

# Insper

**Congreso Aapresid 2021**  
"Siempre Vivo; Siempre Diverso"

**El rol y liderazgo del continente americano como protagonista en la implementación de sistemas agroalimentarios sustentables**

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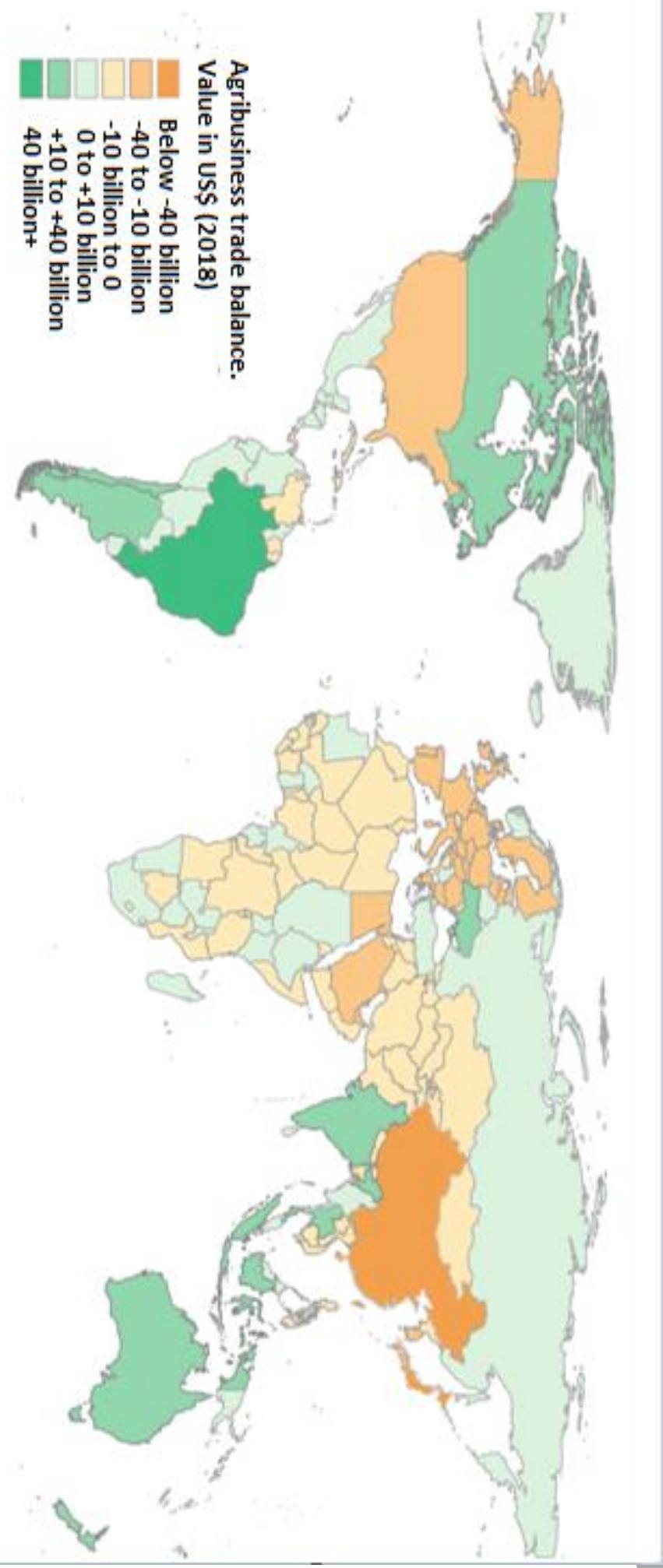
August 13<sup>th</sup>, 2021

**Insper AGRO GLOBAL**

Global Agribusiness Center

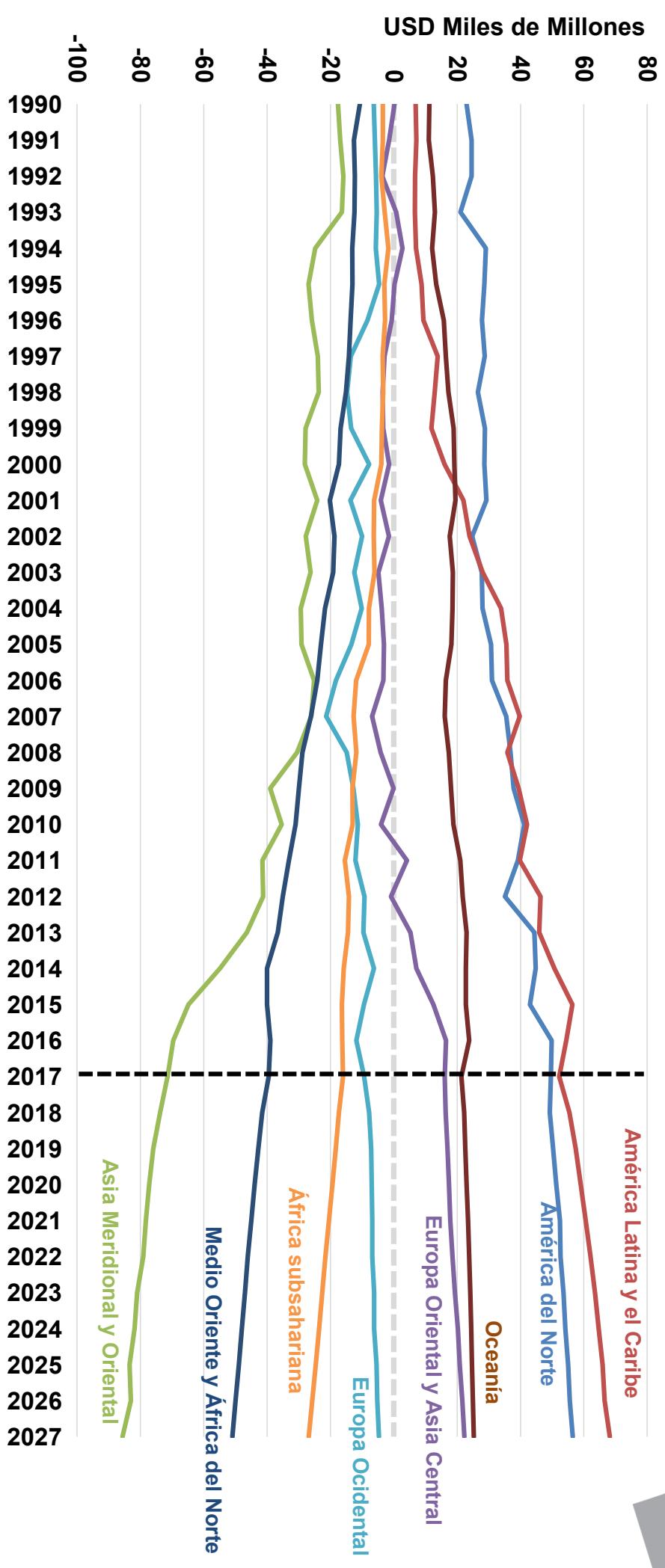
# Agribusiness trade balance

Outlook for 2018

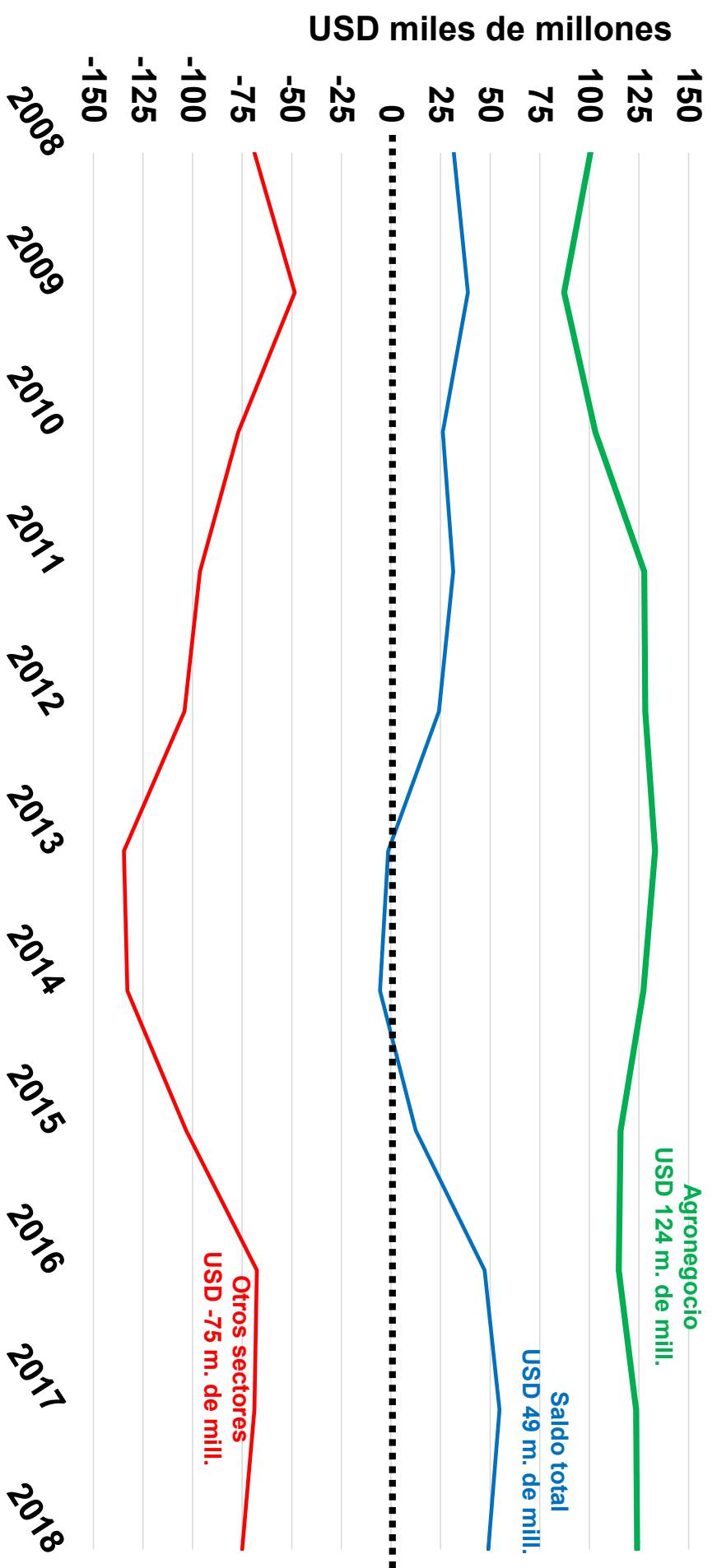


# Brasil: balanza comercial del agronegocio

por región

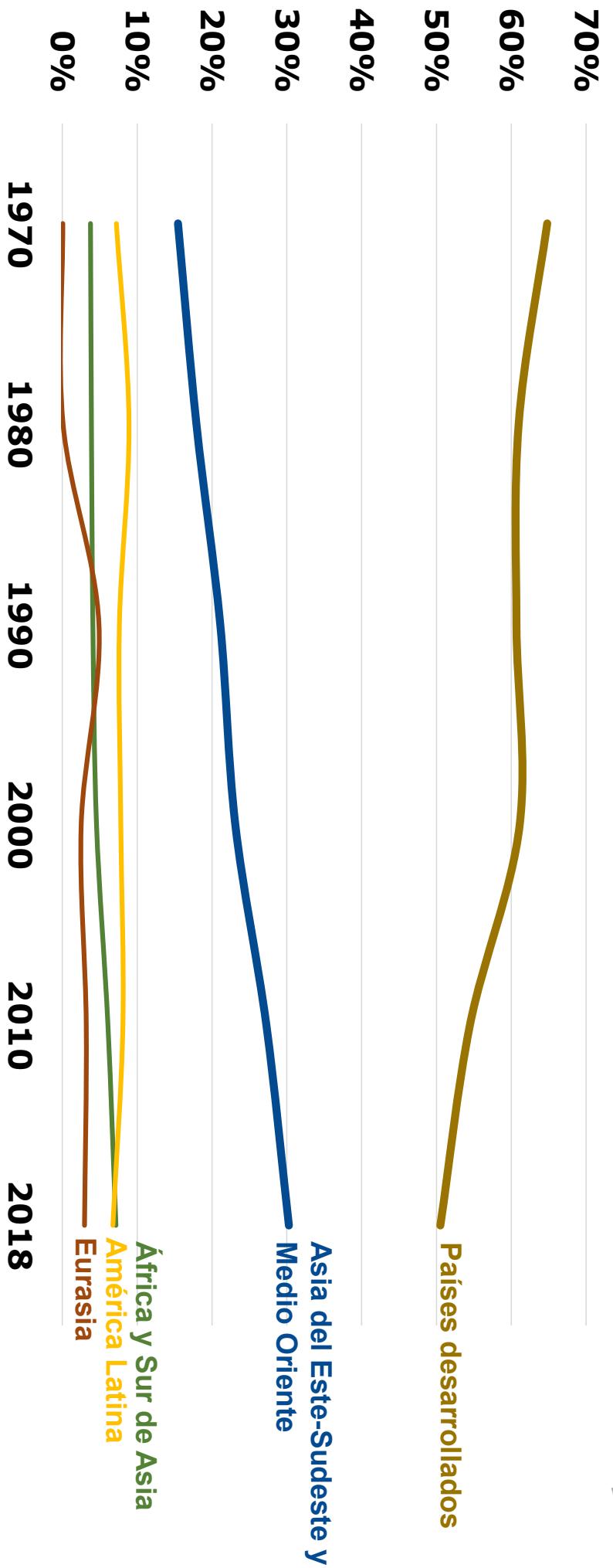


# Mercosur – saldo de la balanza comercial (2000-2018)



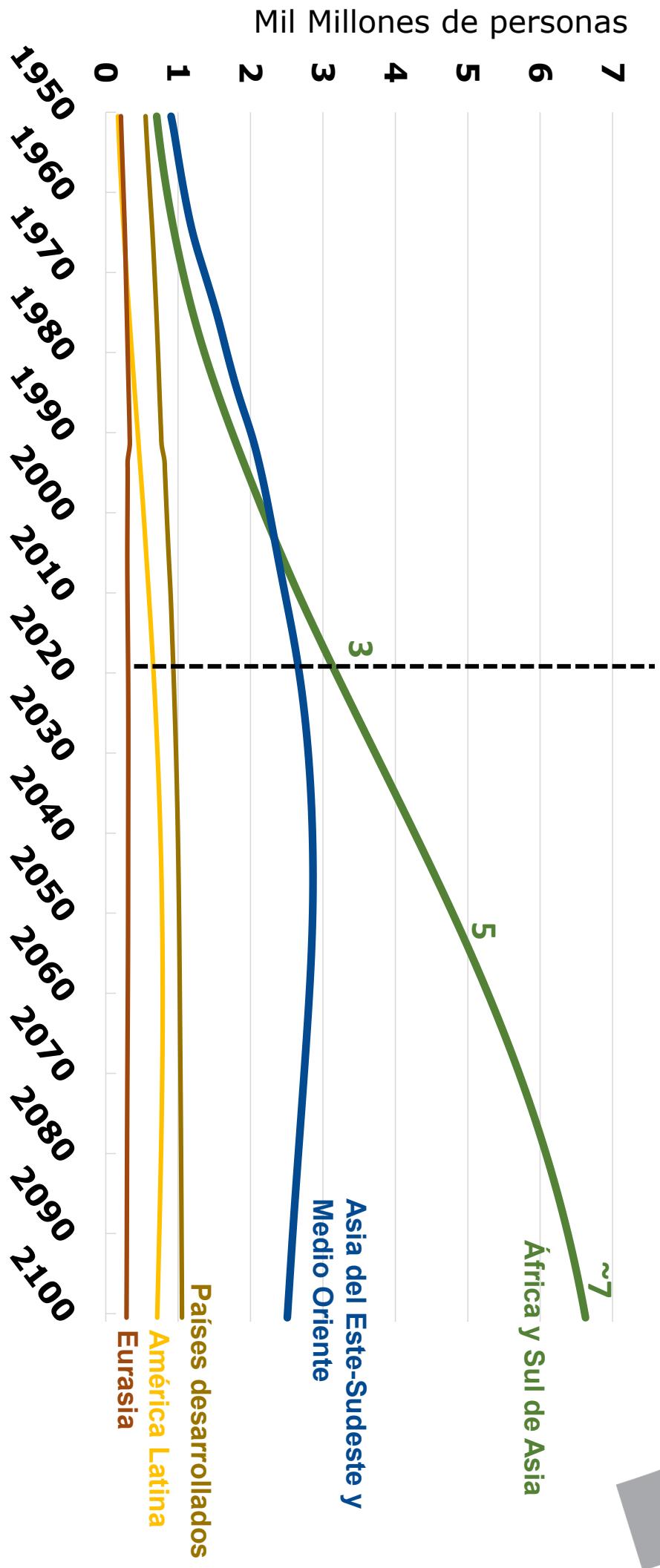
WWW.INSPER.EDU.BR  
Fuente: UN COMTRADE, Insper Agro Global.  
Nota: Definição do agronegócio segundo o MAPA.

# Proporción del PIB global (US\$) +15 p.p. para Asia oriental / Sudeste y Medio Oriente



# Crecimiento de la población

Realce para África y Sur de Asia (Índia)



# Emerging Economies

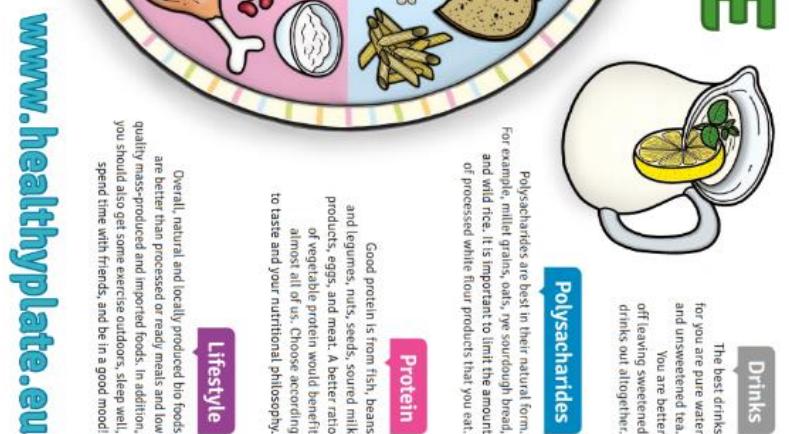
## Focusing the Eastern Hemisphere

Population: 5.6 de 7.6 billion (~74%)  
Agri imports in 2017: US\$ 537 billion  
66% of Brazilian exports (agri)

East Asia  
Southeast Asia  
Middle East  
South Asia  
Africa



# What is a Healthy Diet?



**Directrizes de uma dieta alimentar: diversidade/equilíbrio entre grupos de alimentos. Alto consumo de frutas e vegetais frescos, proteínas animais e vegetais, cereais integrais, legumes/castanhas.**

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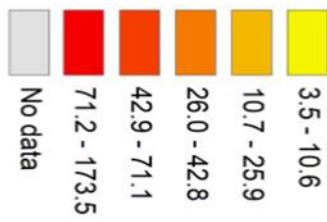
Nota: extraído de apresentação de Derek Headey, Senior Research Fellow do International Food Policy Research Institute (IFPRI).

# Challenge: access to healthy diets



+1,5 billion people do  
not have access to  
healthy diets in Africa  
and Asia

Cost of a healthy diet  
as % of medium  
family income



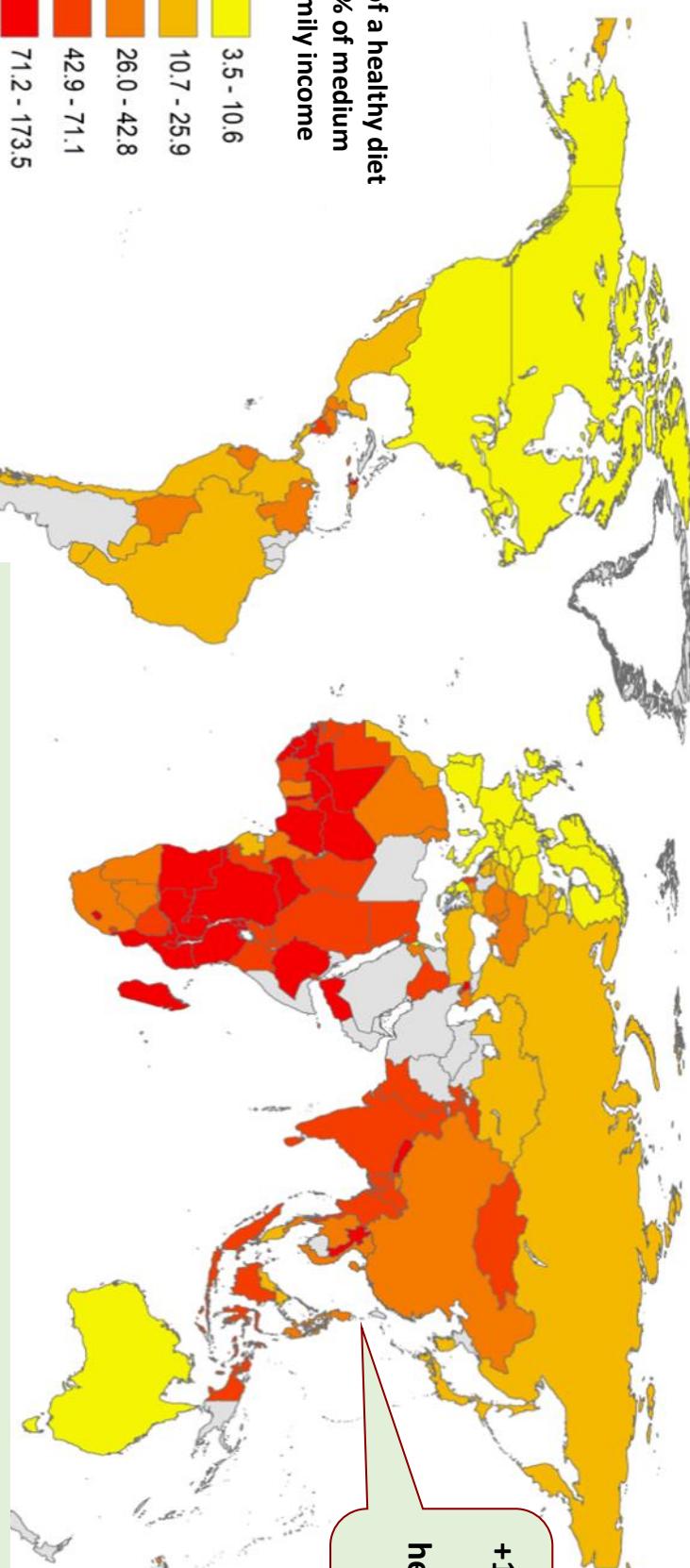
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## CHEAPEST AND MOST DURABLE PRODUCTS:

- Carbs, snack foods, Tubers, sugar, vegetable oils, soft drinks

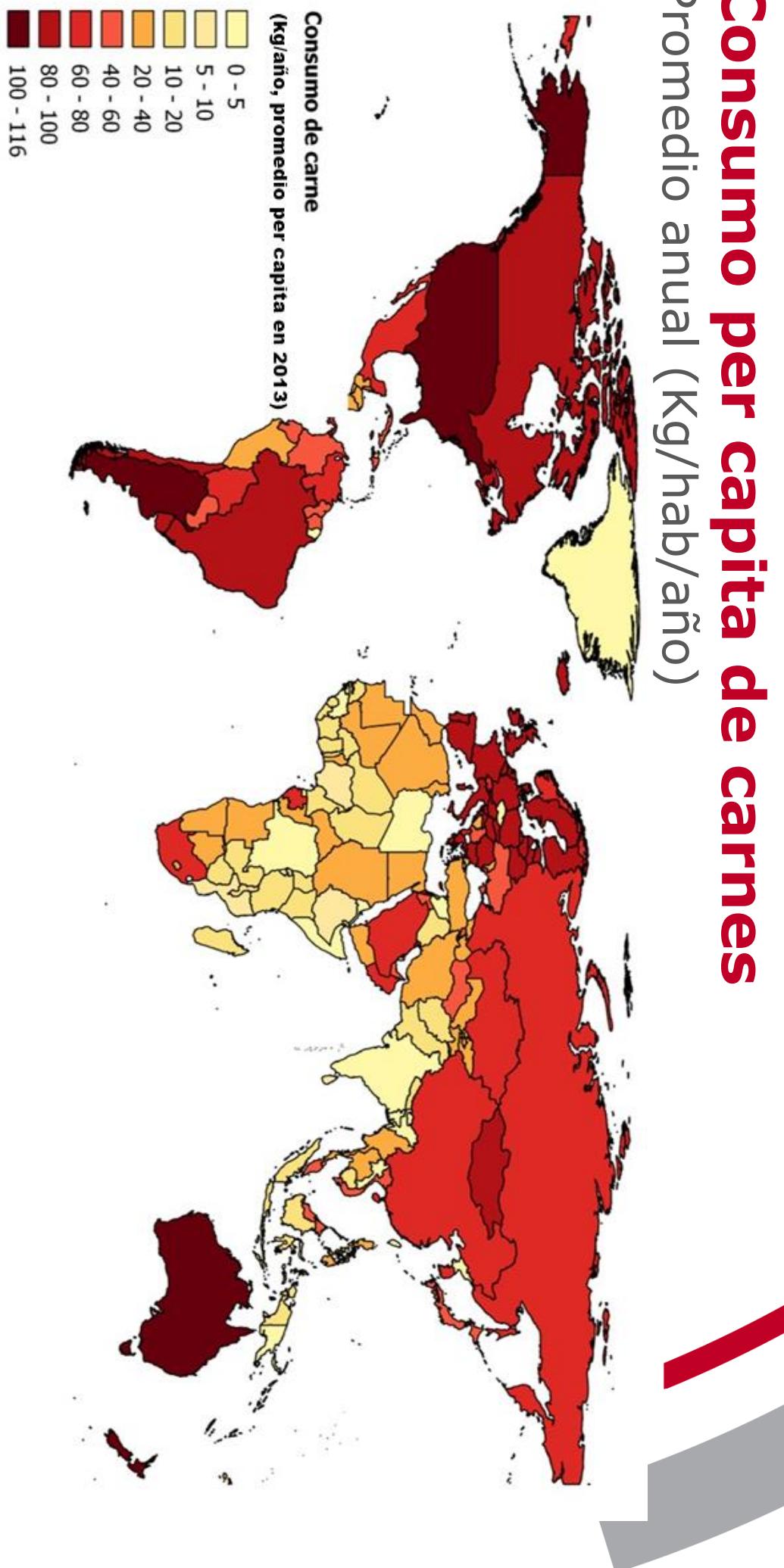
## MORE EXPENSIVE AND LESS DURABLE PRODUCTS:

- Fruits & vegetables, eggs, meats, fresh fish



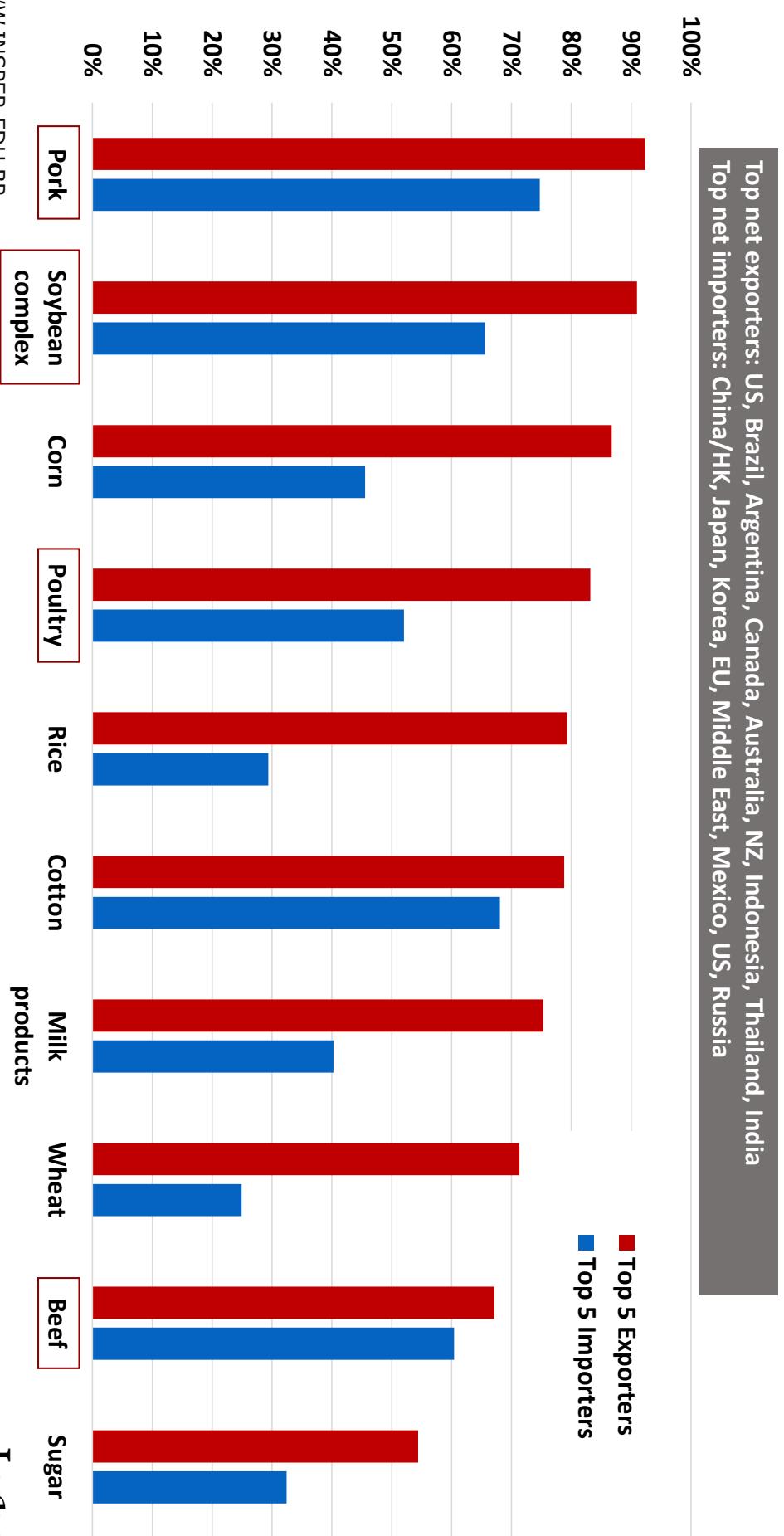
# Consumo per capita de carnes

Promedio anual (Kg/hab/año)



# Top 5 exporters and importers

## Share by commodity (2017-2019)

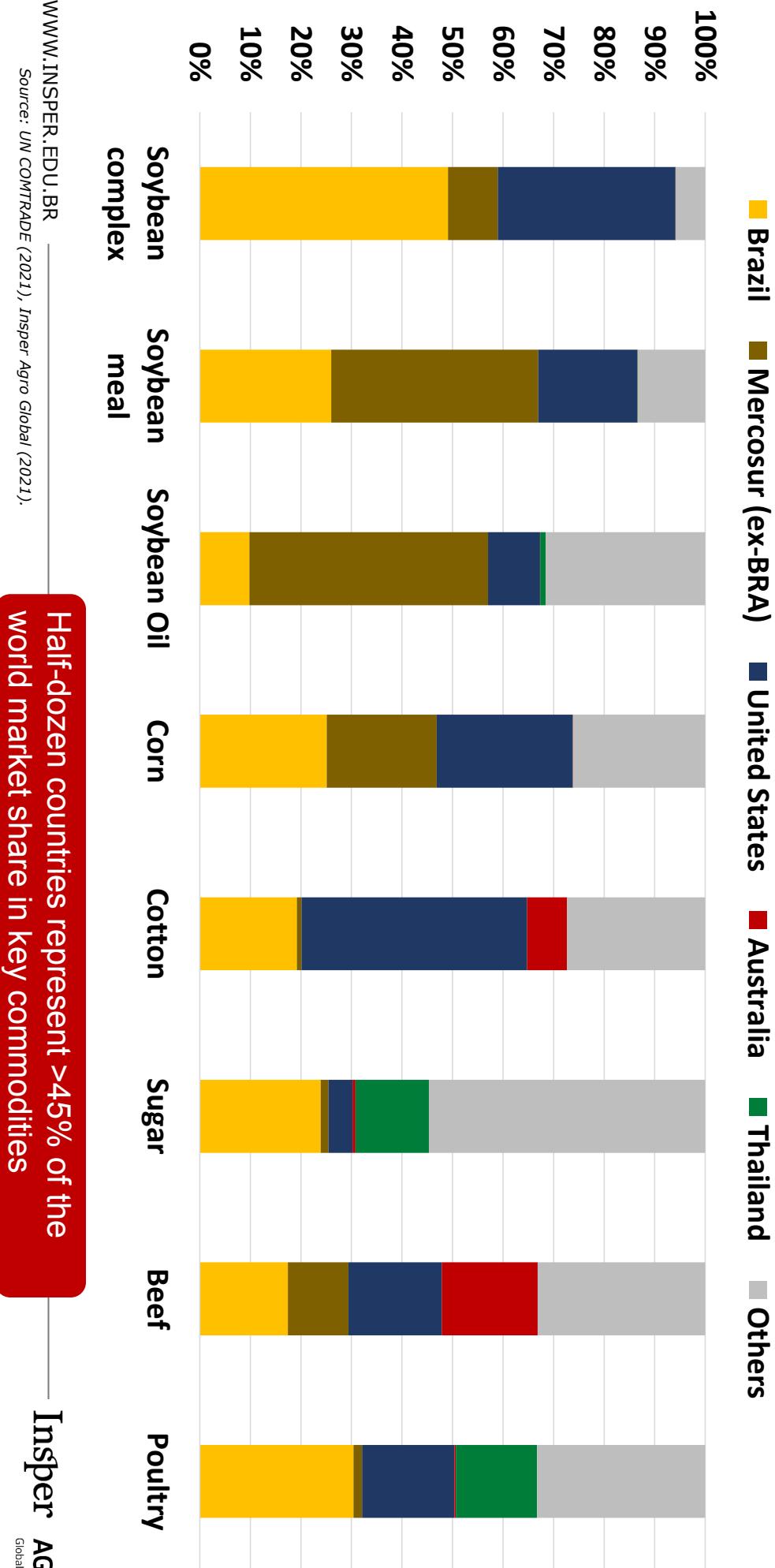


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Source: UN COMTRADE (2021), Insper Agro Global (2021).

# World Agribusiness

## Main products exported by country of origin (2019)



Half-dozen countries represent >45% of the world market share in key commodities

# Land Use in Brazil

## Main sustainability challenge

Current Deforestation rate: 1,1 M ha/ano

TOTAL: 850 M ha

Native vegetation: 565 M ha  
(66% of the total area)

Pastures:  
175 M ha (20%)

Agriculture:  
85 M ha (10%)

Siembra  
Directa

ILPF

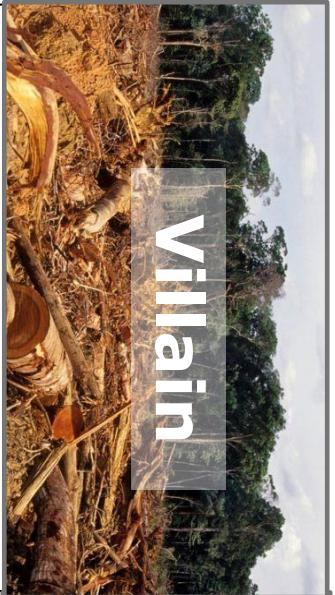
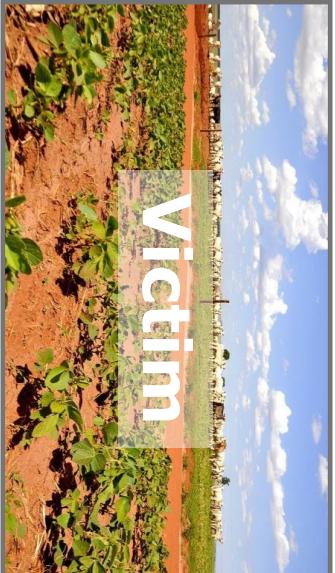
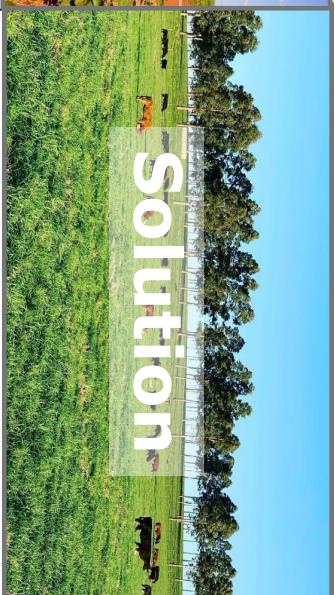
Agriculture + livestock +

planted forests:  
260 M ha (30%)

Agriculture

Urbanization:  
4 M ha (0,5%)

# The Brazilian agricultural and livestock sector: Villain, victim, or solution to climate change?

 <p>Villain</p> <ul style="list-style-type: none"><li>• Agriculture and livestock emit large amounts of greenhouse gases</li><li>• Deforestation and emissions due to land use change</li><li>• Methane and nitrous oxide have large impacts</li><li>• Livestock of low productivity</li><li>• Monocultures and input use</li></ul>	 <p>Victim</p> <ul style="list-style-type: none"><li>• Temperature rises and dry seasons</li><li>• Extreme weather events</li><li>• Abrupt changes in rainfall patterns</li><li>• Reduction in production windows</li><li>• Pests increases</li><li>• Soil degradation and productivity loses</li></ul>	 <p>Solution</p> <ul style="list-style-type: none"><li>• The ABC plan and good production practices</li><li>• Integrated systems (ILPF)</li><li>• Restoration of degraded areas</li><li>• Innovation and the potential for creation of new technologies</li><li>• Renewable energy matrix and biofuels</li><li>• Conservation and restoration of native vegetation</li><li>• Connections with the SDG goals</li></ul>
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# Top priority issues are challenging trade-offs

How to achieve?



...with import restrictions and self-sufficiency policies?

Trade is still very limited in the agri-food sector...

# Insper

*Thank you / Gracias / Obrigado*

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