

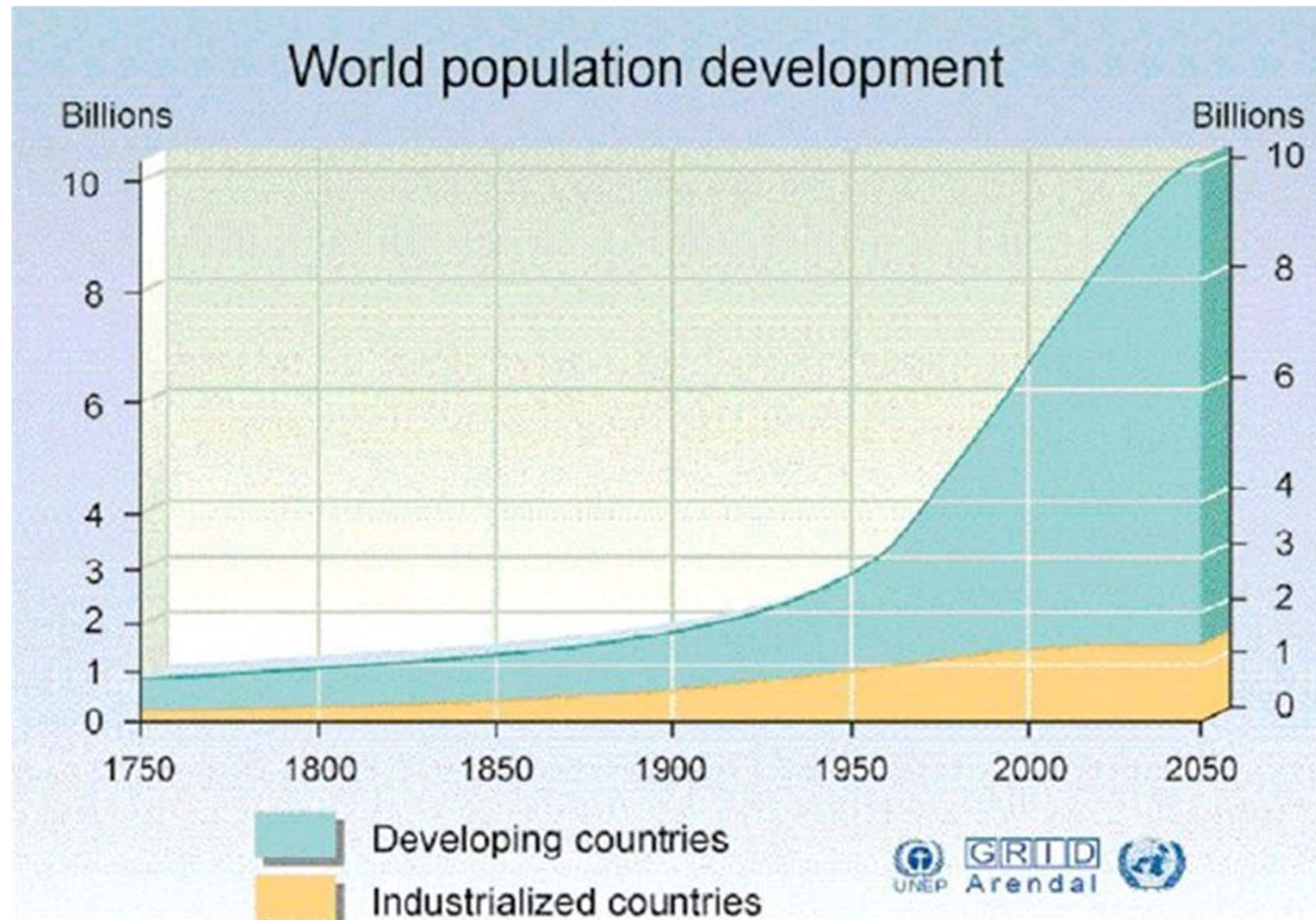


Agricultural Production Potential in Brazil – Implications for U.S. Agriculture and Trade

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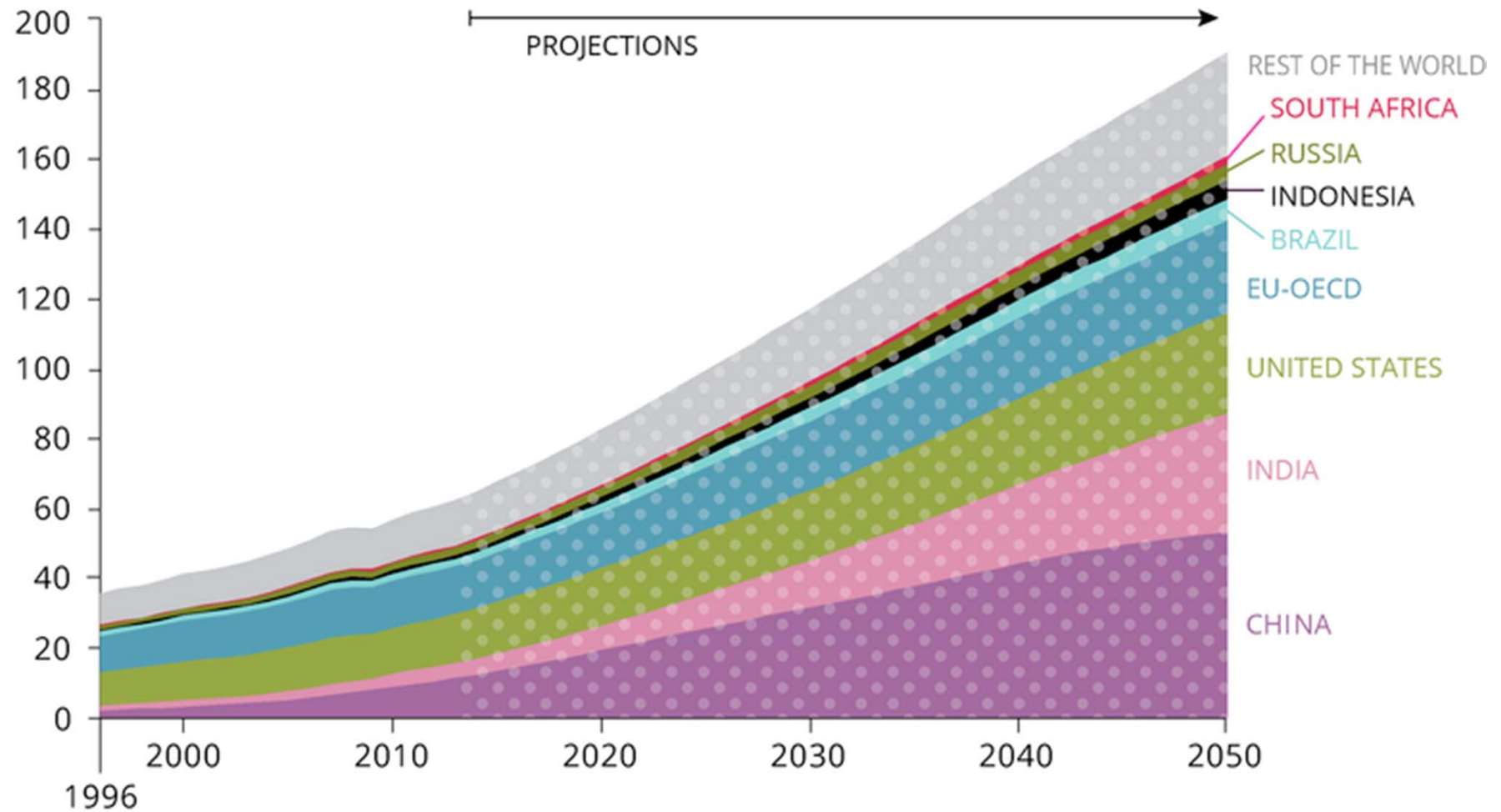
2018 Agricultural Outlook Forum, Washington DC, February 22, 2018

World Population

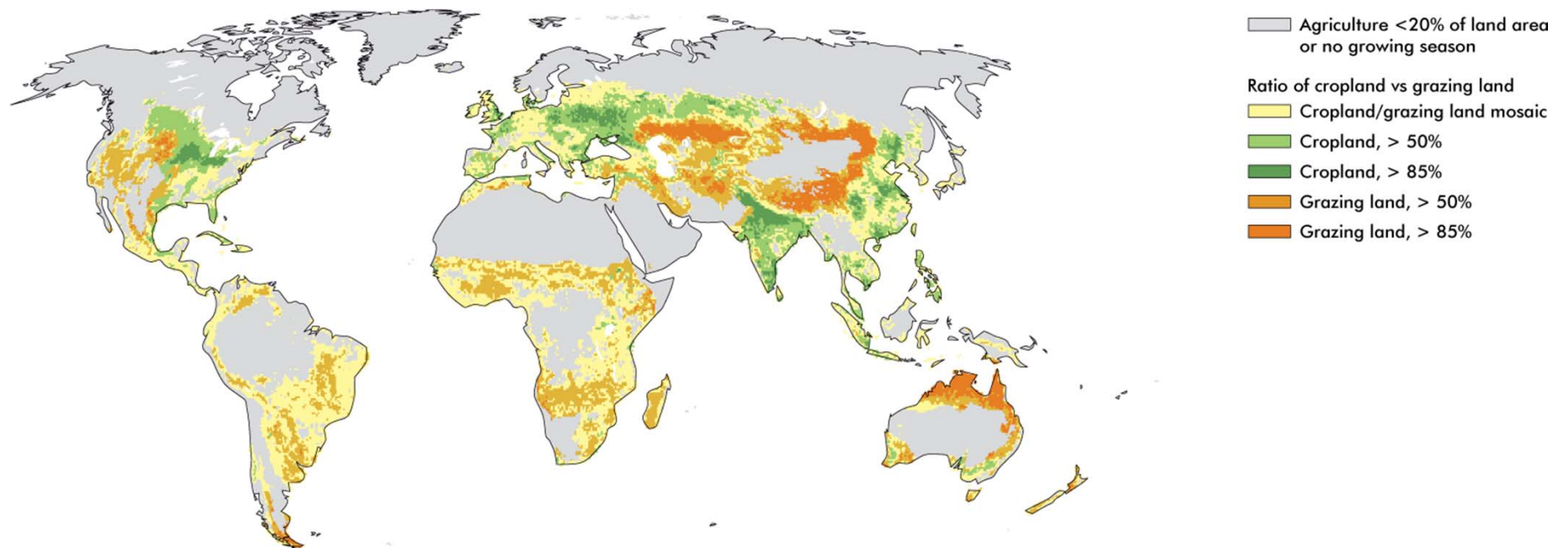


World GDP

Gross domestic product (trillion 2005 USD PPP)



Agricultural Land



Consumer Expenditures Spent on Food, 2016

	Country/Territory	Share of consumer expenditures			
		Food ²	Alcoholic beverages and tobacco	Consumer expenditures ³	Expenditures on food ²
		Percent		U.S. dollars per person	
1	USA	6.3	2.0	38,461	2,408
2	Singapore	6.7	2.1	19,219	1,297
3	United Kingdom	8.1	3.8	24,541	1,991
4	Switzerland	8.7	3.6	41,942	3,631
5	Canada	9.1	3.3	23,700	2,168
6	Ireland	9.5	5.5	20,851	1,973
7	Austria	9.6	3.3	23,636	2,273
8	Australia	9.7	3.4	30,079	2,927
9	Germany	10.6	3.2	21,207	2,246
10	Denmark	11.3	3.7	24,938	2,821
28	Brazil	15.7	1.5	5,295	833
29	Chile	16.3	3.0	8,601	1,402
35	Colombia	17.3	2.9	3,729	646
41	Uruguay	18.7	1.3	10,665	1,990
50	Ecuador	22.5	0.8	3,752	843
53	Mexico	23.1	2.5	5,757	1,331
58	Costa Rica	26.1	1.1	8,051	2,098
59	Peru	26.3	2.4	4,055	1,068
60	Dominican Republic	26.8	3.8	5,183	1,389
61	Argentina	28.2	1.9	8,165	2,306
62	Bolivia	29.2	2.1	2,245	656
80	Guatemala	40.8	1.7	3,550	1,450
86	Nigeria	58.9	1.0	1,745	1,028

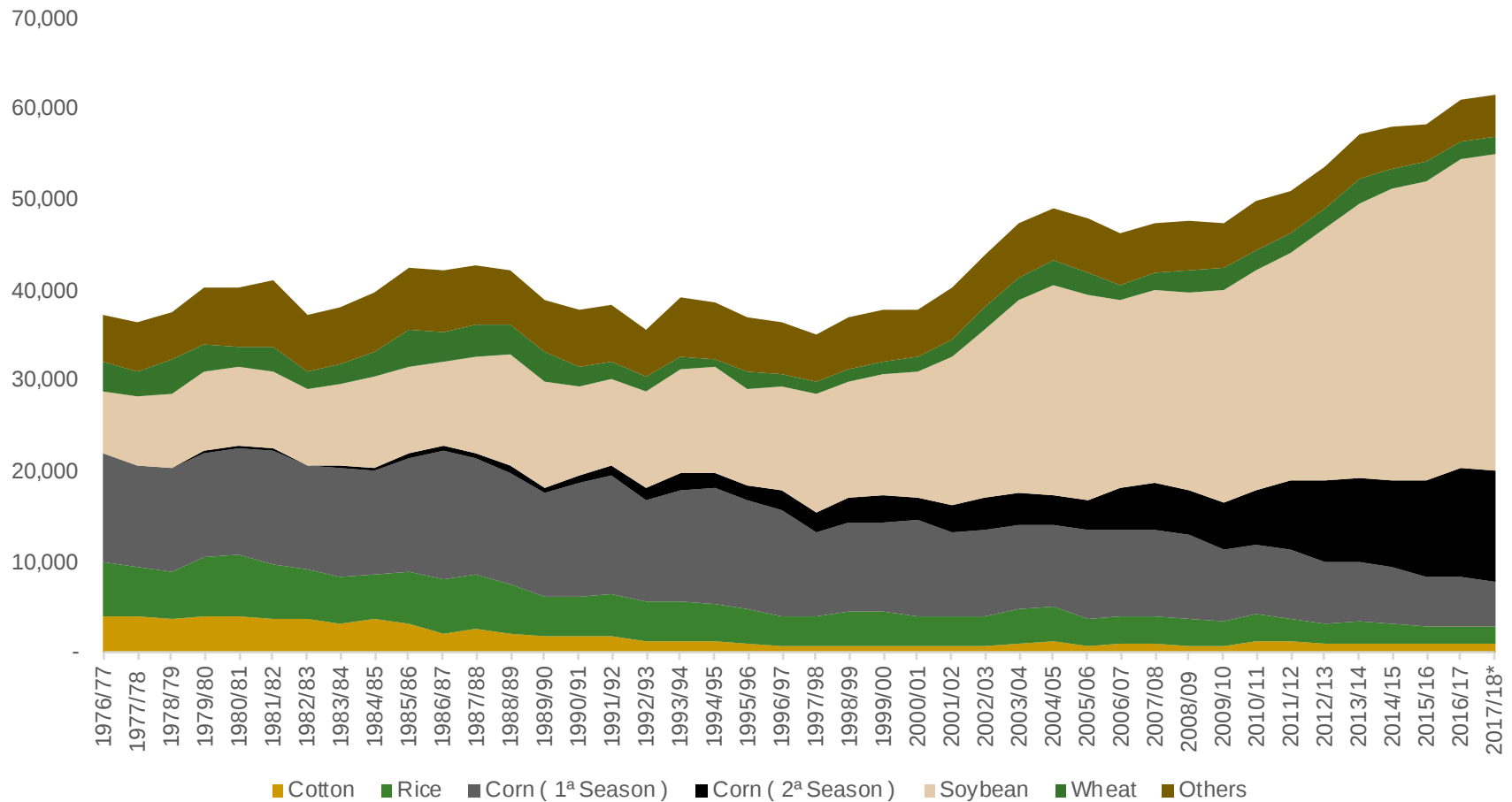
Source: USDA-ERS

U.S. Ag Exports as Share of Production 2016

Commodity	Percentage of Production Exported
Cotton	86.9
Rice	52.0
Sorghum	50.1
Soybean	47.0
Wheat	45.7
Pork	21.0
Poultry	16.5
Corn	15.1
Beef	10.1

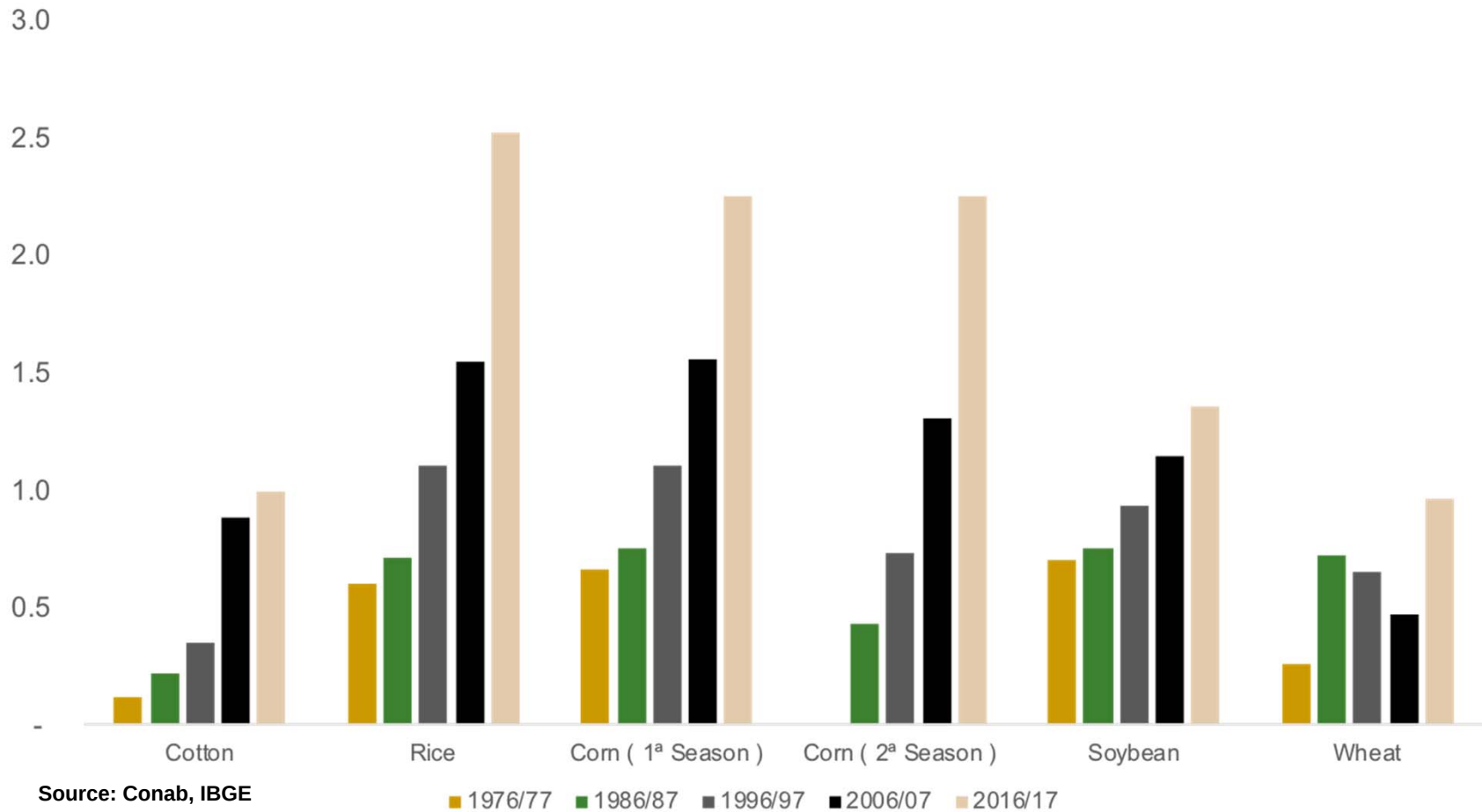
Source: USDA-FAS

Brazilian Planted Area Evolution (1000 ha)

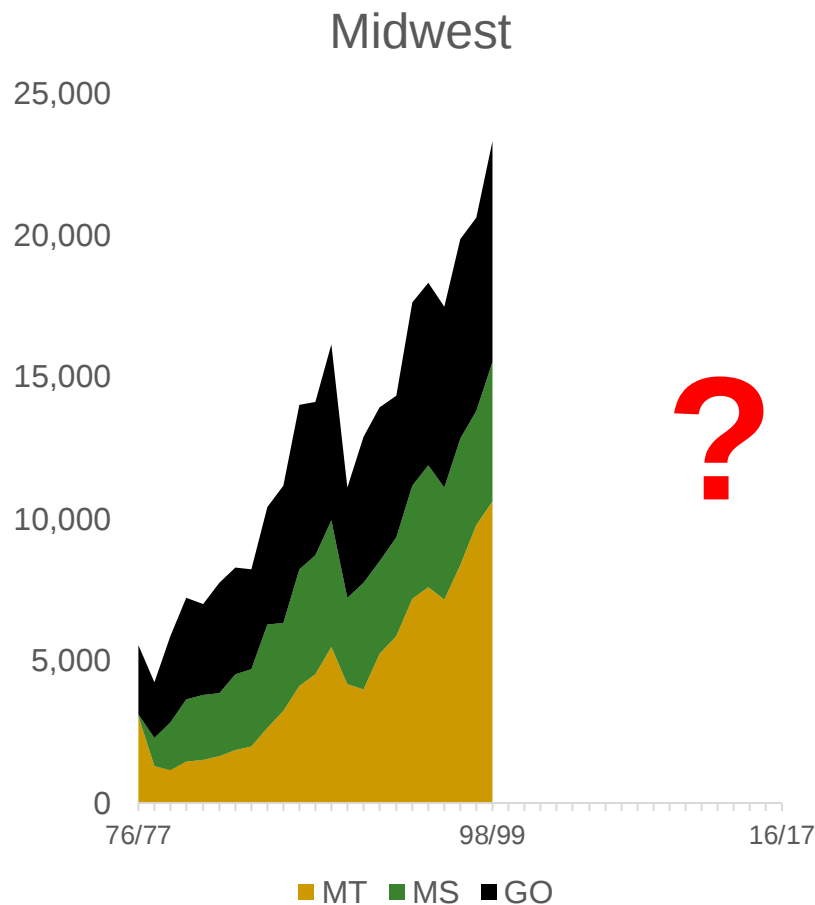


Source: Conab, IBGE

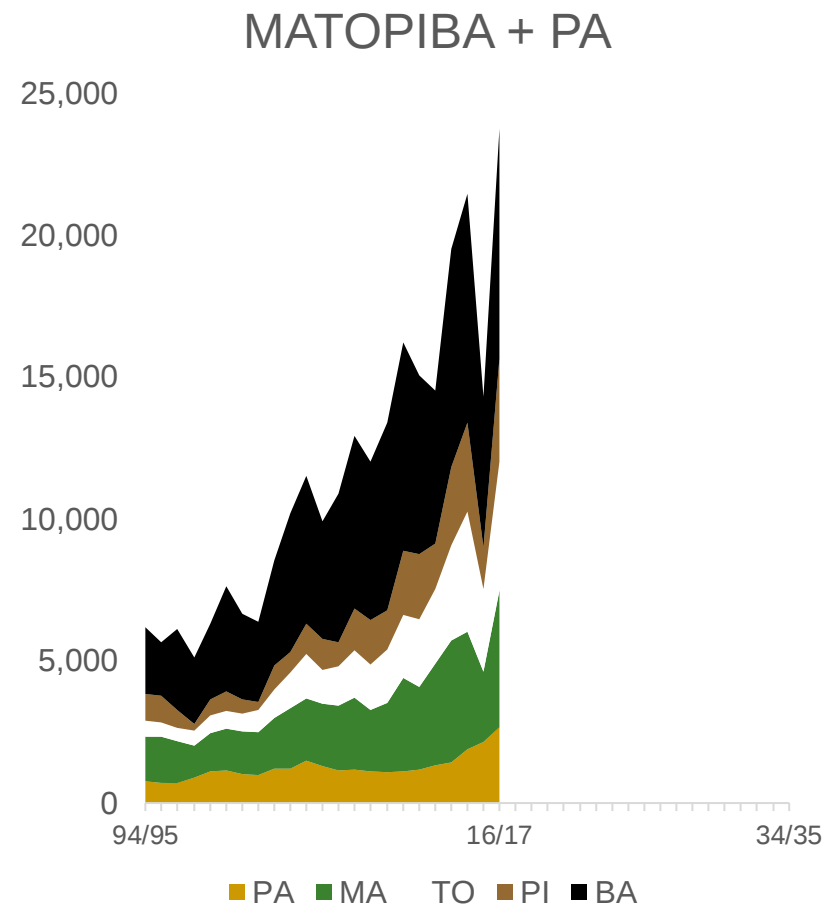
Brazilian Crop Yield Performance (metric tons/acre)



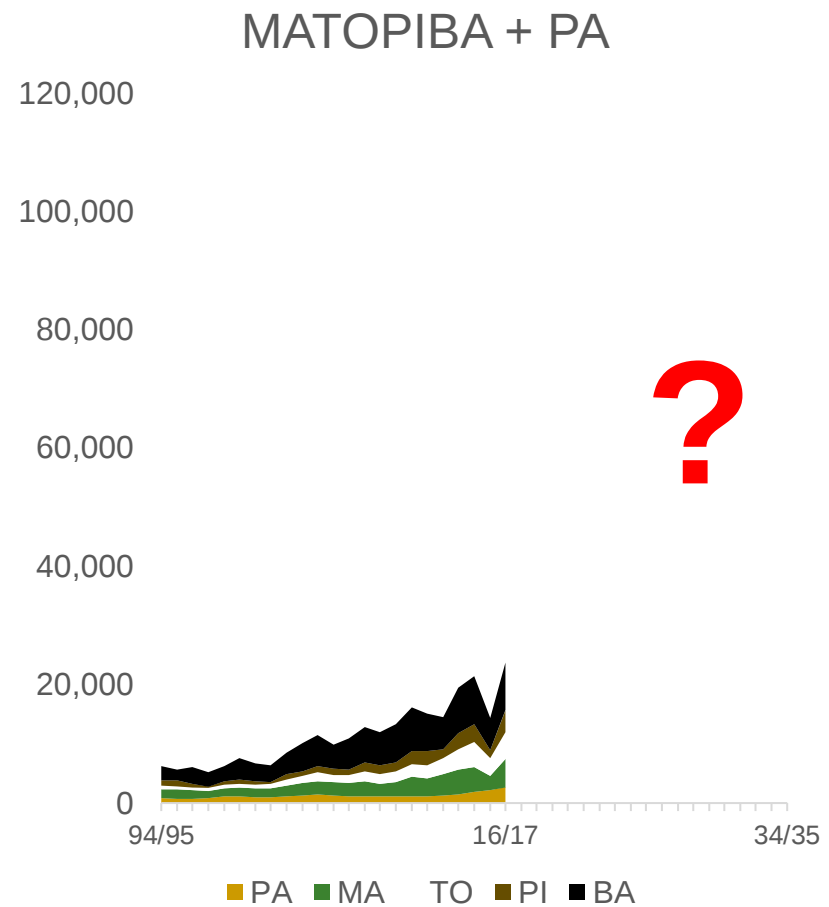
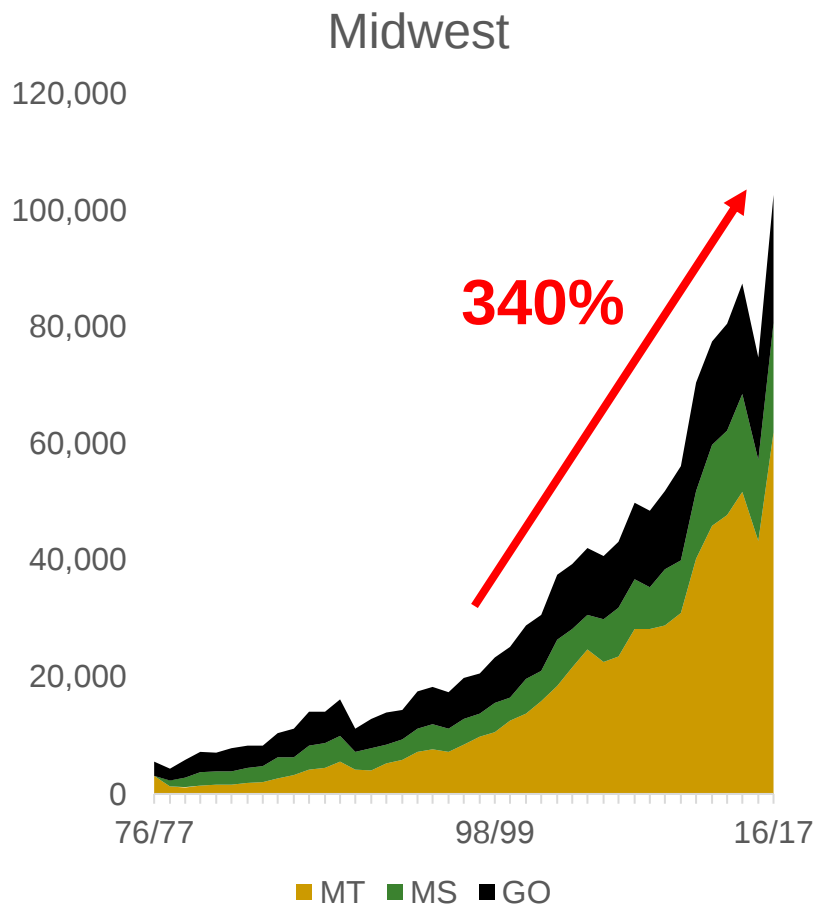
Brazilian Grain Production by Region (1000 tons)



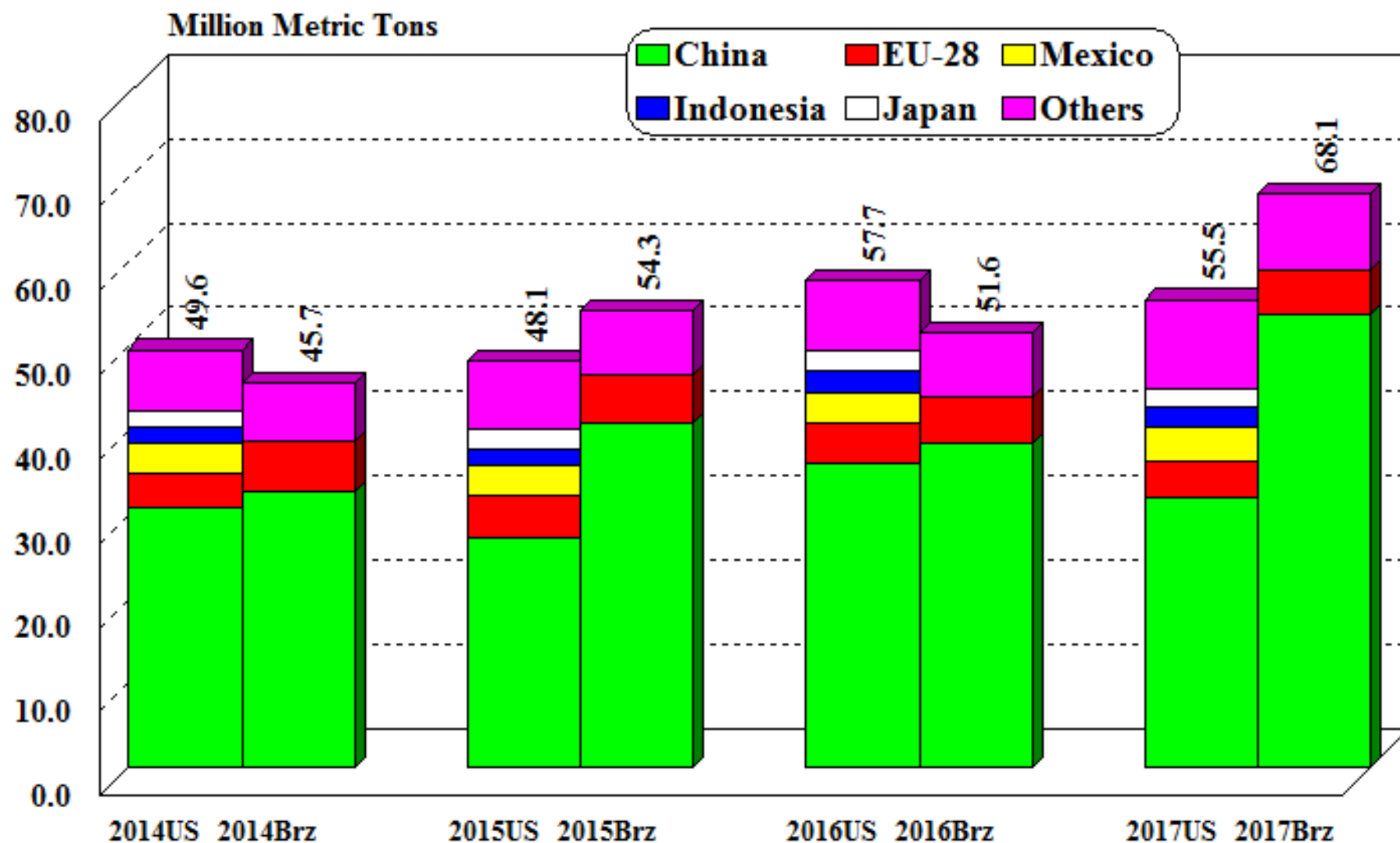
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Brazilian Grain Production by Region (1000 tons)

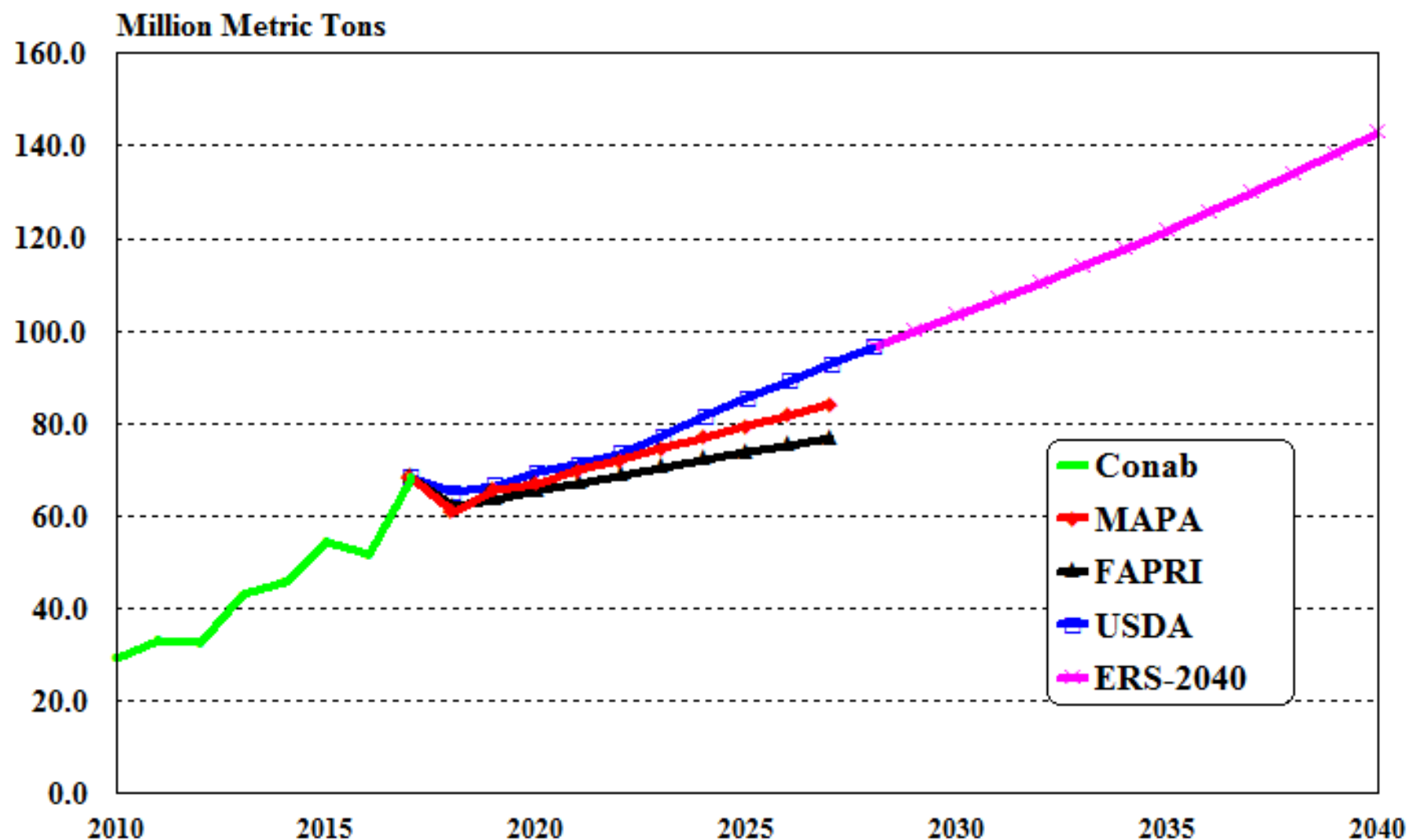


U.S. & Brazil Exports of Soybeans, 2014-2017



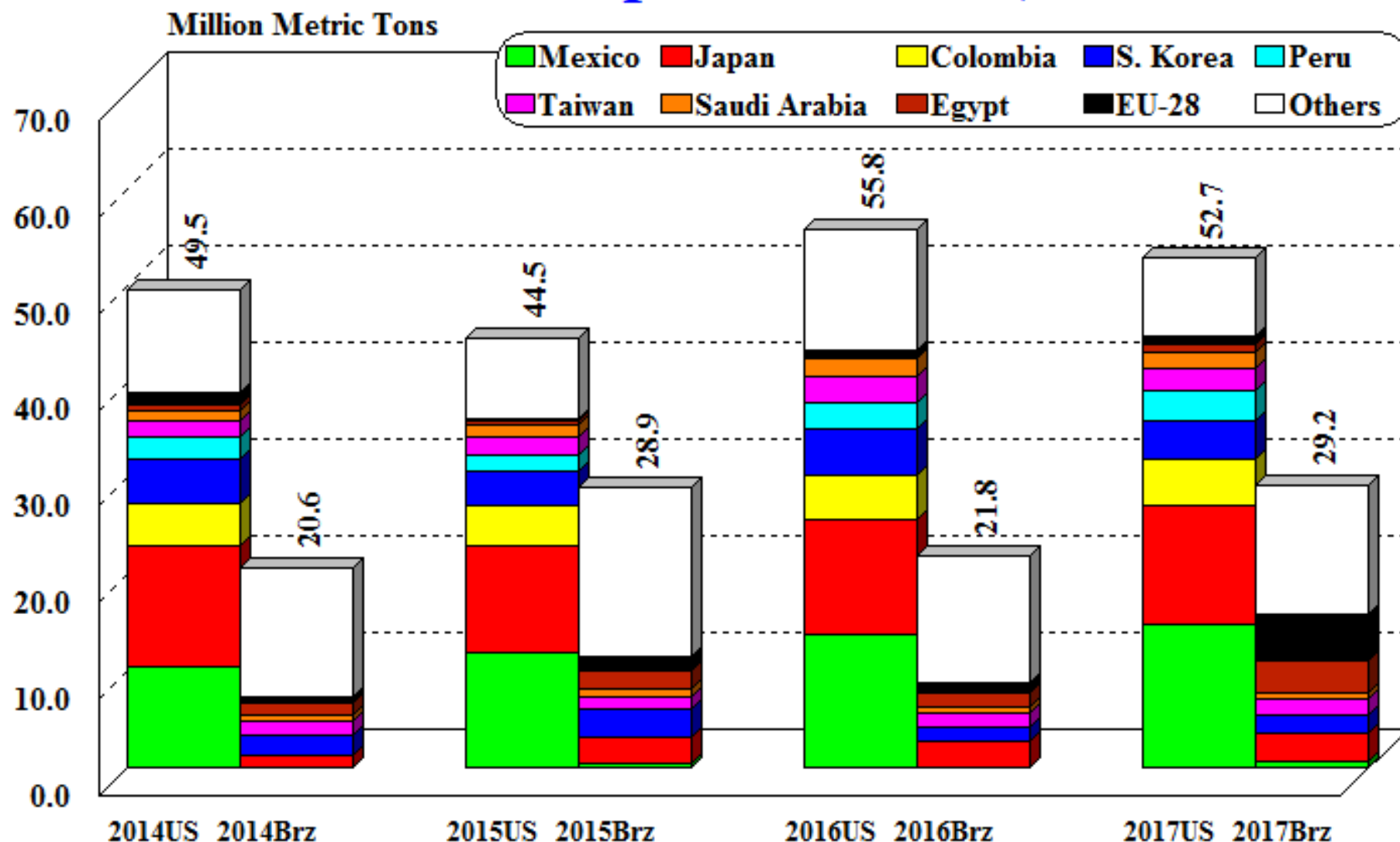
Source: USDA Global Agricultural Trade System, FAS/USDA & AGROSAT, MAPA, Brazil

Brazil Soybean Exports, 2010-2040F



Source: Conab, MAPA-Brazil, FAPRI, USDA, ERS-Brazil at 2040 Collaborator

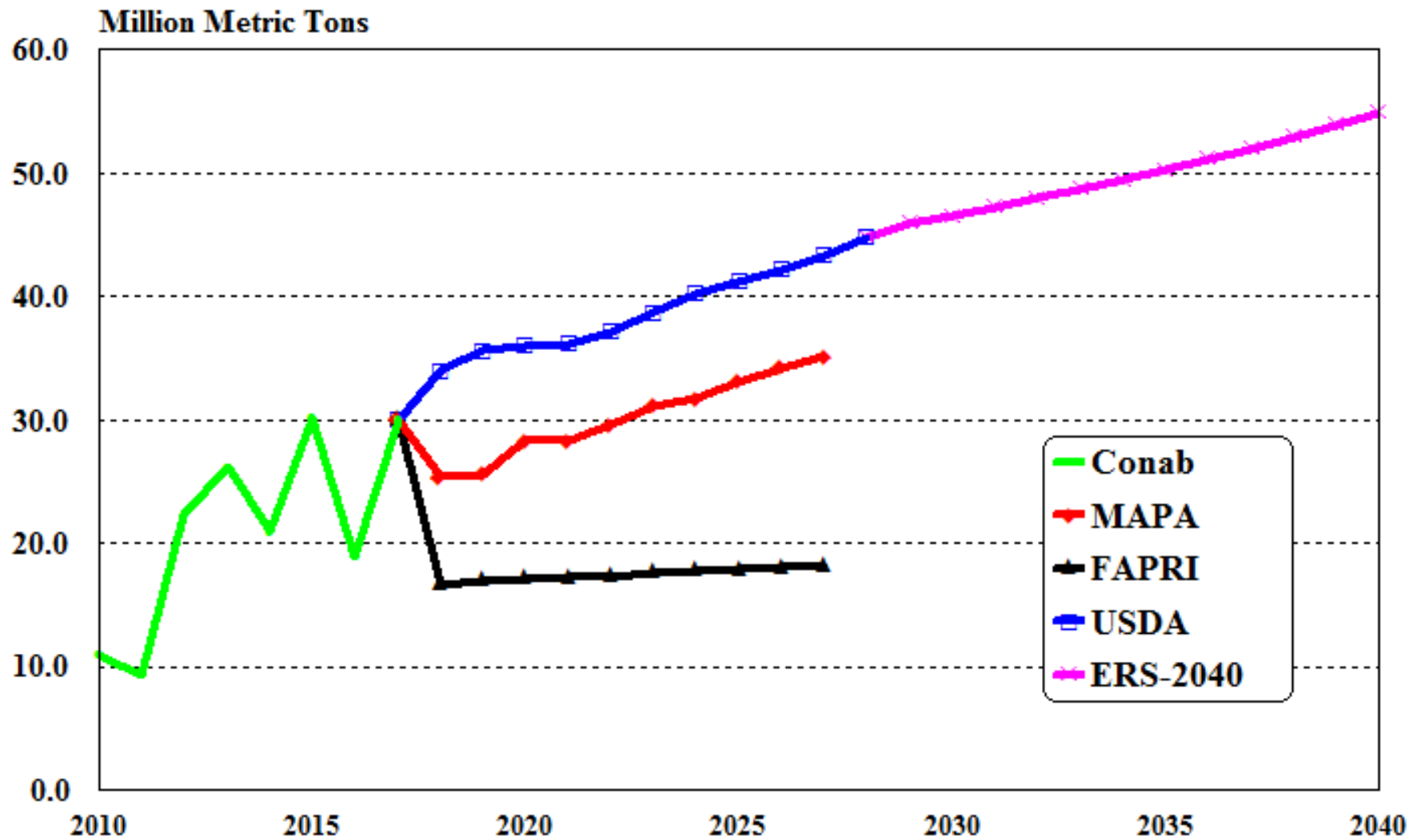
U.S. & Brazil Exports of Corn, 2014-2017



Source: USDA Global Agricultural Trade System, FAS/USDA & AGROSAT, MAPA, Brazil

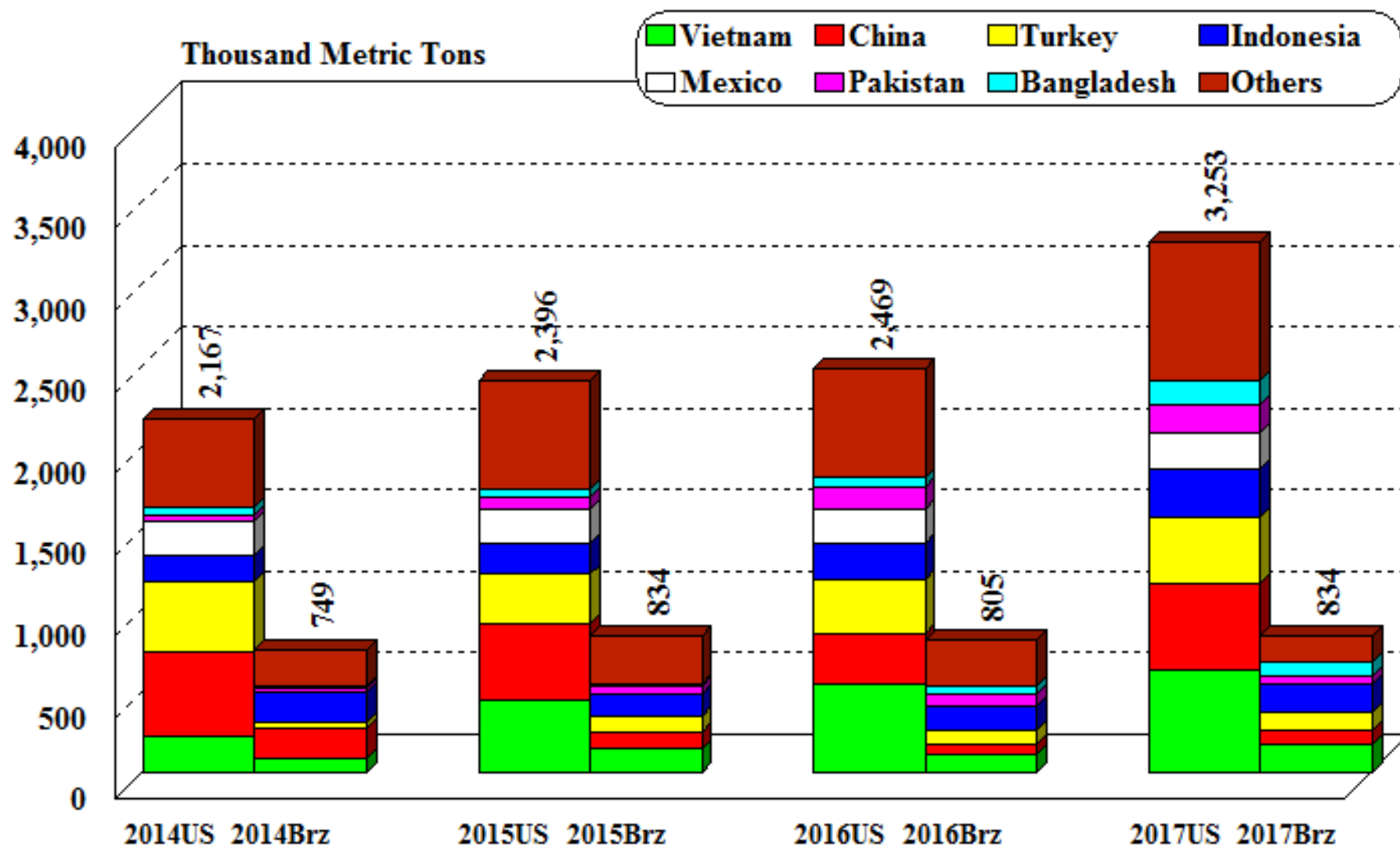
Note: Iran is Brazil's #2 Export Market for Corn while Iran is not a consistent market for U.S. Corn.

Brazil Corn Exports, 2010-2040F



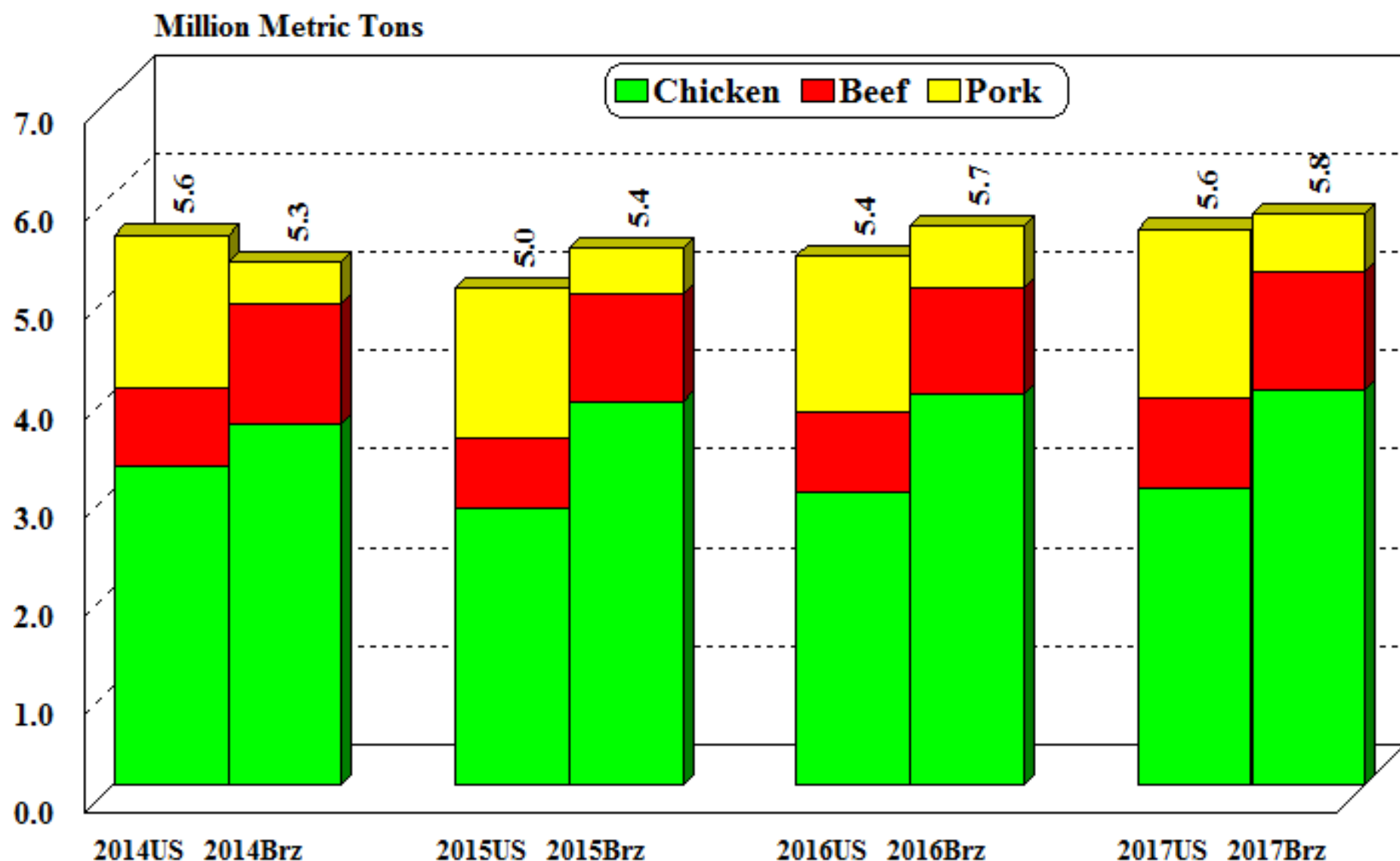
Source: Conab, MAPA-Brazil, FAPRI, USDA, ERS-Brazil at 2040 Collaborator

U.S. & Brazil Exports of Cotton, 2014-2017



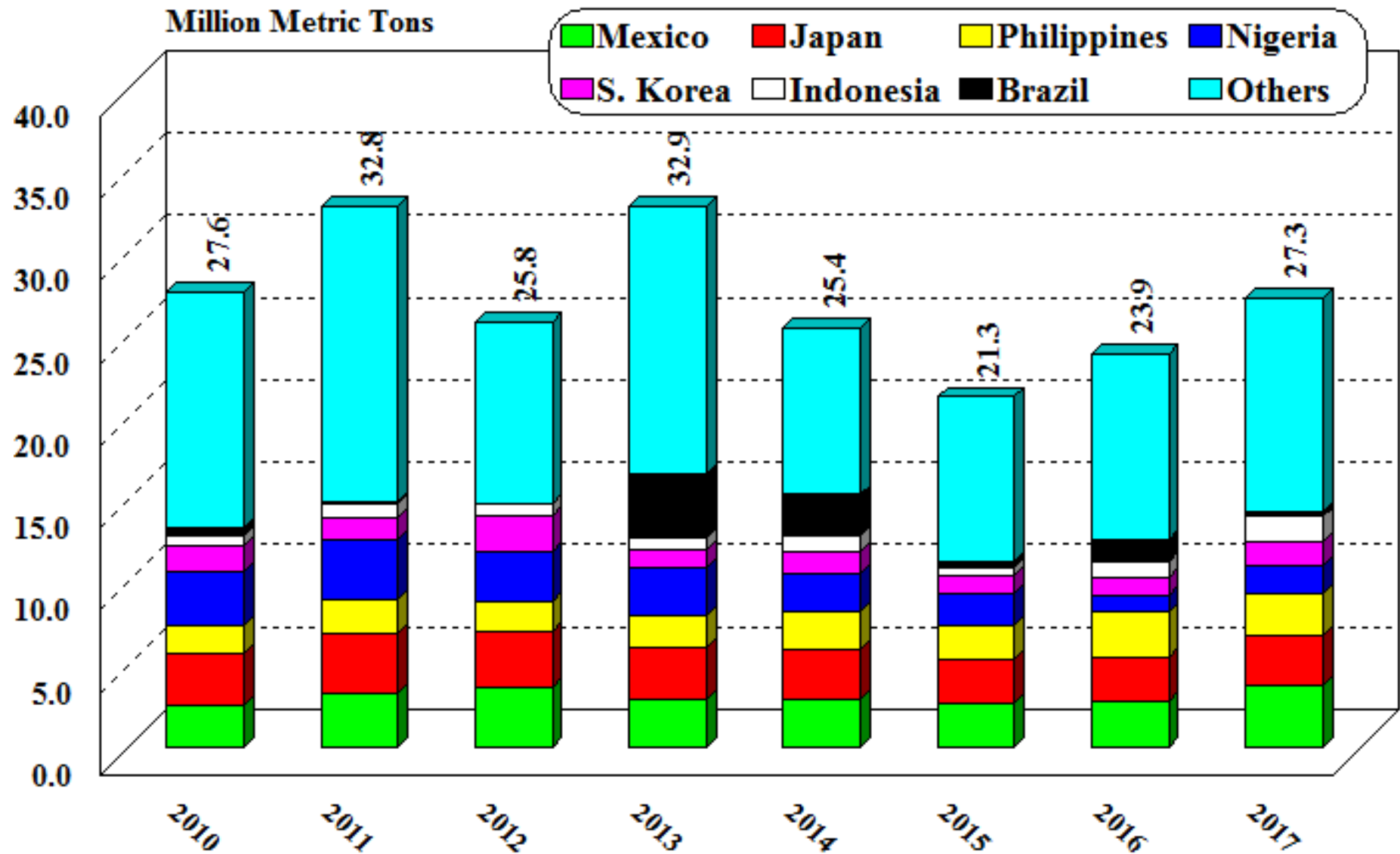
Source: USDA Global Agricultural Trade System, FAS/USDA & AGROSAT, MAPA, Brazil

U.S. & Brazil Exports of Meats, 2014-2017



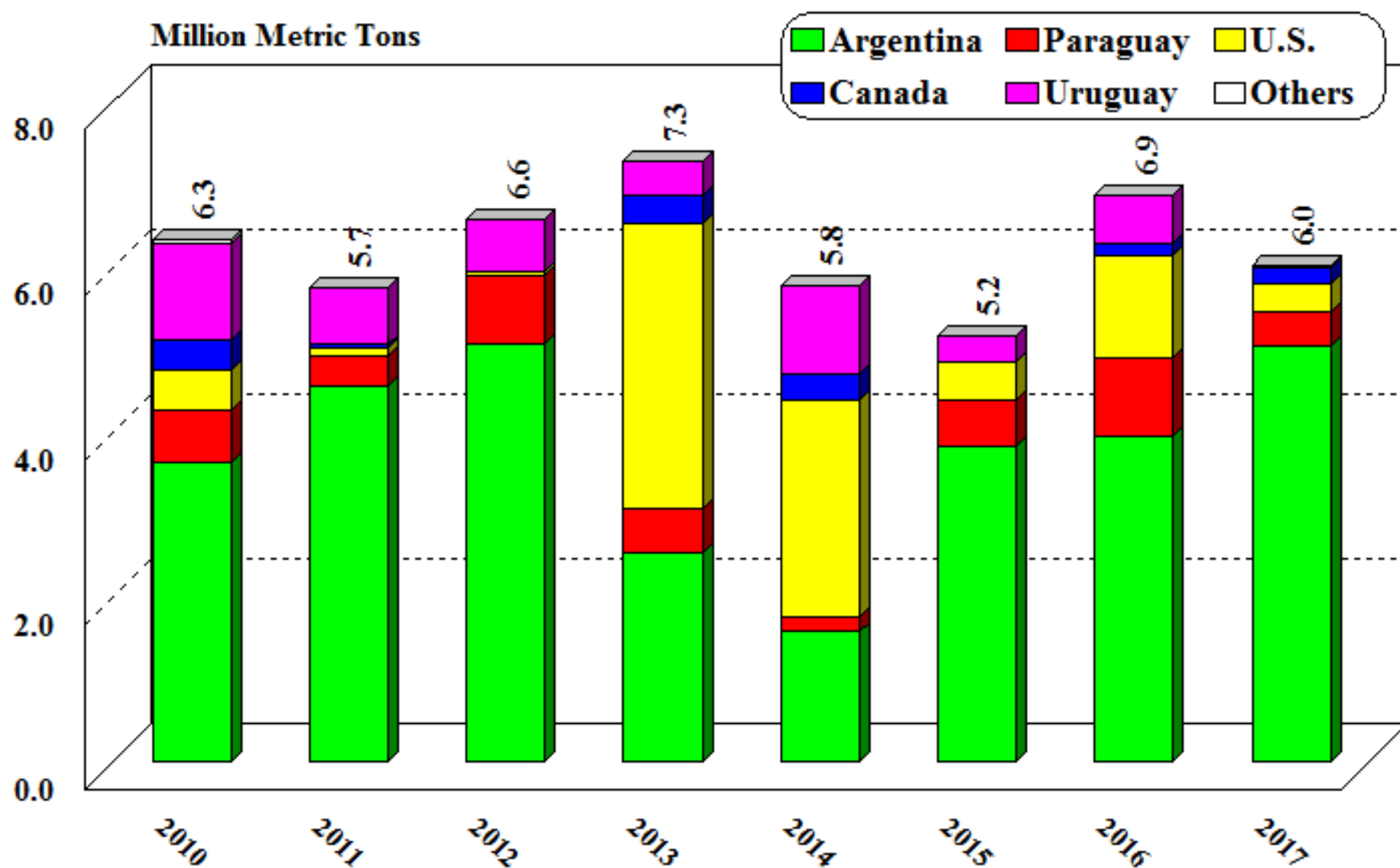
Source: USDA Global Agricultural Trade System, FAS/USDA & AGROSAT, MAPA, Brazil

U.S. Exports of Wheat, 2010-2017



Source: USDA Global Agricultural Trade System, FAS/USDA

Brazil Imports of Wheat, 2010-2017



Source: AGROSAT, MAPA, Brazil

U.S. Exports of Selected Commodities to Brazil

Commodities	'17 Cust Rank
Cotton, Ex Linters	16
Nonfat Dry Milk	20
Wheat, Unmilled	24
Beef & Veal Fr/Froz	30
Soybeans	43
Soybean Oil	52
Soybean Meal	56
Cheese	56
Pork, Fr/Froz	58
Corn	62
Rice-Paddy, Milled	85
Chickens, Fr/Froz	122

Source: USDA-FAS

Implications to the U.S.

- U.S. Ag Remains Export Dependent
 - Brazil Keeps Growing
 - Infrastructure Key to Remain Competitive
 - U.S. Farm Financial Situation a Concern
 - U.S. Trade Policy?
 - Brazil Political Issues?
-

Brazil 2040 Project



Brazil 2040 Project Cooperators



Confederação da Agricultura
e Pecuária do Brasil



Brazil 2040 Project Cooperators



Questions

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