tobacco and its Products: 2006-2011
(US$ millions)



Source: AgroStat Brasil basend on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 4.11 (b)

Exports of Tobacco and its Products: 2006-2011
(thousand tonnes)



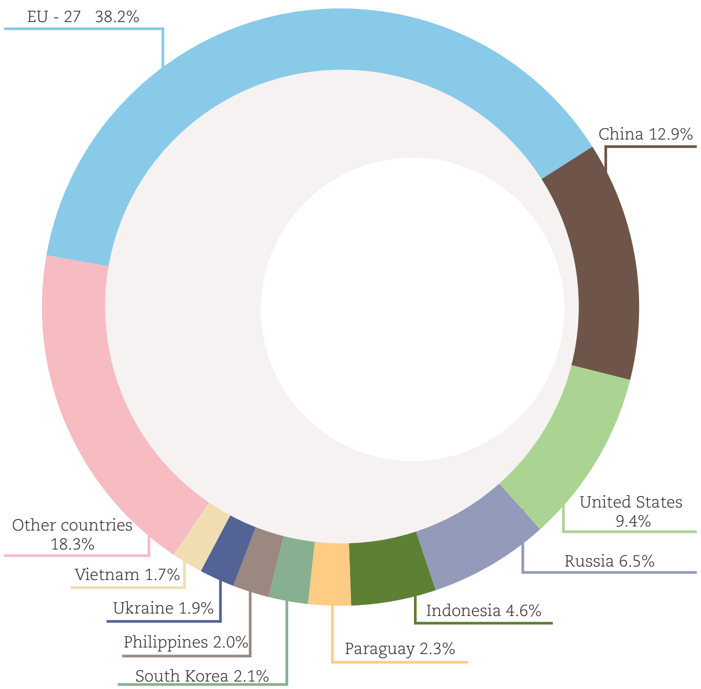
Source: AgroStat Brasil basend on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Brazilian tobacco exports were directed to the following markets: European Union (38.2%), China (12.9%), United States (9.4%), Russia (6.5%), Indonesia (4, 6%), Paraguay (2.3%), South Korea (2.1%) and Philippines (2.0%).

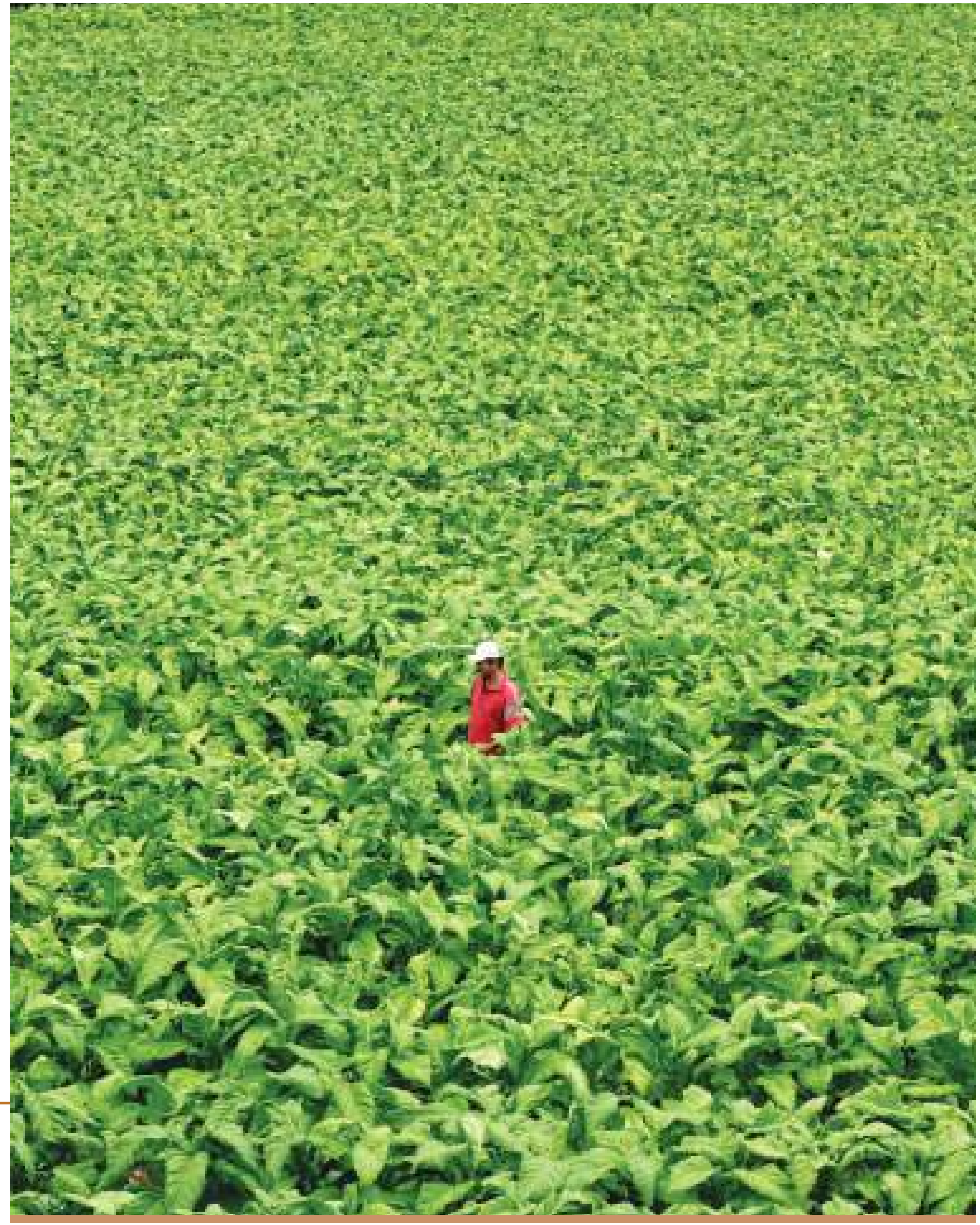
Graph 4.11 (c)

Exports of Tobacco and its Products

Main Destinations - 2011



Source: AgroStat Brasil basend on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.



Orange juice

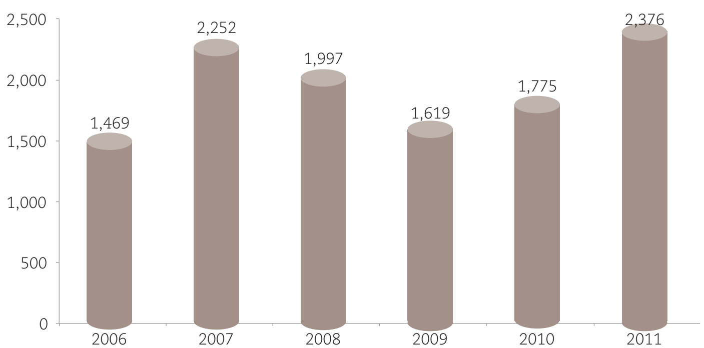
Exports of orange juice from Brazil remained around 2 million tonnes between 2007 and 2011, after reaching a level of 1.77 million in 2006. Export prices, in turn, increased from US$ 829 per tonne in 2006 to US$ 1,184 per tonne in 2011 (+42.9%). However, this rise in prices was not linear. Between 2007 and 2009 there was a decline in the product's international prices, from US$ 1,090 per tonne to US$ 782 per tonne (-28.2%). This decrease had an impact on the total value of exports, which in 2009 reached US$ 1.6 billion.

The orange juice concept employed includes frozen orange juice (HS-200911), non-frozen orange juice, with Brix value less than or equal to 20 (HS-200912) and other unfermented orange juices (HS-020919). Brazil had a 48.2% market share[7] for frozen juice, and non-frozen juice share drop to 19.7%, while in other types of orange juice drop to 37.9%

An analysis of trade flows shows that countries such as Belgium and Netherlands bought most of the frozen orange juice (83.2%) exported by Brazil. At the same time, Belgium is a major buyer and re-exporter of non-frozen orange juice, importing 476 thousand tonnes in 2010 and re-exporting 493 thousand tonnes the same year.

Graph 4.12 (a)

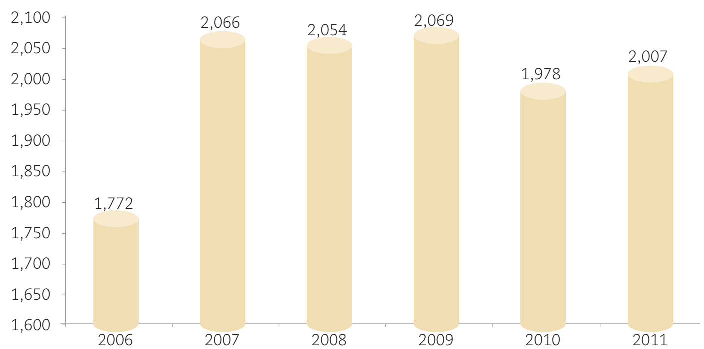
Orange Juice Exports: 2006-2011
(US$ millions)



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 4.12 (b)

Orange Juice Exports: 2006-2011
(thousand tonnes)



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

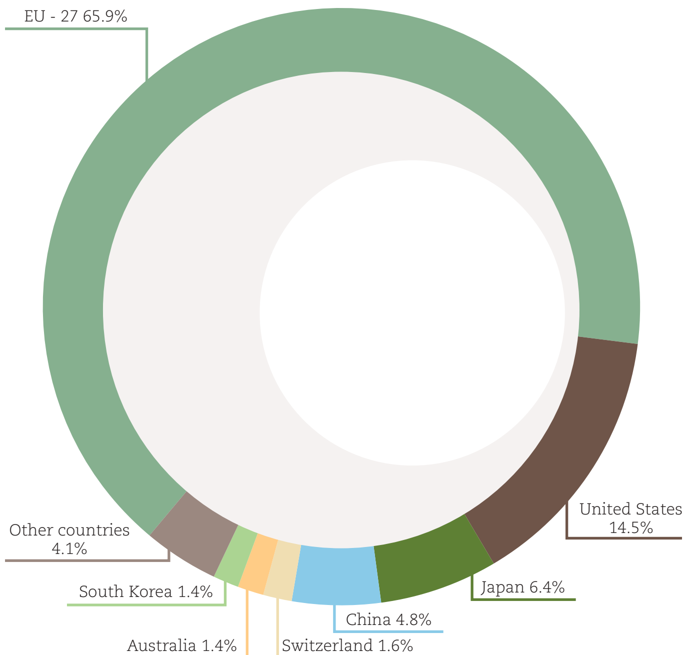
[7] The participation in this case does not exclude the European Union's intra-trade.

The greatest share of Brazil's orange juice exports is sent to the European Union, which had a 65.9% participation in 2011. Other relevant partners are: the United States (14.5%), Japan (6.4%), China (4.8%), Switzerland (1.6%), Australia (1.4%) and South Korea (1.4%).

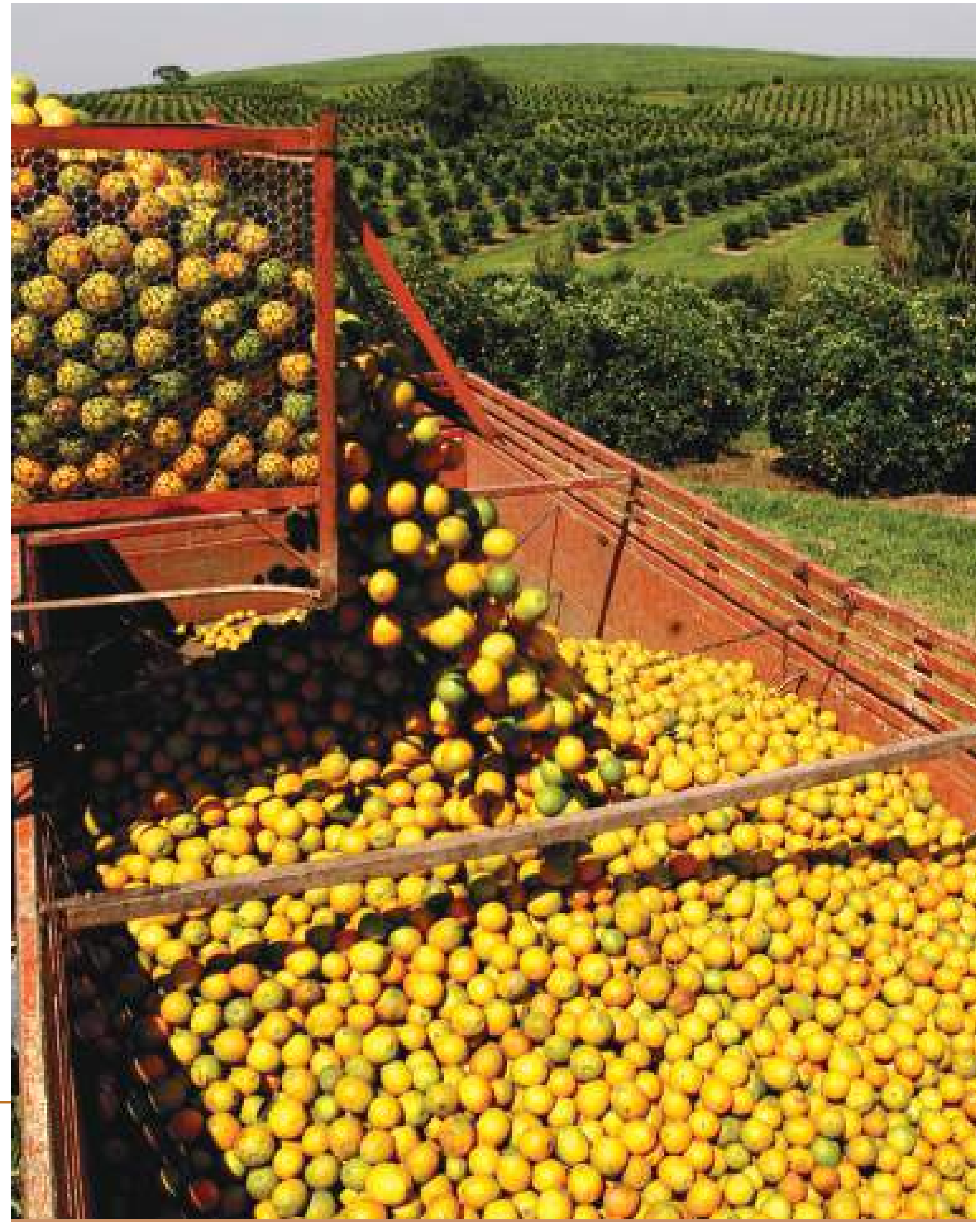
Graph 4.12 (c)

Orange Juice Exports

Main Destinations - 2011



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.



Cotton

Areas sown with cotton in Brazil totaled once 2.0 million hectares in the early nineties. However, there was a reduction leading to a minimum area used for the product in the 1996/1997 harvest, with 657 thousand hectares planted. In the last harvest, 2010/2011, the planted area recovered strongly, reaching 1.4 million hectares, a 67.7% increase in the planted area in relation to the 2009/2010 harvest. Between the early 1990's and 2010, Brazilian cotton productivity rose from 1 tonne per hectare to 3.7 tonnes per hectare. So, despite reduction in area, Brazilian cotton production increased sharply, rising from 2 million tonnes in the early nineties to 5.2 million tonnes in the 2010/2011 harvest. It should be pointed out the strong growth in production between the 2009/2010 and 2010/2011 harvests, ranging from 3.0 million tonnes to 5.2 million (+73%).

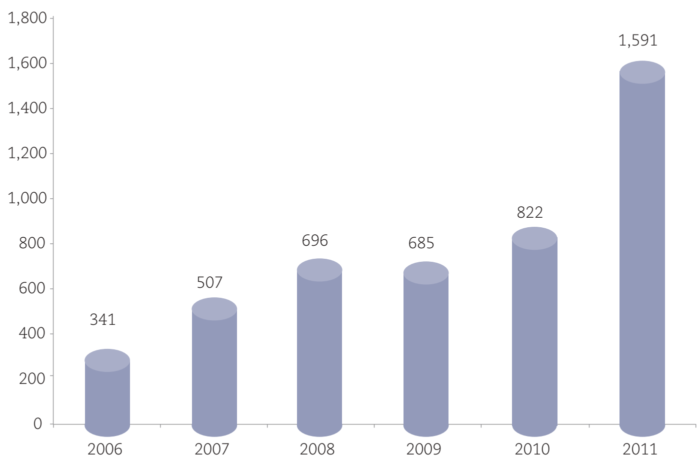
With production increment in the last harvest, non-carded uncombed cotton Brazilian exports had a strong quantum development, rising from 512.5 thousand tonnes in 2010 to 758.3 thousand tonnes in 2011 (+48%). Besides quantity elevation, there was a sharp rise in international prices, which reached US$ 2,096 per tonne of non-carded uncombed cotton, in 2011, a 30.8% increase compared to 2010 prices and 88.8% rise in relation to the

Brazil almost doubled the value exported in cotton between 2010 and 2011.

2006 prices. The increase in the exported amount, as well as in the product's international prices allowed Brazil to export US$ 1.6 billion in 2011, a 93.5% increase compared to the US$ 822 million exported in 2010.

Graph 4.13 (a)

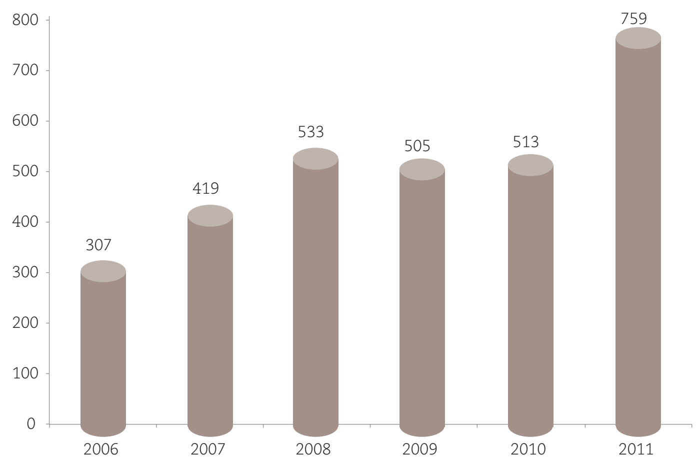
Cotton Exports: 2006-2011
(US$ millions)



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 4.13 (b)

Cotton Exports: 2006-2011
(thousand tonnes)



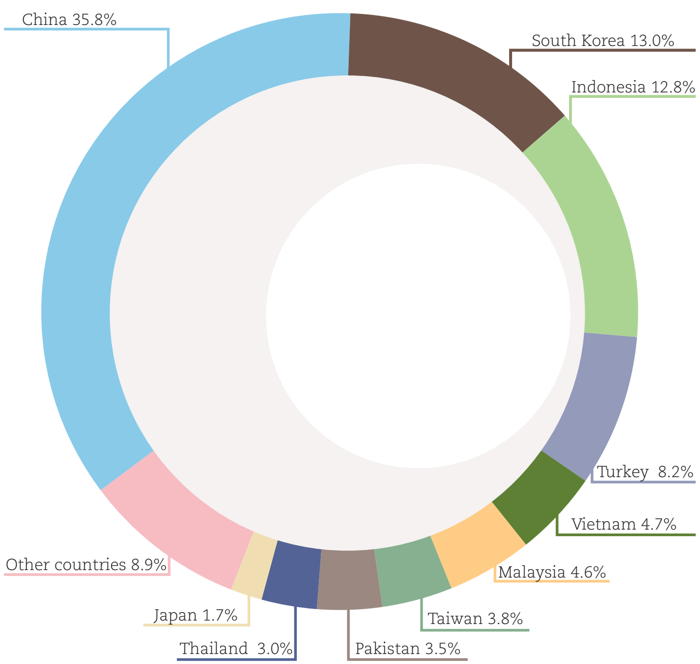
Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Brazilian cotton exports are heavily concentrated on Asia, a continent with the world's largest textile industry. Asia imported 85.2% of all non-carded uncombed cotton sold abroad by Brazil. Among Asian countries, the largest importer was China, which purchased 35.8% of all cotton exported by Brazil. Other than China, the following Asian countries stand out as importers of Brazilian cotton: South Korea (13.0%), Indonesia (12.6%), Vietnam (4.7%), Malaysia (4.6%) Taiwan (3.8%), Pakistan (3.5%), Thailand (3.0%) and Japan (1.7%). Turkey is the only non-Asian country on the list of major Brazilian cotton importers, having purchased 8.2% of total exports, due to its important textile industry.

Graph 4.13 (c)

Cotton Exports

Main Destinations - 2011



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Fruit

Brazilian fruit exports totaled US$ 941 million in 2011 (+3.8%). The value of fruit exports from Brazil has fluctuated around this figure since 2007. That year, they reached a maximum of 1.0 million tonnes, but shipped quantities dropped down every year until reaching 749 thousand tonnes in 2011. The average fruit export price however, has increased in recent years, from US$ 808 per tonne in 2006 to US$ 1,255 per tonne, resulting in maintenance of the value of exports.

The main product from fruits sector exported from Brazil was cashew nut, which reached US$ 226.7 million in 2011, or 24.1% of the total fruit exported from Brazi. The average cashew nut export price was US$ 8,617 per tonne, well above the average price of other exported fruit. This high added value fruit was responsible for a 11.2% world market participation in 2010. The product export market was dominated by two countries beyond Brazil, both with higher participation. Vietnam, the main export, had a 42.6%

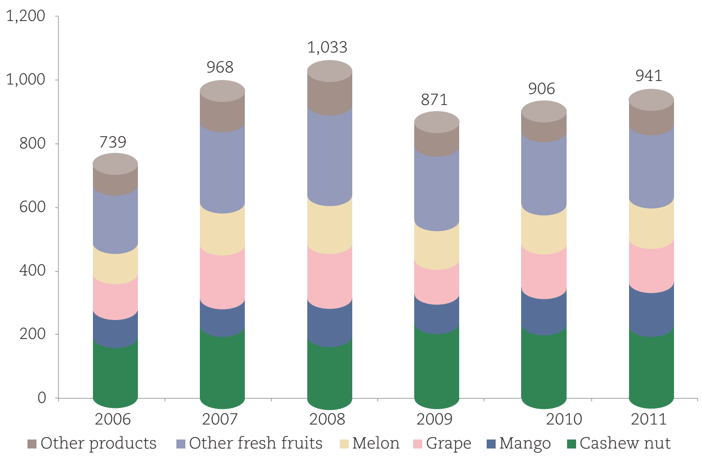
The main product from fruits sector exported from Brazil was cashew nut, which reached US$ 226.7 million in 2011.

share of cashew nuts exports, while India, the second largest exporter, had a 27.4% share. Other fruits with strong participation were Mango (US$ 140.9 million or 15.0% of total fruit exports), Grape (US$ 135.8 million or 14.4% of total fruit exports) and Melon (US$ 128.4 million or 13.6% of total fruit exports).

Brazil has a significant participation in these fruits' international market, with the following market share: fresh Mango (9.4%), fresh Grape (2.2%) and Melon (8.3%).

Graph 4.14 (a)

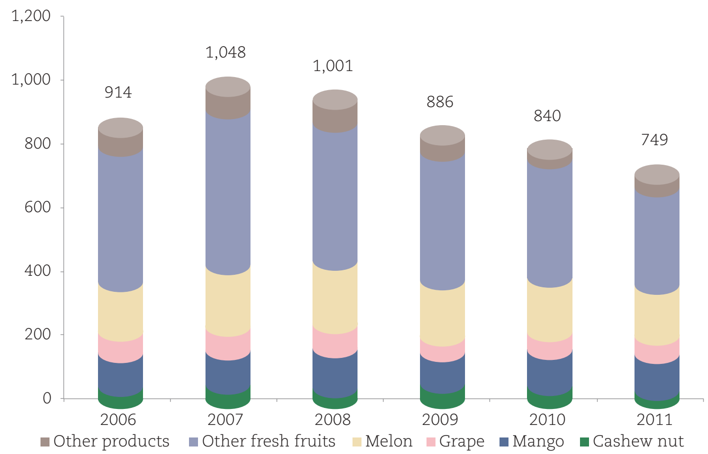
Fruit Exports (incl. Nuts and Chestnuts): 2006-2011 (US$ millions)



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 4.14 (b)

Fruit Exports (incl. Nuts and Chestnuts): 2006-2011 (thousand tonnes)



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

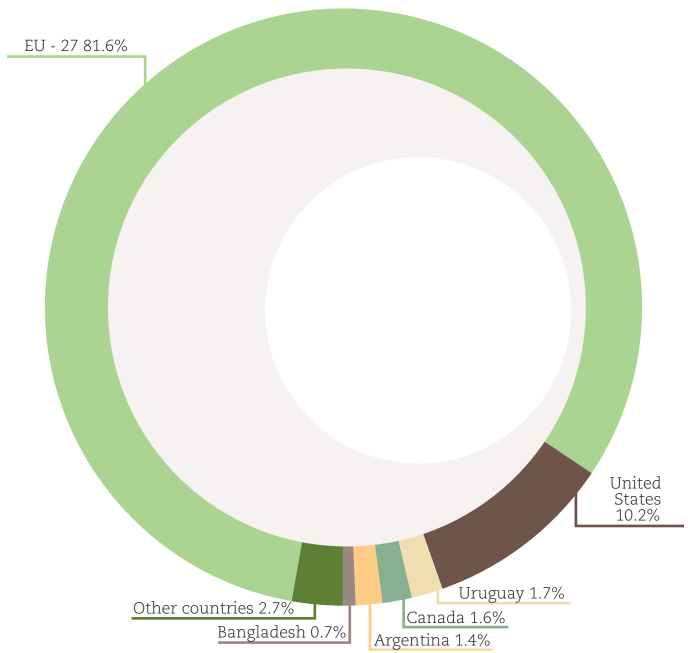
Brazilian fresh fruit exports are directed primarily to the European Union market, which was responsible for 81.6% of the total value exported in 2011. The second main destination market for Brazilian fresh fruit was the United States, with 10.2%. In addition to these markets, two Mercosur countries are included in the list of the main importing countries: Uruguay (1.7%) and Argentina (1.4%).

Cashew nuts exports have a similar concentration as that of fresh fruit. Two markets alone have purchased more than 80% of total exports. Unlike other fresh fruit, exports of cashew nuts were concentrated in the U.S. market, with 62.8%. Moreover, the European Union countries bought 20.0% of the amount exported, followed by Canada with 6.2%.

Graph 4.14 (c)

Fresh Fruit Exports

Main Destinations - 2011

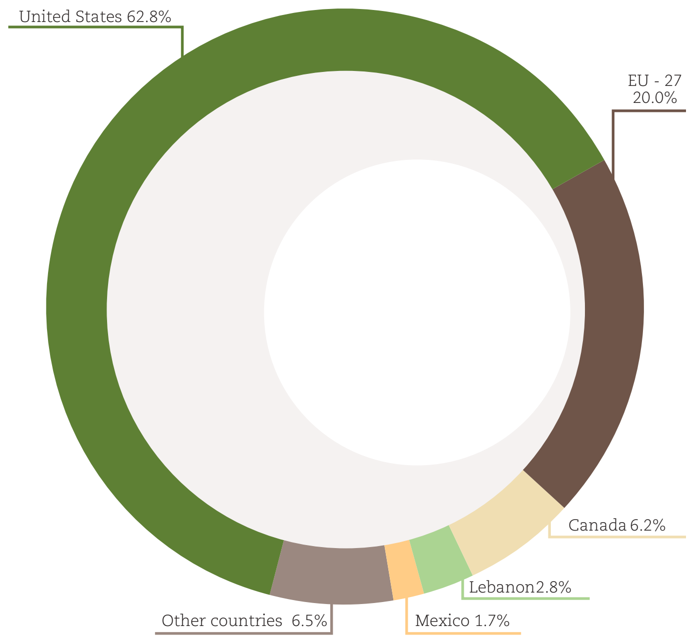


Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 4.14 (d)

Cashew Nuts Exports

Main Destinations - 2011



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Imports of Agricultural Products

Agricultural products imports reached US$ 11.6 billion in 2011, a 29.7% increase compared to the amount imported in 2010 (US$ 9.0 billion). Between 2006 and 2011, agricultural products purchases rose from US$ 4.5 billion to the aforementioned US$ 11.6 billion, representing an average annual growth of 21.1%.

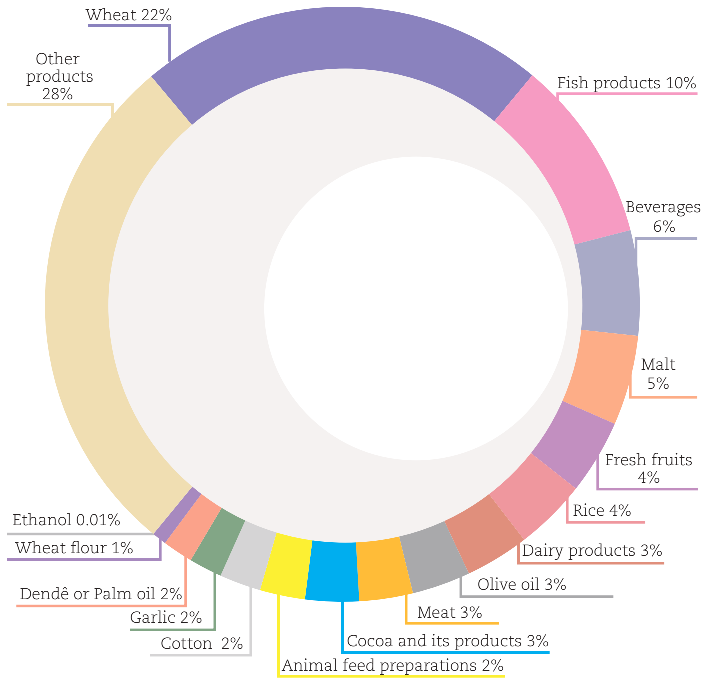
Imported and exported agricultural products prices have increased, greatly contributing to the rise in the value of imports. Wheat, for example, the main product purchased by Brazil abroad, underwent a price increase of 32% last year and, between 2006 and 2011, the increment reached 110%.

The agricultural products import portfolio is very diversified, and fourteen sectors represent the percentage of 70% in imports total value. In contrast, in the case of exports, the sum of only four sectors (soybean complex, sugar and ethanol, meat and coffee) comprise almost 80% of exports value.

Among the main imported items, the following stand out: Wheat (16%), Fish products (11%), Dairy products (5%) Beverages (5%), Palm Oil (4%), Malt (4%), Fresh Fruit (4%) Ethanol (4%), Meat (4%) and Cotton (3%).

Graph 4.15

Main Products Share in Brazilian Agricultural Imports - 2011 (%)
Total: US$ 11,63 billion



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Table 4.2

Main Brazilian Agricultural Products Imports

	2010			2011			RELATIVE VARIATION % 2010/2011		
	VALUE US$	QUANT. t	AVE. PRICE US$/t	VALUE US$	QUANT. t	AVE. PRICE US$/t	VALUE	QUANT.	AVE. PRICE
TOTAL	**8,967,701,277**	**-**	**-**	**11,630,021,920**	**-**	**-**	**29.69**	**-**	**-**
Cereals, flours e preparations	**2,829,513,413**	**9,480,661**	**298**	**3,328,390,119**	**8,978,060**	**371**	**17.63**	**-5.30**	**24.22**
Wheat	1,528,251,906	6,323,206	242	1,832,276,566	5,740,451	319	19.89	-9.22	32.06
Malt	445,230,940	845,176	527	502,804,470	805,880	624	12.93	-4.65	18.44
Wheat flour	226,241,416	653,127	346	312,410,769	719,864	434	38.09	10.22	25.29
Rice	373,244,942	781,870	477	267,032,255	619,237	431	-28.46	-20.80	-9.67
Fish products	**1,001,432,125**	**280,016**	**3,576**	**1,252,785,894**	**344,555**	**3.636**	**25.10**	**23.05**	**1.67**
Fish	939,683,025	259,242	3,625	1,166,624,337	318,383	3.664	24.15	22.81	1.09
Fish preparations and preserves	44,888,176	16,039	2,799	62,103,020	20,736	2.995	38.35	29.28	7.01
Crustaceans and mollusks	16,860,924	4,735	3,561	24,058,537	5,436	4.425	42.69	14.82	24.28
Vegetables, roots and tubers	**1,033,251,738**	**1,166,420**	**886**	**1,038,451,870**	**1,121,976**	**926**	**0.50**	**-3.81**	**4.48**
Garlic	251,691,845	153,141	1,644	249,366,197	163,570	1.525	-0.92	6.81	-7.24
Prepared and preserved potatos	212,744,684	247,252	860	241,789,346	238,299	1.015	13.65	-3.62	17.92
Dry beans	125,484,467	178,015	705	147,420,703	205,979	716	17.48	15.71	1.53
Prepared and preserved olives	126,085,898	84,810	1,487	122,316,738	93,198	1.312	-2.99	9.89	-11.72
Oil products (excl. soybean)	**732,624,559**	**539,324**	**1,358**	**1,041,332,103**	**580,107**	**1.795**	**42.14**	**7.56**	**32.14**
Dende or Palm oil	304,097,751	332,606	914	522,902,761	369,871	1.414	71.95	11.20	54.63
Olive oil	237,825,201	55,910	4,254	292,343,801	65,841	4.440	22.92	17.76	4.38

Continues

Continued

	2010			2011			RELATIVE VARIATION % 2010/2011		
	VALUE US$	QUANT. t	AVE. PRICE US$/t	VALUE US$	QUANT. t	AVE. PRICE US$/t	VALUE	QUANT.	AVE. PRICE
Fruits (incl. nuts and chestnuts)	**608,965,624**	**480,789**	**1,267**	**836,110,717**	**620,764**	**1.347**	**37.30**	**29.11**	**6.34**
Fresh fruit	**367,890,196**	**374,085**	**983**	**495,388,998**	**459,460**	**1.078**	**34.66**	**22.82**	**9.64**
Pears	161,974,250	189,841	853	204,554,304	210,328	973	26.29	10.79	13.99
Apples	60,046,723	76,879	781	84,486,234	96,565	875	40.70	25.61	12.02
Dairy products	**330,305,351**	**113,120**	**2,920**	**609,117,032**	**166,685**	**3.654**	**84.41**	**47.35**	**25.15**
Beverages	**444,951,255**	**175,403**	**2,537**	**589,367,367**	**216,450**	**2.723**	**32.46**	**23.40**	**7.34**
Wine	251,591,302	75,345	3,339	294,722,950	77,644	3.796	17.14	3.05	13.68
Whisky	92,558,307	19,828	4,668	115,563,695	23,639	4.889	24.86	19.22	4.73
Sugar and ethanol	**39,279,092**	**59,689**	**658**	**433,945,788**	**473,674**	**916**	**1.004.78**	**693.57**	**39.22**
Ethanol	39,104,010	59,674	655	433,686,329	473,648	916	1.009.06	693.72	39.73
Meat	**313,260,966**	**52,523**	**5,964**	**410,889,622**	**58,166**	**7.064**	**31.17**	**10.74**	**18.44**
Beef fresh	160,729,755	24,064	6,679	232,482,231	28,162	8.255	44.64	17.03	23.60
Cotton	**68,499,415**	**39,268**	**1,744**	**390,143,759**	**144,244**	**2.705**	**469.56**	**267.33**	**55.05**
Cocoa and its products	**278,393,570**	**79,856**	**3,486**	**258,985,172**	**64,094**	**4.041**	**-6.97**	**-19.74**	**15.91**
Animal feed	**187,952,088**	**119,250**	**1,576**	**223,479,170**	**125,052**	**1.787**	**18.90**	**4.87**	**13.39**
Sub-total	**7,868,429,196**	-	-	**10,412,998,613**	-	-	**32.34**	-	-
Other products	**1,099,272,081**	-	-	**1,217,023,307**	-	-	**10.71**	-	-

Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Wheat

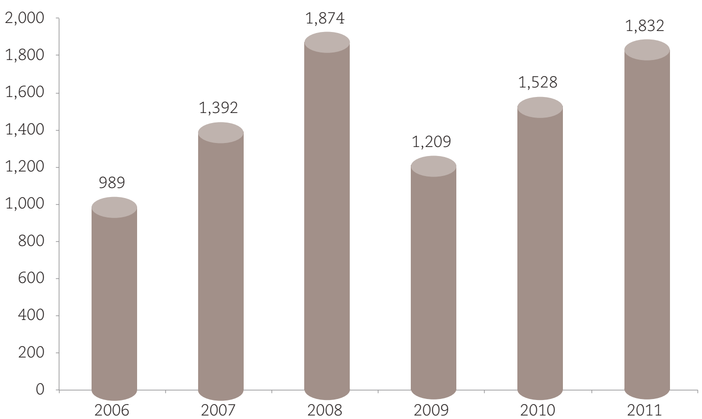
The domestic demand for wheat reached 11.6 million tonnes in 2011, considering domestic consumption as imports plus domestic production. Domestic production totaled 5.9 million tonnes in the 2010/2011 harvest, a 17.2% increase compared to the 2009/2010 harvest, and 2011 imports reached 5.7 million tonnes (-9 2%). The wheat domestic production record made it possible to reduce international purchases to 5.7 million tonnes, the second lowest wheat import in five years.

Despite the decline in the imported quantity, the rise in the average price of imported wheat to US$ 319.2 per tonne in 2011, a record high since 2008 (US$ 310.6 per tonne), resulted in imports of US$ 1.8 billion in 2011.

Graph 4.16 (a)

Wheat Imports: 2006-2011

(US$ millions)

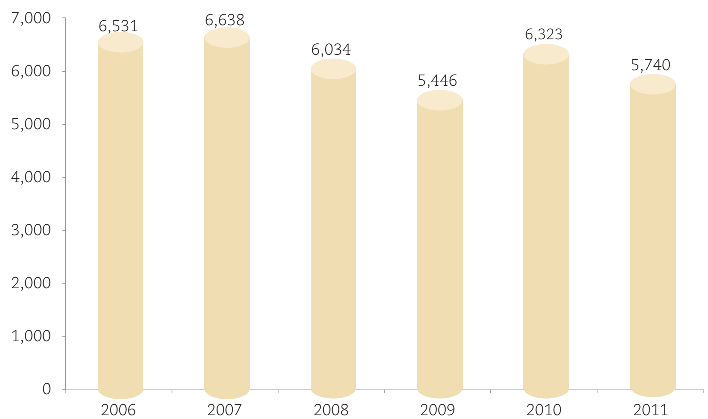


Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 4.16 (b)

Wheat Imports: 2006-2011

(thousand tonnes)



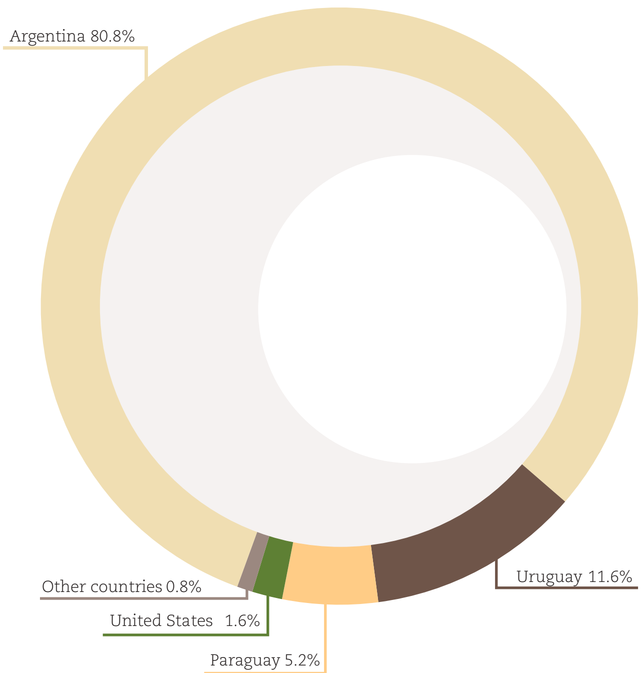
Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Brazilian wheat imports are concentrated in Mercosur partners, especially Argentina, which accounted for 80.8% of the value exported in wheat to Brazil in 2011. In addition to Argentina, Uruguay and Paraguay were also major suppliers, with 11.6% and 5.2% of the value imported by Brazil, respectively.

Graph 4.16 (c)

Wheat Imports

Main Suppliers - 2011



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

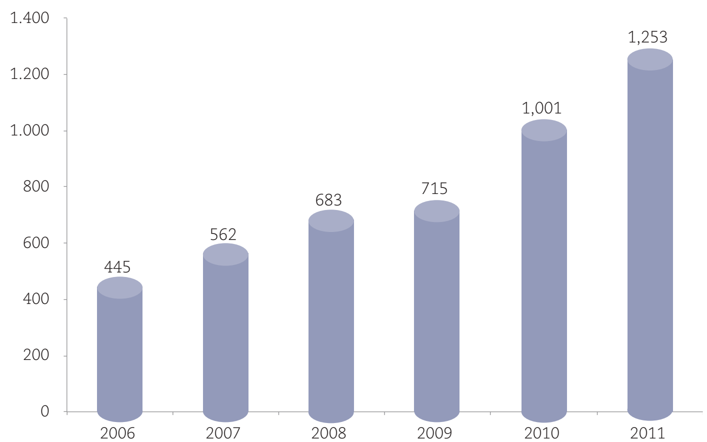
Fish products

Fish products imports have been growing continuously in recent years, from 180 thousand tonnes in 2006 to 345 thousand tonnes in 2011. This is a 91.7% expansion of the imported quantity in the last five years. With this expansion the purchases value rose from US$ 445 million in 2006 to US$ 1.3 billion in 2011 (+ 181.6%).

The species with the highest share in the import portfolio in 2011 were cod (US$ 345.4 million or 27.6% of total imports) and salmon (US$ 219.4 million with 17.5% of total imports). The share of other fishes, imported as fresh or chilled fish fillets, reached 32.5% of imports or US$ 407.3 million.

Graph 4.17 (a)

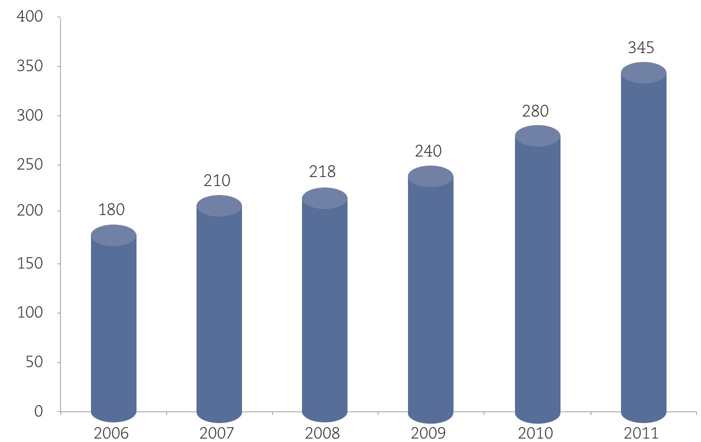
Fish Products Imports – 2006-201
(US$ millions)



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 4.17 (b)

Fish Products Imports – 2006-201
(thousand tonnes)



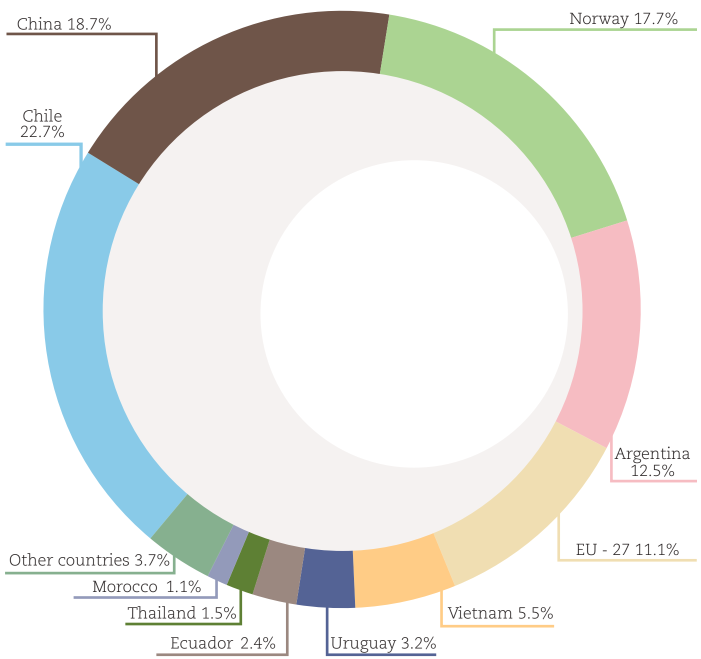
Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Chile was the main supplier of fish products to Brazil with a share of 22.7%, followed by China, with 18,7% and Norway with 17.7%. Two of them (China and Norway) were also the world's largest suppliers of fish products. Besides these countries, other suppliers to Brazil were Argentina (12.5%), European Union (11.1%), Vietnam (5.5%), Uruguay (3.2%), Ecuador (2, 4%), Thailand (1.5%) and Morocco (1.1%).

Graph 4.17 (c)

Fish Products Imports

Main Suppliers - 2011



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Dairy products

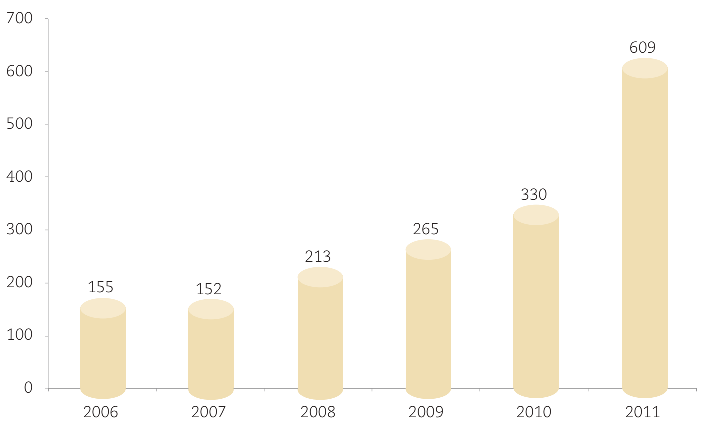
The Brazilian milk production grew from 25.4 billion liters in 2006 to 30.7 billion in 2010, according to the Municipal Livestock Survey of the Brazilian Institute of Geography and Statistics - IBGE, with a 25.4% increase in total production or 3.9% per annum in the period. At the same time, Brazilian production of industrialized raw milk, cooled or not, increased from 16.6 billion liters in 2006 to 21.4 billion liters between October 2010 and September 2011, according to the quarterly IBGE survey on milk. That is, an increase of 28.7% in production of industrialized raw milk in the last five years, or an annual rise of 5.2%.

Despite the rise in milk supply, domestic demand strong growth has enabled the expansion on imports of various dairy products. International purchases of powdered milk rose from US$ 172.9 million in 2010 to US$ 335.3 million in 2011 (+93.9%), or 55.1% of all dairy products bought from abroad. In addition to the powdered milk purchases, there was a consistent expansion in the demand for cheese, which rose from US$ 103.3 million in 2010 to US$ 205.3 million in 2011 (+98.7%), or 33.7% of total imports of dairy products. Thus, dairy products imports reached US$ 609 million in 2011, a 84.4% rise compared to US$ 330 million acquired in 2010.

The rise in acquisitions of dairy products elevated significantly the sector's deficit, ranging from US$ 179.7 million in 2010 to US$ 494.3 million in 2011. It should be noted, however, that in 2008 the sector produced a surplus of US$ 328.4 million, with exports of US$ 541.6 million and imports of US$ 213.2 million. Three years later, exports dropped to US$ 121.8 million, while imports reached the figure of US$ 609 million.

Graph 4.18 (a)

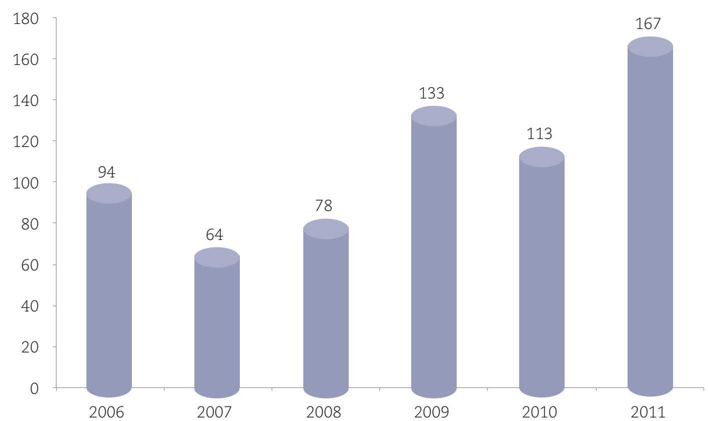
Dairy Products Imports – 2006-2011
(US$ millions)



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 4.18 (b)

Dairy Products Imports – 2006-2011
(thousand tonnes)



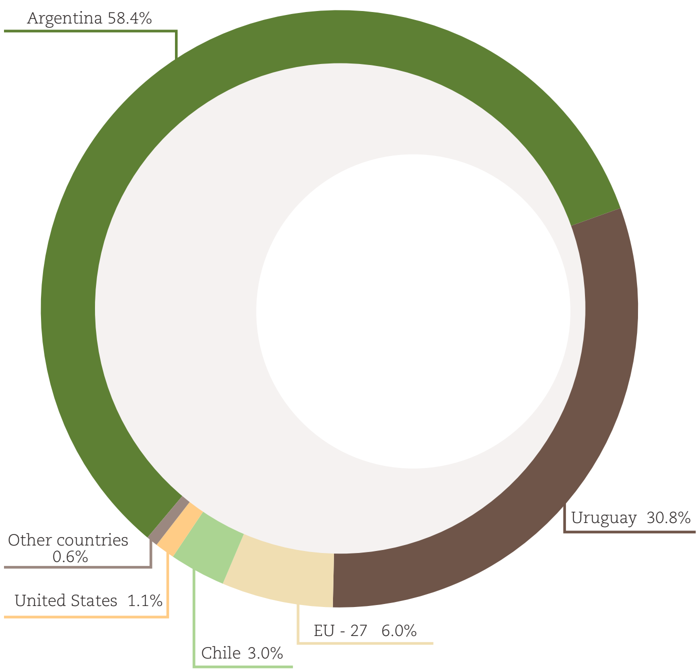
Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

The main dairy products suppliers to Brazil were two Mercosur partners, Argentina and Uruguay. The two countries were the main suppliers of powdered milk with 95% of the total, and also major suppliers of imported cheese, with 87.5% of total imports. Other suppliers were the European Union (6.0%), Chile (3.0%) and U.S. (1.1%).

Graph 4.18 (c)

Dairy Products Imports

Main Suppliers - 2011



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Palm Oil

The Brazilian production of palm oil raised from 190 thousand tonnes in 2006 to 275 thousand tonnes in 2011[8], corresponding to a 44.7% expansion over the past five years. Despite domestic production growth, Brazilian consumption has developed even more, paving the way for the imports increase.

In the period under analysis, imports of palm oil rose from 147 thousand tonnes to 370 thousand tonnes, corresponding to an absolute rise of 223 thousand tonnes in the last five years, or a 151.7% expansion of the imported quantity. This imported amount totaled US$ 522.9 million in 2011. At the same time as imports rose, palm oil exports reached US$ 61.4 million in 2011, with 52 thousand tonnes sold abroad. The difference between imports and exports resulted in a trade deficit of US$ 461.5 million in 2011.

The Brazilian production of palm oil raised from 190 thousand tonnes in 2006 to 275 thousand tonnes in 2011.

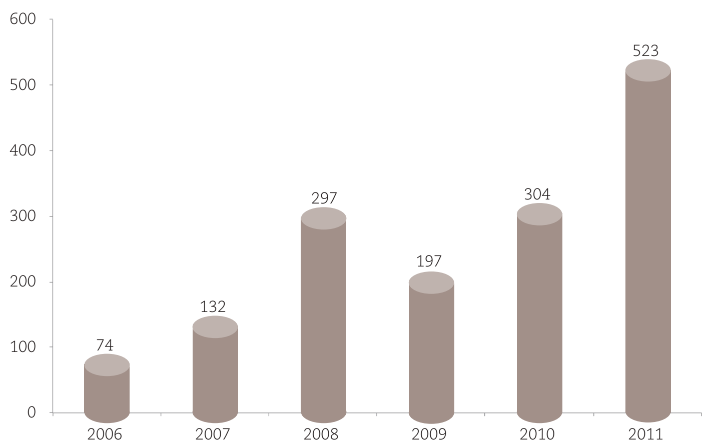
[8] Source: US Department of Agriculture.

It's important to mention that the global trade of palm oil reached US$ 28.5 billion in 2010, turning the agricultural product one of the most important in world trade. Moreover, although Brazil has the adequate weather conditions to supply the domestic market and to obtain a significant market share in world trade, it presented a trade deficit of nearly half a billion dollars on imports of the product, as mentioned before.

Graph 4.19 (a)

Dendê or Palm Oil Imports – 2006-2011

(US$ millions)

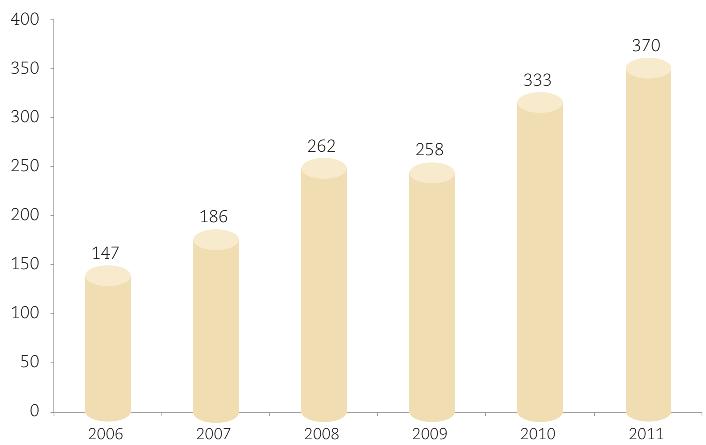


Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 4.19 (b)

Dendê or Palm Oil Imports – 2006-2011

(thousand tonnes)

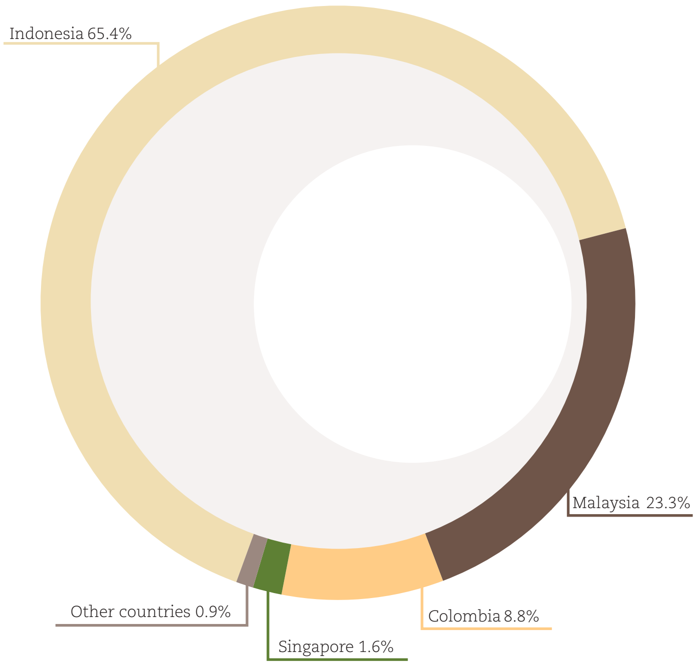


Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

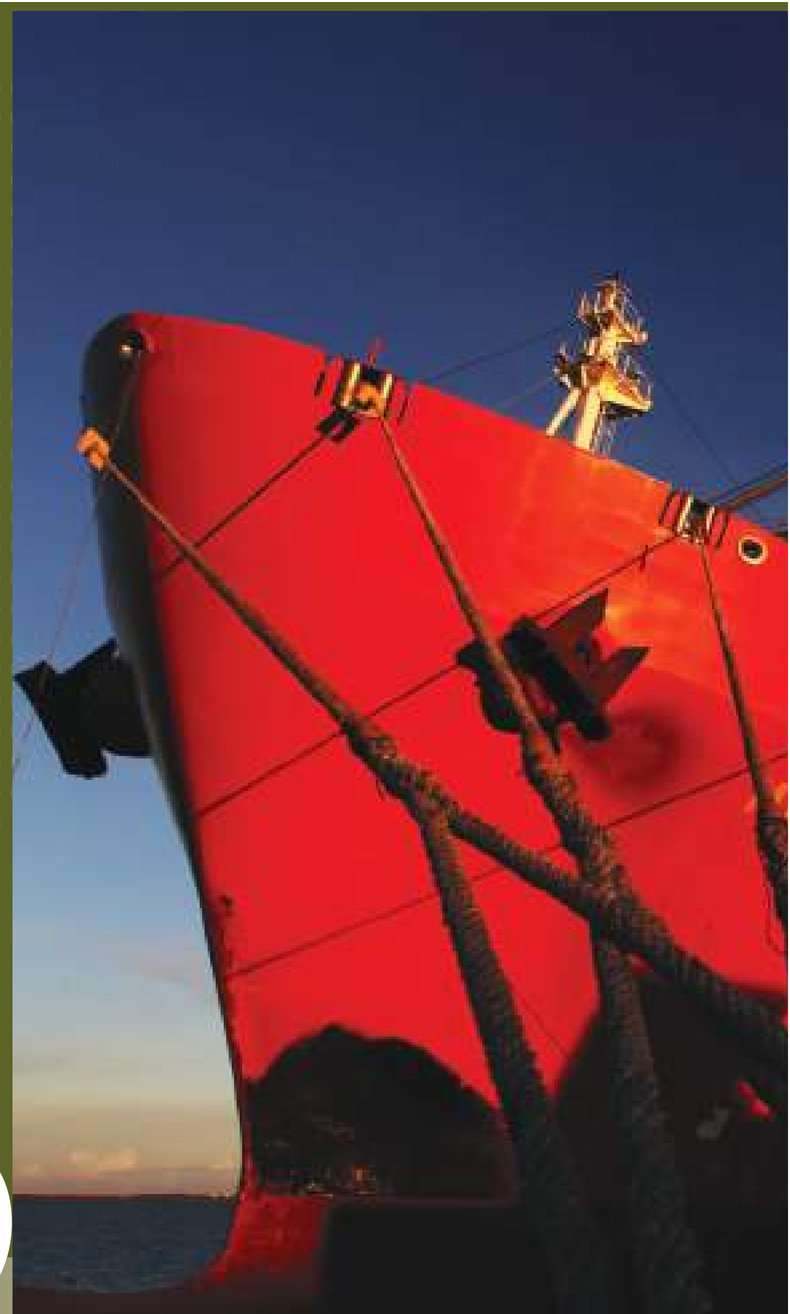
Indonesia is the largest producer of palm oil in the world, with a production of 25.4 million tonnes in 2011, or approximately 50% of world production. The second largest producer, Malaysia, had a 37% participation in world production. These major producers are Brazil's main suppliers. Indonesia provided around 65.4% of all the palm oil purchased by Brazil, while Malaysia exported 23.3% of Brazil's imports. Besides these two countries, attention should be drawn to Colombia's share of 8.8%.

Graph 4.19 (c)

Dendê or Palm Oil Imports
Main Suppliers - 2011



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.



5

Agricultural Foreign Trade - Countries and Economic Blocs

5. Agricultural Foreign Trade - Countries and Economic Blocs

Exports by Countries

China became the largest importer of Brazilian agricultural products in 2008, and in 2011 it accounted for 18% of Brazil's agricultural exports. After China, the main partners include the Netherlands (6.3%), United States (5.5%), Russia (4.9%) and Japan (4%). Between 2006 and 2011, agricultural exports average variation for the ten main partners increased at rates exceeding 10%, except for the Netherlands (8.6%), United States (6.8%) and Russia (5.1%). The greatest increase happened from 2009, after the world economical crisis, when international prices resumed growth and reached unprecedented figures in 2011. In some cases, value of exports nearly doubled from 2009 to 2011, as for China and Japan.

Table 5.1

Brazilian agricultural products exports – main countries

	2006 VALUE US$	2007 VALUE US$	2008 VALUE US$	2009 VALUE US$	2010 VALUE US$	2011 VALUE US$	Var. % Annual average	Share 2011 (%)
TOTAL	**36,936,099**	**44,888,446**	**58,361,879**	**54,831,006**	**63,750,591**	**81,425,457**	**17.13**	**-**
China	2,803,501	3,579,478	6,695,667	7,430,030	9,338,735	14,621,214	39.14	18.0%
Netherlands	3,399,229	4,578,682	5,482,393	4,362,097	4,300,211	5,143,636	8.64	6.3%
United States	3,193,908	3,043,572	3,435,106	2,627,363	3,056,086	4,440,331	6.81	5.5%
Russia	3,124,929	3,362,436	4,155,595	2,769,095	4,038,708	4,016,306	5.15	4.9%
Japan	1,177,953	1,472,182	2,144,376	1,606,188	2,115,679	3,233,175	22.38	4.0%
Germany	1,815,015	2,110,631	2,771,925	2,506,734	2,419,172	3,141,720	11.60	3.9%
Saudi Arabia	816,741	953,482	1,392,791	1,478,585	1,926,232	2,387,615	23.93	2.9%
Spain	938,322	1,735,161	1,988,251	1,400,029	1,561,960	2,233,426	18.94	2.7%
Venezuela	518,145	946,294	2,216,379	1,441,438	1,998,328	2,177,040	33.25	2.7%
Belgium	1,167,385	1,685,931	1,898,244	1,848,385	1,714,859	2,123,171	12.71	2.6%
Sub-total	**18,955,128**	**23,467,849**	**32,180,727**	**27,469,944**	**32,469,970**	**43,517,634**	**18.08**	**53.4%**
Other countries	**17,980,971**	**21,420,597**	**26,181,152**	**27,361,062**	**31,280,621**	**37,907,823**	**16.09**	**46.6%**

Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

China

China was Brazil's largest agricultural partner from 2008 to 2011. Brazilian exports to China in 2011 reached US$ 14.6 billion, coming from US$ 2.5 billion in 2006, the year when China came fourth in the same ranking. The exported amount increased 107%, comparing 2011 figures with those of 2006, while the average variation in the same period had a 17.7% rate. The main product imported by China was soybean grains (US$ 11 billion), and soybean (grains, meal and oil) accounted for 80.2% of total agricultural exports to China. Subsequently, the main products exported were sugar (US$ 1.2 billion), not carded or combed cotton (US$ 569 million), fresh chicken meat (US$ 423 million), unmanufactured tobacco (US$ 380 million) and orange juice (US$ 114 million).

Table 5.2

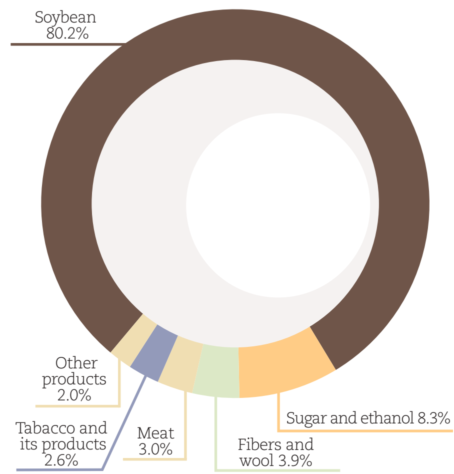
Main brazilian agricultural products exports to China

	2006		2011		Var. % Annual average (value)
	VALUE US$	QUANT. t	VALUE US$	QUANT. t	
TOTAL	**2,803,501,360**	**-**	**14,621,213,816**	**-**	**39.14**
Soybean	2,548,144,504	11,019,751	11,729,840,164	22,768,436	35.71
Sugar and ethanol	55,201,424	187,425	1,217,133,877	2,137,508	85.64
Fibers and wool	31,735,445	46,712	571,531,849	275,680	78.28
Meat	20,366,813	29,000	433,899,162	198,897	84.37
Tobacco and its products	77,610,730	16,961	379,963,967	52,932	37.39
Fruit juices	43,700,504	40,356	114,239,291	53,996	21.19
Other plant products	7,710,844	4,666	68,640,309	56,671	54.84
Oilseed products (excl. soybean)	174,742	30	50,669,912	144,945	210.79
Sub-total	**2,784,645,006**	**-**	**14,565,918,531**	**-**	**39.22**
Other products	**18,856,354**	**-**	**55,295,285**	**-**	**24.01**

Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 5.1

Main brazilian agricultural products exports to China 2011



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: CGOE/DPI/SRI/MAPA.

Netherlands

Until 2007, the Netherlands ranked first among importers of Brazilian agricultural products. Since then, it has occupied the second position. In 2011, the value imported by the country was US$ 5.1 billion, an average annual growth of 8.6% between 2006 and 2011. The soybean products accounted for 45.8% of Brazil's agricultural exports, and this percentage was comprised by 31.9% of soybean meal, 13.8% of soybean grains and 0.1% of soybean oil. Other relevant items in the agricultural export portfolio were orange juice (US$ 501.8 million), edible offal (US$ 411.1 million), chicken meat (US$ 359.6 million), fresh fruit (US$ 251.4 million), turkey meat (US$ 209.1 million), beef (US$ 202.1 million), unmanufactured tobacco (US$ 198.3 million), green coffee (US$ 127.4 million), corn (US$ 109.6 million) and ethanol (US$ 55.4 million).

Table 5.3

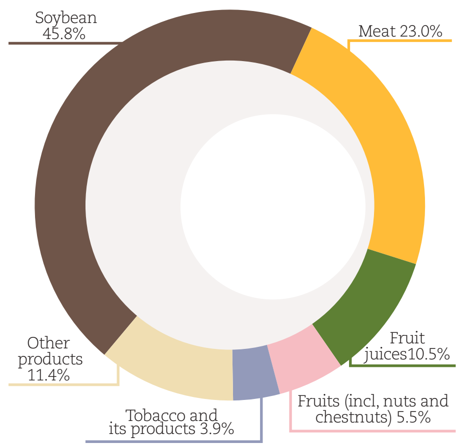
Main brazilian agricultural products exports to the Netherlands

	2006		2011		Var. % Annual average (value)
	VALUE US$	QUANT. t	VALUE US$	QUANT. t	
TOTAL	**3,399,228,780**	**-**	**5,143,636,241**	**-**	**8.64**
Soybean	1,641,439,338	6,850,878	2,354,615,332	5,438,268	7.48
Meat	709,436,408	256,994	1,182,734,483	305,885	10.76
Fruit juices	337,338,936	407,335	538,986,511	497,647	9.83
Fruits (incl. nuts and chestnuts)	198,391,020	265,241	283,248,073	262,074	7.38
Tobacco and its products	118,696,387	33,278	199,018,572	31,702	10.89
Sub-total	**3,005,302,089**	**-**	**4,558,602,971**	**-**	**8.69**
Other products	**393,926,691**	**-**	**585,033,270**	**-**	**8.23**

Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: CGOE/DPI/SRI/MAPA.

Graph 5.2

Main brazilian agricultural products exports to the Netherlands – 2011



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: CGOE/DPI/SRI/MAPA.

United States

Between 2007 and 2010, the United States was Brazil's fourth agricultural trading partner in terms of values. In 2011, it rose one position and became the third largest trading partner, with a share of 5.5% in total exports, which amounted to US$ 4.4 billion. The main product imported by the country was green coffee (US$ 1.8 billion), followed by ethanol (US$ 421.5 million), orange juice (US$ 344.2 million), sugar (US$ 308.5 million), unmanufactured tobacco (US$ 274.7 million), beef (US$ 166.2 million), cashew nuts (US$ 142.3 million), essential oils (US$ 90.8 million), cocoa products (US$ 84.1 million), spices (US$ 79.5 million) and fresh fruit (US$ 69.9 million).

Table 5.4

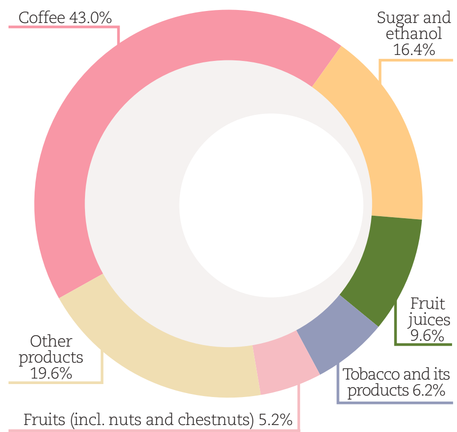
Main brazilian agricultural products exports to the United States

	2006		2011		Var. % Annual average (value)
	VALUE US$	QUANT. t	VALUE US$	QUANT. t	
TOTAL	**3,193,908,402**	**-**	**4,440,331,253**	**-**	**6.81**
Coffee	613,853,757	299,670	1,908,397,162	413,239	25.46
Sugar and ethanol	971,704,418	1,611,677	729,992,033	838,361	-5.56
Fruit juices	264,924,296	326,584	427,820,748	421,689	10.06
Tobacco and its products	250,741,798	80,834	276,759,550	58,645	1.99
Fruits (incl. nuts and chestnuts)	210,966,146	86,563	229,120,240	70,690	1.66
Sub-total	**2,312,190,415**	**-**	**3,572,089,733**	**-**	**9.09**
Other products	**881,717,987**	**-**	**868,241,520**	**-**	**-0.31**

Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 5.3

Main agricultural products exports to the United States (2011)



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Russia

The annual average variation of agricultural exports to Russia in the last six years was 5.1%, and the value of exports in 2011 was US$ 4 billion. The agricultural portfolio was concentrated in two sectors: sugar and ethanol and meat. For both, the exported quantity from 2006 to 2011 decreased, although the value has grown, thanks to rising prices of these products. In 2011, the Russian health service suspended exports of meat from three Brazilian states (Rio Grande do Sul, Paraná and Mato Grosso) and apply temporary restrictions to various establishments. The meat volume shipped in 2011 was 54.7% lower than the volume exported in 2006. However, the increase in international prices guaranteed an average growth of exports value at 0.02%. Raw sugar accounted for 45.5% of the total exported to the country, and 99.3% of sugar and ethanol sector, while beef accounted for 25% of total exported and 63% of all meat. Thus, the main agricultural products exported were sugar (US$ 1.8 billion), beef (US$ 1.1 billion), pork (US$ 393.5 million), unmanufactured tobacco (US$ 190,5 million), soybean grains (US$ 143.1 million) and chicken meat (US$ 123.5 million).

Table 5.5

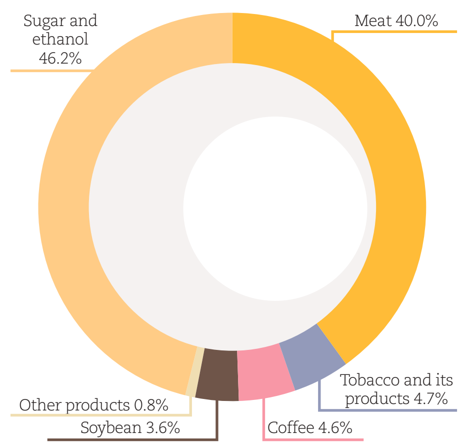
Main brazilian agricultural products exports to Russia

	2006		2011		Var. % Annual average (value)
	VALUE US$	QUANT. t	VALUE US$	QUANT. t	
TOTAL	**3,124,928,565**	**-**	**4,016,306,391**	**-**	**5.15**
Sugar and ethanol	1,294,973,217	4,346,110	1,856,251,118	3,275,089	7.47
Meat	1,606,367,282	795,176	1,607,975,472	434,740	0.02
Tobacco and its products	115,355,061	54,990	190,542,216	41,390	10.56
Coffee	79,585,807	18,750	185,902,159	32,082	18.49
Soybean	0	0	143,077,645	270,104	-
Sub-total	**3,096,281,367**	**-**	**3,983,748,610**	**-**	**5.17**
Other products	**28,647,198**	**-**	**32,557,781**	**-**	**2.59**

Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 5.4

Main agricultural products exports to Russia (2011)



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Japan

In 2011, Japan was Brazil's fifth trading partner, reaching 4%, or US$ 3.2 billion of total agricultural exports. From 2006 to 2011, the average annual growth of exports was 22.4%, reaching 34.4% in the 2009/2011 triennium. Six products accounted for 80% of the agricultural portfolio: chicken meat (37.7% or US$ 1.3 billion), green coffee (19% or US $ 669.6 million), soybean grains (7.2% or US$ 253.8), corn (6.4% or US$ 225.6 million), ethanol (5.2% or US$ 183.1 million) and orange juice (4.3% or US$ 152 million).

Table 5.6

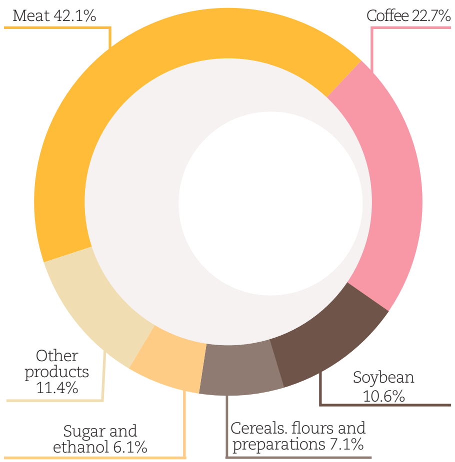
Main brazilian agricultural products exports to Japan

	2006		2011		Var. % Annual average (value)
	VALUE US$	QUANT. t	VALUE US$	QUANT. t	
TOTAL	**1,177,953,335**	**-**	**3,233,175,170**	**-**	**22.38**
Meat	503,022,515	328,472	1,360,078,594	451,865	22.01
Coffee	312,104,296	130,991	733,412,319	144,487	18.63
Soybean	59,534,050	271,238	344,331,354	774,860	42.05
Cereals, flours and preparations	3,208,100	1,606	228,518,822	735,923	134.71
Sugar and ethanol	102,381,567	198,171	198,589,741	239,319	14.17
Sub-total	**980,250,528**	**-**	**2,864,930,830**	**-**	**23.92**
Other products	**197,702,807**	**-**	**368,244,340**	**-**	**13.25**

Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 5.5

Main agricultural products exports to Japan (2011)



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Germany

In 2000 Germany was the third largest importer (in value) of Brazilian agricultural products, accounting for 6.9% of total exports. In 2006 it moved to the fifth position, then descended to the sixth in 2011. The country's share in this period decreased relatively, while the value traded increased from US$ 1.8 billion (4.9%) in 2006 to US$ 3.1 billion (3.9%) in 2011. The main products in 2011 were the same as in 2006: green coffee (US$ 1.6 billion), soybean (US$ 763.7 million), meat (US$ 330.6 million), unmanufactured tobacco (US$ 166.2 million), fresh fruit (US$ 30.1 million) and spices (US$ 30.8 million).

Table 5.7

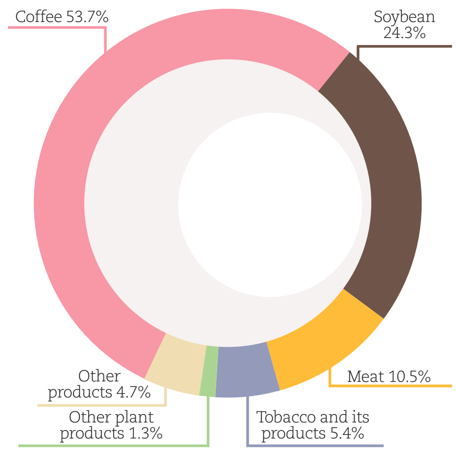
Main brazilian agricultural products exports to Germany

	2006		2011		Var. % Annual average (value)
	VALUE US$	QUANT. t	VALUE US$	QUANT. t	
TOTAL	**1,815,014,763**	-	**3,141,720,389**	-	**11.60**
Coffee	656,566,825	312,148	1,688,219,517	364,540	20.79
Soybean	432,519,491	1,975,197	763,764,511	1,736,929	12.04
Meat	394,696,241	159,709	330,602,568	96,271	-3.48
Tobacco and its products	174,317,822	49,291	168,666,158	28,454	-0.66
Other plant products	25,952,304	18,715	41,757,867	9,352	9.98
Sub-total	**1,684,052,683**	-	**2,993,010,621**	-	**12.19**
Other products	**130,962,080**	-	**148,709,768**	-	**2.57**

Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 5.6

Main agricultural products exports to Germany (2011)



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Saudi Arabia

Saudi Arabia's share in Brazilian agricultural exports had an average annual rate of 23.9% between 2006 and 2011. Until 2006, the country was Brazil's 13th trading partner in value of exports. In 2011, it was the 7th partner, with a total of US$ 2.3 billion traded. This increase in value of imports was due to the purchase of other agricultural products and also the rise in prices and volume of some products that Saudi Arabia already purchased from Brazil, including green coffee, sugar, corn and soybean grains. Chicken meat was the main exported product (49.6%), followed by raw sugar (18.7%), refined sugar (8.2%), soybean grains (6.7%), beef (5 6%), corn (4.4%), soybean meal (1.3%) and wheat (1.2%).

Table 5.8

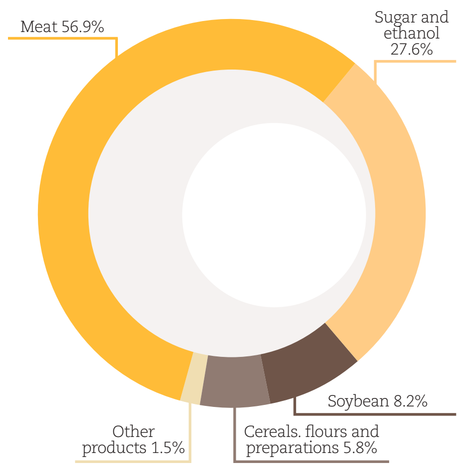
Main brazilian agricultural products exports to Saudi Arabia

	2006		2011		Var. % Annual average (value)
	VALUE US$	QUANT. t	VALUE US$	QUANT. t	
TOTAL	**816,741,476**	**-**	**2,387,614,993**	**-**	**23.93**
Meat	473,903,933	384,515	1,358,769,671	655,359	23.45
Sugar and ethanol	249,121,174	765,929	658,742,544	1,159,625	21.47
Soybean	74,743,291	369,780	195,432,873	407,300	21.20
Cereal, flours and preparations	1,873,740	11,663	139,503,139	461,026	136.80
Coffee	2,110,443	1,230	19,779,380	3,306	56.45
Sub-total	**801,752,581**	**-**	**2,372,227,607**	**-**	**24.23**
Other products	**14,988,895**	**-**	**15,387,386**	**-**	**0.53**

Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 5.7

Main agricultural products exports to Saudi Arabia (2011)



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Spain

In 2011, Spain was, in value, Brazil's 8th agricultural trading partner, importing a total of US$ 2.5 billion (2.7%). The country was the 11th in the same ranking in 2006, when it imported US$ 938.3 million (2.5%). In 2011, soybean accounted for a large share of the traded value: 64.5% (53.4% were soybean grains, 10.1% soybean meal and 1.1% soybean oil). Green coffee accounted for 10.2% of total sales, and raw sugar accounted for 8%. The main types of meat exported to the country were chicken (2%), beef (1.7%) and turkey (1.6%). Corn, fresh fruit, fish and rice accounted for 8.5% of all exports.

Table 5.9

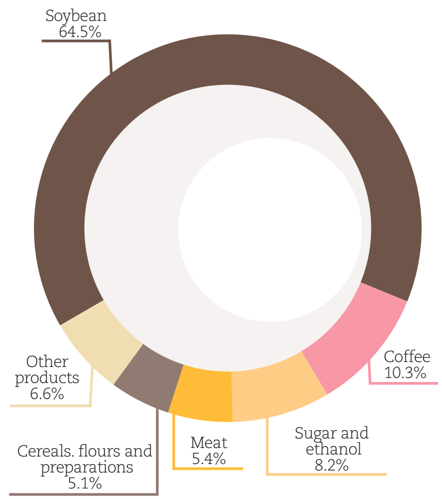
Main brazilian agricultural products exports to Spain

	2006		2011		Var. % Annual average (value)
	VALUE US$	QUANT. t	VALUE US$	QUANT. t	
TOTAL	**938,321,765**	**-**	**2,233,426,160**	**-**	**18.94**
Soybean	485,713,178	2,134,134	1,441,206,089	3,001,908	24.30
Coffee	94,393,266	46,904	229,184,387	51,202	19.41
Sugar and ethanol	1,249,214	3,034	182,500,765	264,413	170.97
Meat	96,288,890	47,172	120,373,895	34,480	4.57
Cereal, flours and preparations	110,262,105	953,691	113,044,912	442,316	0.50
Sub-total	**787,906,653**	**-**	**2,086,310,048**	**-**	**21.50**
Other products	**150,415,112**	**-**	**147,116,112**	**-**	**-0.44**

Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 5.8

Main agricultural products exports to Spain (2011)



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Venezuela

Between 2006 and 2011, Venezuela climbed nine positions in the ranking of importers of Brazilian agricultural products. While in 2006, total imports reached US$ 518.1 million (1.4%), in 2011 the amount was US$ 2.1 billion (2.7%). The concentrated portfolio was composed by six products that accounted for 80% of all agricultural products: sugar (24.1%), beef (17.3%), live cattle (16.5%), chicken meat (16,4%), preparations for making beverages (3.4%) and seeds (2.6%). Venezuela began to import green coffee from Brazil on 2009 and since then exports have had an average annual growth of 24.5%.

Table 5.10

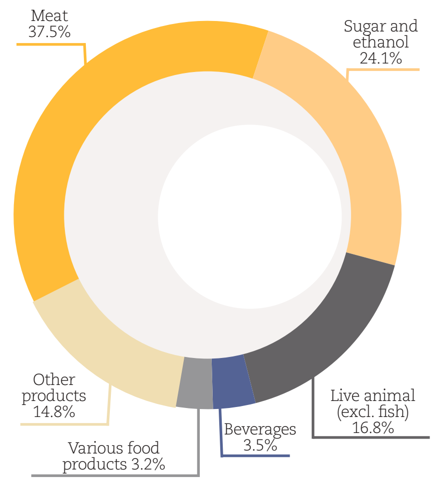
Main brazilian agricultural products exports to Venezuela

	2006		2011		Var. % Annual average (value)
	VALUE US$	QUANT. t	VALUE US$	QUANT. t	
TOTAL	**518,144,934**	**-**	**2,177,039,874**	**-**	**33.25**
Meat	188,737,135	160,397	817,205,531	279,640	34.06
Sugar and ethanol	147,486,084	307,282	524,442,964	876,374	28.88
Live animal (excl. fish)	2,029,858	18	366,254,684	157,348	182.66
Beverages	39,232,323	5,561	77,191,891	4,951	14.49
Various food products	13,504,155	11,438	69,128,041	32,291	38.62
Sub-total	**390,989,555**	**-**	**1,854,223,111**	**-**	**36.52**
Other products	**127,155,379**	**-**	**322,816,763**	**-**	**20.48**

Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 5.9

Main agricultural products exports to Venezuela (2011)



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Belgium

Agricultural exports to Belgium increased at an average annual rate of 12.7% between 2006 and 2011. Sales rose from US$ 1.1 billion in 2006 to US$ 2.1 billion in 2011. Three sectors accounted for 91.6% of total exports in 2011: fruit juices (45.3%), coffee (29.4%) and tobacco (19.9%). Orange juice was the main product exported (US$ 959.2 million), followed by green coffee (US$ 611 million), unmanufactured tobacco (US$ 359.5 million), soybean grains (US$ 42 million), soybean meal (US$ 26.1 million), soluble coffee (US$ 13.9 million), chicken meat (US$ 13.3 million) and corn (US$ 11.5 million). Ethanol value exports oscillated until 2005. In 2006 there was no exports and it were resumed in 2007. Since then, there has been a 103.2% average annual growth.

Table 5.11

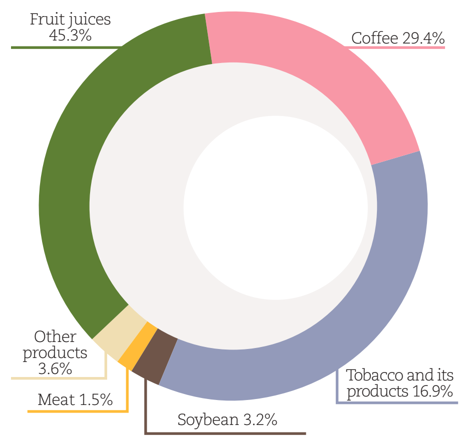
Main brazilian agricultural products exports to Belgium

	2006		2011		Var. % Annual average (value)
	VALUE US$	QUANT. t	VALUE US$	QUANT. t	
TOTAL	**1,167,384,942**	-	**2,123,171,117**	-	**12.71**
Fruit juices	560,330,201	743,475	962,068,495	881,281	11.42
Coffee	154,365,037	70,090	624,958,452	134,752	32.27
Tobacco and its products	261,697,721	73,381	359,572,395	70,007	6.56
Soybean	138,435,477	627,321	68,220,369	166,692	-13.20
Meat	28,529,335	13,252	31,515,183	9,093	2.01
Sub-total	**1,143,357,771**	-	**2,046,334,894**	-	**12.35**
Other products	**24,027,171**	-	**76,836,223**	-	**26.17**

Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 5.10

Main agricultural products exports to Belgium (2011)



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Exports by Economic Blocs

Between 2006 and 2011, agricultural exports to the main economic blocs maintained a positive growth due to the rising value of transactions and fast growth in exports to new partners. The greatest annual average variation occurred in exports to Asia and the ALADI countries (excluding Mercosur): 30.4% and 27.4%, respectively. Asia was the destination of 33.7% of agricultural exports in 2011, followed by the European Union, which imported 23.5%. Until 2008, the European Union had the largest share in agricultural exports among economic blocs. Between 2006 and 2011 trade with NAFTA and Oceania, grew at a 7.6% average annual rate. Middle East and Africa registered an above 100% absolute growth in the period, and participations of 10.4% and 10.3% respectively in 2011. Agricultural exports to Mercosur increased from US$ 648.9 million in 2006 to US$ 1.4 billion in 2011, resulting in a 1.8% share in total agricultural trade.

Table 5.12

Brazilian agricultural products exports - main destinations by economic blocs

	2006	2007	2008	2009	2010	2011	Var. %	Share 2011 (%)
	VALUE US$	VALUE US$	VALUE US$	VALUE US$	VALUE US$	VALUE US$	Annual average	
TOTAL	**36,936,099**	**44,888,446**	**58,361,879**	**54,831,006**	**63,750,591**	**81,425,457**	**17.13**	**-**
Asia (excl. Middle East)	7,274,825	9,022,423	14,452,585	17,284,403	20,035,584	27,440,767	30.41	33.7%
European Union (EU27)	12,090,936	16,120,502	18,819,157	15,695,692	15,827,700	19,150,229	9.63	23.5%
Middle East	4,038,539	4,579,839	4,973,176	5,726,794	7,562,793	8,477,807	15.99	10.4%
Africa (excl. Middle East)	3,214,973	3,515,230	4,498,113	4,672,706	5,816,114	8,423,064	21.24	10.3%
NAFTA	3,778,944	3,633,235	4,059,926	3,338,003	3,903,009	5,474,263	7.69	6.7%
Eastern Europe	4,049,473	4,202,970	5,348,870	3,763,899	5,064,460	5,422,132	6.01	6.7%
ALADI (excl. Mercosur)	1,229,603	1,741,427	3,314,229	2,415,121	3,427,065	4,131,219	27.43	5.1%
Mercosur	648,925	828,548	1,046,421	938,221	1,195,444	1,438,288	17.25	1.8%
Other Western Europe countries	468,842	556,850	739,864	643,966	830,357	1,103,090	18.66	1.4%
Oceania	191,237	224,311	344,690	173,138	166,349	275,791	7.60	0.3%
Other countries in Latin America	76,333	154,531	109,883	77,749	124,976	196,397	20.80	0.2%
Other countries in America	44,179	93,816	179,743	64,288	63,798	72,655	10.46	0.1%

Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Asia

The Asian continent was the largest importer of Brazilian agricultural products between 2009 and 2011. In 2011, it accounted for 33.7% of total exports. Growth was driven by China, which represented 53.3% of Asian imports in 2011. The three main sectors of the export portfolio were soybean (55.1%), meat (14.1%) and sugar and ethanol (12.7%). Together, these products accounted for 81.9% of the total. The main products exported were soybean grains (US$ 12.7 billion), raw sugar (US$ 2.9 billion), chicken meat (US$ 2.5 billion), not carded or combed cotton (US$ 1,3 billion), soybean oil (US$ 1.1 billion), soybean meal (US$ 1.1 billion), green coffee (US$ 839 million), corn (US$ 835.7 million), unmanufactured tobacco (US$ 794.4 million), beef (US$ 783.1 million), pork (US$ 403.6 million), ethanol (US$ 394.3 million) and orange juice (US$ 315.2 million).

Table 5.13

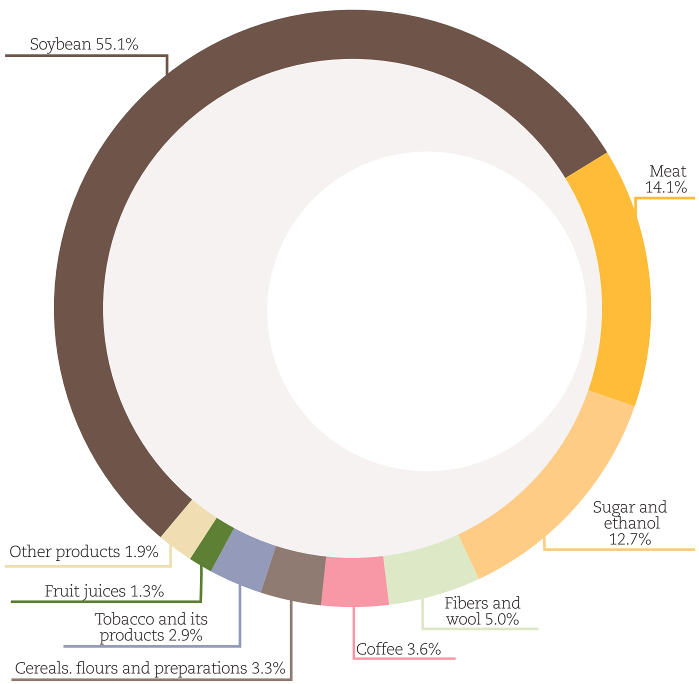
Main brazilian agricultural products exports to Asia (excl. Middle East)

	2006		2011		Var. % Annual average (value)
	VALUE US$	QUANT. t	VALUE US$	QUANT. t	
TOTAL	**7,274,824,748**	**-**	**27,440,766,767**	**-**	**30.41**
Soybean	3,605,665,082	15,641,631	15,131,073,652	29,780,042	33.22
Meat	1,329,798,680	1,035,931	3,860,253,742	1,527,487	23.76
Sugar and ethanol	935,174,930	2,731,723	3,493,449,932	5,942,187	30.16
Fibers and wool	275,481,826	266,990	1,370,801,640	666,342	37.84
Coffee	376,673,055	154,936	998,841,426	192,051	21.54
Cereals, flours and preparations	146,020,290	1,257,084	902,626,616	3,157,993	43.95
Tobacco and its products	234,092,421	68,807	794,522,921	123,120	27.69
Fruit juices	176,265,599	156,996	354,155,181	160,654	14.98
Sub-total	**7,079,171,883**	**-**	**26,905,725,110**	**-**	**30.61**
Other products	**195,652,865**	**-**	**535,041,657**	**-**	**22.29**

Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 5.11 (a)

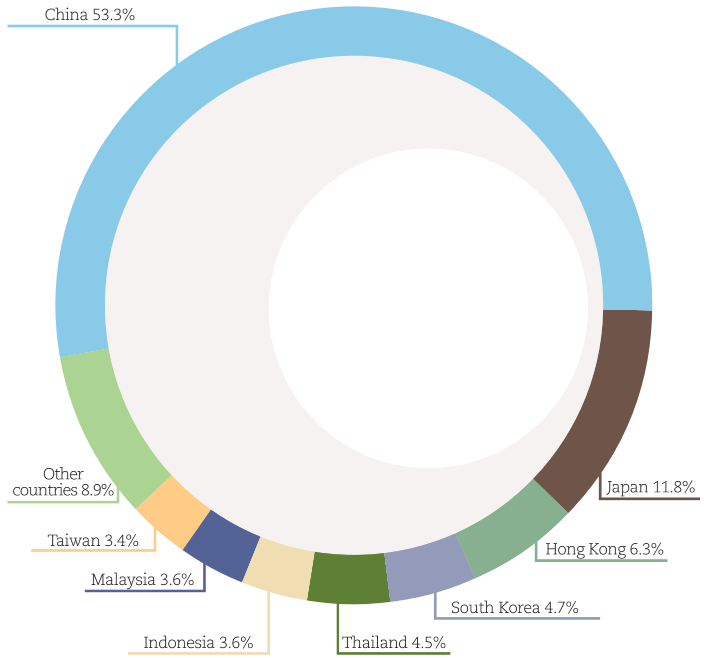
Main agricultural products exports to Asia (excl. Middle East) (2011)



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 5.11 (b)

Main destinations of agricultural products in Asia (excl. Middle East) (2011)



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

European Union

Half the agricultural exports to the European Union in 2011 were concentrated in two sectors: soybean (36.2%) and coffee (23%). The main products exported to the bloc were green coffee (US$ 4.2 billion), soybean meal (US$ 4 billion), soybean grains (US$ 2.7 billion), orange juice (US$ 1.5 billion), unmanufactured tobacco (US$ 1.1 billion), sugar (US$ 833.5 million), beef (US$ 812.6 million), chicken meat (US$ 726.2 million), fresh fruit (US$ 517.7 million), turkey meat (US$ 297 million) and corn (US$ 278.8 million). In 2008, the European Commission Directive 2008/61/EC limited the number of properties able to export beef to the bloc, so that in 2008 the volume of shipments fell 53.1%. Between 2008 and 2011, the exported quantity of beef decreased by a 8.7% average annual rate, while the value of total exports grew 4.1% on average during the same period. Although the value of exports has resumed growth, it has not yet reached the values exported in 2007.

Table 5.14

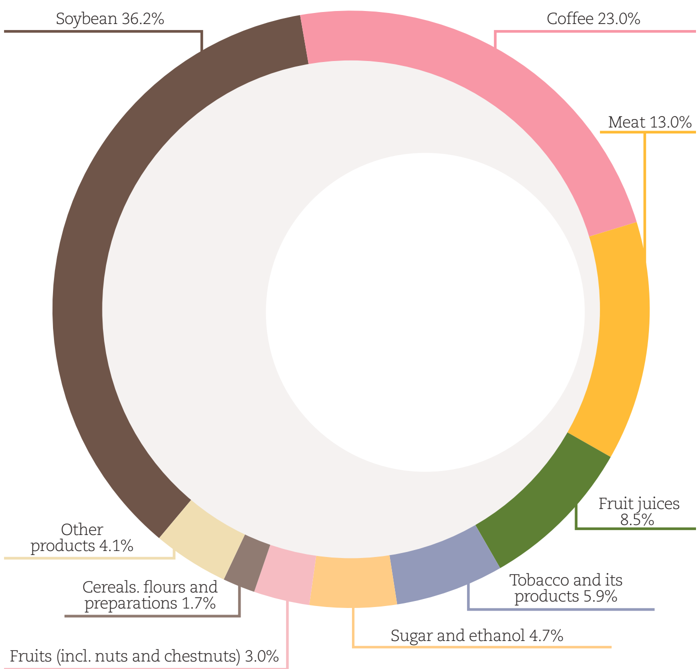
Main brazilian agricultural products exports to the EU-27

	2006		2011		Var. % Annual average (value)
	VALUE US$	QUANT. t	VALUE US$	QUANT. t	
TOTAL	**12,090,936,288**	**-**	**19,150,229,342**	**-**	**9.63**
Soybean	4,349,318,989	19,060,092	6,924,187,172	15,764,783	9.75
Coffee	1,866,916,722	892,057	4,406,566,300	956,150	18.74
Meat	2,476,127,130	974,181	2,480,226,939	648,236	0.03
Fruit juices	970,413,626	1,210,648	1,618,312,168	1,435,279	10.77
Tobacco and its products	786,058,089	238,858	1,121,111,264	208,364	7.36
Sugar and ethanol	383,477,623	873,813	900,421,269	1,402,302	18.62
Fruits (incl. nuts and chestnuts)	432,664,149	647,288	579,444,442	555,959	6.02
Cereals, flours and preparations	141,807,221	1,161,876	334,965,188	1,245,030	18.76
Sub-total	**11,406,783,549**	**-**	**18,365,234,742**	**-**	**9.99**
Other products	**684,152,739**	**-**	**784,994,600**	**-**	**2.79**

Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 5.12 (a)

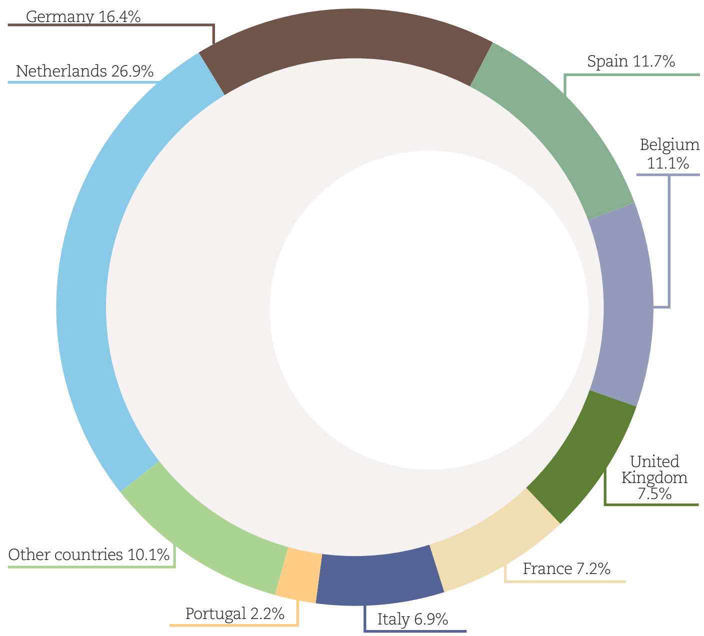
Main agricultural products exports to the EU - 27 (2011)



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 5.12 (b)

Main destinations of agricultural products in the EU - 27 (2011)



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Middle East

Agricultural exports to the Middle East increased 110% from 2006 to 2011, with a 15.9% average variation. The portfolio was mainly composed by meat (45.5%) and sugar and ethanol products (32.1%). Meat exports grew on average 25.3% per annum over the analyzed period. In 2011 exports totaled US$ 2.6 billion in chicken meat, US$ 1.1 billion in beef and US$ 32.3 million in other meat, edible offal and preparations. There were US$ 15.6 million in pork exports and US$ 10.8 million in turkey meat. In 2010 and 2011, sugar was the only product exported from sugar and ethanol products. Corn was the main cereal exported, with 8.2% of the total (US$ 696.6 million), followed by wheat (US$ 101.7 million) with 1.2% of the total in 2011. Green coffee (US$ 184.4 million), live cattle (US$ 75.5 million), unmanufactured tobacco (US$ 58.6 million), soluble coffee (US$ 41.1 million) and orange juice (US$ 24.8 million) can also be highlighted among agricultural exports to the Middle East.

Table 5.15

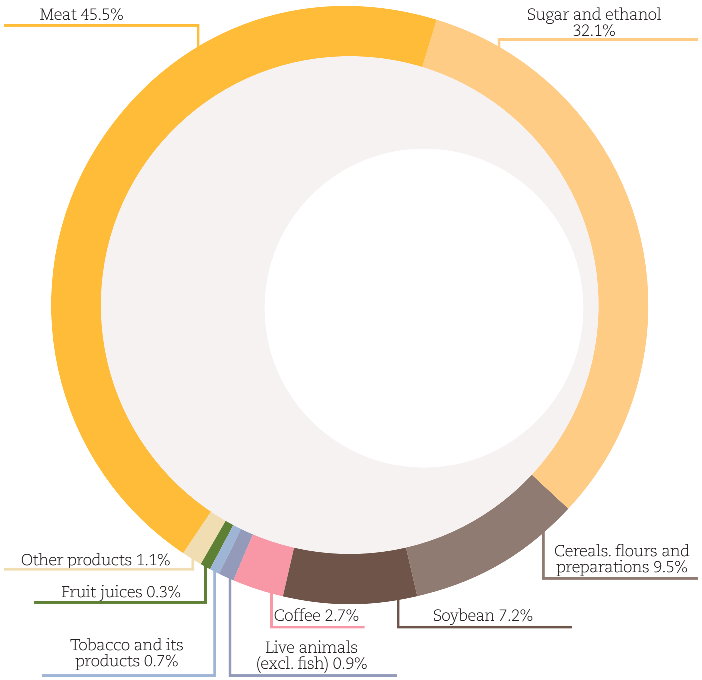
Main brazilian agricultural products exports to the Middle East

	2006		2011		Var. % Annual average (value)
	VALUE US$	QUANT. t	VALUE US$	QUANT. t	
TOTAL	**4,038,539,057**	**-**	**8,477,806,883**	**-**	**15.99**
Meat	1,244,419,187	947,953	3,855,423,566	1,640,602	25.38
Sugar and ethanol	1,521,575,105	4,449,789	2,725,185,805	4,694,747	12.36
Cereals, flours and preparations	225,011,243	1,914,781	805,346,197	2,844,350	29.05
Soybean	803,049,065	2,810,188	613,711,720	1,207,896	-5.24
Coffee	79,309,355	44,278	225,610,159	59,363	23.26
Live animals (excl. fish)	72,275,201	95,075	72,559,120	32,871	0.08
Tobacco and its products	21,123,530	10,508	61,541,522	13,933	23.85
Fruit juices	25,539,243	20,883	25,754,696	11,829	0.17
Sub-total	**3,992,301,929**	**-**	**8,385,132,785**	**-**	**16.00**
Other products	**46,237,128**	**-**	**92,674,098**	**-**	**14.92**

Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 5.13 (a)

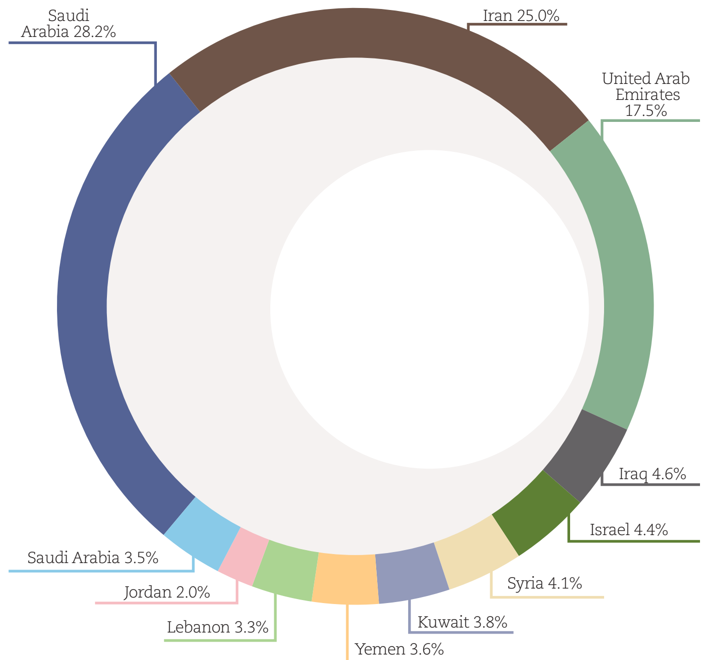
Main agricultural products exports to the Middle East (2011)



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 5.13 (b)

Main destinations of agricultural products in the Middle East (2011)



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Africa

Agricultural exports to Africa rose 21.2% on average from 2006 to 2011. Exports value increased from US$ 3.2 billion in 2006 to US$ 8.4 billion in 2011. In 2011, Africa was the fourth destination for Brazilian agricultural products. The most important sectors in exports were sugar and ethanol (52.9%), meat (18.2%) and cereals (17.8%). The main products exported were sugar (US$ 4.4 billion), chicken meat (US$ 689.1 million), beef (US$ 608.6 million), corn (US$ 534.3 million), wheat (US$ 492 million), soybean oil (US$ 427 million), rice (US$ 385 million), unmanufactured tobacco (US$ 133.4 million), pork (US$ 87.8 million), turkey meat (US$ 75.6 million) and ethanol (US$ 59.7 million).

Table 5.16

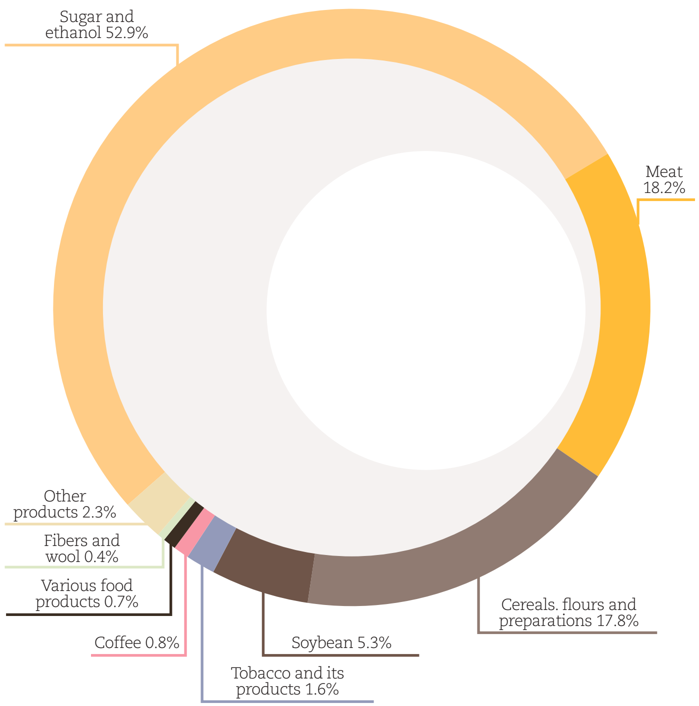
Main brazilian agricultural products exports to Africa (excl.Middle East)

	2006		2011		Var. % Annual average (value)
	VALUE US$	QUANT. t	VALUE US$	QUANT. t	
TOTAL	**3,214,973,297**	**-**	**8,423,064,058**	**-**	**21.24**
Sugar and ethanol	1,807,969,077	5,414,806	4,454,411,783	7,348,662	19.76
Meat	873,552,700	697,204	1,530,996,484	784,866	11.88
Cereal, flours and preparations	95,942,290	469,660	1,498,965,940	4,479,446	73.28
Soybean	116,698,747	324,026	447,689,498	390,292	30.85
Tobacco and its products	93,582,440	33,484	133,698,427	28,575	7.40
Coffee	24,955,775	12,154	71,058,395	19,633	23.28
Various food products	56,765,337	51,376	59,384,691	35,066	0.91
Fibers and wool	1,298,467	1,137	35,484,914	13,662	93.79
Sub-total	**3,070,764,833**	**-**	**8,231,690,132**	**-**	**21.80**
Other products	**144,208,464**	**-**	**191,373,926**	**-**	**5.82**

Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 5.14 (a)

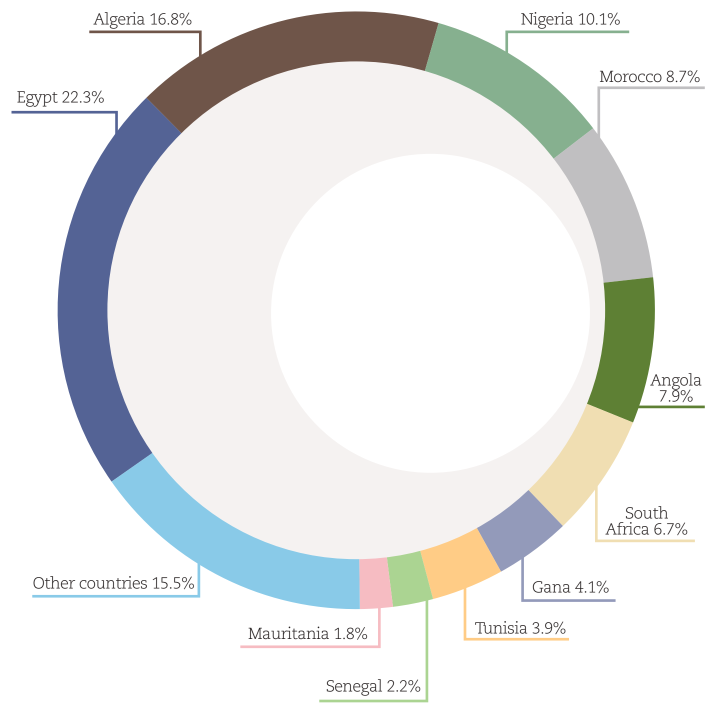
Main agricultural products exports to Africa (excl. Middle East) (2011)



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 5.14 (b)

Main destinations of agricultural products in Africa (excl. Middle East) (2011)



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Nafta

Exports to NAFTA were destined mostly to the United States (81.1%), followed by Canada (14.4%), Mexico (3.5%) and Puerto Rico (1%). The portfolio included several products, 58.1% of which consisted on green coffee (US$ 2 billion), raw sugar (US$ 852.6 million) and ethanol (US$ 441.6 million). Ethanol exports have been declining since 2006 at a 13.5% annual average rate, as well as meat (-8.4%), cocoa butter or oil (-10%) and fish (-9.4%). Orange juice exports grew 7.8% on average between 2006 and 2011. Cashew nuts (US$ 160.2 million), spices (US$ 92.6 million) and fresh fruit (US$ 75 million) accounted, together, for 6% of total agricultural exports to NAFTA in 2011.

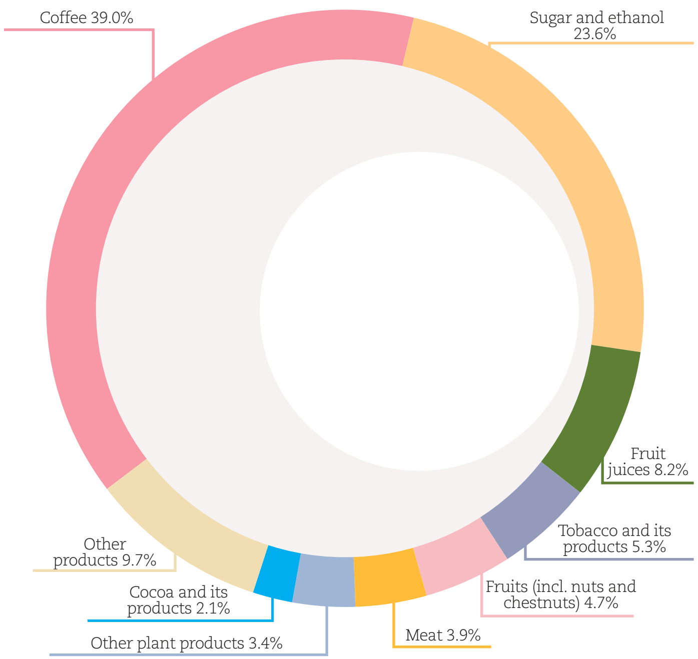
Table 5.17

Main brazilian agricultural products exports to NAFTA

	2006		2011		Var. % Annual average (value)
	VALUE US$	QUANT. t	VALUE US$	QUANT. t	
TOTAL	**3,778,943,679**	**-**	**5,474,262,760**	**-**	**7.69**
Coffee	674,964,958	329,810	2,137,043,676	469,455	25.92
Sugar and ethanol	1,234,719,560	2,449,662	1,294,236,504	1,789,825	0.95
Fruit juices	287,334,700	352,181	450,669,748	432,820	9.42
Tobacco and its products	283,602,348	89,299	289,136,013	60,596	0.39
Fruits (incl. nuts and chestnuts)	233,504,796	102,084	259,462,168	82,386	2.13
Meat	326,039,100	94,037	210,778,283	27,562	-8.35
Other plant products	106,026,300	88,896	185,465,416	68,878	11.83
Cocoa and its products	198,978,237	68,264	117,588,465	24,800	-9.99
Sub-total	**3,345,169,999**	**-**	**4,944,380,273**	**-**	**8.13**
Other products	**433,773,680**	**-**	**529,882,487**	**-**	**4.08**

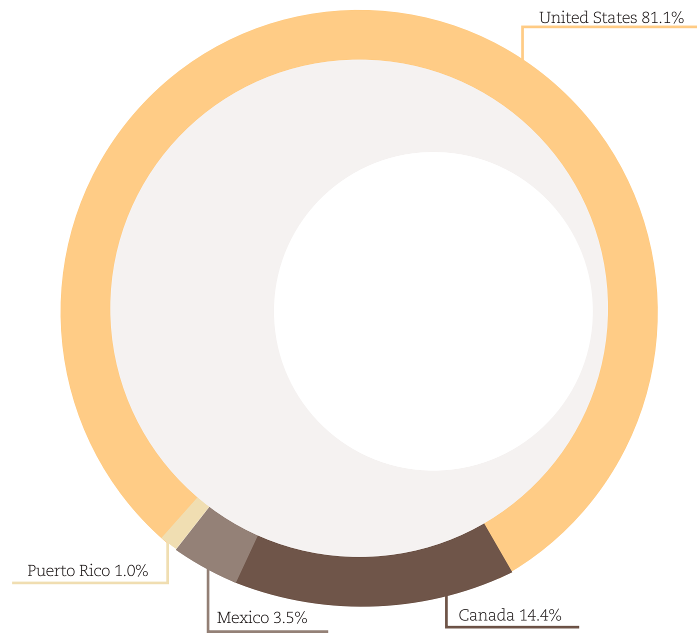
Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 5.15 (a)
Main agricultural products exports to NAFTA (2011)



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 5.15 (b)
Main destinations of agricultural products to NAFTA (2011)



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Eastern Europe

Trade with Eastern Europe grew 6% on average from 2006 to 2011. Only Russia in this region accounted for 74.1% of the total traded. Exports of raw sugar exceeded the meat exported value and in 2011 ranked first with US$ 2 billion. Beef (US$ 1.1 billion), pork (US$ 656.8 million) and chicken (US$ 215.8 million) were the main meat exported. Regarding soybean, meal (US$ 240 million) and grains (US$ 165 million) were the products that stood out. Confectionery products exports grew on average 2.4% over the past six years.

Table 5.18

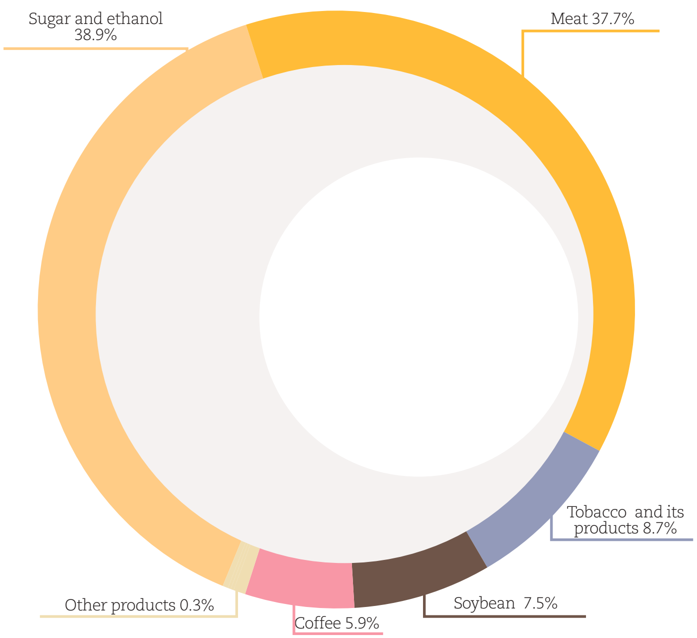
Main agricultural products exports to Eastern Europe

	2006		2011		Var. % Annual average (value)
	VALUE	QUANT.	VALUE	QUANT.	
	US$	t	US$	t	
TOTAL	**4,049,473,004**	**-**	**5,422,131,703**	**-**	**6.01**
Sugar and ethanol	1,401,516,031	4,682,311	2,108,673,796	3,728,350	8.51
Meat	2,110,594,285	1,151,383	2,045,952,998	618,883	-0.62
Tobacco and its products	246,902,344	108,750	473,206,540	92,728	13.90
Soybean	84,801,292	429,507	405,006,621	955,528	36.71
Coffee	157,187,736	37,123	320,574,918	52,209	15.32
Various food products	9,624,240	11,235	34,991,194	21,778	29.45
Fruits (incl. nuts and chestnuts)	8,587,464	5,190	8,924,648	7,091	0.77
Other animal products	5,840,963	9,278	8,768,834	4,288	8.47
Sub-total	**4,025,054,355**	**-**	**5,406,099,549**	**-**	**6.08**
Other products	**24,418,649**	**-**	**16,032,154**	**-**	**-8.07**

Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 5.16 (a)

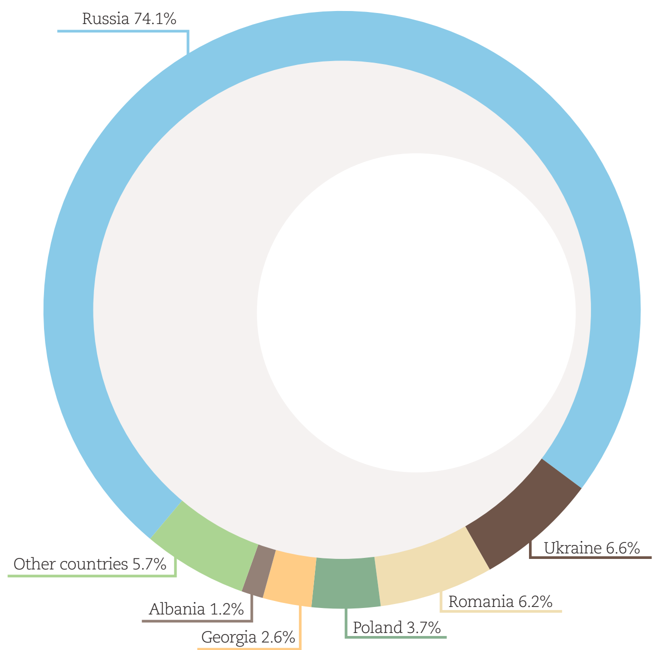
Main agricultural products exports to Eastern Europe (2011)



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 5.16 (b)

Main destinations of agricultural products in Eastern Europe (2011)



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Aladi

Agricultural exports to the Latin American Integration Association (ALADI), not considering Mercosur, had a 27,4% average growth for the last six years. A rate that ranked second after the asian exports growth rate. This growth followed Venezuelan demand for agricultural products. In the bloc, Venezuela accounted for 52.7% of total imports in 2011. The export portfolio for ALADI was less concentrated compared to other economic blocs. Beef (US$ 602.3 million), raw sugar (US$ 530.2 million), chicken meat (US$ 433.3 million), live cattle (US$ 359.6 million), corn (US$ 228.4 million) and soybean meal (US$ 227.7 million) accounted for 57.6% of the total. The average growth of exports of some products from 2006 to 2011 was greater than 100%, as in the case of live cattle (141.7%), corn (139.2%) and pork (107.7%).

Table 5.19

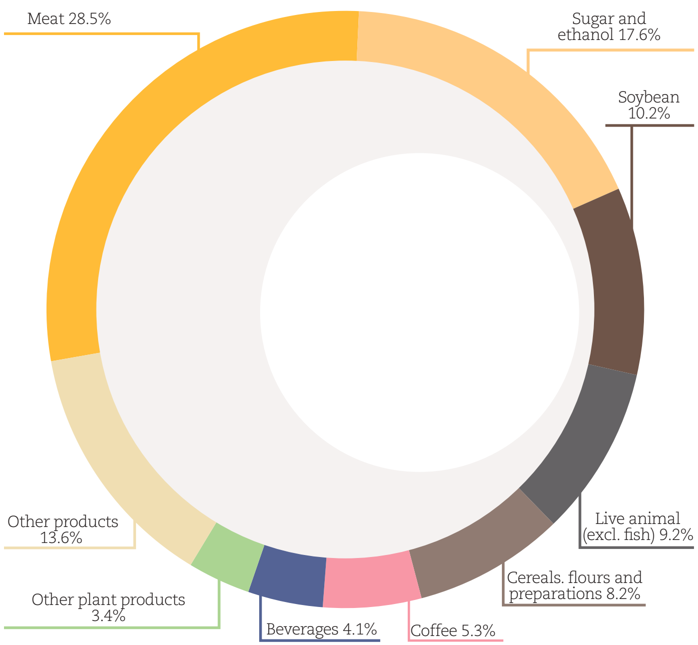
Main brazilian agricultural products exports to ALADI (excl.Mercosur)

	2006		2011		Var. % Annual average (value)
	VALUE US$	QUANT. t	VALUE US$	QUANT. t	
TOTAL	**1,229,603,074**	**-**	**4,131,218,896**	**-**	**27.43**
Meat	268,992,194	225,411	1,177,462,874	408,362	34.35
Sugar and ethanol	289,439,982	664,004	729,113,435	1,172,902	20.29
Soybean	91,333,961	414,548	419,339,587	721,639	35.64
Live animal (excl. fish)	4,613,694	92	380,490,924	157,495	141.69
Cereal, flours and preparations	35,122,159	84,306	337,004,969	1,006,879	57.18
Coffee	44,916,799	23,005	219,607,030	60,283	37.36
Beverages	94,210,057	30,233	167,601,829	51,865	12.21
Other plant products	60,246,724	30,280	140,363,792	37,084	18.43
Sub-total	**888,875,570**	-	**3,570,984,440**	-	**32.07**
Other products	**340,727,504**	-	**560,234,456**	-	**10.46**

Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 5.17 (a)

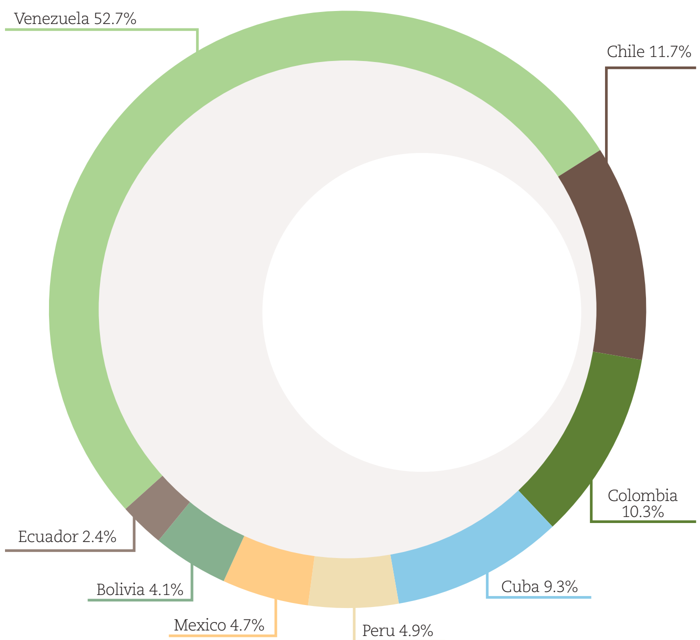
Main agricultural products exports to ALADI (excl. Mercosur) (2011)



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 5.17 (b)

Main destinations of agricultural products in ALADI (excl. Mercosur) (2011)



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Mercosur

Mercosur was the destination of 1.8% or US$ 1.4 billion of Brazilian agricultural exports in 2011. The main products purchased by the bloc were pork (US$ 181.5 million), green coffee (US$ 95.6 million), sugar (US$ 95.4 million), unmanufactured tobacco (US$ 76.4 million), chocolate and food preparations containing cocoa (US$ 59.9 million), mate (US$ 54.5 million), pet foods (US$ 54.3 million), confectionery products (US$ 51.7 million), cocoa powder (US$ 48.7 million) and soluble coffee (US$ 48.5 million). Together, these products accounted for 53.3% of the total exports and Argentina alone answered for 52% of this amount. The three main agricultural products imported by Argentina were fresh pork (US$ 115.2 million), green coffee (US$ 91.5 million) and cocoa powder (US$ 44.3 million). Among Paraguay's imports, the main products were unmanufactured tobacco (US$ 67.3 million), cereal seed (US$ 34 million) and other pet foods (US$ 30.3 million). Among Uruguay's imports, the three main agricultural products were mate (US$ 54.1 million), fresh pork (US$ 43.3 million) and refined sugar (US$ 32.3 million).

Table 5.20

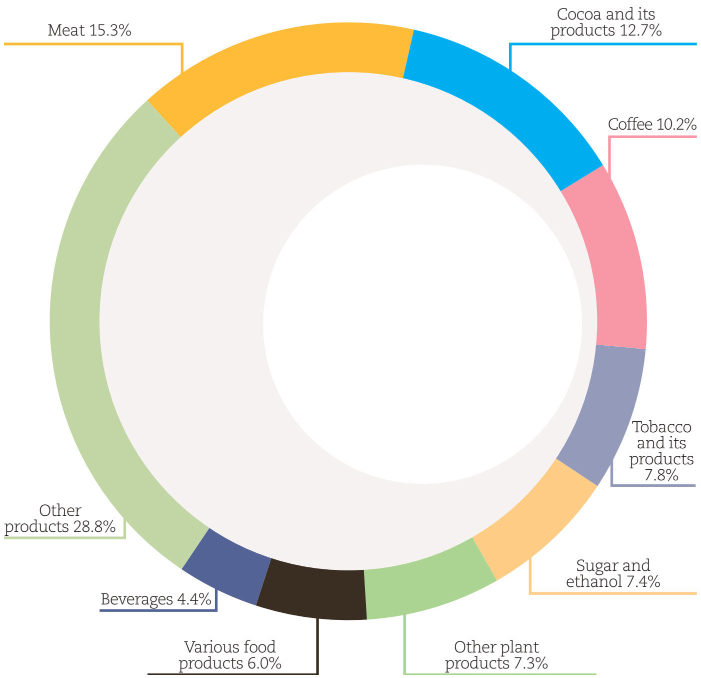
Main brazilian agricultural products exports to Mercosur

	2006		2011		Var. % Annual average (value)
	VALUE US$	QUANT. t	VALUE US$	QUANT. t	
TOTAL	**648,924,709**	**-**	**1,438,288,364**	**-**	**17.25**
Meat	67,899,185	37,130	219,810,898	75,461	26.48
Cocoa and its products	88,543,205	38,145	183,176,832	39,491	15.65
Coffee	73,640,415	35,413	147,234,940	37,158	14.86
Tobacco and its products	30,690,466	11,246	112,187,913	26,206	29.60
Sugar and ethanol	21,714,423	63,243	106,667,648	162,400	37.49
Other plant products	41,701,127	39,882	104,975,378	47,819	20.28
Various food products	44,906,867	30,916	86,338,135	37,733	13.97
Beverages	47,463,249	48,805	63,550,543	58,035	6.01
Sub-total	**416,558,937**	**-**	**1,023,942,287**	**-**	**19.71**
Other products	**232,365,772**	**-**	**414,346,077**	**-**	**12.26**

Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 5.18 (a)

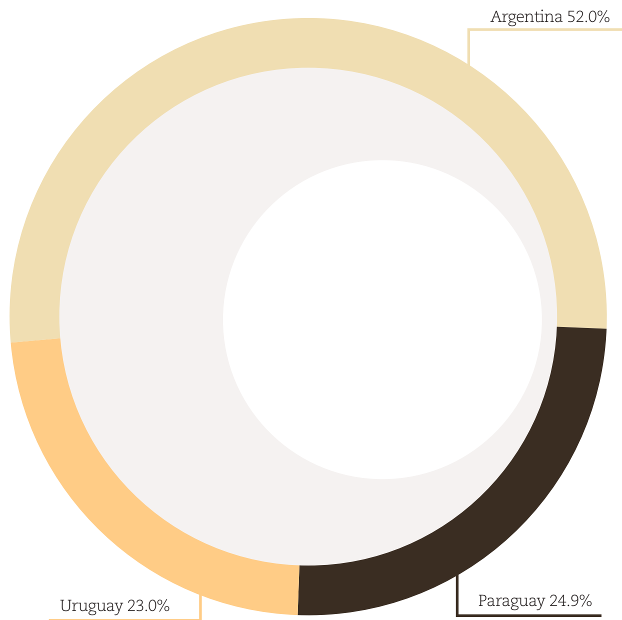
Main agricultural products exports to Mercosur (2011)



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 5.18 (b)

Main destinations of agricultural products in Mercosur (2011)



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Oceania

Australia was the destination for 0.3% of Brazilian agricultural exports in 2011. However, among the Oceania countries, it was responsible for 74.3% of imports. Therefore, the bloc's participation in agricultural exports in 2011 was similar to the Australian participation (0.3%) totaling US$ 275.8 million. This amount was obtained after a 7.6% annual average growth after 2006. The portfolio includes products such as green coffee (US$ 65.8 million), raw sugar (US$ 60.2 million) and unmanufactured tobacco (US$ 38.3 million), which together accounted for 59.6% of the total exports. There were also orange juice (US$ 38.3 million), jellies (US$ 11 million), ethanol (US$ 9.9 million) and refined soybean oil (US$ 7.2 million). The main meat types exported were chicken (US$ 6 million) and beef (US$ 2.3 million).

Table 5.21

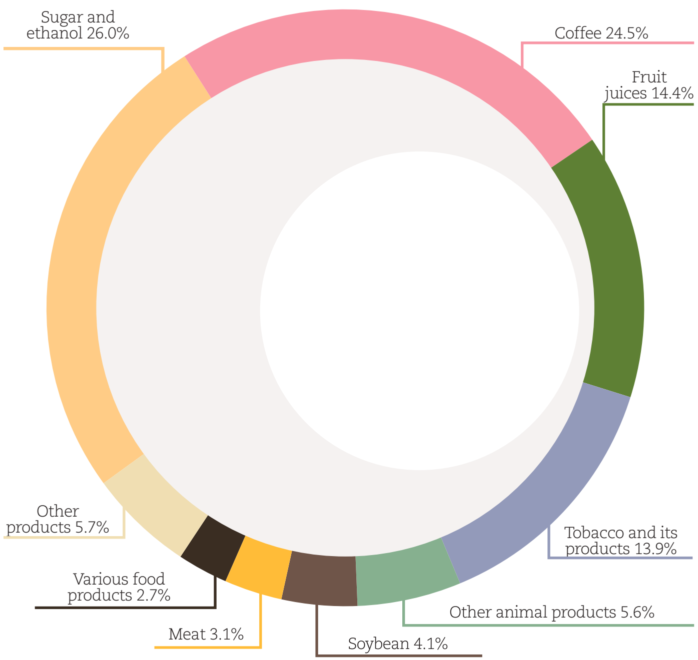
Main brazilian agricultural products exports to Oceania

	2006		2011		Var. % Annual average (value)
	VALUE US$	QUANT. t	VALUE US$	QUANT. t	
TOTAL	**191,237,008**	**-**	**275,791,192**	**-**	**7.60**
Sugar and ethanol	293,073	772	71,585,330	125,635	200.31
Coffee	23,842,026	9,017	67,631,738	12,888	23.19
Fruit juices	30,334,787	29,983	39,610,376	19,891	5.48
Tobacco and its products	13,656,307	3,990	38,288,714	6,165	22.90
Other animal products	7,649,207	2,697	15,514,462	2,442	15.19
Soybean	93,885,670	436,072	11,265,077	9,973	-34.56
Meat	5,156,018	3,669	8,649,262	3,500	10.90
Various food products	2,053,543	1,582	7,530,351	3,791	29.68
Sub-total	**176,870,631**	**-**	**260,075,310**	**-**	**8.02**
Other products	**14,366,377**	**-**	**15,715,882**	**-**	**1.81**

Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 5.19 (a)

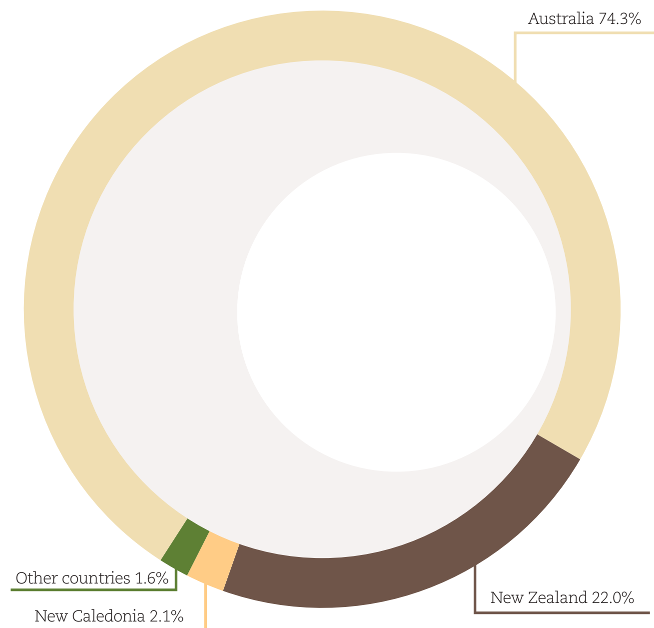
Main agricultural products exports to Oceania (2011)



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Graph 5.19 (b)

Main destinations of agricultural products in Oceania (2011)



Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Brazilian Imports by Countries

Agricultural imports have grown on average 21.1% over the past six years. In 2011, Brazil imported US$ 11.6 billion, and Argentina was responsible for 35.5% of this value, followed by the United States (10%), Uruguay (8.5%), China (5.5%) and Chile (5.5%). Agricultural imports from China e the United States have had, respectively, a 49,6% and a 35,2% expansion on average, since 2006. The products imported from the five main partners in 2011 were: from Argentina, wheat (35.9%), wheat flour (7.1%) and malt (4.9%); from the United States, ethanol (33.1%), not carded or combed cotton, (30%) and food products (6.6%); from Uruguay, wheat (21.4%), malt (21.1%) and powdered milk (14.1%); from China, fish (35.2%), garlic (15.9%) and pet foods (10.3%); and from Chile, salmon (34.2%), wine (13.4%) and nuts (5.6%).

Table 5.22

Main agricultural products imports - by country

	2006 VALUE US$	2007 VALUE US$	2008 VALUE US$	2009 VALUE US$	2010 VALUE US$	2011 VALUE US$	Var. % Annual average	Share 2011 (%)
TOTAL	**4,467,050**	**6,015,899**	**8,055,631**	**7,167,576**	**8,967,701**	**11,630,022**	**21.09**	**-**
Argentina	1,935,607	2,569,839	3,158,660	2,501,965	3,053,388	4,123,964	16.33	35.5%
United States	257,152	380,230	659,933	354,159	535,733	1,160,627	35.18	10.0%
Uruguay	314,497	405,350	531,169	805,555	967,321	989,798	25.77	8.5%
China	85,695	115,412	301,479	238,998	482,052	641,433	49.57	5.5%
Chile	235,075	291,715	360,148	424,201	575,121	637,810	22.09	5.5%
Paraguay	219,350	322,764	476,770	461,499	429,057	453,447	15.63	3.9%
Indonesia	118,628	180,924	249,916	251,788	330,654	407,130	27.97	3.5%
Portugal	147,866	187,495	234,638	223,455	295,241	382,234	20.92	3.3%
France	122,600	129,079	149,712	143,204	203,933	232,625	13.67	2.0%
Norway	151,841	177,451	193,656	155,668	219,078	223,578	8.05	1.9%
Sub-total	**3,588,310**	**4,760,259**	**6,316,081**	**5,560,493**	**7,091,578**	**9,252,645**	**20.86**	**79.6%**
Other countries	**878,741**	**1,255,641**	**1,739,550**	**1,607,083**	**1,876,123**	**2,377,377**	**22.02**	**20.4%**

Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Brazilian Imports by Blocs

In 2011, Brazil imported US$ 11.6 billion in agricultural products, of which 47.9% came from Mercosur countries, 15.8% from European Union countries, 12.4% from Asia (excluding Middle East), 11.1% from the NAFTA countries and 7.9% from ALADI countries (excluding Mercosur). Countries not included in these blocs answer for the remaining 4.9%. Imports from Asia were the ones that rose the most between 2006 and 2011, (39.4% rate on average), from US$ 273.8 million in 2006 to US$ 1.4 billion in 2011. Imports from NAFTA countries also had an above 30% average growth, from US$ 313.6 million in 2006 to US$ 1.3 billion in 2011. Imports from Eastern Europe countries declined from 2006 to 2011, at a 5.4% average rate, equivalent to a 24.2 % decrease in absolute numbers.

The main products imported from each bloc were: from Mercosur, wheat (32.1%), malt (7.4%) and powdered milk (5.7%); from the European Union, alcoholic beverages (16.2%), olive oil (14.2%) and fish (7.3%); from Asia, palm oil (32.8%), fish (21.9%) and garlic (7.1%); from NAFTA, ethanol (29.7%), not carded or combed cotton, (26.9%) and other food preparations (5.4%); and from ALADI, salmon (31.5%), wine (9.3%) and palm oil (5.4%).

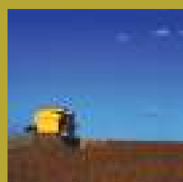
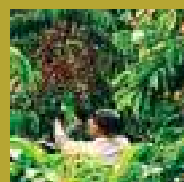
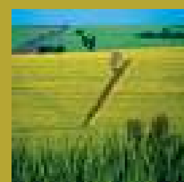
Table 5.23

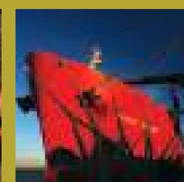
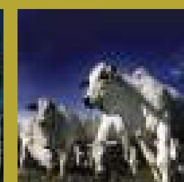
Imported agricultural products main origins by economic bloc

	2006	2007	2008	2009	2010	2011	Var. % Annual average	Share 2011 (%)
	VALUE US$	VALUE US$	VALUE US$	VALUE US$	VALUE US$	VALUE US$		
TOTAL	**4,467,050**	**6,015,899**	**8,055,631**	**7,167,576**	**8,967,701**	**11,630,022**	**21.09**	**-**
Mercosur	2,469,454	3,297,954	4,166,599	3,769,020	4,449,766	5,567,208	17.65	47.9%
EU-27	774,356	944,032	1,248,455	1,215,617	1,460,877	1,840,530	18.91	15.8%
Asia (excl. Middle East)	273,767	416,188	741,786	678,348	1,085,928	1,440,963	39.40	12.4%
NAFTA	313,562	523,877	874,252	511,599	730,501	1,294,011	32.78	11.1%
ALADI (excl. Mercosur)	299,246	395,592	549,739	562,665	754,984	914,269	25.03	7.9%
Africa (excl. Middle East)	85,547	137,449	143,045	150,302	120,179	187,645	17.01	1.6%
Other Western Europe countries	44,218	50,457	64,116	57,965	60,336	66,468	8.49	0.6%
Oceania	19,231	29,884	41,151	31,681	24,577	39,579	15.53	0.3%
Middle East	17,151	18,813	15,504	14,527	23,705	20,312	3.44	0.2%
Eastern Europe	21,615	22,094	21,945	14,339	17,173	16,381	-5.39	0.1%

Source: AgroStat Brasil based on data from SECEX/MDIC.
Prepared by: MAPA/SRI/DPI.

Notes

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