



ABIEC



OVERVIEW

Abril, 2019

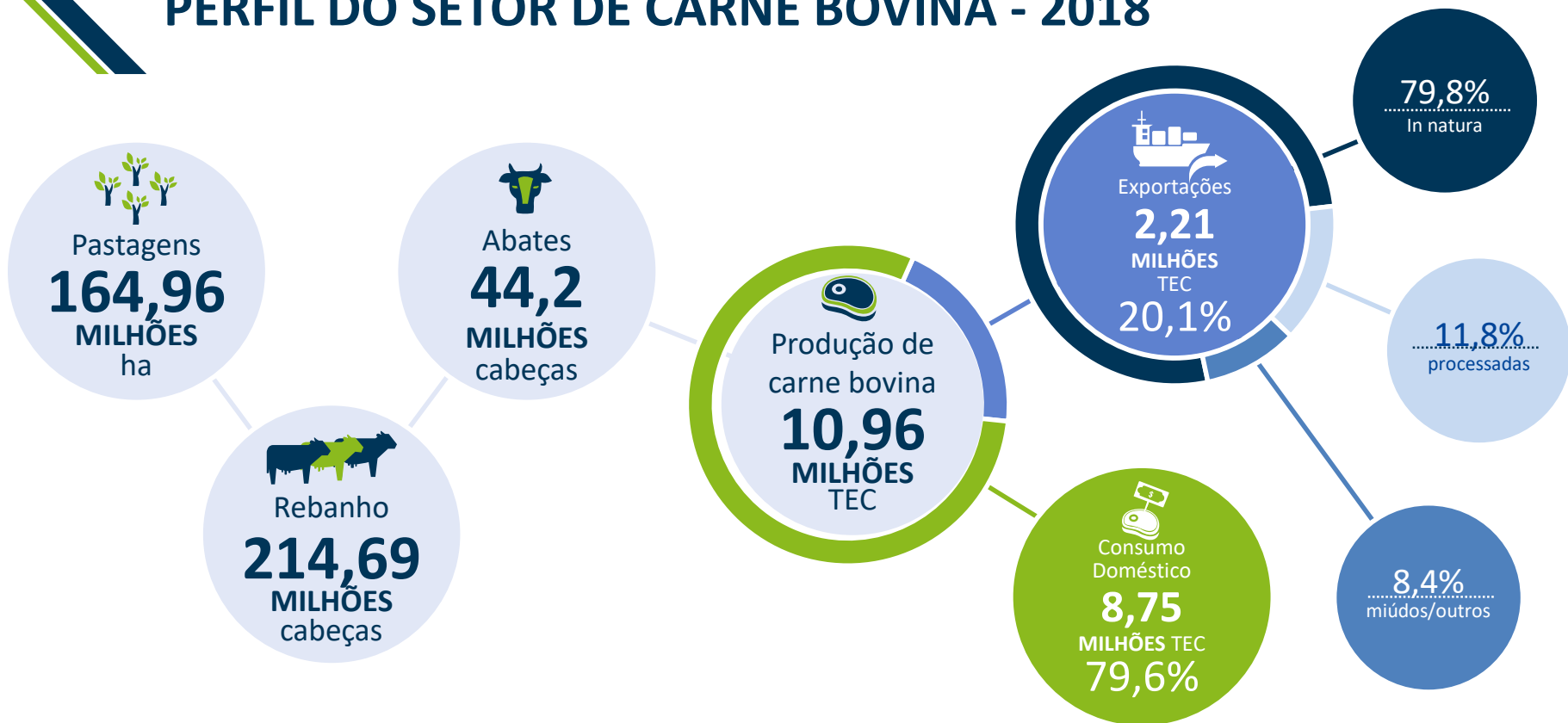
**Brazilian
Beef**



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PERFIL DO SETOR DE CARNE BOVINA - 2018



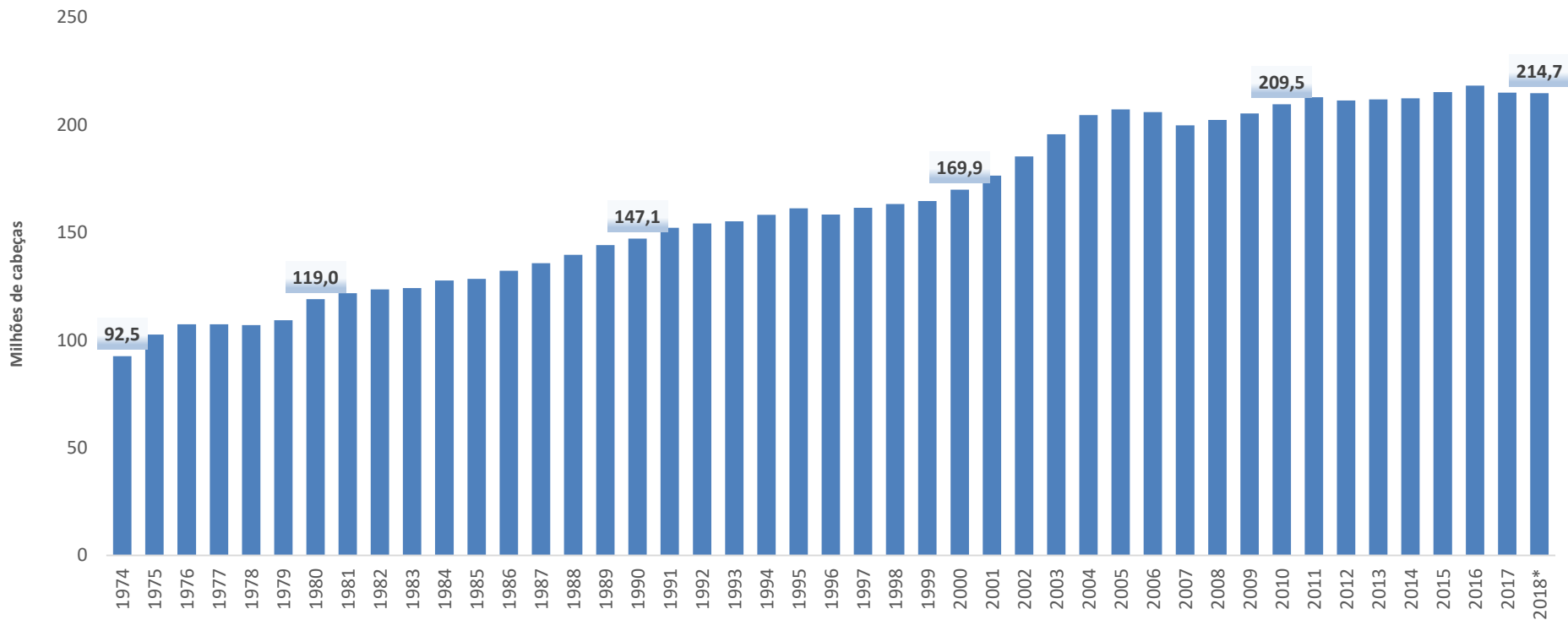
Fonte: Ministério da Economia/Comex Stat/Athenagro/ABIEC



NÚMEROS DO REBANHO BOVINO BRASILEIRO 2018/2019

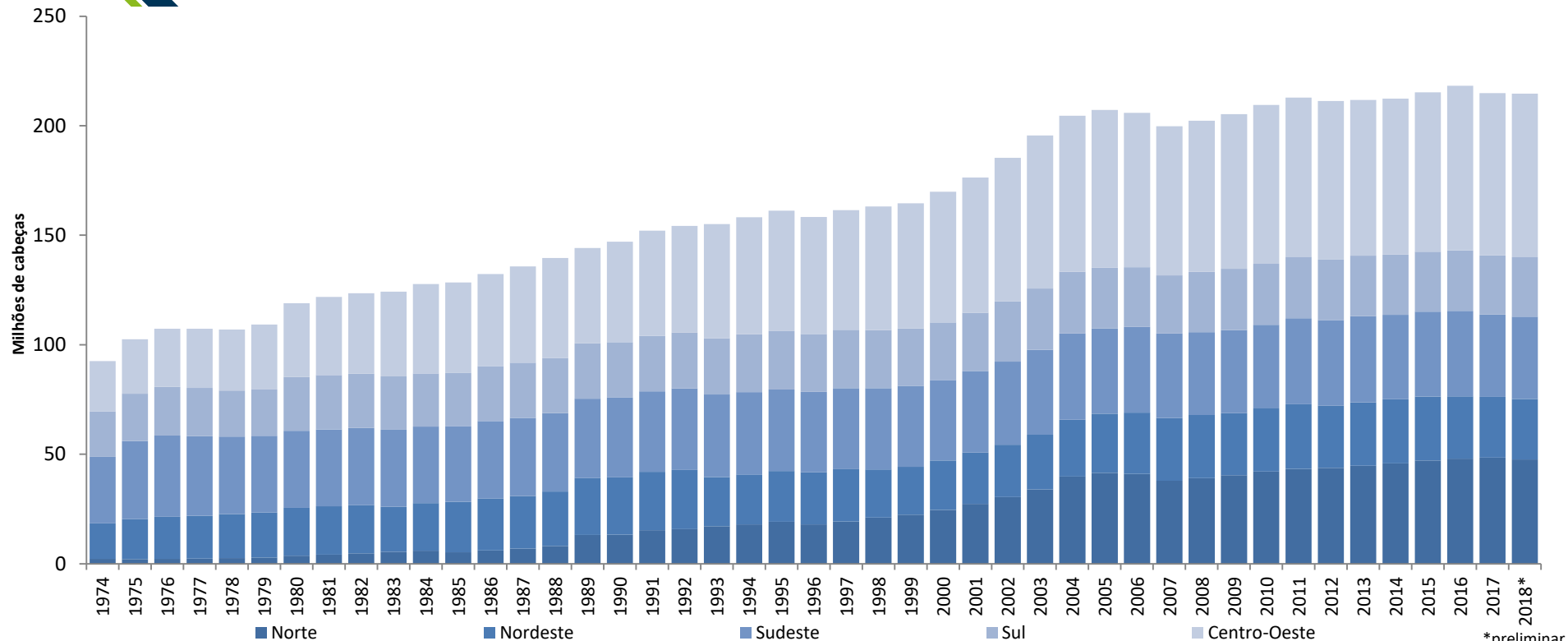


EVOLUÇÃO DO REBANHO BOVINO BRASILEIRO



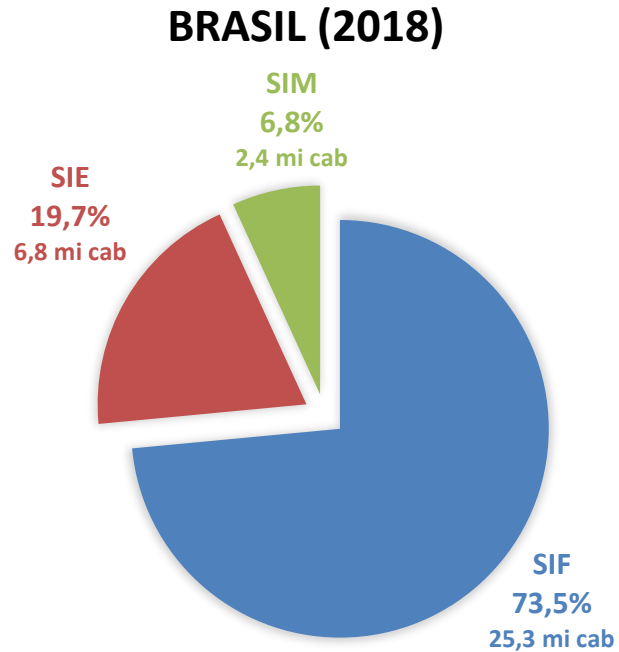
Fonte: IBGE/Athenagro/ABIEC

EVOLUÇÃO DO REBANHO BOVINO BRASILEIRO POR REGIÃO



*preliminar

PARTICIPAÇÃO DO SIF, SIE E SIM NOS ABATES BOVINOS



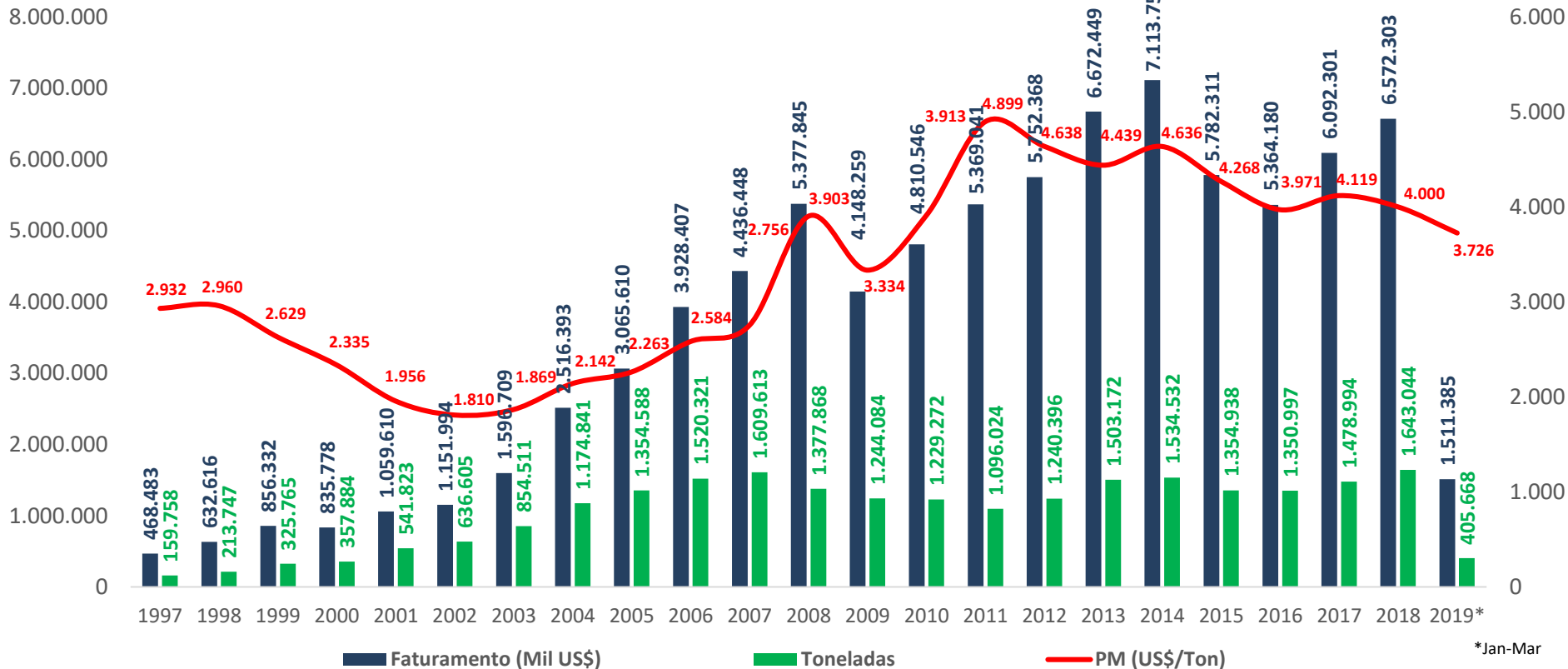
Fonte: IBGE/Athenagro/ABIEC



NÚMEROS DAS EXPORTAÇÕES BRASILEIRAS DE CARNE BOVINA 2018/2019



EVOLUÇÃO DAS EXPORTAÇÕES BRASILEIRAS DE CARNE BOVINA



EVOLUÇÃO DAS EXPORTAÇÕES BRASILEIRAS DE CARNE BOVINA

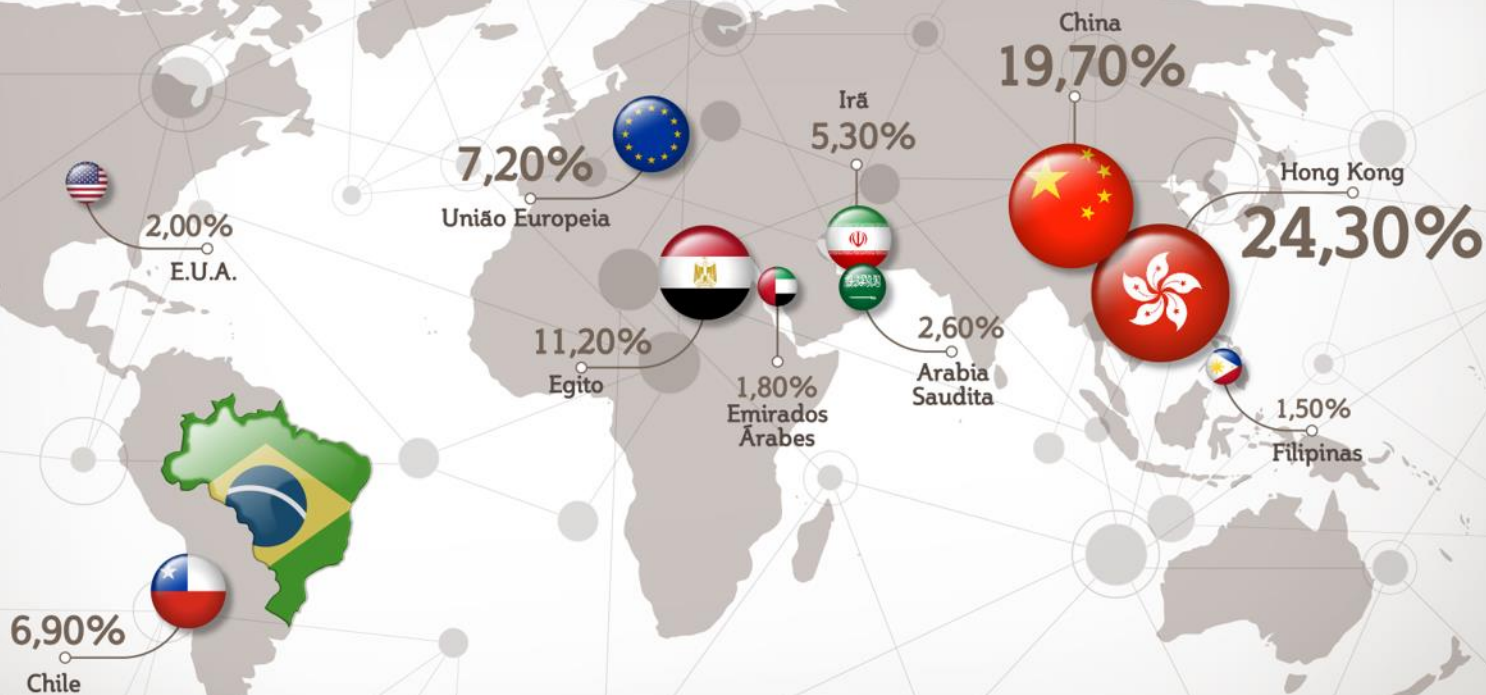
RECORDE HISTÓRICO
2,08% acima de 2007 (2°)



COMPARATIVO DE JANEIRO A DEZEMBRO – 2018/2017

PAÍSES + UE	FOB - (US\$) jan 2017 - dez 2017	FOB - (US\$) jan 2018 - dez 2018	Var. US\$	Tons - jan 2017 - dez 2017	Tons - jan 2018 - dez 2018	Var. Tons
TOTAL	6.092.301	6.572.303	7,88%	1.478.994	1.643.044	11,09%
HONG KONG	1.356.635	1.437.396	5,95%	356.200	394.856	10,85%
CHINA	929.204	1.487.115	60,04%	211.363	322.415	52,54%
EGYPT	528.868	526.165	-0,51%	153.661	180.812	17,67%
EUROPEAN UNION	709.427	728.164	2,64%	108.758	118.317	8,79%
CHILE	281.247	467.837	66,34%	64.688	114.959	77,71%
IRAN	559.718	328.221	-41,36%	133.193	84.045	-36,90%
SAUDI ARABIA	168.321	156.248	-7,17%	42.217	42.548	0,78%
UNITED ARAB EMIRATES	95.371	143.047	49,99%	22.319	36.821	64,97%
UNITED STATES	292.028	266.307	-8,81%	38.806	32.404	-16,50%
PHILIPPINES	29.891	86.856	190,57%	9.745	27.264	179,78%
LEBANON	64.920	81.454	25,47%	13.445	18.858	40,25%
JORDAN	49.333	68.161	38,16%	12.481	18.548	48,61%
ISRAEL	89.286	82.776	-7,29%	18.881	18.479	-2,13%
SINGAPORE	72.690	70.392	-3,16%	18.569	18.300	-1,44%
ALGERIA	39.928	59.124	48,08%	10.212	15.944	56,14%
PARAGUAY	8.335	34.180	310,09%	4.905	14.289	191,33%
ARGENTINA	0	34.102	-	0	14.096	-
URUGUAY	16.219	48.708	200,31%	4.637	14.010	202,16%
COTE D'IVORE	6.940	10.679	53,87%	9.726	13.868	42,59%
ANGOLA	60.186	33.383	-44,53%	17.373	12.098	-30,37%
OTHERS	733.753	421.987	-42,49%	227.817	130.112	-42,89%
RUSSIA	487.185	27.849	-94,28%	151.645	7.505	-95,05%

10 principais destinos da carne bovina brasileira em 2018 (em volume)

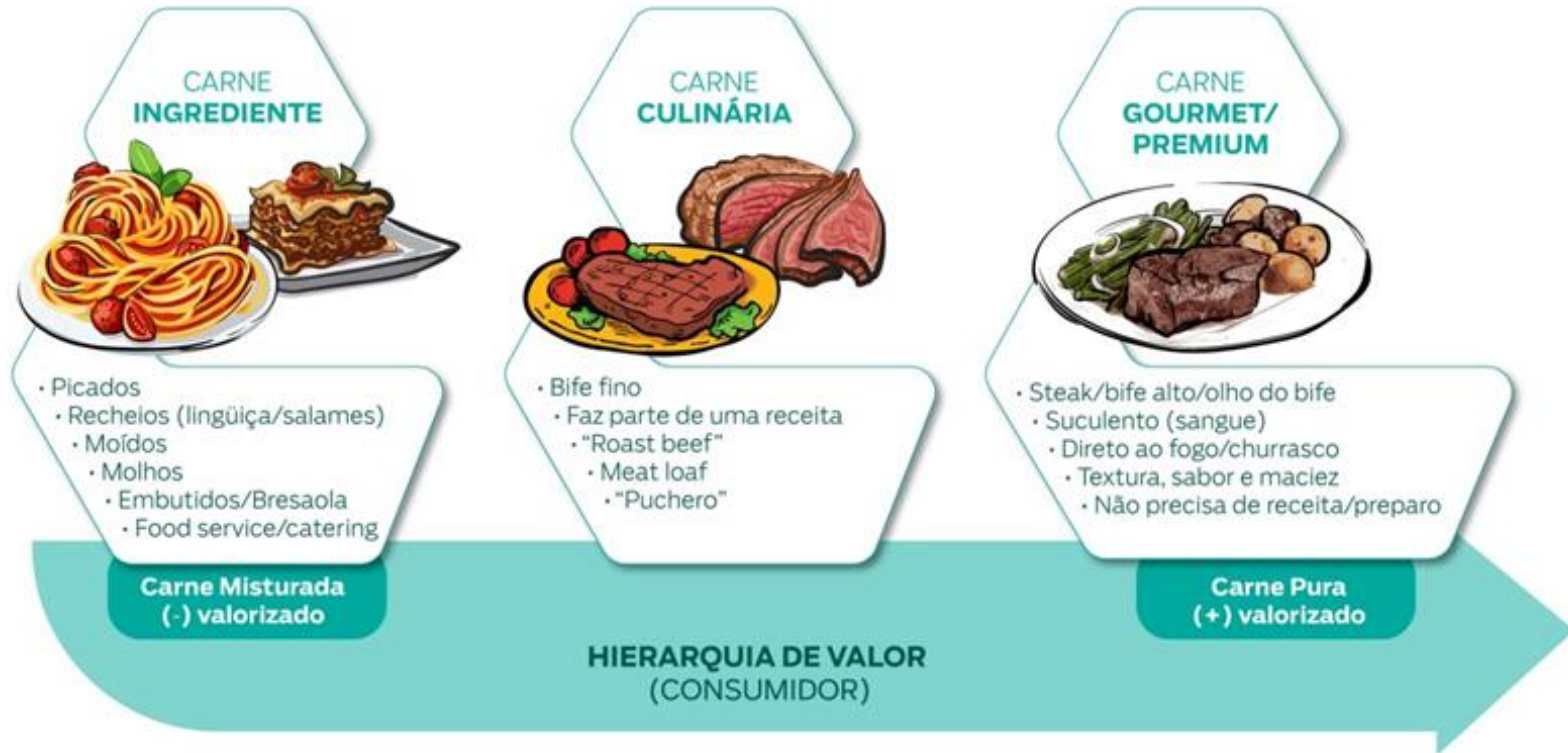


Fonte: Ministério da Economia/ ComexStat / ABIEC

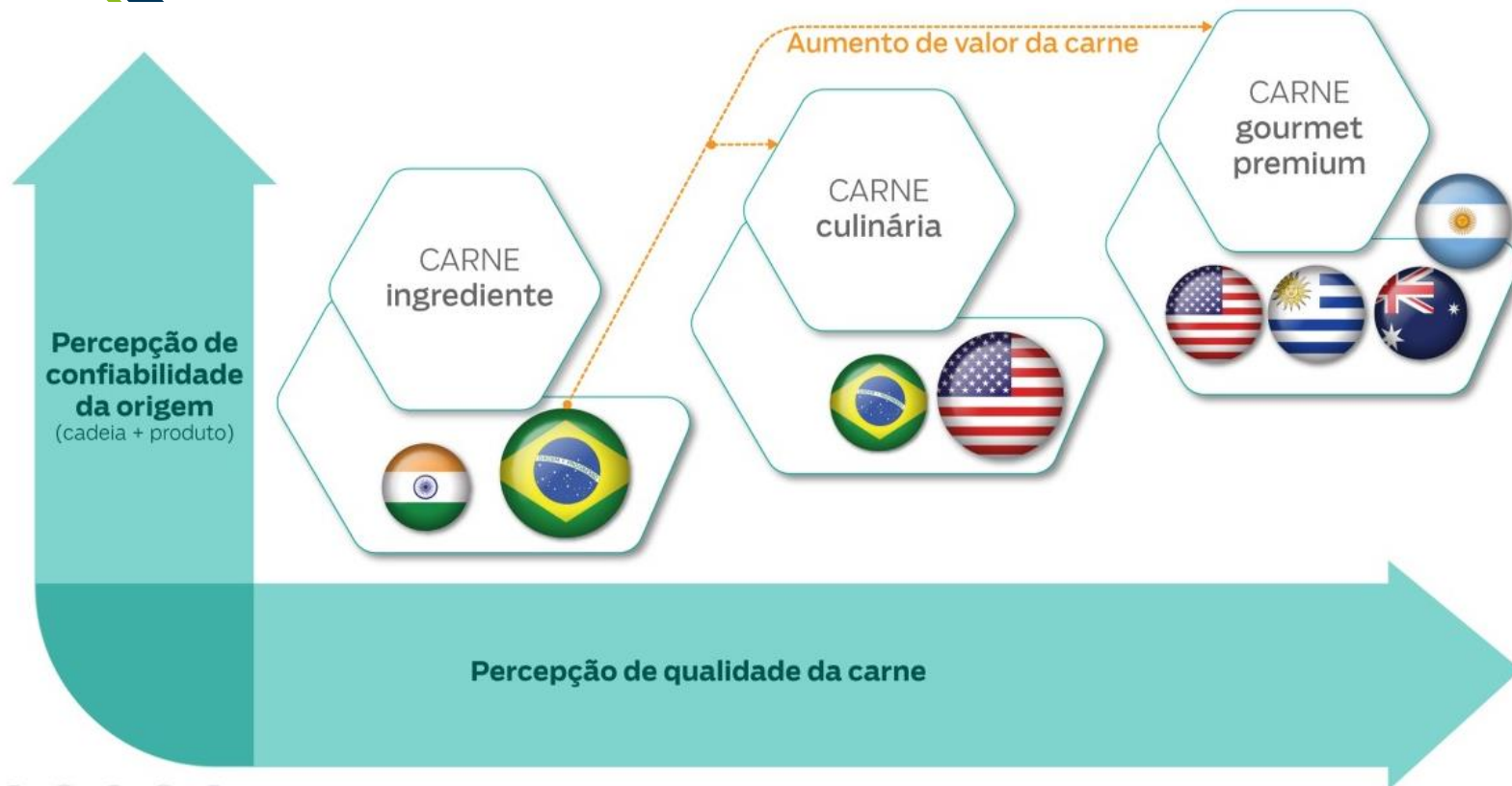
ABIEC

Brazilian
Beef

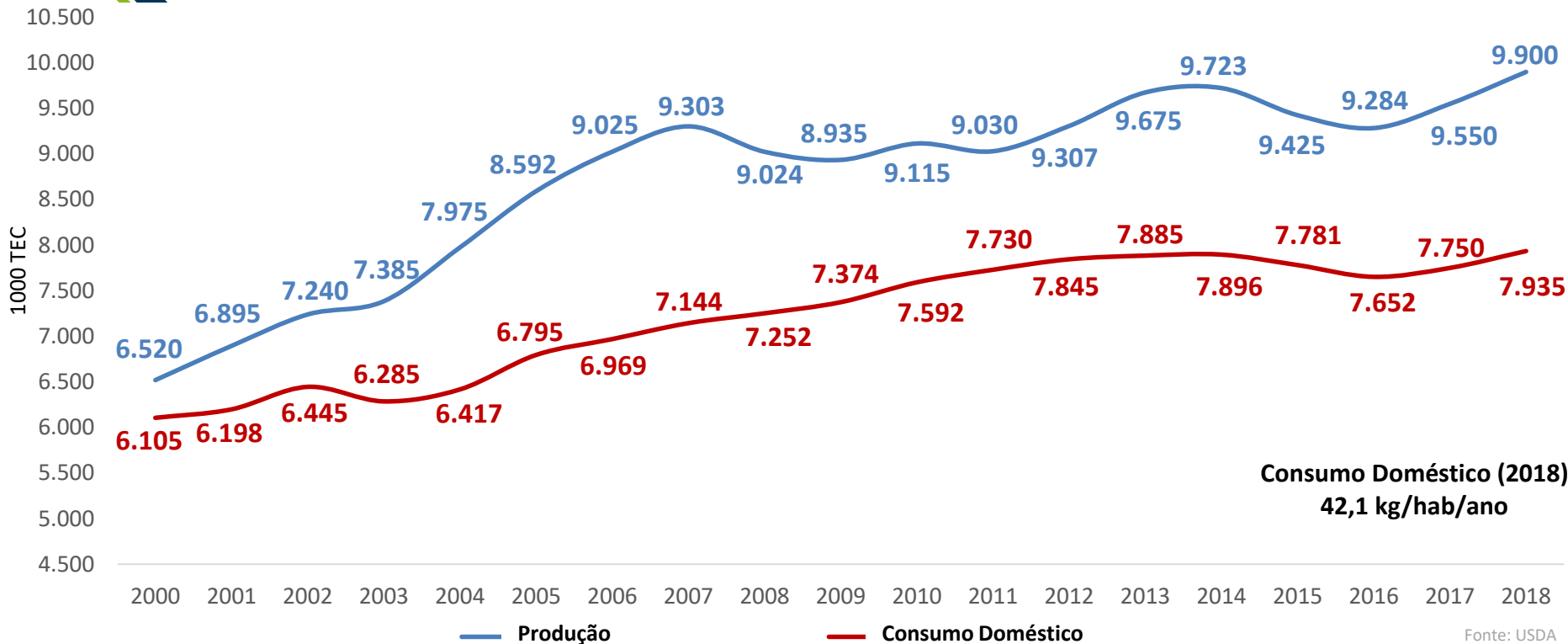
A HIERARQUIA DA CARNE



Mapa perceptual dos países exportadores



EVOLUÇÃO DA PRODUÇÃO E CONSUMO DOMÉSTICO DO BRASIL DE CARNE BOVINA

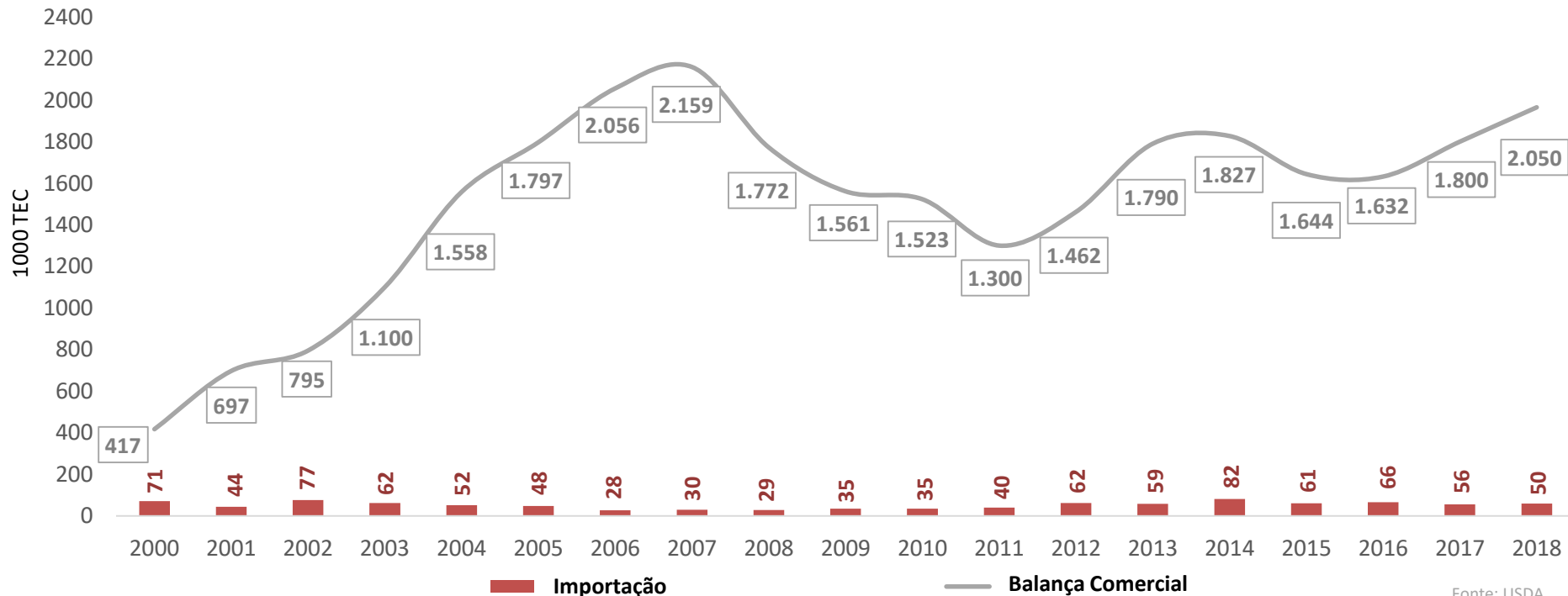


Consumo Doméstico (2018)
42,1 kg/hab/ano

Fonte: USDA

EVOLUÇÃO DAS EXPORTAÇÕES E IMPORTAÇÕES DE CARNE BOVINA DO BRASIL

Dados em tonelada equivalente carcaça



Fonte: USDA



ACESSO A MERCADOS



AGREGAÇÃO DE VALOR

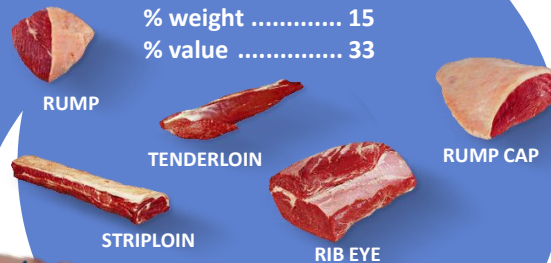
Carcass Zone III

Weight 52kg
 % weight 29
 % value 24



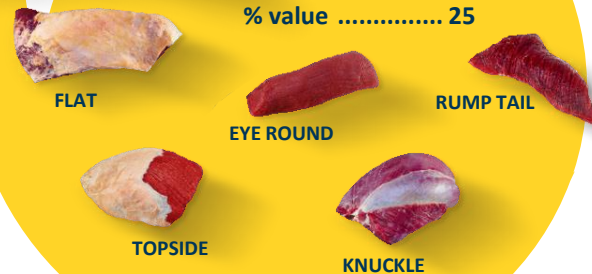
Carcass Zone I

Weight 26kg
 % weight 15
 % value 33



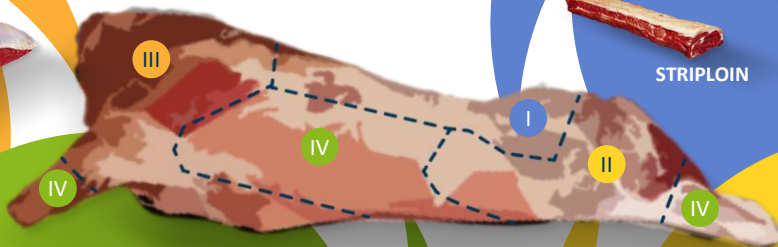
Carcass Zone II

Weight 43kg
 % weight 25
 % value 25



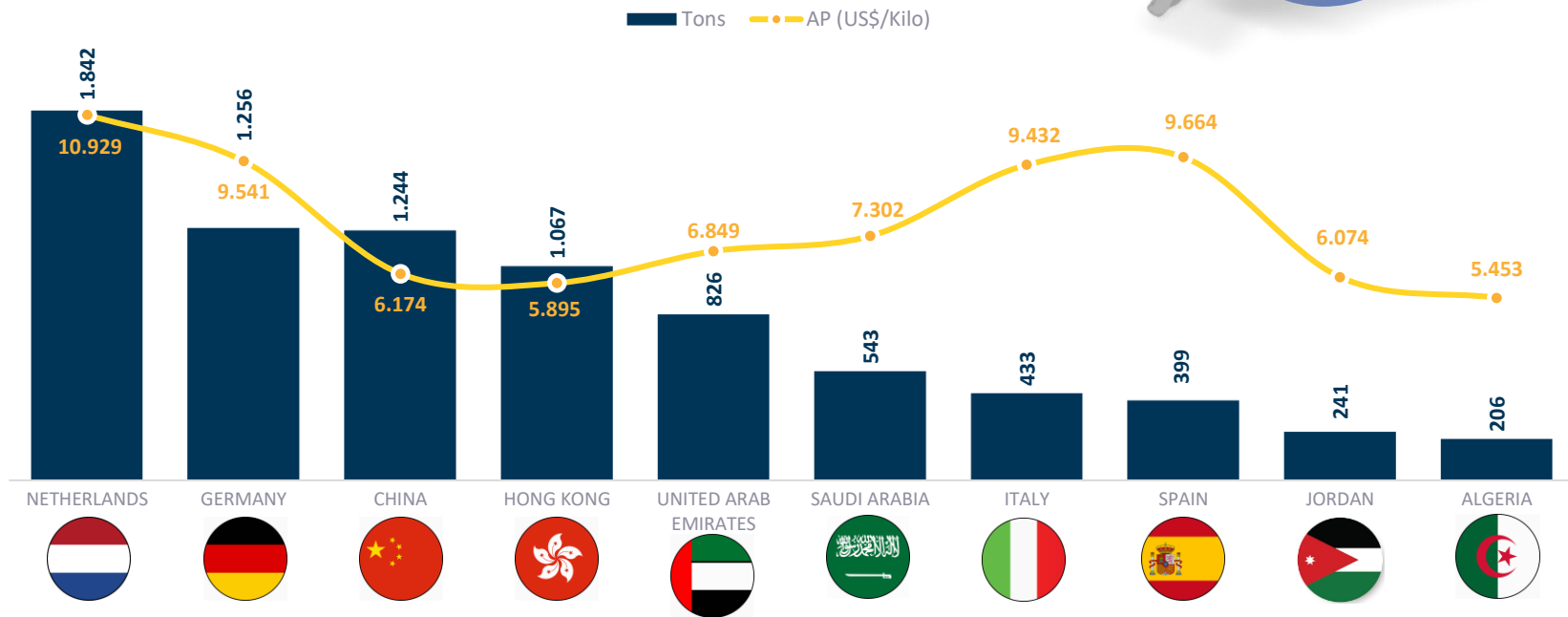
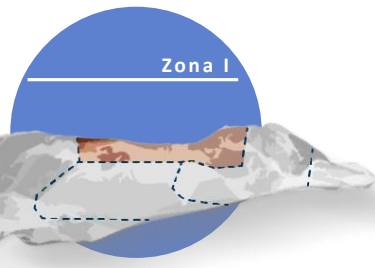
Carcass Zone IV

Weight 56kg
 % weight 31
 % value 18



AGREGAÇÃO DE VALOR – JAN A MAR/2018

CLASSIFICAÇÃO POR ZONAS

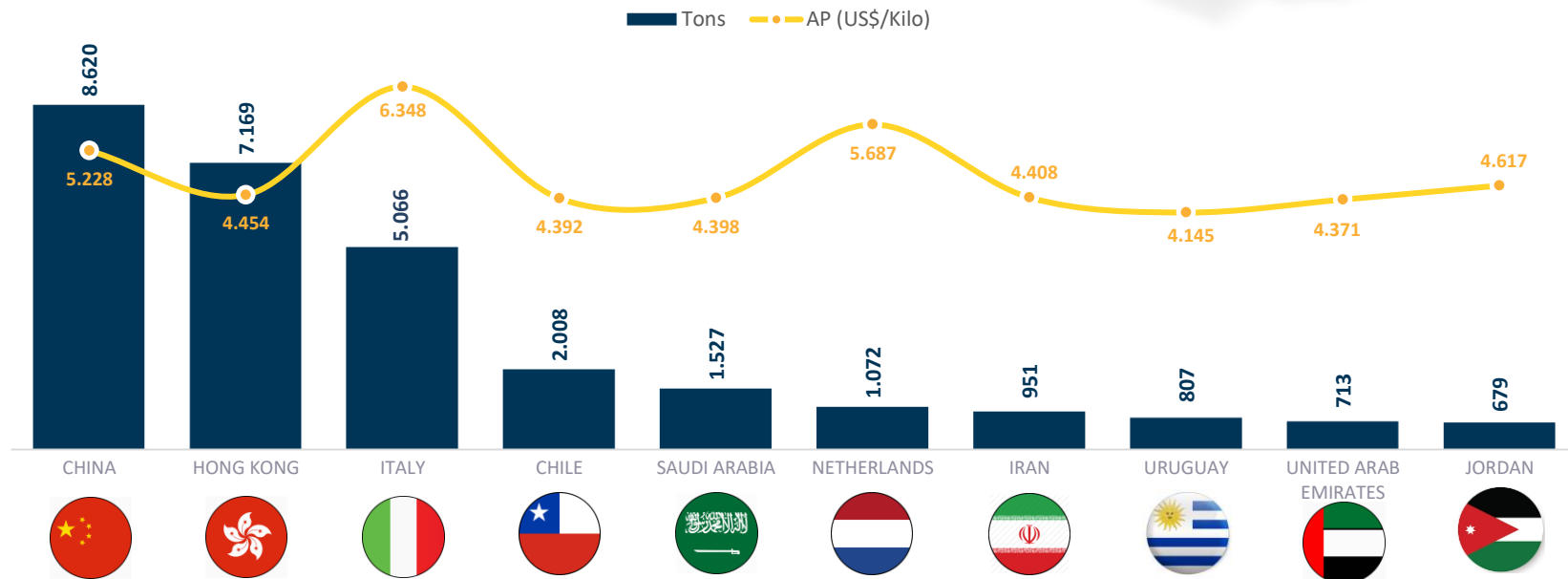
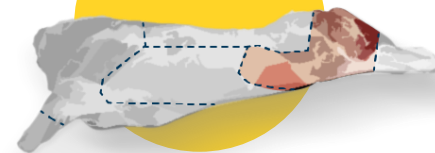


Source: Ministério da Economia/Comex Stat/ABIEC

AGREGAÇÃO DE VALOR – JAN A MAR/2018

CLASSIFICAÇÃO POR ZONAS

Zona II

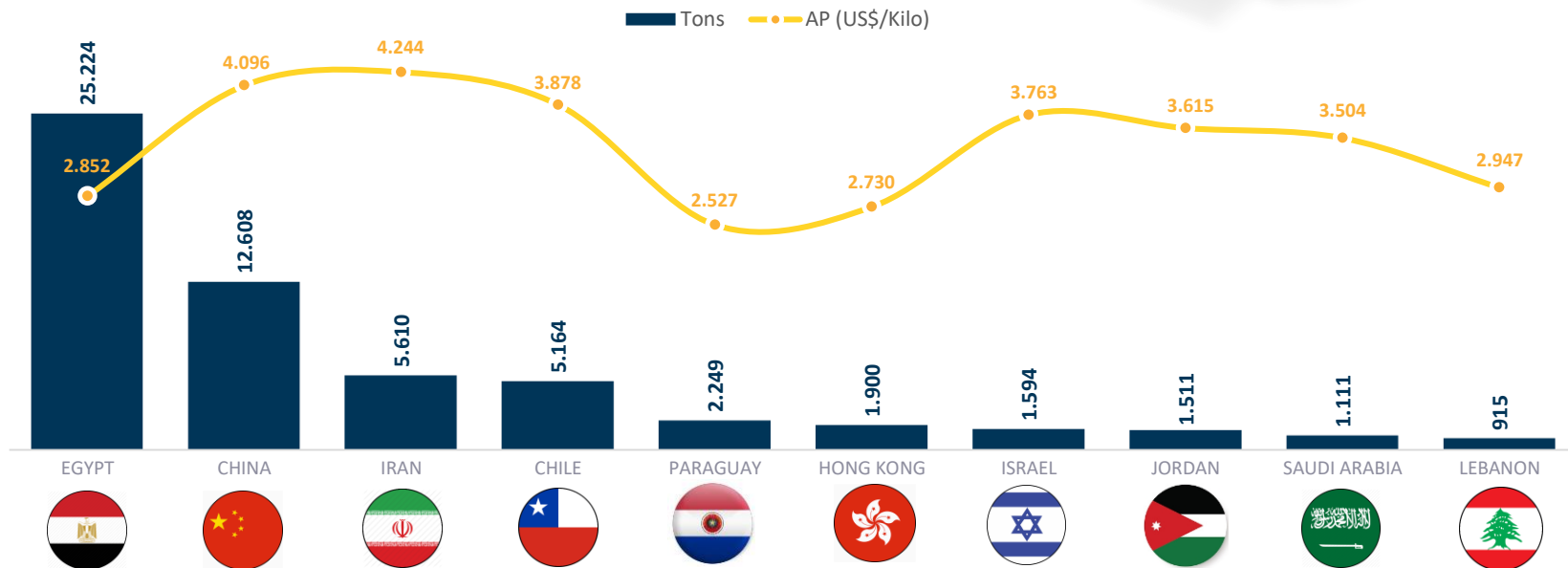
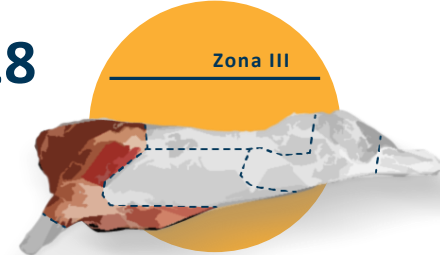


Fonte: Ministério da Economia/Comex Stat/ABIEC

AGREGAÇÃO DE VALOR – JAN A MAR/2018

CLASSIFICAÇÃO POR ZONAS

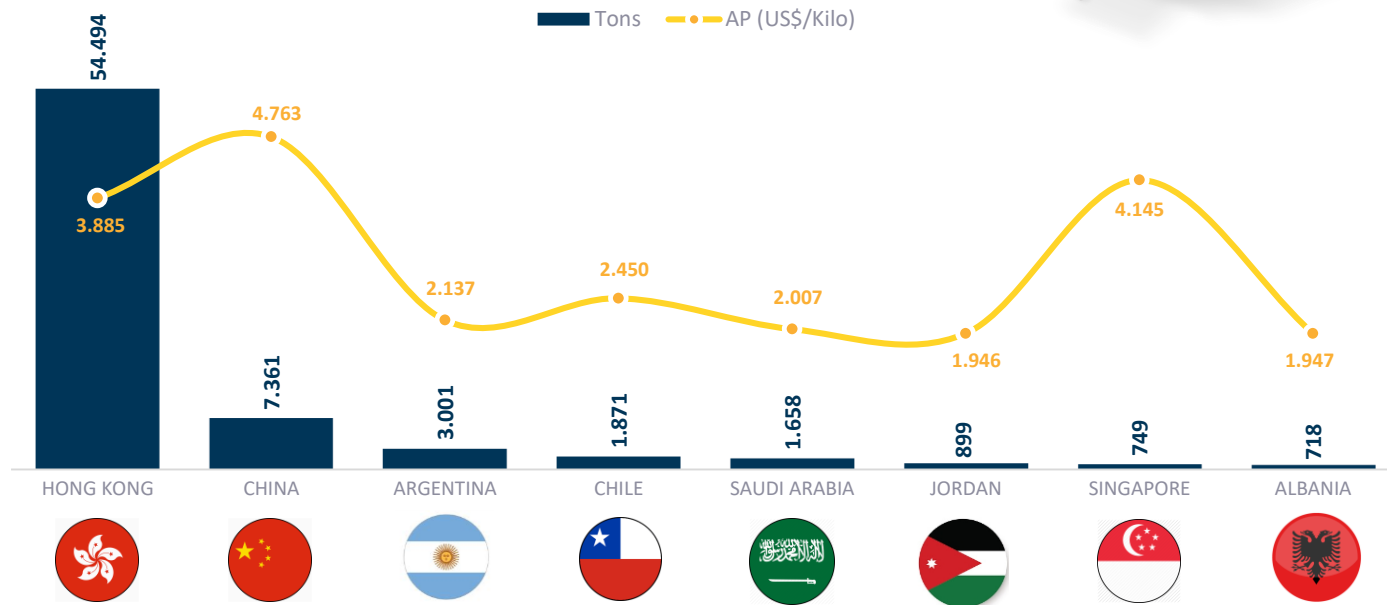
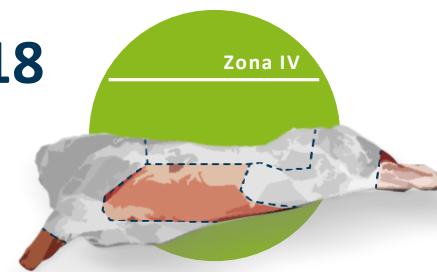
Zona III



Fonte: Ministério da Economia/Comex Stat/ABIEC

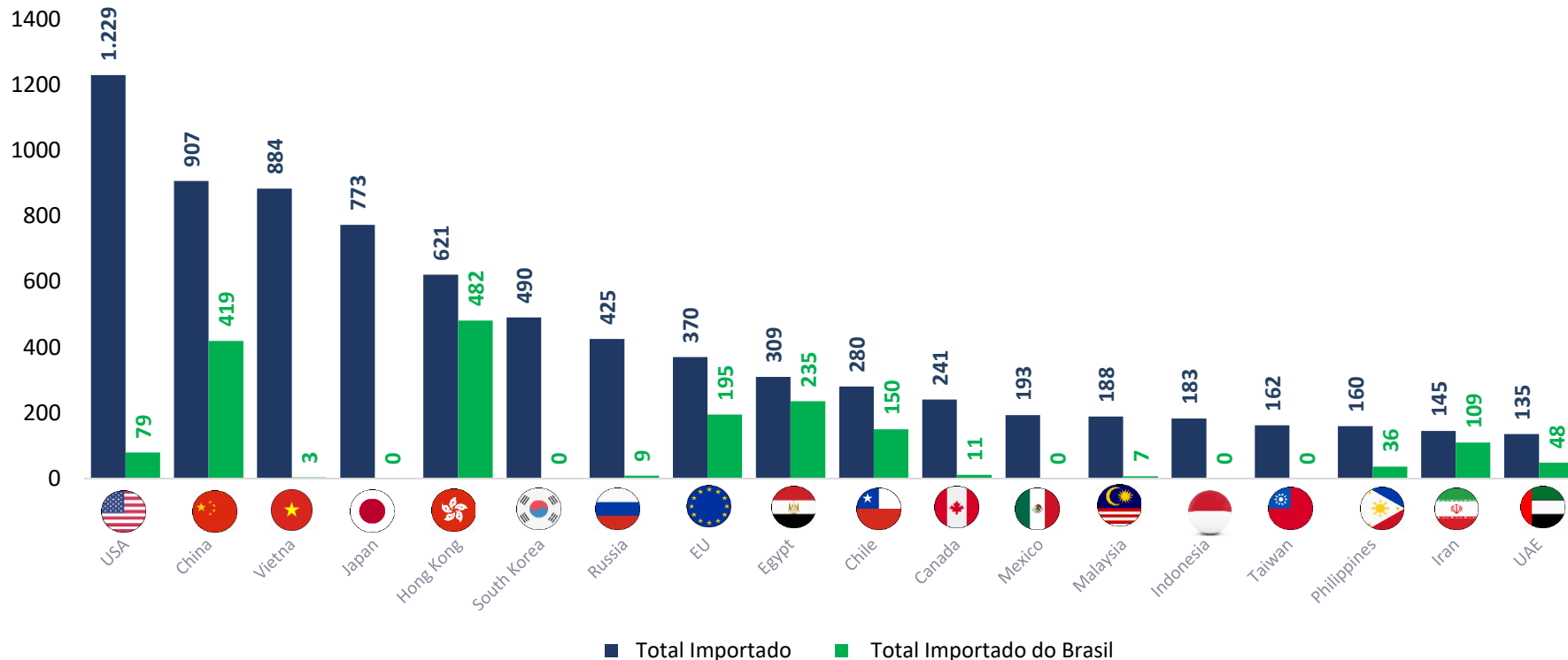
AGREGAÇÃO DE VALOR – JAN A MAR/2018

CLASSIFICAÇÃO POR ZONAS



Fonte: Ministério da Economia/Comex Stat/ABIEC

MAIORES IMPORTADORES DE CARNE BOVINA DO MUNDO - 2018



MERCADOS NÃO ACESSADO PELO BRASIL



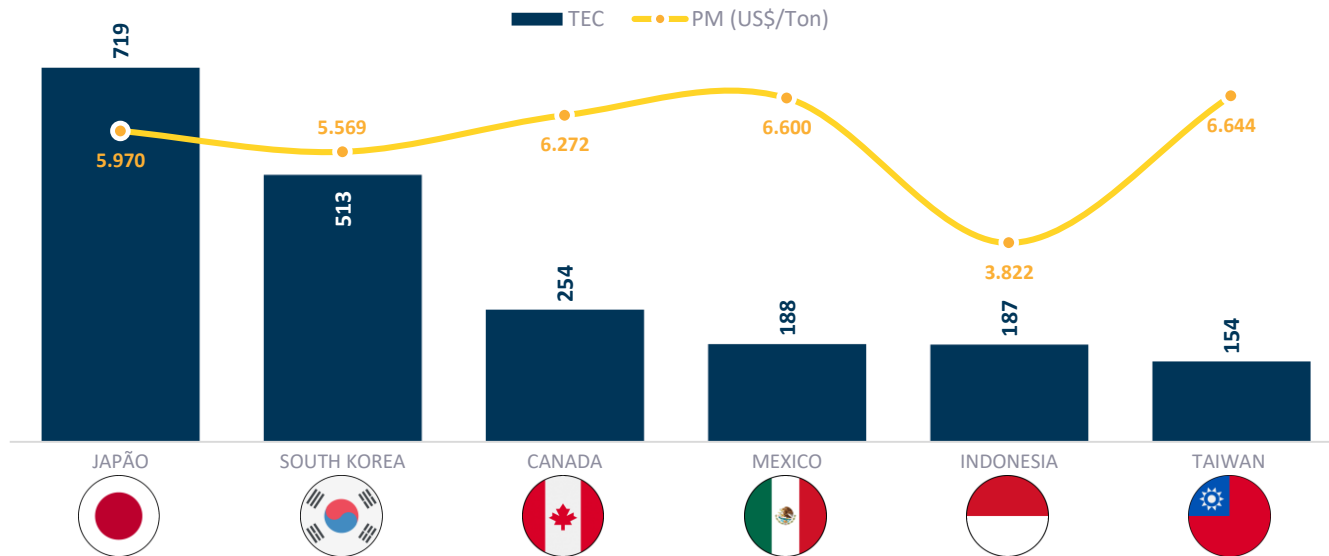
POSSIBILITY TO EXPORT 300 THOUSAND T.CWE*



APROXIMAMENTE US\$ 1,7 BI PER YEAR*



REPRESENT 18% OF WORLD'S IMPORTS



Fonte: USDA/Athenagro

SANIDADE ANIMAL – STATUS BSE

According to [Resolution No. 26](#) (86th General Session of World Assembly, May 2018)

+ Negligible BSE risk

Member Countries recognised as having a **negligible BSE risk** in accordance with Chapter 11.4. of the [Terrestrial Code](#) :

Argentina	Hungary	Norway
Australia	Iceland	Panama
Austria	India	Paraguay
Belgium	Israel	Peru
Brazil	Italy	Poland
Bulgaria	Japan	Portugal
Chile	Korea (Rep. of)	Romania
Colombia	Latvia	Singapore
Costa Rica	Liechtenstein	Slovakia
Croatia	Lithuania	Slovenia
Cyprus	Luxembourg	Spain
Czech Republic	Malta	Sweden
Denmark	Mexico	Switzerland
Estonia	Namibia	The Netherlands
Finland	New Zealand	United States of America
Germany	Nicaragua	Uruguay

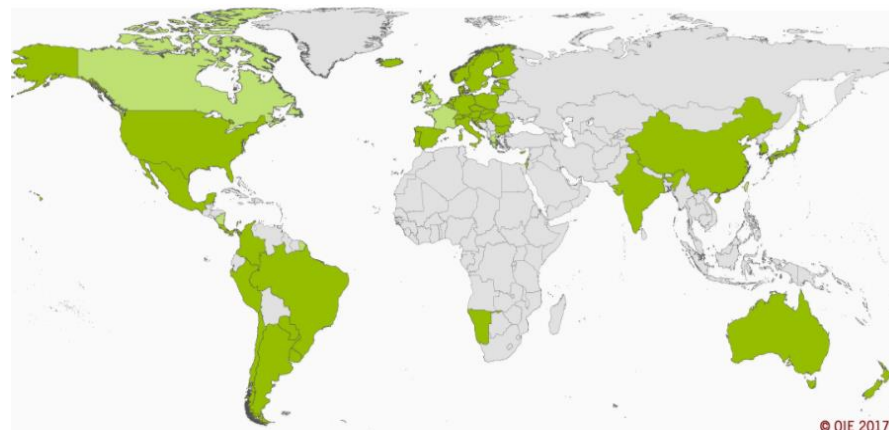
+ Controlled BSE risk

Member Countries recognised as having a **controlled BSE risk** in accordance with Chapter 11.4. of the [Terrestrial Code](#) :

Canada	France	Ireland
Chinese Taipei	Greece	

OIE Member Countries' official BSE risk status map

Last update May 2017



- Member Countries and zones recognised as having a negligible BSE risk status
- Member Countries and zones recognised as having a controlled BSE risk status
- Countries and zone without an OIE official BSE risk status





Fonte: OIE

SANIDADE ANIMAL – STATUS FMD (OIE MEMBROS)

SOUTH AMERICA: OIE Members' official FMD status map

Last update October 2018



-  Members and zones recognised as FMD free without vaccination
-  Members and zones recognised as FMD free with vaccination
-  Suspension of FMD free status
-  Country and zone without an OIE official status for FMD

© OIE 2018

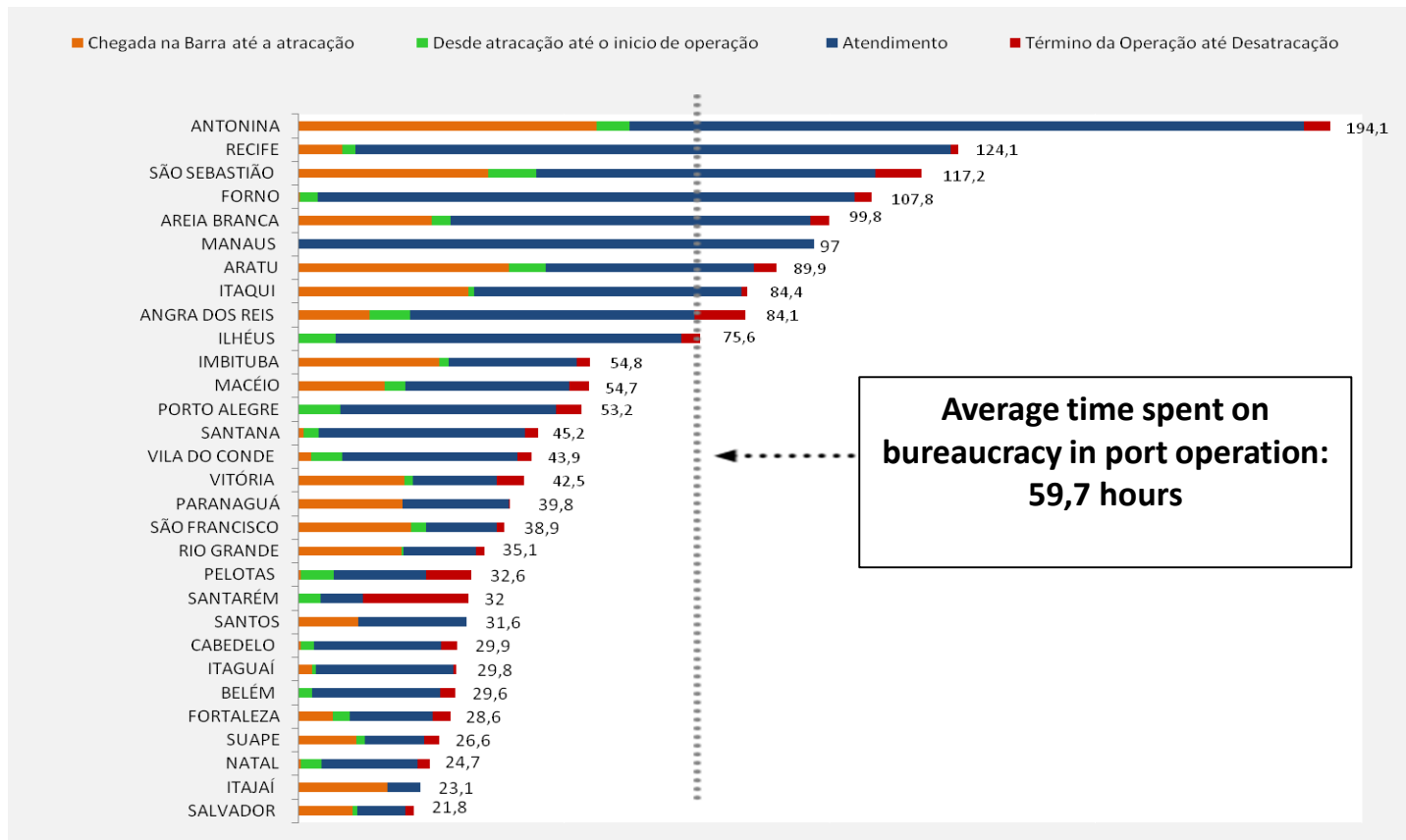
Fonte: OIE



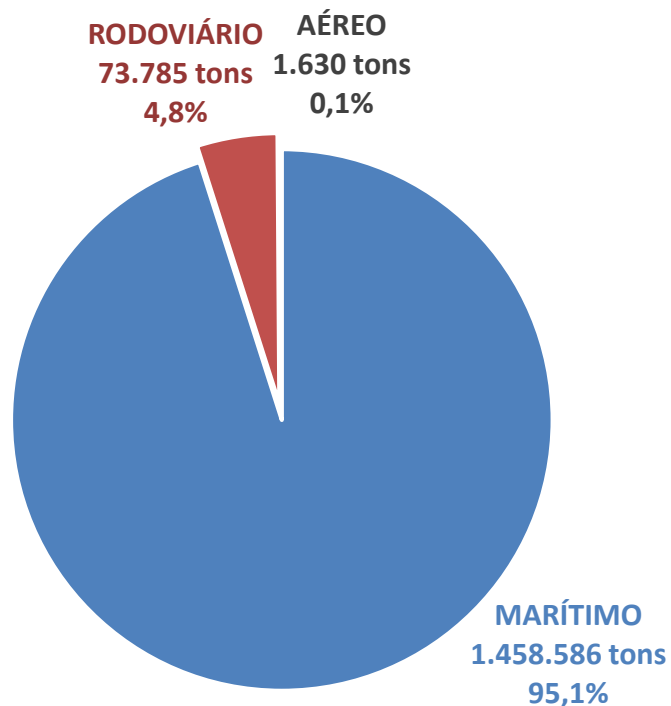
LOGÍSTICA



LOGÍSTICA DOS PORTOS BRASILEIROS



PRINCIPAIS ROTAS DE EXPORTAÇÃO BRASILEIRA DE CARNE BOVINA- 2018



Fonte: Ministério da Economia/Comex Stat/ABIEC



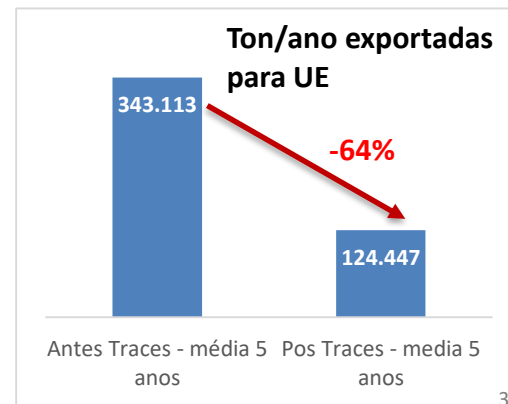
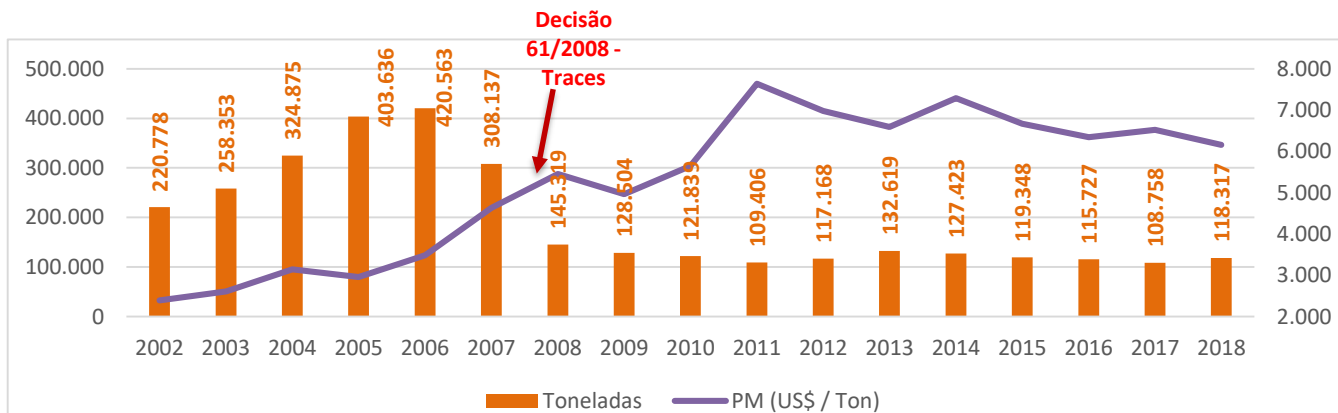
EXPORTAÇÕES UE

LISTA TRACE
COTA HILTON



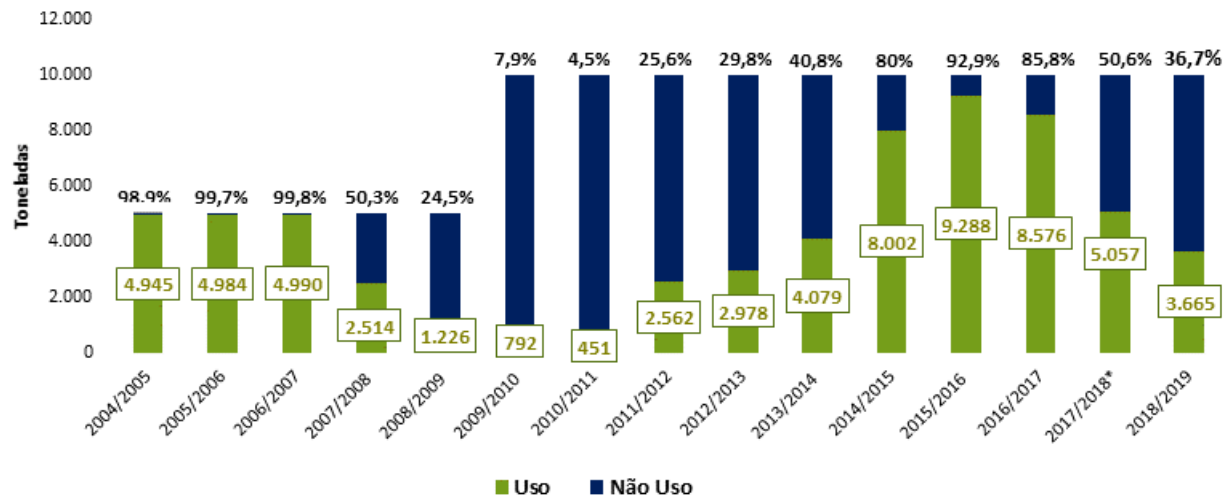
EXPORTAÇÕES PARA UNIÃO EUROPEIA

- **Lista Traces** (Decisão 61/2008) – requisitos sanitários impostos exclusivamente ao Brasil
- **Definição Hilton** – solicitação da alteração de **alimentação exclusivamente a pasto** - negociações desde 2009
- Perda do **pre-listing** para indicação de estabelecimentos – desde 03/2017
- **Cota 481** – falta de resposta ao pedido brasileiro – apresentada em 2016
- Controles **reforçados** das exportações – desde 03/2017
- **Reconhecimento de RO, TO e DF** para exportação de carne bovina – auditoria em 2016, até hoje sem resposta – negociações desde 2011;



COTA HILTON

Ano Hilton	Cota Ton.	Uso	Não Uso	%
2004/2005	5.000	4.945	55	98,9%
2005/2006	5.000	4.984	16	99,7%
2006/2007	5.000	4.990	10	99,8%
2007/2008	5.000	2.514	2.486	50,3%
2008/2009	5.000	1.226	3.774	24,5%
2009/2010	10.000	792	9.208	7,9%
2010/2011	10.000	451	9.549	4,5%
2011/2012	10.000	2.562	7.438	25,6%
2012/2013	10.000	2.978	7.022	29,8%
2013/2014	10.000	4.079	5.921	40,8%
2014/2015	10.000	8.002	1.998	80,0%
2015/2016	10.000	9.288	712	92,9%
2016/2017	10.000	8.576	1.424	85,8%
2017/2018*	10.000	5.057	4.943	50,6%
2018/2019	10.000	3.665	6.335	36,7%



*Dado divulgado pela Comissão Europeia - CIRCA BC

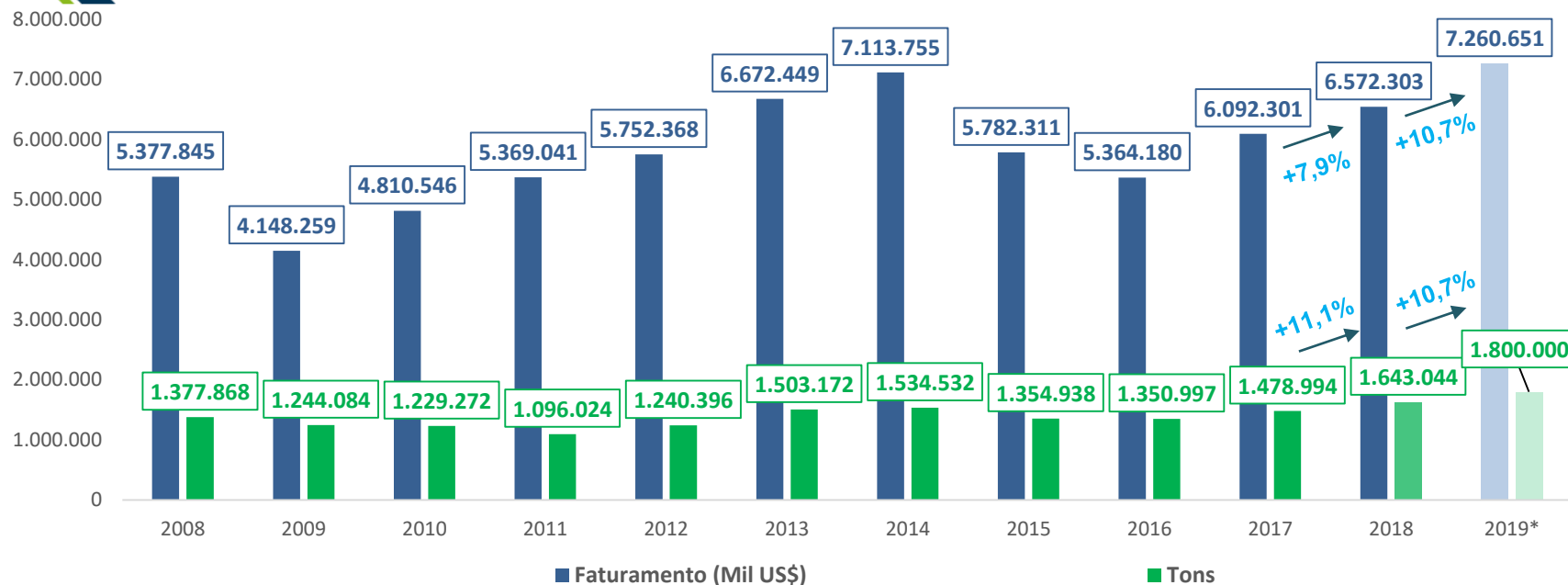
Fonte: ABIEC



PERSPECTIVAS 2019



PERSPECTIVAS - 2019



Perspectivas 2018/2019					
Ano	Faturamento (Bi US\$)	Tons (Mi)		Var% US\$	Var% Ton
2017	6,09	1,47			
2018	6,57	1,64		7,9%	11,1%
2019*	7,24	1,8		10,7%	10,7%

* perspectiva

Fonte: Ministério da Economia/Comex Stat/ABIEC



Obrigado!

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