

Subject: Poultry
Area: Brazil

ABPA Annual Report 2024 | Poultry Specific

Poultry Industry Overview

Production and Market Performance

- **2023 Production:** Brazil's poultry industry saw a slight increase in production, reflecting a stable yet modest growth trend. The total chicken meat production reached significant levels, maintaining Brazil's position as a leading global producer.
- **Export Markets:** Brazil continued to dominate as the world's largest chicken meat exporter, with key markets including the Middle East, Asia, and Europe. The report details the distribution of exports across these regions, highlighting the strategic importance of maintaining diversified international markets.

Key Markets and Export Destinations

- **Middle East and Asia:** These regions remained the top destinations for Brazilian chicken meat, with strong demand driven by competitive pricing and the high quality of Brazilian products.
- **European Market:** Exports to Europe also performed well, supported by Brazil's adherence to stringent food safety and quality standards, which are critical for maintaining access to these markets.

Challenges and Adaptations

- **Avian Influenza Threat:** One of the major challenges in 2023 was the threat of Avian Influenza. The report praises the industry's robust biosecurity measures, which successfully prevented outbreaks in commercial flocks, ensuring the continuity of production and exports.
- **Logistical and Economic Pressures:** The industry faced logistical challenges, including fluctuating transportation costs and global economic pressures. However, Brazil's poultry sector adapted well, leveraging its competitive advantages to sustain growth.

Sustainability and Innovation

- **Sustainable Practices:** The poultry industry in Brazil has increasingly focused on sustainable production practices. The report highlights initiatives aimed at reducing environmental impact, such as improving feed efficiency and waste management systems.
- **Technological Innovation:** Investment in technological advancements has been a priority. The report mentions the adoption of new technologies in breeding, feeding, and processing, which have contributed to enhancing productivity and maintaining high standards of animal welfare.

Future Outlook

- **2024-2025 Projections:** Looking ahead, the report forecasts continued growth for Brazil's poultry industry. Production is expected to increase by 1.8% in 2024, with further growth projected for 2025. This optimism is based on expected increases in global demand and ongoing improvements in production efficiency.

Conclusion

The poultry section of the ABPA 2024 report portrays a resilient and forward-looking industry that, despite challenges, continues to expand its global footprint. The emphasis on sustainability, innovation, and biosecurity underscores Brazil's commitment to maintaining its leading role in the global poultry market.

Source:

<https://abpa-br.org/abpa-relatorio-anual/>

Turkey Industry Overview

Production and Market Performance

- **2023 Production:** Brazil's turkey production remained relatively stable in 2023, with the industry focusing on maintaining its niche market position both domestically and internationally. While the turkey sector is smaller compared to the broader poultry industry, it continues to play a significant role in the country's meat production landscape.
- **Domestic Consumption:** The report notes that turkey meat is less popular in Brazil compared to chicken, but there has been steady demand during festive seasons and for specific culinary uses. This seasonal demand helps sustain the market throughout the year.

Export Markets

- **Global Presence:** Although smaller in scale, Brazil's turkey exports have a solid presence in select international markets, primarily in Europe and Latin America. The report outlines key export destinations, with a focus on countries where turkey meat is traditionally consumed or used in processed foods.
- **European Market:** Europe remains the largest export market for Brazilian turkey meat. The stringent quality standards required by European countries have shaped Brazil's production processes, ensuring that exported products meet high safety and quality benchmarks.

Challenges and Adaptations

- **Market Competition:** The turkey sector faces intense competition from other poultry products, both domestically and globally. The report highlights the need for differentiation and marketing strategies to position turkey meat as a premium product in both local and international markets.
- **Economic Pressures:** Like other sectors, the turkey industry has been impacted by economic factors such as rising feed costs and transportation challenges. However, the report notes that the sector has been resilient, adapting through cost management and efficiency improvements.

Sustainability and Industry Practices

- **Sustainable Production:** The report emphasizes the sector's commitment to sustainable practices, particularly in the areas of feed efficiency and waste reduction. The industry continues to implement environmental management systems to minimize its ecological footprint.
- **Animal Welfare:** High standards of animal welfare are maintained in the turkey industry, with continuous improvements in farming practices to ensure the health and well-being of the turkeys throughout their lifecycle.

Future Outlook

- **Growth Projections:** The turkey sector is expected to maintain its stable production levels into 2024 and 2025, with a focus on expanding export markets. The report suggests that with targeted marketing and product differentiation, there is potential for modest growth, particularly in regions where demand for turkey meat is increasing.

Conclusion

The Turkey section of the ABPA 2024 report provides an overview of a stable yet competitive industry. While facing challenges from market competition and economic pressures, Brazil's turkey sector continues to sustain its production levels and maintain a significant presence in key international markets. The report emphasizes the importance of sustainability and animal welfare as integral components of the industry's ongoing strategy.

Source:

<https://abpa-br.org/abpa-relatorio-anual/>

Duck and Other Poultry Products Overview

Production and Market Performance

- **2023 Production:** The production of duck and other specialty poultry products in Brazil remains a smaller segment within the overall poultry industry. Despite its size, this niche market has shown consistent demand, particularly in gourmet and high-end markets, both domestically and internationally.
- **Domestic Market:** Within Brazil, the consumption of duck and other specialty poultry products is limited to specific culinary traditions and high-end dining. These products are often associated with premium food experiences, and their demand tends to be concentrated in urban areas and among more affluent consumers.

Export Markets

- **International Demand:** Brazil exports a portion of its duck and other poultry products to select international markets, particularly in Europe and Asia, where there is a stronger tradition of consuming these types of poultry. The report highlights that these products are often exported to meet the demand for specialty cuisines.
- **Key Export Destinations:** The primary export markets include countries in Europe, where duck is a traditional dish, and certain Asian markets, particularly China and Japan, where there is significant demand for high-quality duck meat and other specialty poultry products.

Challenges and Adaptations

- **Market Niche:** The niche nature of duck and other specialty poultry products presents both opportunities and challenges. While there is less competition than in the broader poultry market, the small scale of production and the need to meet specific quality standards can make it a more challenging sector to operate in.
- **Logistical and Economic Factors:** As with other poultry sectors, producers of duck and specialty products have faced logistical challenges, particularly in maintaining the freshness and quality of products during transport. The report also notes economic pressures, such as fluctuating feed costs, which can have a significant impact on this smaller-scale sector.

Sustainability and Industry Practices

- **Sustainability Initiatives:** Producers of duck and other specialty poultry are increasingly focusing on sustainable farming practices. This includes optimizing feed conversion rates, reducing environmental impact, and implementing efficient waste management systems.
- **Animal Welfare:** High standards of animal welfare are maintained across the sector, with producers adhering to strict guidelines to ensure the ethical treatment of birds. This commitment to welfare is particularly important for maintaining access to premium markets.

Future Outlook

- **Growth Prospects:** The future outlook for the duck and other specialty poultry sectors in Brazil is stable, with potential for modest growth, particularly in export markets. The report suggests that with the right marketing strategies and continued focus on quality, these sectors can capitalize on growing global demand for gourmet and specialty foods.

Conclusion

The Duck and Other Poultry Products section of the ABPA 2024 report outlines a niche but resilient part of Brazil's poultry industry. While smaller in scale, this sector benefits from steady demand in both domestic and international markets. The focus on sustainability, quality, and animal welfare positions Brazil's duck and specialty poultry products as competitive offerings in the global market.

ANNUAL REPORT 2024

ABPA


BRAZILIAN
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OF ANIMAL
PROTEIN


... ANNUAL REPORT

2024





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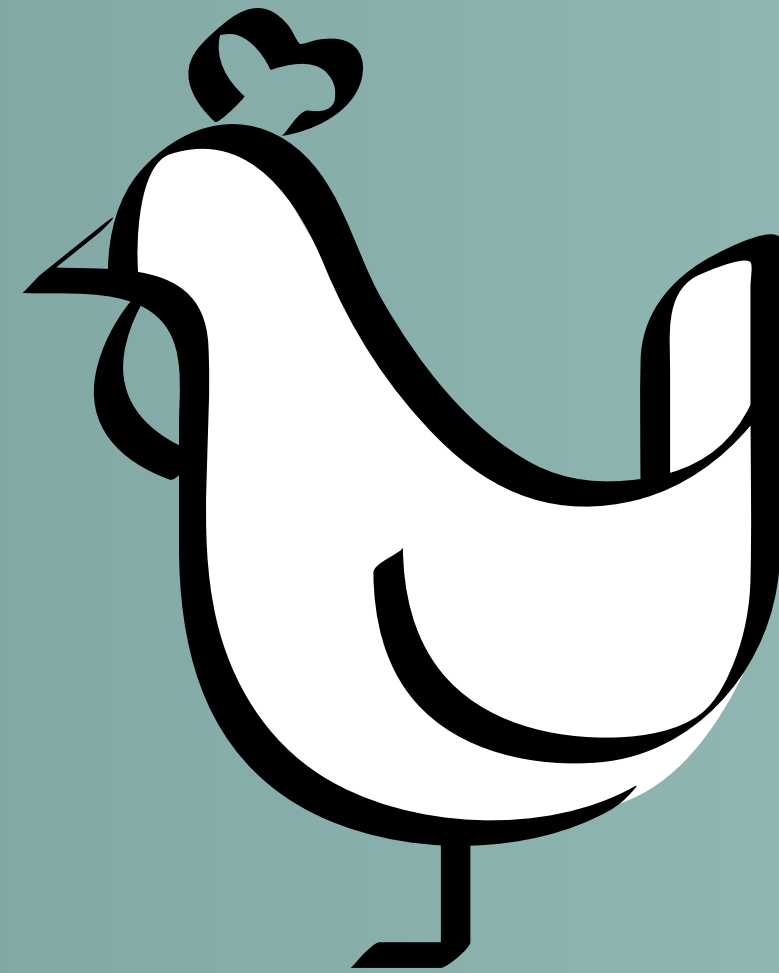
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 brazilian.chicken

 BrazilianChicken

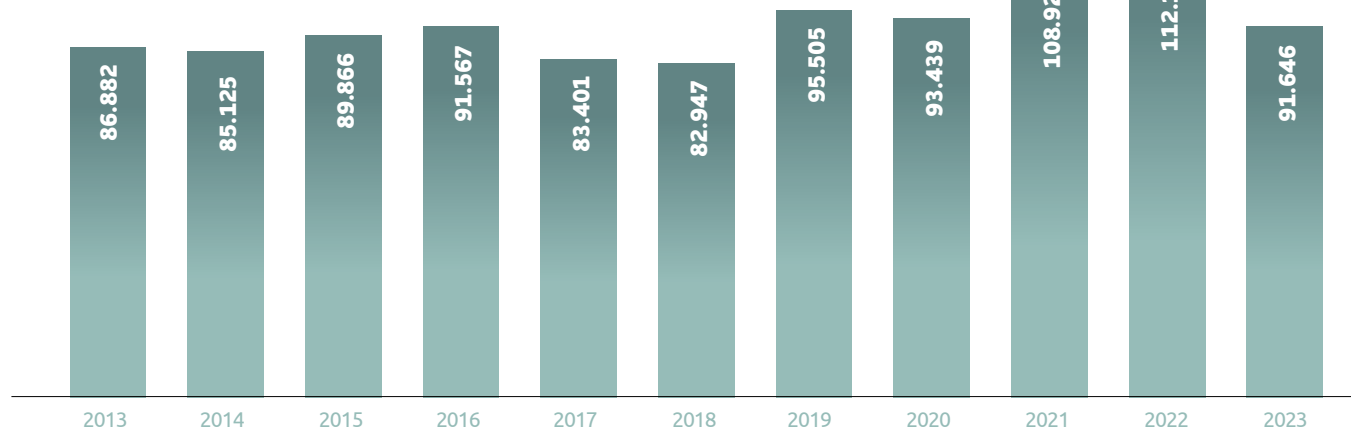
www.brazilianchicken.com.br



CHICKEN MEAT

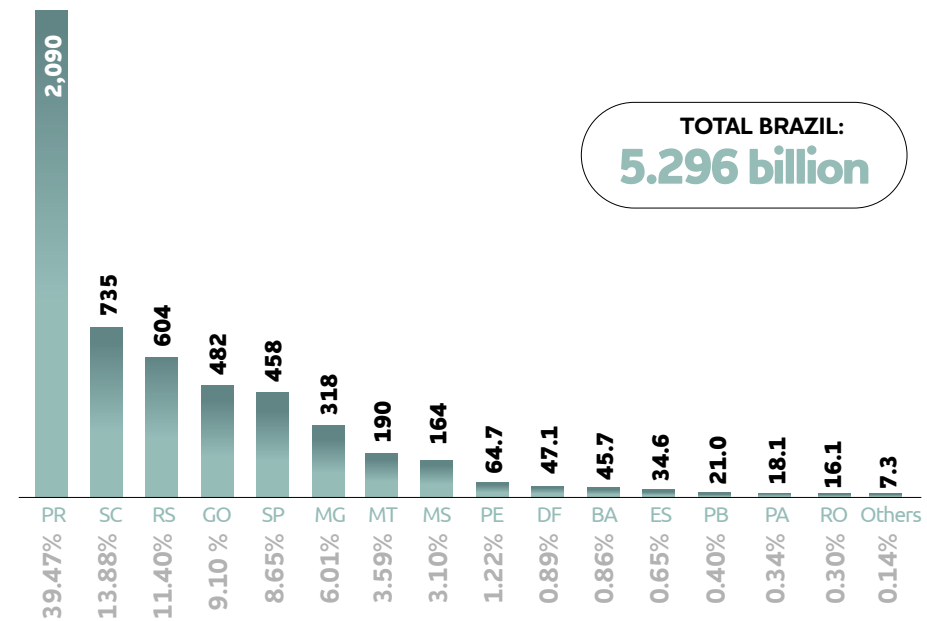
BRAZILIAN PRODUCTION

GROSS PRODUCTION VALUE (billion R\$)



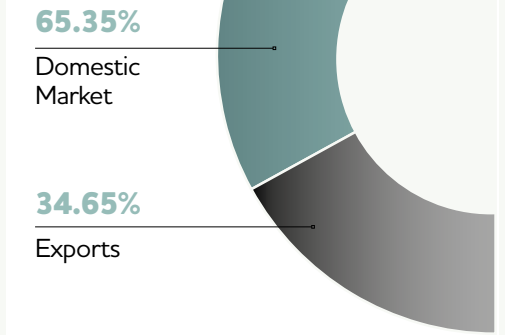
SOURCE: MINISTRY OF AGRICULTURE AND LIVESTOCK (MAPA)

CHICKEN SLAUGHTERING BY FEDERAL UNIT in 2023 (million heads)



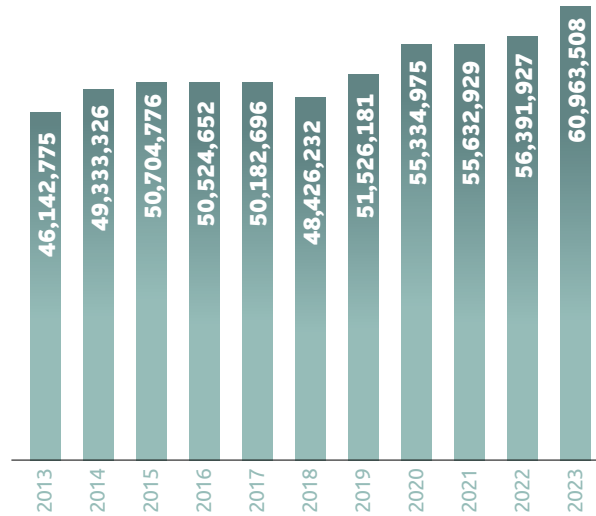
SOURCE: MINISTRY OF AGRICULTURE AND LIVESTOCK (MAPA)
* SLAUGHTERING UNDER FEDERAL INSPECTION

DESTINATION OF BRAZILIAN CHICKEN MEAT PRODUCTION in 2023



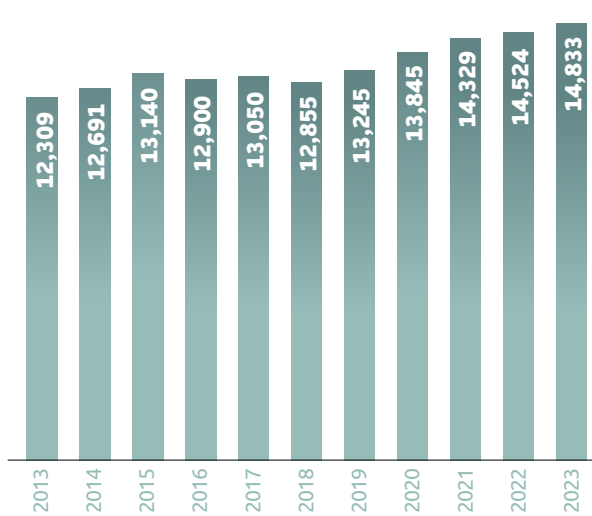
SOURCE: SECEX/ABPA

PLACEMENT OF BREEDERS (heads)



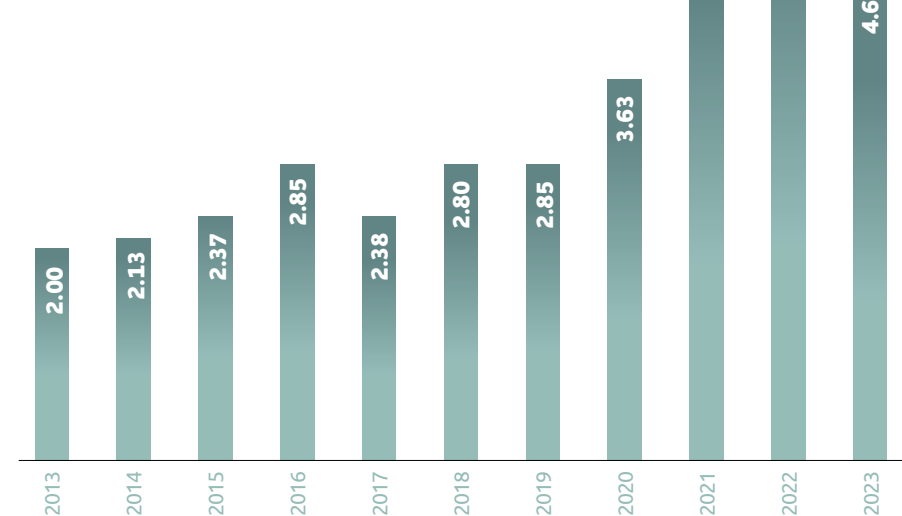
SOURCE: ABPA

BRAZILIAN CHICKEN MEAT PRODUCTION (1,000 MT)



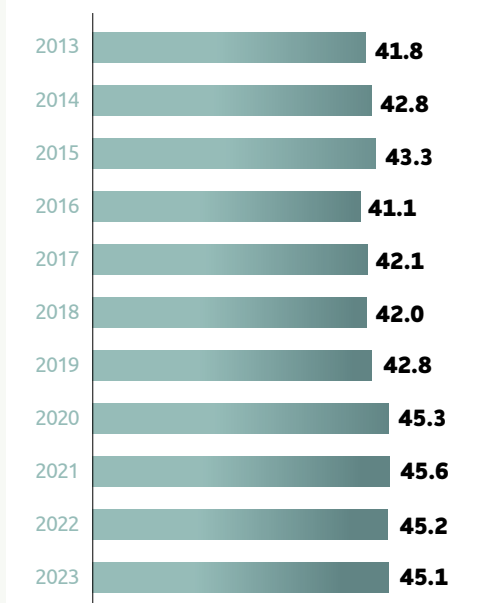
SOURCE: ABPA

COST OF BROILER PRODUCTION in 2023 (R\$/kg live)



*VALUE OF REFERENCE: AVERAGE COST OF PRODUCING BROILER IN A CLIMATIZED AVIARY IN THE STATE OF PARANÁ / SOURCE: EMBRAPA PORK AND POULTRY

CHICKEN MEAT PER CAPITA CONSUMPTION (kg per person)

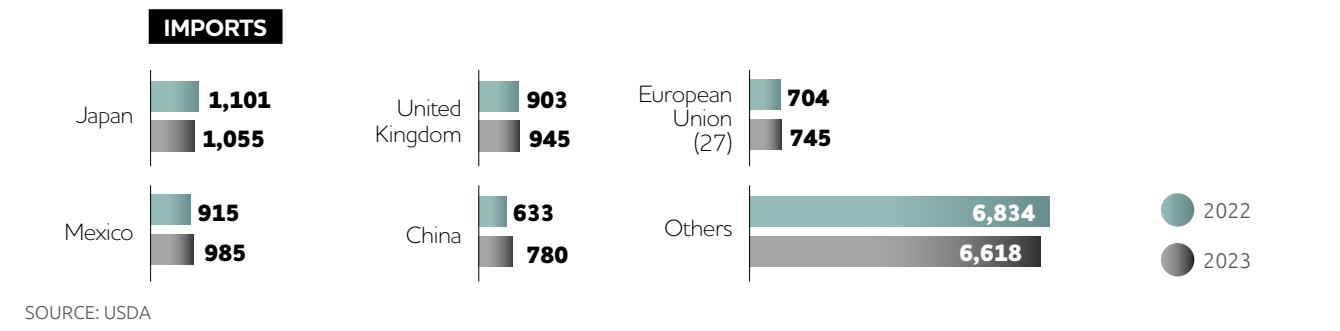
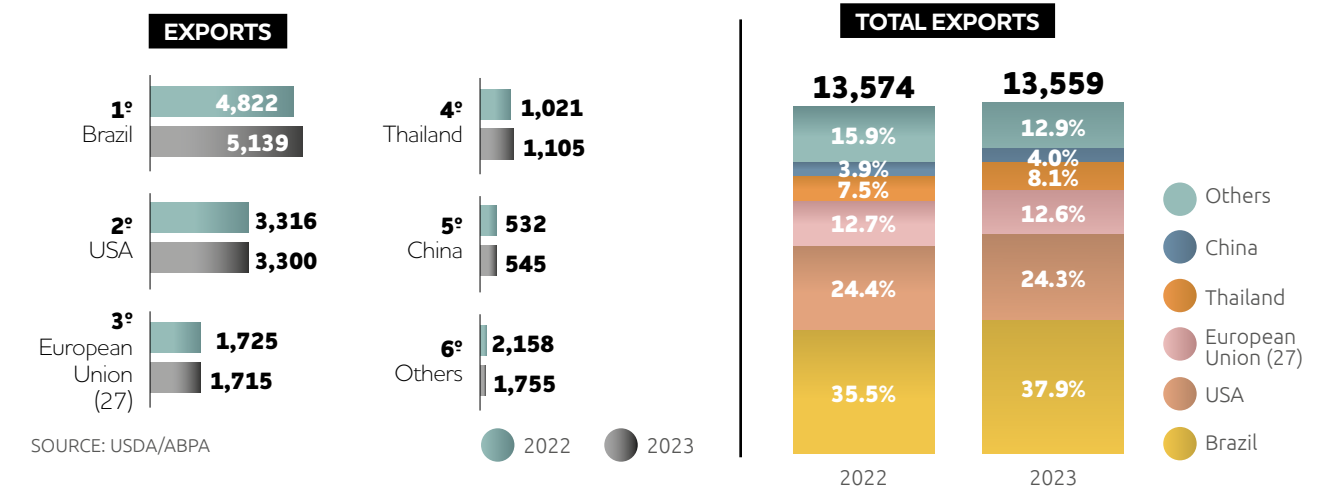
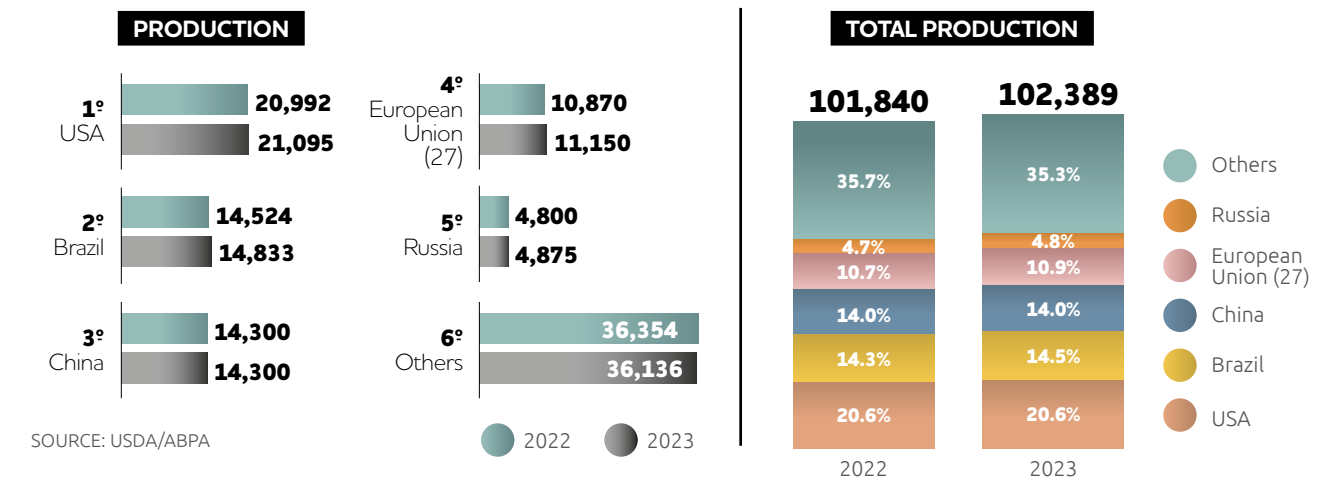


SOURCE: ABPA



WORLD MARKET

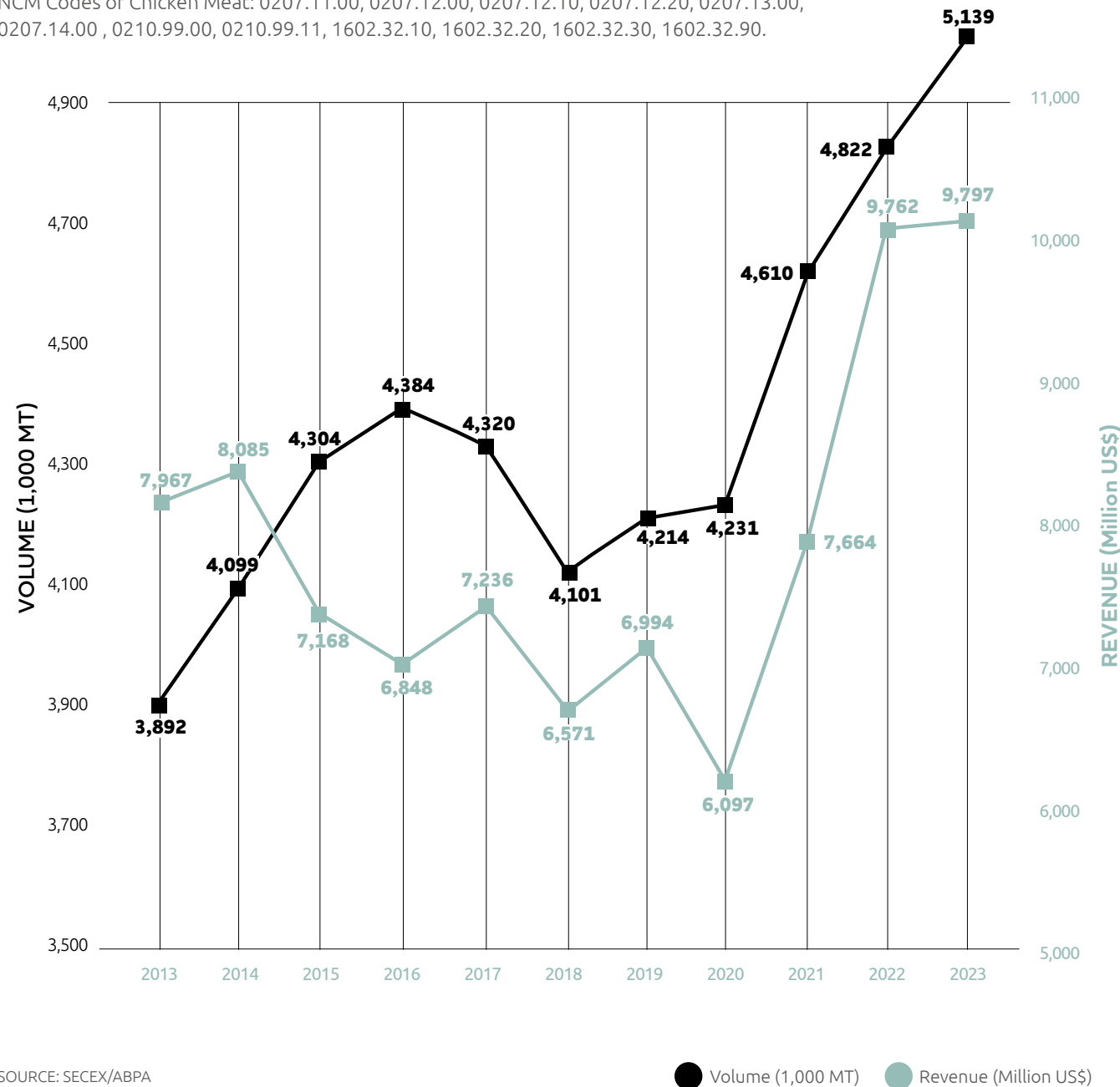
WORLD CHICKEN MEAT MARKET (1,000 MT)



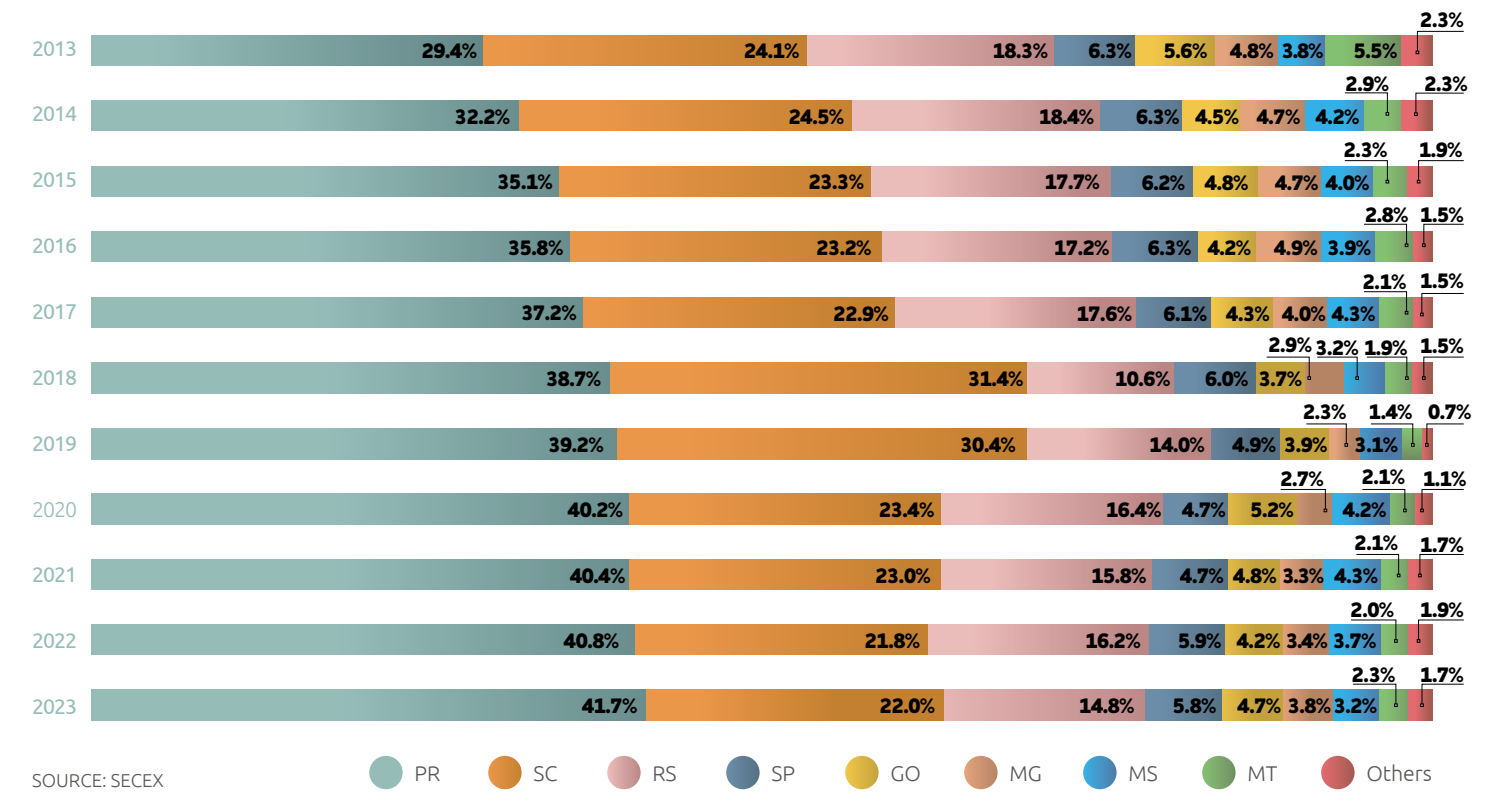
BRAZILIAN EXPORTS

BRAZILIAN EXPORTS OF CHICKEN MEAT (historical series)

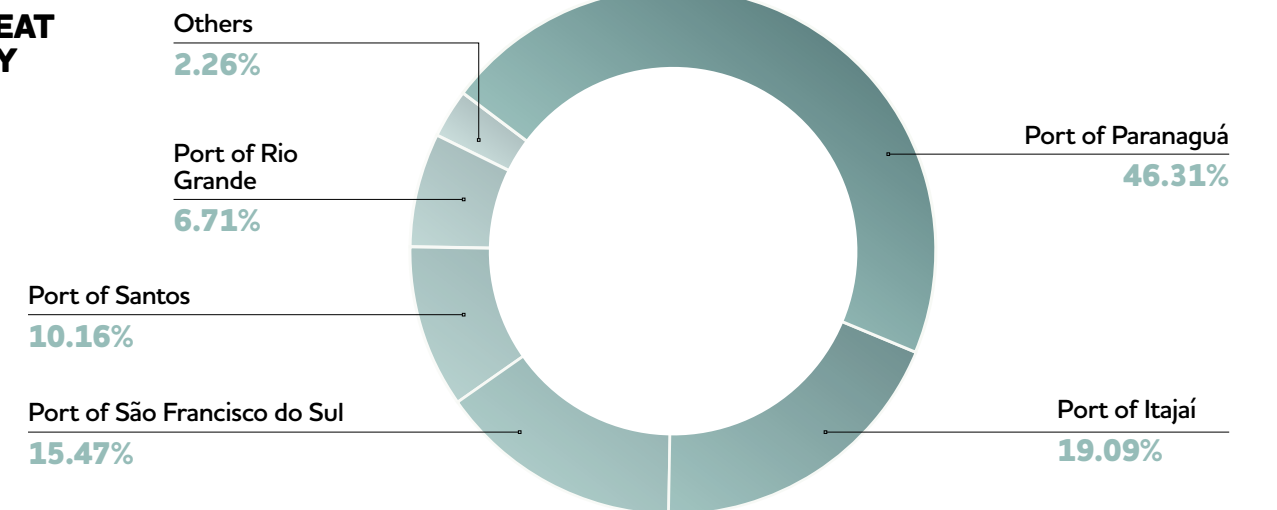
NCM Codes of Chicken Meat: 0207.11.00, 0207.12.00, 0207.12.10, 0207.12.20, 0207.13.00, 0207.14.00, 0210.99.00, 0210.99.11, 1602.32.10, 1602.32.20, 1602.32.30, 1602.32.90.



BRAZILIAN CHICKEN MEAT EXPORTS BY FEDERAL UNIT between 2013 and 2023



BRAZILIAN CHICKEN MEAT EXPORTS BY CUSTOMS in 2023



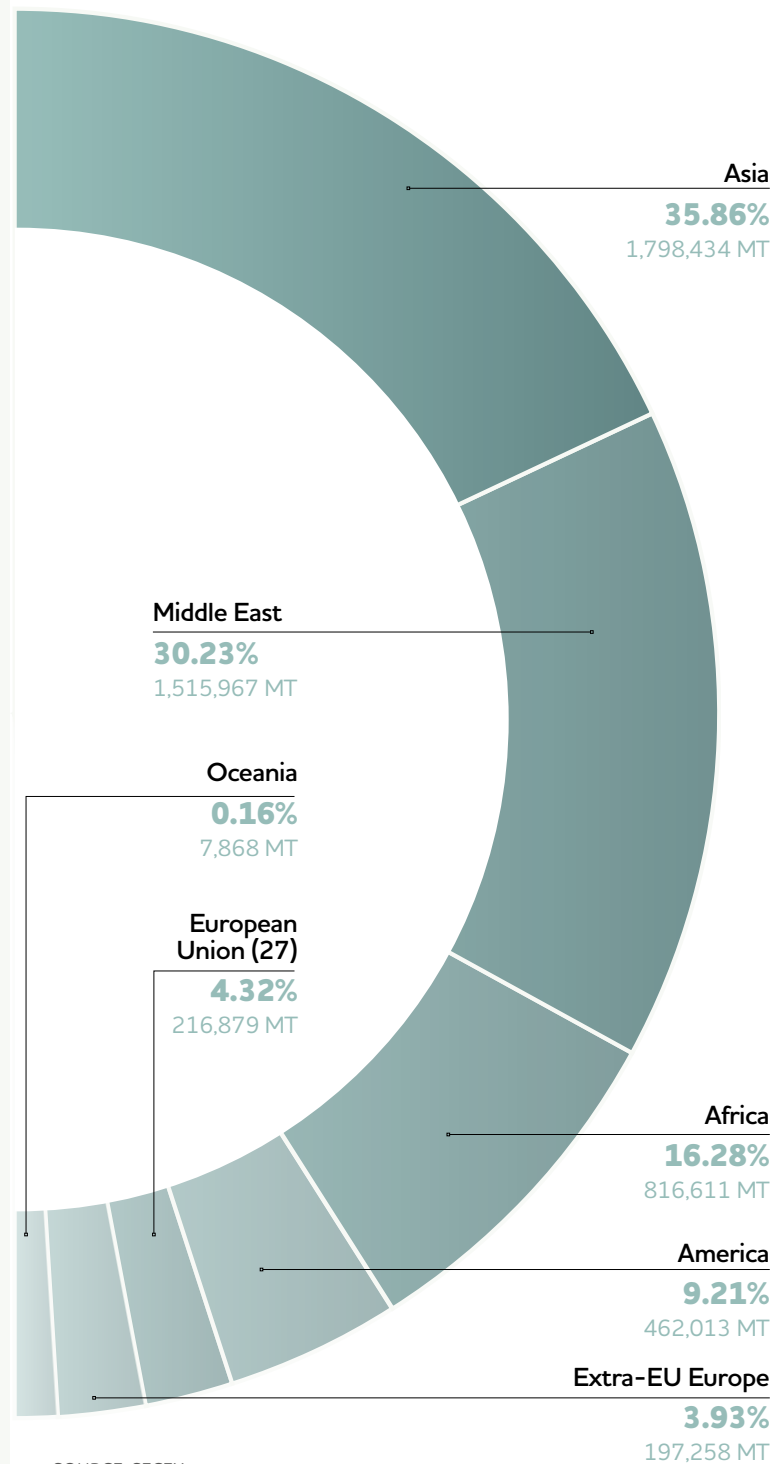
BRAZILIAN CHICKEN MEAT EXPORTS
2022 x 2023 (MT)

	WHOLE			CUTS			PROCESSED				SALTED			SAUSAGES AND SIMILAR PRODUCTS			TOTAL		
	2022	2023	VAR. (%)	2022	2023	VAR. (%)	2022	2023	VAR. (%)		2022	2023	VAR. (%)	2022	2023	VAR. (%)	2022	2023	VAR. (%)
JAN	72,103	85,936	19.18	241,942	297,167	22.83	9,424	9,171	(2.69)		16,249	16,952	4.33	9,431	11,676	23.80	349,150	420,904	20.55
FEB	84,745	80,759	(4.70)	251,722	269,343	7.00	9,900	8,988	(9.22)		13,622	12,824	(5.86)	14,609	7,371	(49.54)	374,596	379,285	1.25
MAR	70,750	107,532	51.99	310,256	370,431	19.40	10,002	10,980	9.78		12,030	15,962	32.68	15,819	9,745	(38.40)	418,858	514,650	22.87
APR	89,543	76,659	(14.39)	293,131	327,166	11.61	10,922	9,252	(15.29)		12,918	11,812	(8.56)	11,762	10,260	(12.76)	418,276	435,149	4.03
MAY	92,272	88,525	(4.06)	304,095	309,557	1.80	9,052	10,236	13.08		13,094	14,991	14.49	11,175	10,058	(9.99)	429,687	433,367	0.86
JUN	94,990	92,033	(3.11)	298,037	318,178	6.76	10,351	9,421	(8.99)		15,301	11,963	(21.82)	13,836	14,620	5.67	432,515	446,216	3.17
JUL	83,143	88,240	6.13	288,217	310,683	7.79	9,086	10,084	10.99		12,655	13,821	9.22	12,237	9,297	(24.03)	405,337	432,125	6.61
AUG	90,997	90,430	(0.62)	302,419	307,343	1.63	10,673	10,549	(1.16)		18,709	13,718	(26.68)	15,083	11,355	(24.71)	437,880	433,396	(1.02)
SEP	90,063	76,141	(15.46)	268,501	291,537	8.58	8,843	8,933	1.02		16,364	11,734	(28.29)	15,933	8,851	(44.45)	399,703	397,195	(0.63)
OCT	82,781	86,208	4.14	274,418	283,709	3.39	9,920	9,480	(4.43)		14,103	13,020	(7.68)	12,791	9,300	(27.29)	394,013	401,716	1.96
NOV	82,576	78,697	(4.70)	256,931	270,544	5.30	7,921	8,716	10.03		14,218	10,572	(25.65)	14,027	8,967	(36.07)	375,674	377,496	0.48
DEC	84,290	99,679	18.26	265,711	331,162	24.63	8,957	9,529	6.38		12,187	14,663	20.32	15,219	12,182	(19.96)	386,365	467,215	20.93
TOTAL	1,018,252	1,050,839	3.20	3,355,381	3,686,821	9.88	115,050	115,337	0.25		171,449	162,033	(5.49)	161,922	123,683	(23.62)	4,822,054	5,138,714	6.57

SOURCE: SECEX/ABPA

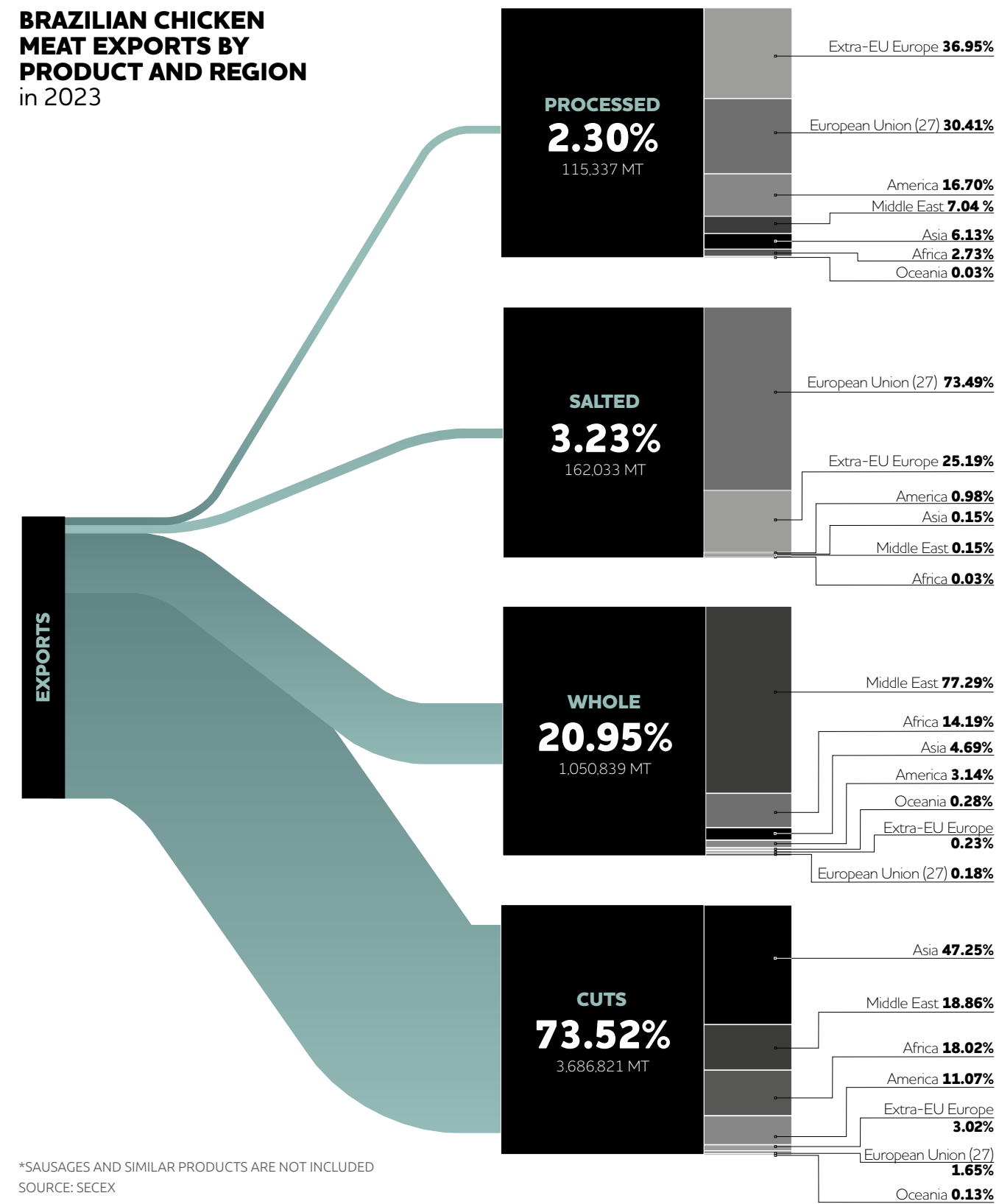


BRAZILIAN EXPORTS OF CHICKEN MEAT BY REGION in 2023



SOURCE: SECEX

BRAZILIAN CHICKEN MEAT EXPORTS BY PRODUCT AND REGION in 2023



*SAUSAGES AND SIMILAR PRODUCTS ARE NOT INCLUDED
SOURCE: SECEX

IMPORTING COUNTRIES OF BRAZILIAN CHICKEN MEAT in 2023

AFRICA

- Angola
- Benin
- Burkina Faso
- Burundi
- Cameroon
- Cape Green
- Central African Rep.
- Chad
- Comoros Islands
- Congo
- Dem. Rep. of Congo
- Djibouti
- Egypt
- Equatorial Guinea
- Gabon
- Gambia
- Ghana
- Guinea
- Guinea Bissau
- Ivory Coast
- Kenya
- Liberia
- Libya
- Malawi
- Mauricio Islands
- Mauritania
- Mayotte Islands
- Morocco
- Mozambique
- Namibia
- Niger
- Sao Tome and Principe
- Senegal
- Seychelles
- Sierra Leone
- Somalia
- South Africa
- Southern Sudan
- Sudan
- Tanzania
- Togo
- Tunisia
- Uganda
- Western Sahara
- Zambia
- Zimbabwe

AMERICA

- Anguilla
- Antigua and Barbuda
- Argentina
- Aruba
- Bahamas
- Barbados
- Belize
- Bermuda
- Bolivia
- Bonaire, Saint Eustatius and Saba
- British Virgin Islands
- Canada
- Cayman Islands
- Cuba
- Curacao
- Chile
- Dominica
- Dominican Rep.
- Grenade
- Guyana
- Haiti
- Honduras
- Mexico
- Montserrat
- Panama
- Paraguay
- Peru
- Saint Kitts and Nevis
- Saint Vincent and the Grenadines
- St. Maarten
- Suriname
- Trinidad and Tobago
- Uruguay
- Venezuela

ASIA

- Afghanistan
- Armenia
- Brunei Darussalam
- Cambodia
- China
- East Timor
- Hong Kong
- India
- Japan
- Kazakhstan
- Malaysia
- Maldives
- Philippines
- Singapore
- South Korea
- Sri Lanka
- Turkmenistan
- Uzbekistan
- Vietnam

EXTRA-EU EUROPE

- Albania
- Gibraltar
- Isle of Man
- Macedonia
- Monaco
- Montenegro
- Norway
- Russia
- Serbia
- Switzerland
- United Kingdom

OCEANIA

- American Samoa
- Cook Islands
- French Polynesia
- Marshall Islands
- New Caledonia
- Palau
- Samoa
- Tonga
- Vanuatu

150 MARKETS!

MIDDLE EAST

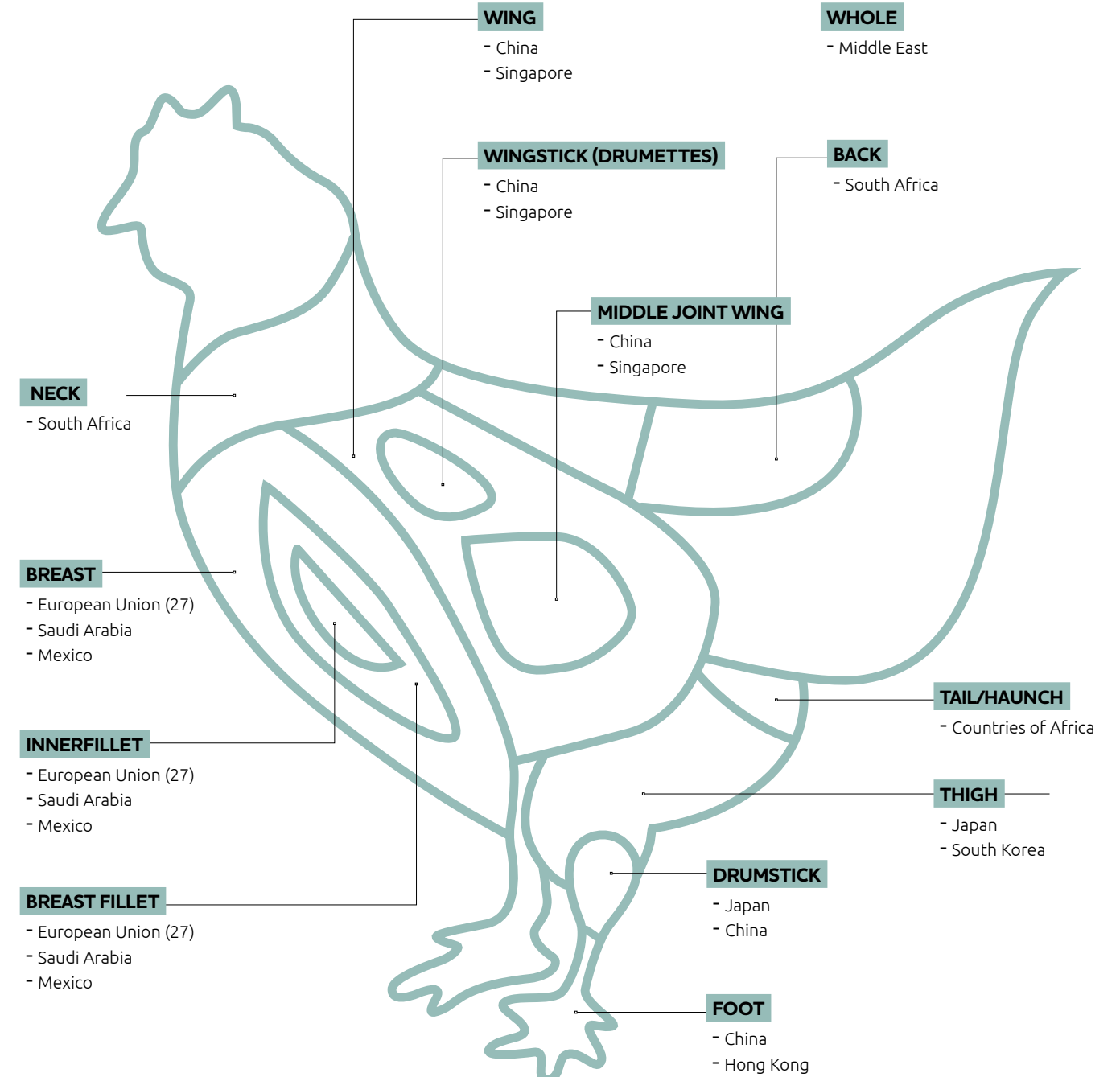
- Bahrain
- Georgia
- Iran
- Iraq
- Israel
- Jordan
- Kuwait
- Lebanon
- Oman
- Qatar
- Saudi Arabia
- Turkey
- United Arab Emirates
- Yemen

EUROPEAN UNION (27)

- Belgium
- Bulgaria
- Cyprus
- Denmark
- France
- Germany
- Greece
- Ireland
- Italy
- Lithuania
- Luxembourg
- Malta
- Netherlands
- Poland
- Portugal
- Romania
- Spain

SOURCE: SECEX

MAIN IMPORT MARKETS BY TYPE OF CHICKEN CUT



MAIN DESTINATIONS OF BRAZILIAN CHICKEN MEAT EXPORTS (MT)

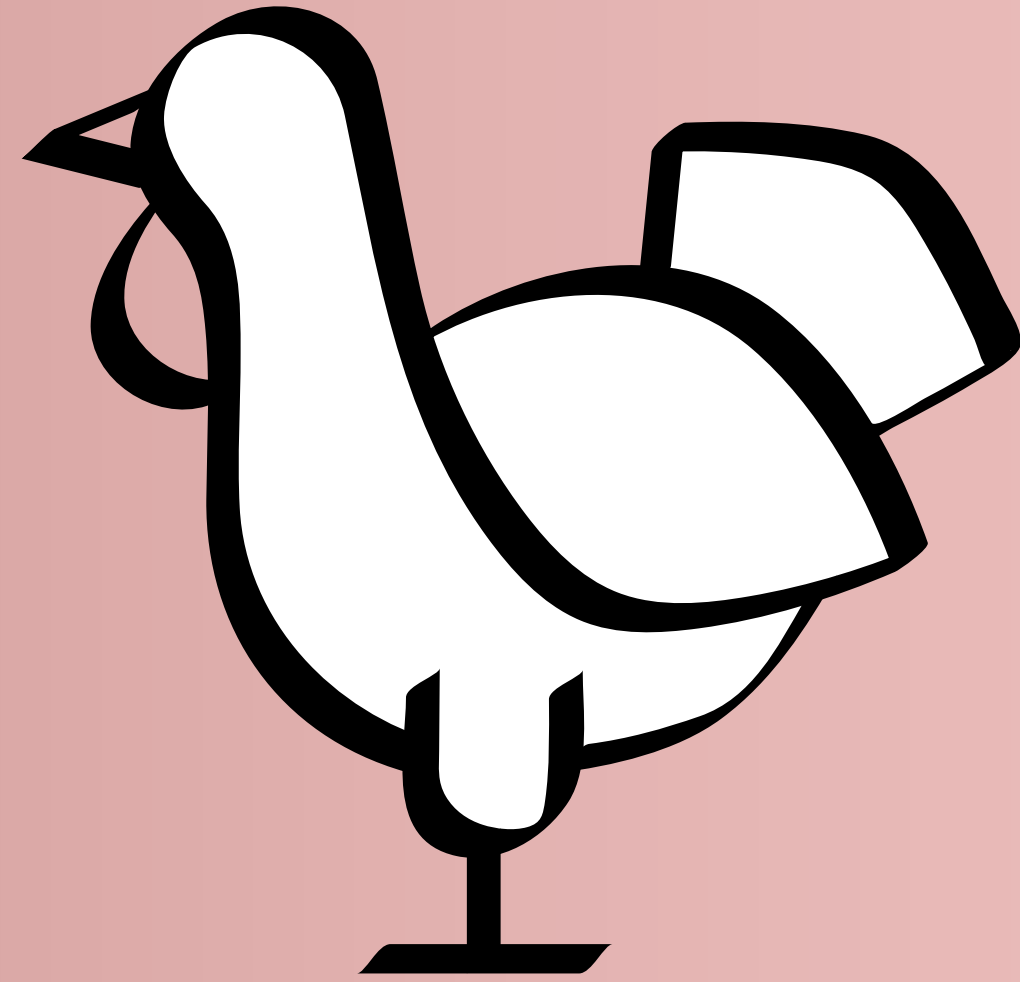
	DESTINATION	TOTAL					WHOLE			CUTS			PROCESSED			SALTED		
		2022	2023	SHARE (%)	VAR. (%)		2022	2023	VAR. (%)	2022	2023	VAR. (%)	2022	2023	VAR. (%)	2022	2023	VAR. (%)
1°	CHINA	540,555	682,665	13.61	26.29		29	20	(29.71)	540,526	682,644	26.29	0.02	0.12	436.36	0.03	-	-
2°	UNITED ARAB EMIRATES	444,983	440,748	8.79	(0.95)		245,469	227,930	(7.14)	198,772	211,034	6.17	553	1,784	222.52	189	-	-
3°	JAPAN	420,295	433,583	8.65	3.16		13,470	11,323	(15.94)	397,403	417,216	4.99	9,422	5,044	(46.47)	-	-	-
4°	SAUDI ARABIA	340,127	376,953	7.52	10.83		181,767	193,392	6.40	158,360	183,561	15.91	0.04	0.10	137.50	-	-	-
5°	SOUTH AFRICA	284,015	340,435	6.79	19.87		164	981	496.97	283,186	338,977	19.70	664	477	(28.21)	-	-	-
6°	PHILIPPINES	246,341	219,501	4.38	(10.90)		0.96	85	8,756.34	245,591	217,682	(11.36)	749	1,735	131.53	-	-	-
7°	EUROPEAN UNION (27)	237,340	216,879	4.32	(8.62)		1,291	1,911	48.07	70,851	60,816	(14.16)	39,838	35,079	(11.94)	125,361	119,073	(5.02)
8°	SOUTH KOREA	185,496	201,795	4.02	8.79		72	459	537.34	185,419	201,324	8.58	5.50	13	133.23	-	-	-
9°	MEXICO	140,384	173,321	3.46	23.46		0.40	0.06	(85.00)	140,384	173,321	23.46	0.02	0.01	(77.27)	-	-	-
10°	IRAQ	54,890	152,271	3.04	177.41		18,536	49,151	165.16	34,734	100,665	189.82	1,620	2,455	51.58	-	-	-
11°	SINGAPORE	150,937	136,921	2.73	(9.29)		27,065	26,282	(2.89)	123,697	110,298	(10.83)	175	91	(48.05)	0.04	250	675.351
12°	YEMEN	85,442	106,861	2.13	25.07		83,791	102,519	22.35	1,643	4,236	157.80	7.78	105	1,245.79	-	-	-
13°	KUWAIT	107,804	105,429	2.10	(2.20)		79,692	74,564	(6.43)	27,190	28,385	4.40	922	2,480	168.88	-	-	-
14°	UNITED KINGDOM	95,018	100,245	2.00	5.50		837	1,599	91.02	12,793	15,801	23.52	39,455	42,540	7.82	41,934	40,305	(3.88)
15°	OMAN	72,710	87,115	1.74	19.81		53,919	57,728	7.07	18,610	28,958	55.60	181	429	137.00	-	-	-

*SAUSAGES AND SIMILAR PRODUCTS ARE NOT INCLUDED
SOURCE: SECEX

MAIN DESTINATIONS OF BRAZILIAN CHICKEN MEAT EXPORTS (MT)

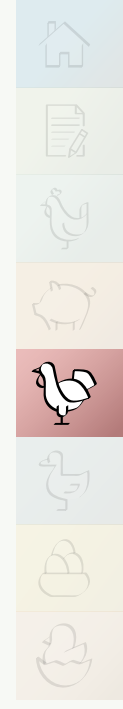
	DESTINATION	TOTAL					WHOLE			CUTS			PROCESSED			SALTED		
		2022	2023	SHARE (%)	VAR. (%)		2022	2023	VAR. (%)	2022	2023	VAR. (%)	2022	2023	VAR. (%)	2022	2023	VAR. (%)
16°	CHILE	102,259	77,112	1.54	(24.59)		1,230	7,912	543.12	91,058	59,333	(34.84)	7,294	8,302.36	13.82	2,677	1,564	(41.57)
17°	LIBYA	76,452	76,401	1.52	(0.07)		44,641	38,112	(14.63)	31,791	38,089	19.81	20	199	911.13	-	-	-
18°	QATAR	106,787	76,345	1.52	(28.51)		62,929	47,062	(25.21)	43,077	28,779	(33.19)	781	504	(35.54)	-	-	-
19°	JORDAN	71,217	63,086	1.26	(11.42)		17,597	19,712	12.02	53,597	43,374	(19.07)	22	-	-	-	-	-
20°	EGYPT	47,162	59,136	1.18	25.39		44,510	51,936	16.68	2,513	7,200	186.47	138	-	-	-	-	-
21°	PERU	39,096	56,820	1.13	45.34		7,879	13,527	71.69	31,201	43,133	38.24	16	160	898.32	-	-	-
22°	GHANA	31,256	56,213	1.12	79.84		1,631	3,676	125.43	28,921	52,314	80.88	705	223	(68.29)	-	-	-
23°	ANGOLA	105,862	55,698	1.11	(47.39)		24,432	9,207	(62.32)	81,306	46,436	(42.89)	124	55	(55.76)	-	-	-
24°	RUSSIA	38,486	52,046	1.04	35.23		0.12	0.04	(70.00)	38,485	52,046	35.23	-	-	-	-	-	-
25°	HONG KONG	50,234	49,072	0.98	(2.31)		2,383	2,416	1.40	47,851	46,633	(2.55)	1.01	24	2,244.23	0.06	-	-
	SUBTOTAL	4,075,148	4,396,651	87.67	7.89		913,335	941,507	3.08	2,888,960	3,192,256	10.50	102,692	101,697	(0.97)	170,161	161,191	(5.27)
	OTHERS	584,984	618,379	12.33	5.71		104,916	109,332	4.21	466,421	494,565	6.03	12,358	13,640	10.38	1,289	841	(34.74)
	TOTAL*	4,660,132	5,015,030	100.00	7.62		1,018,252	1,050,839	3.20	3,355,381	3,686,821	9.88	115,050	115,337	0.25	171,449	162,033	(5.49)

*SAUSAGES AND SIMILAR PRODUCTS ARE NOT INCLUDED
SOURCE: SECEX



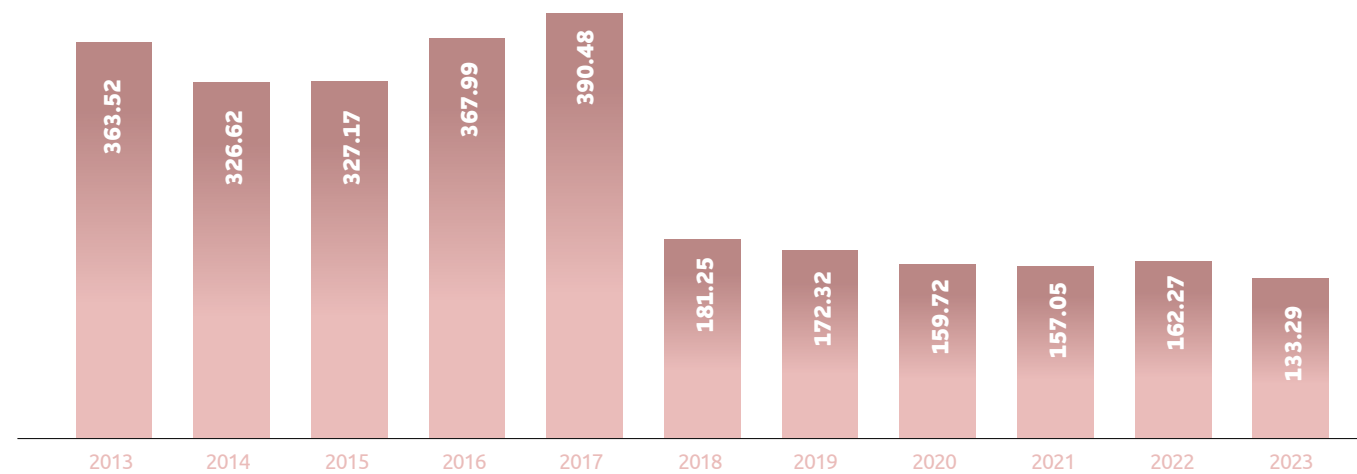
TURKEY

MEAT



:::: BRAZILIAN PRODUCTION

BRAZILIAN TURKEY MEAT PRODUCTION (1,000 MT)



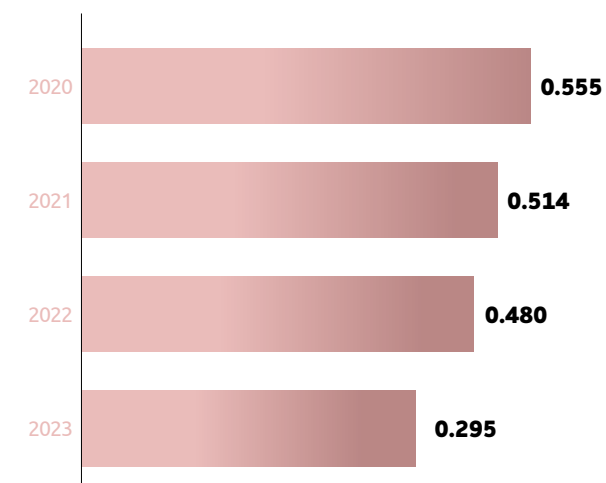
SOURCE: ABPA

DESTINATION OF BRAZILIAN TURKEY MEAT PRODUCTION in 2023



SOURCE: SECEX/ABPA

TURKEY MEAT PER CAPITA CONSUMPTION (kg per person)



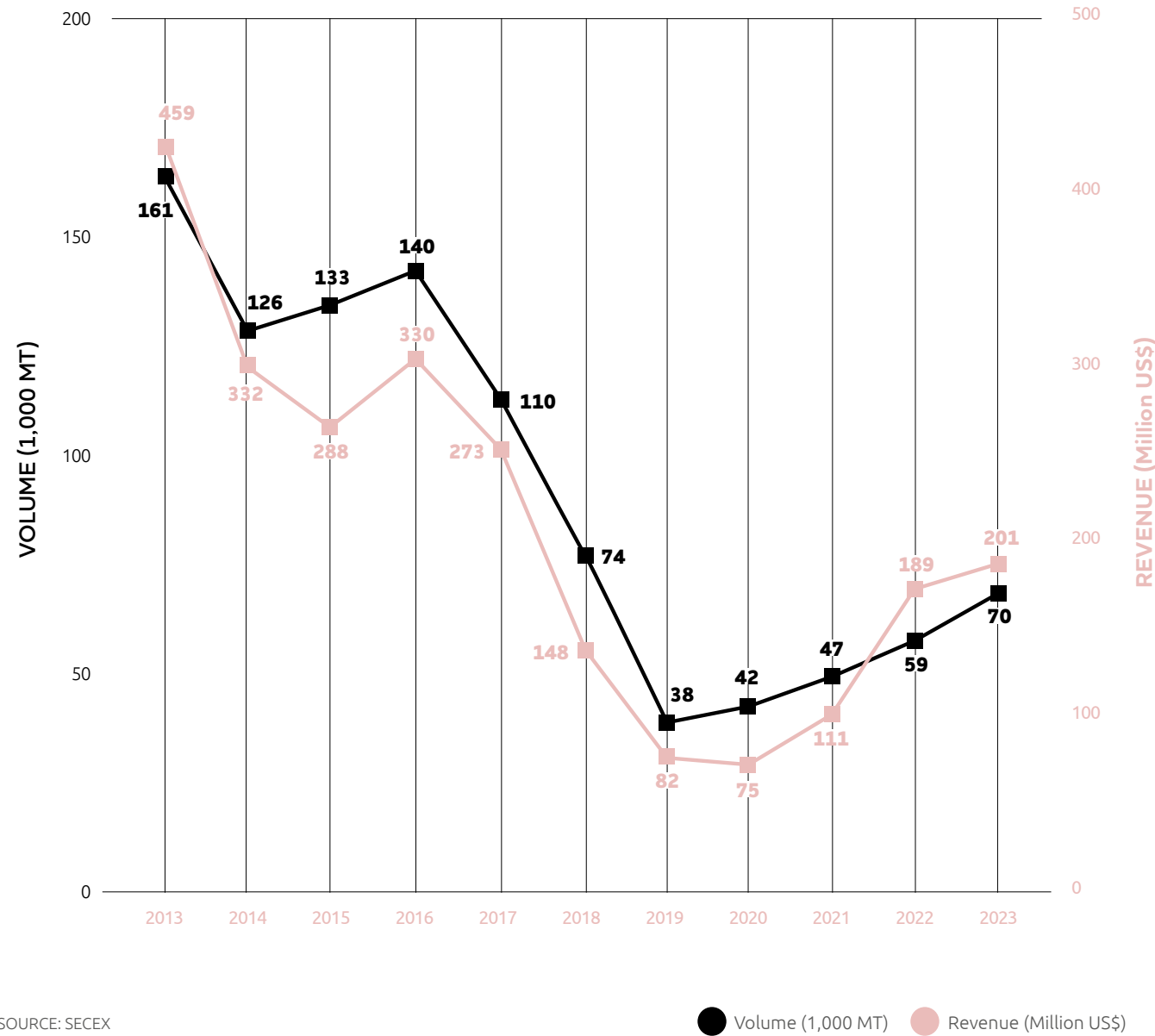
SOURCE: ABPA



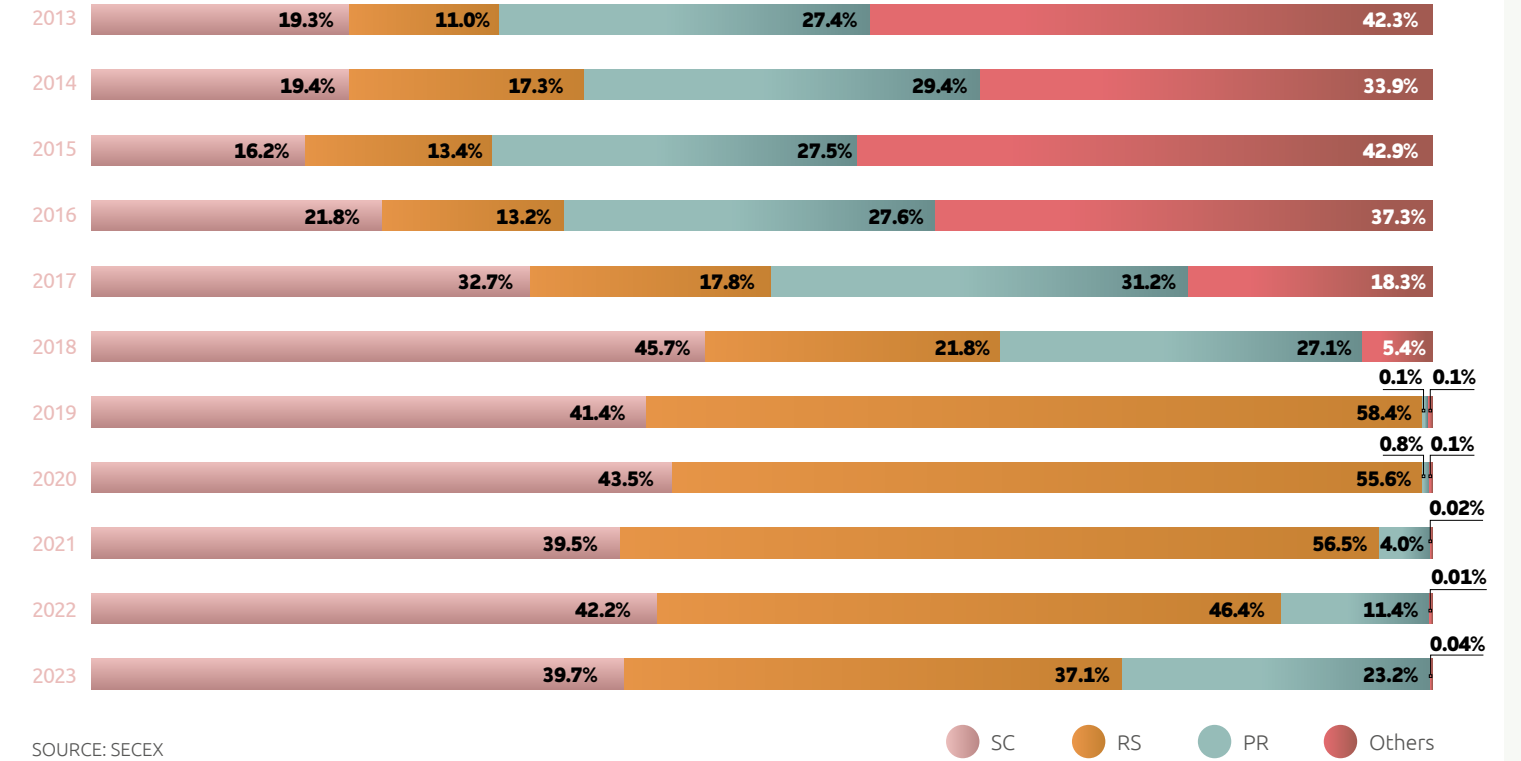
BRAZILIAN EXPORTS

BRAZILIAN EXPORTS OF TURKEY MEAT (historical series)

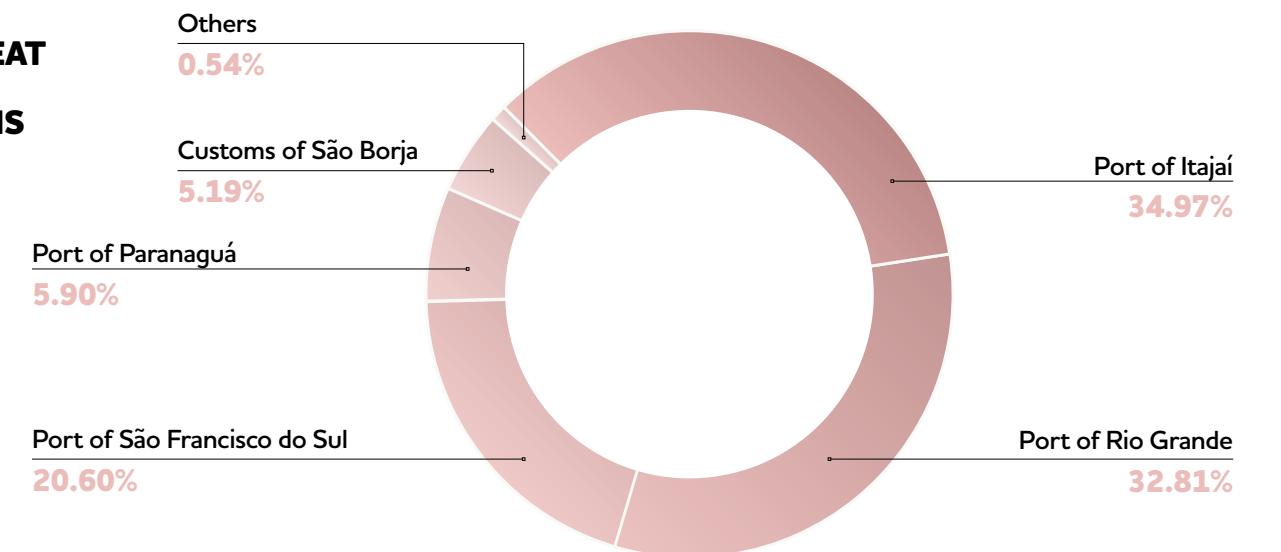
NCM Codes of Turkey Meat: 0207.24.00, 0207.25.00, 0207.26.00, 0207.27.00, 1602.31.00.



BRAZILIAN TURKEY MEAT EXPORTS BY FEDERAL UNIT between 2013 and 2023



BRAZILIAN TURKEY MEAT EXPORTS BY CUSTOMS in 2023

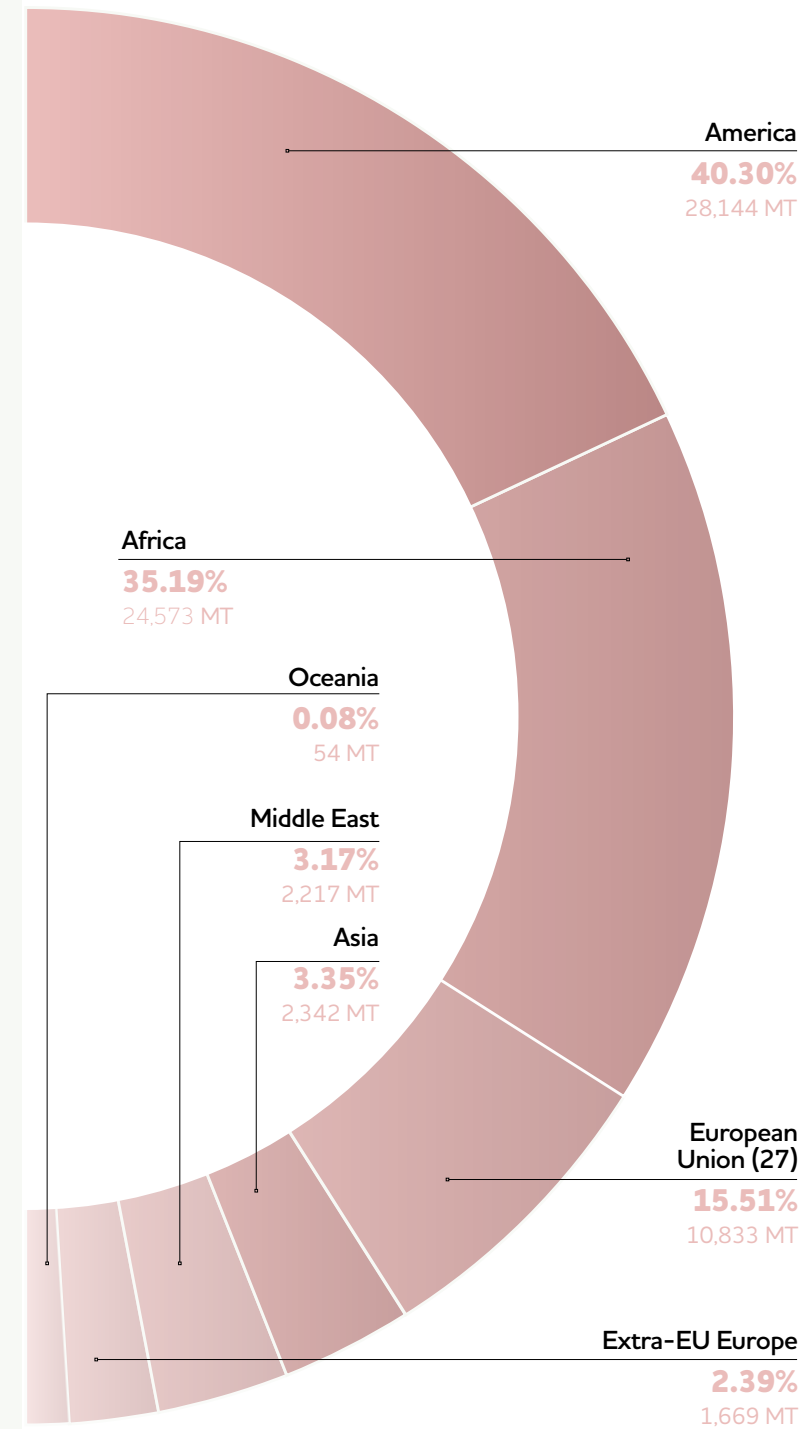


BRAZILIAN TURKEY MEAT EXPORTS
2022 x 2023 (MT)

	WHOLE			CUTS			PROCESSED			TOTAL		
	2022	2023	VAR. (%)	2022	2023	VAR. (%)	2022	2023	VAR. (%)	2022	2023	VAR. (%)
JAN	142	16	1,016.83	3,447	5,174	50.12	35	944	(73.11)	3,483	5,199	49.27
FEB	183	0.59	(67.94)	2,993	3,055	2.05	28	477	1,579.42	3,024	3,532	16.81
MAR	0.52	58	11,114.31	3,689	5,753	55.97	43	1,263	2,807.18	3,732	7,074	89.52
APR	0.16	737	449,415.85	4,227	3,463	(18.06)	27	1,052	3,822.91	4,254	5,253	23.49
MAY	0.34	546	159,097.38	4,300	3,904	(9.22)	49	651	1,230.84	4,349	5,101	17.27
JUN	0.43	534	124,322.84	6,511	8,218	26.22	106	769	626.52	6,617	9,521	43.89
JUL	0.26	707	277,147.45	5,463	4,699	(13.98)	87	859	891.86	5,550	6,266	12.90
AUG	21	519	2,360.75	4,905	4,289	(12.56)	406	888	118.51	5,332	5,695	6.81
SEP	23	1,081	4,522.30	5,452	4,361	(20.01)	629	714	13.55	6,105	6,156	0.84
OCT	39	458	1,086.87	5,488	3,914	(28.68)	698	405	(41.95)	6,225	4,778	(23.24)
NOV	11	99	780.72	6,962	6,762	(2.87)	131	187	42.83	7,104	7,049	(0.78)
DEC	27	2.69	(89.92)	3,424	3,962	15.73	47	245	425.90	3,497	4,210	20.39
TOTAL	126	4,759	3,676.19	56,859	57,553	1.22	2,286	7,521	228.95	59,271	69,833	17.82

SOURCE: SECEX

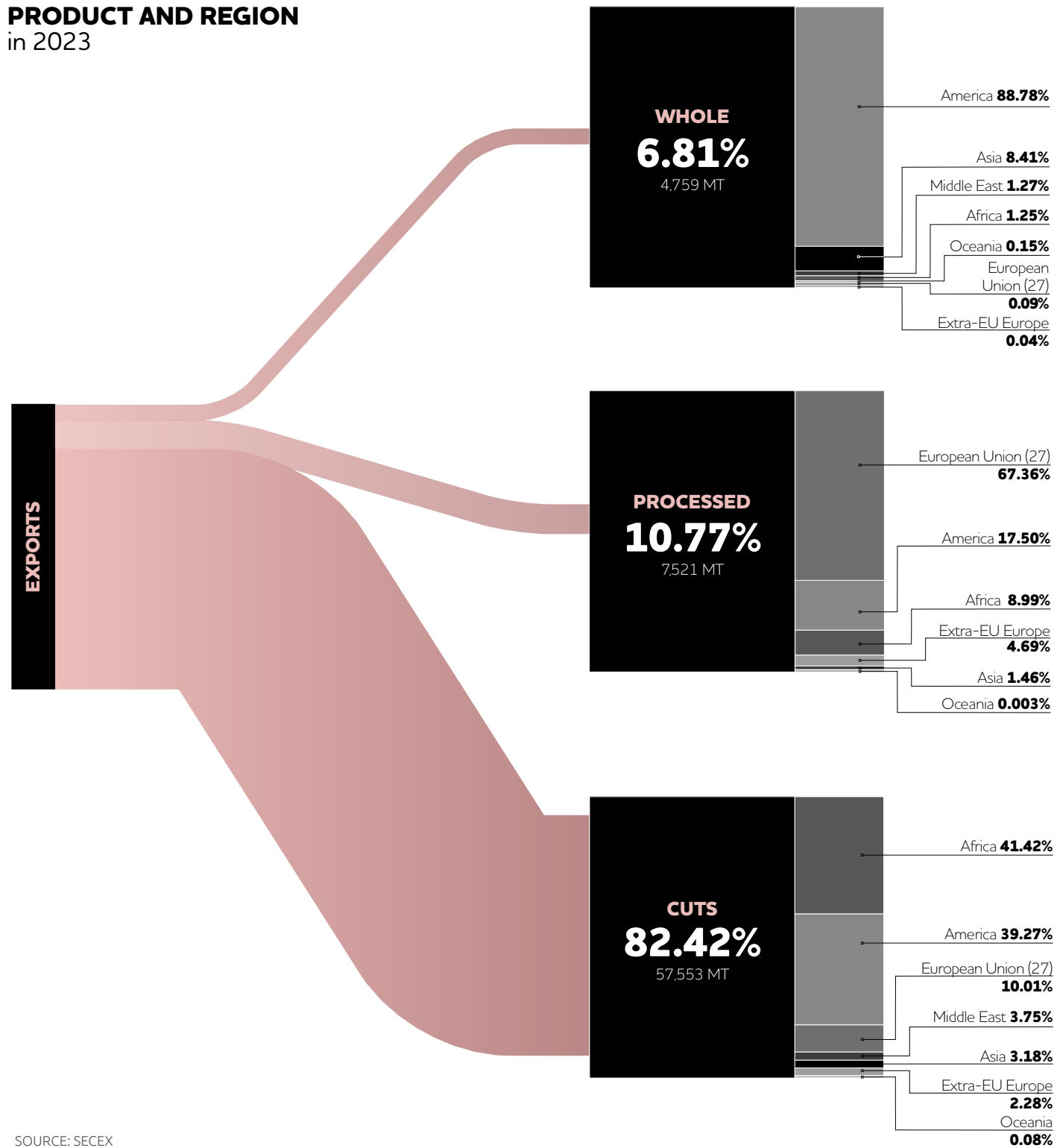
BRAZILIAN TURKEY MEAT EXPORTS BY REGION
in 2023



SOURCE: SECEX



BRAZILIAN TURKEY MEAT EXPORTS BY PRODUCT AND REGION in 2023



SOURCE: SECEX

IMPORTING COUNTRIES OF BRAZILIAN TURKEY MEAT in 2023

78 MARKETS!

AFRICA

- Angola
- Benin
- Central African Rep.
- Congo
- Dem. Rep. of Congo
- Equatorial Guinea
- Gabon
- Ghana
- Guinea
- Guinea Bissau
- Ivory Coast
- Liberia
- Mauricio Islands
- Mozambique
- Seychelles
- South Africa
- Togo

AMERICA

- Anguilla
- Antigua and Barbuda
- Argentina
- Bahamas
- Barbados
- Bermuda
- British Virgin Islands
- Cayman Islands
- Chile
- Cuba
- Curacao
- Dominica
- Dominican Rep.
- Grenade
- Haiti
- Mexico
- Montserrat
- Paraguay
- Peru

- Saint Kitts and Nevis
- St Maarten
- Uruguay

ASIA

- Azerbaijan
- Hong Kong
- Japan
- Malaysia
- Philippines
- Singapore
- South Korea

EXTRA-EU EUROPE

- Gibraltar
- Isle of Man
- Norway
- Switzerland
- United Kingdom

OCEANIA

- Cook Islands
- Marshall Islands
- Palau
- Tonga

MIDDLE EAST

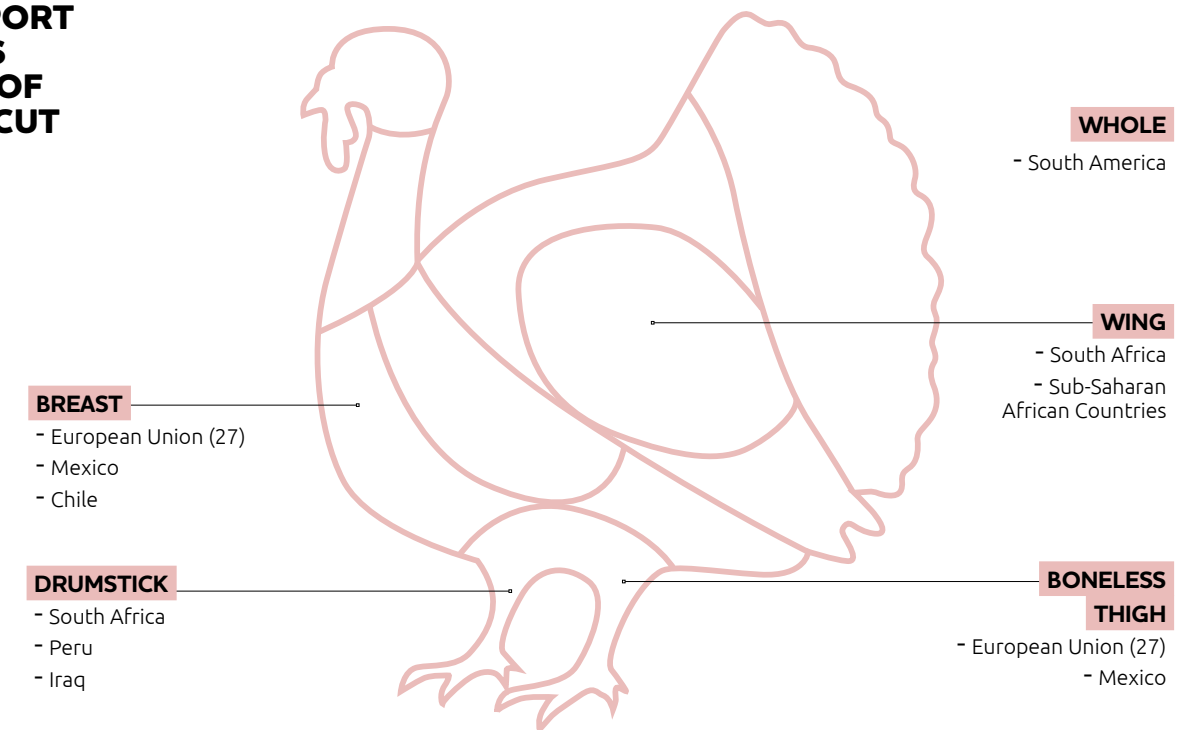
- Bahrain
- Georgia
- Iraq
- Jordan
- Kuwait
- Qatar
- Saudi Arabia
- Turkey
- United Arab Emirates

EUROPEAN UNION (27)

- Belgium
- Cyprus
- Denmark
- France
- Greece
- Ireland
- Italy
- Luxembourg
- Malta
- Netherlands
- Portugal
- Romania

SOURCE: SECEX

MAIN IMPORT MARKETS BY TYPE OF TURKEY CUT



MAIN DESTINATIONS OF BRAZILIAN TURKEY MEAT EXPORTS (MT)

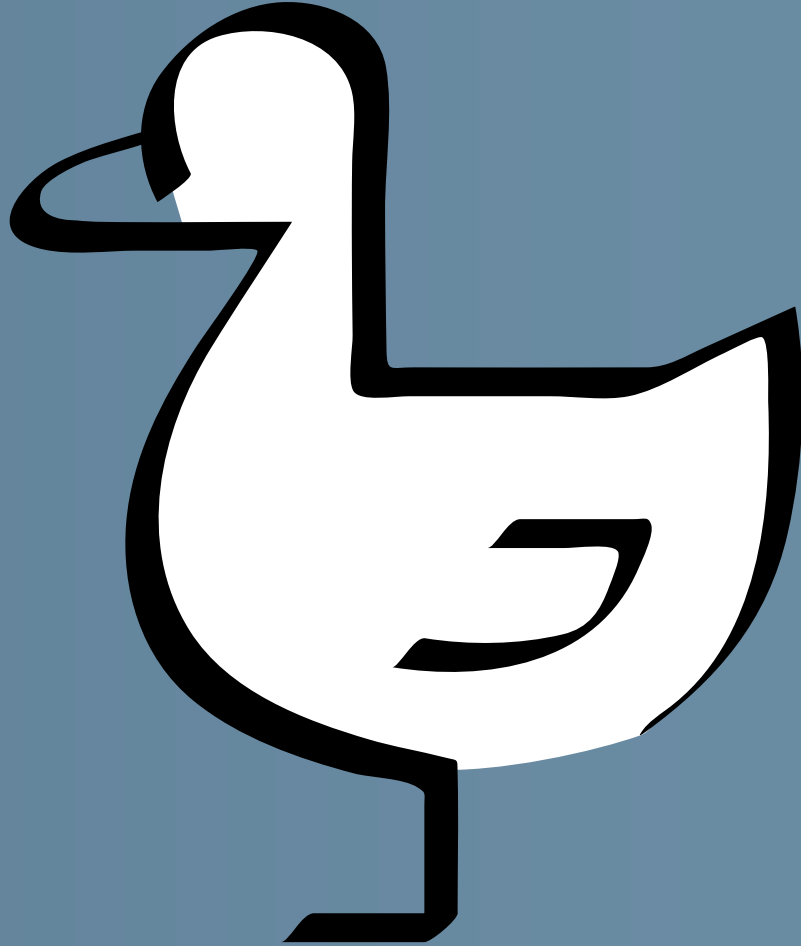
	DESTINATION	TOTAL					WHOLE			CUTS			PROCESSED		
		2022	2023	SHARE (%)	VAR. (%)		2022	2023	VAR. (%)	2022	2023	VAR. (%)	2022	2023	VAR. (%)
1°	MEXICO	16,676	16,056	22.99	(3.72)		-	4,215	-	16,676	11,841	(29.00)	-	-	-
2°	SOUTH AFRICA	9,381	12,966	18.57	38.21		0.07	0.05	(36.11)	8,733	12,439	42.43	648	528	(18.59)
3°	EUROPEAN UNION (27)	3,196	10,833	15.51	238.93		1.36	4.38	222.13	3,194	5,763	80.39	-	5,066	-
4°	CHILE	8,284	4,490	6.43	(45.80)		-	-	-	7,558	3,832	(49.30)	726	658	(9.37)
5°	PERU	4,796	4,432	6.35	(7.59)		-	-	-	4,796	4,432	(7.59)	-	-	-
6°	BENIN	2,539	2,181	3.12	(14.11)		1.86	-	-	2,537	2,181	(14.05)	-	-	-
7°	CONGO	1,664	2,115	3.03	27.13		-	-	-	1,664	2,115	27.13	0.03	-	-
8°	GABON	826	1,908	2.73	130.98		0.03	0.02	(35.48)	826	1,907	130.87	-	0.91	-
9°	EQUATORIAL GUINEA	2,162	1,716	2.46	(20.61)		-	-	-	2,160	1,716	(20.54)	2.00	-	-
10°	DOMINICAN REP.	1,389	1,586	2.27	14.21		-	-	-	1,389	1,586	14.21	-	-	-
11°	AZERBAIJAN	224	1,468	2.10	554.54		-	-	-	224	1,468	554.54	-	-	-
12°	GHANA	723	1,264	1.81	74.73		2.50	-	-	721	1,264	75.34	-	-	-
13°	ANGOLA	3,081	1,219	1.75	(60.42)		30	53	76.14	3,024	1,155	(61.82)	27	12	(55.84)
14°	UNITED KINGDOM	76	882	1.26	1,065.01		0.11	0.25	124.11	76	529	600.01	-	353	-
15°	SWITZERLAND	515	785	1.12	52.45		-	-	-	515	785	52.45	-	-	-

SOURCE: SECEX

**MAIN DESTINATIONS OF BRAZILIAN
TURKEY MEAT EXPORTS (MT)**

	DESTINATION	TOTAL					WHOLE			CUTS			PROCESSED		
		2022	2023	SHARE (%)	VAR. (%)		2022	2023	VAR. (%)	2022	2023	VAR. (%)	2022	2023	VAR. (%)
16°	SINGAPORE	168	658	0.94	292.47		29	376	1.181.47	138	259	87.61	-	23	-
17°	DEM. REP. OF CONGO	129	638	0.91	395.97		-	-	-	127	632	399.36	2.08	6.04	189.87
18°	UNITED ARAB EMIRATES	106	632	0.91	496.43		-	37	-	106	595	461.46	-	-	-
19°	JORDAN	-	594	0.85	-		-	-	-	-	594	-	-	-	-
20°	GEORGIA	-	392	0.56	-		-	-	-	-	392	-	-	-	-
21°	ARGENTINA	541	348	0.50	(35.68)		-	-	-	88	53	(39.14)	453	295	(35.01)
22°	HAITI	157	262	0.38	67.31		-	-	-	157	262	67.31	-	-	-
23°	IRAQ	220	200	0.29	(9.21)		-	-	-	220	200	(9.21)	-	-	-
24°	GRENADE	223	186	0.27	(16.52)		-	1.00	-	220	185	(16.13)	2.24	-	-
25°	QATAR	23	185	0.27	695.58		23	-	-	-	185	-	-	-	-
	SUBTOTAL	57,098	67,997	97.37	19.09		89	4,687	5,185.76	55,149	56,370	2.21	1,861	6,940	272.97
	OTHERS	2,173	1,836	2.63	(15.53)		37	72	93.21	1,710	1,183	(30.85)	426	581	36.49
	TOTAL	59,271	69,833	100.00	17.82		126	4,759	3,676.19	56,859	57,553	1.22	2,286	7,521	228.95

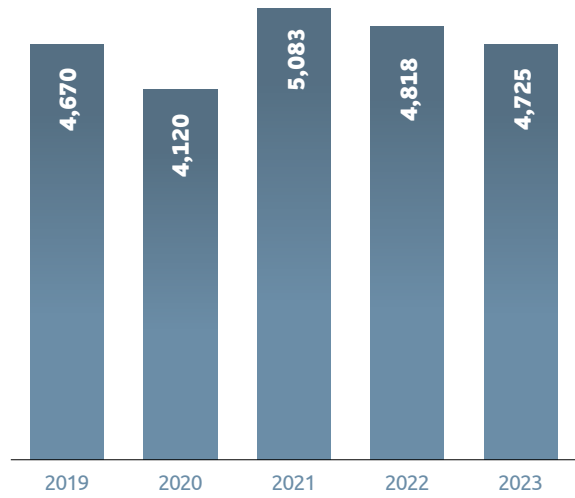
SOURCE: SECEX



DUCK AND OTHER POULTRY MEAT

.... BRAZILIAN PRODUCTION

BRAZILIAN DUCK MEAT PRODUCTION (MT)



SOURCE: ABPA

DESTINATION OF BRAZILIAN DUCK MEAT PRODUCTION in 2023

74.06%
Exports

25.94%
Domestic Market

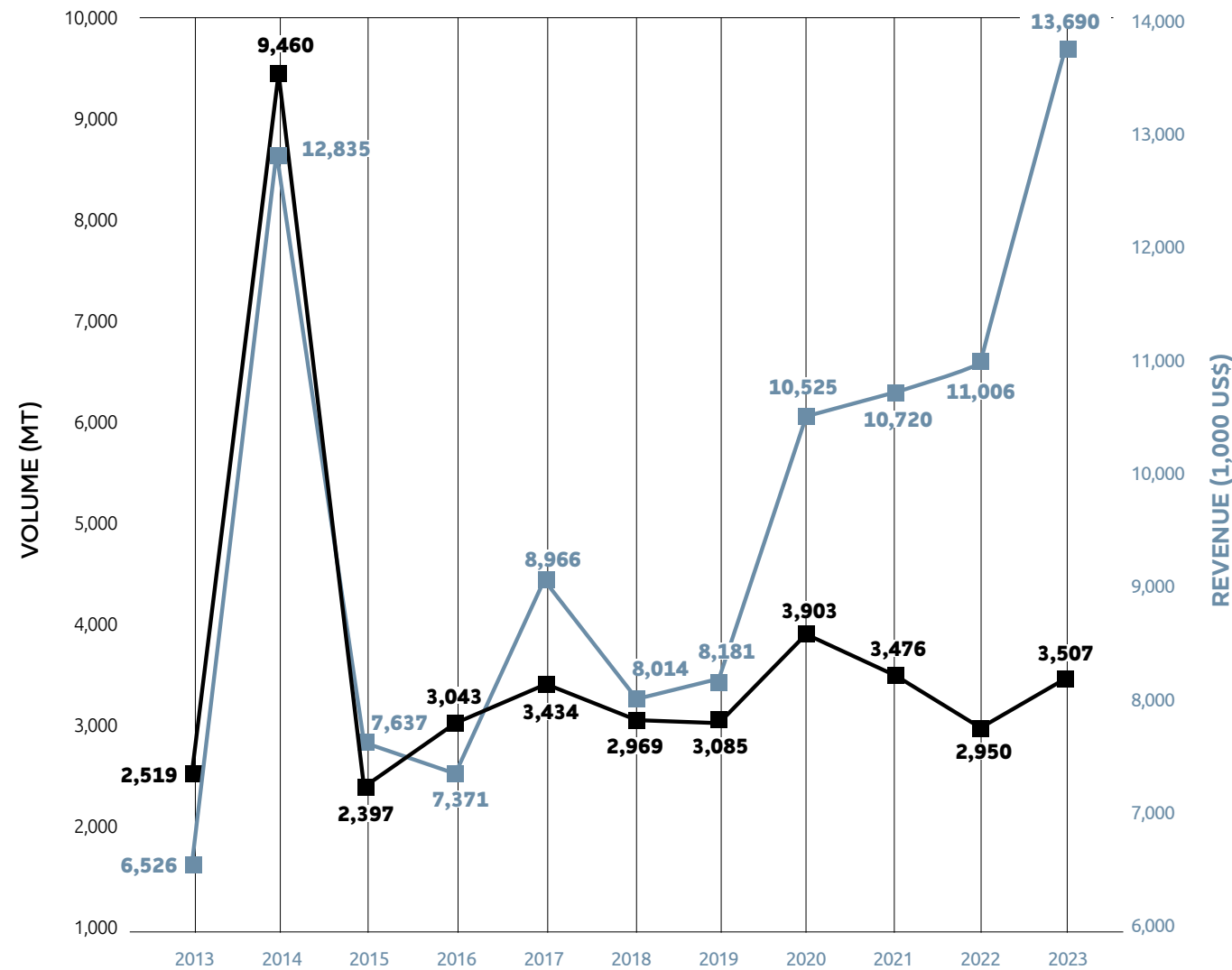
SOURCE: SECEX/ABPA



BRAZILIAN EXPORTS

BRAZILIAN EXPORTS OF DUCK AND OTHER POULTRY MEAT (historical series)

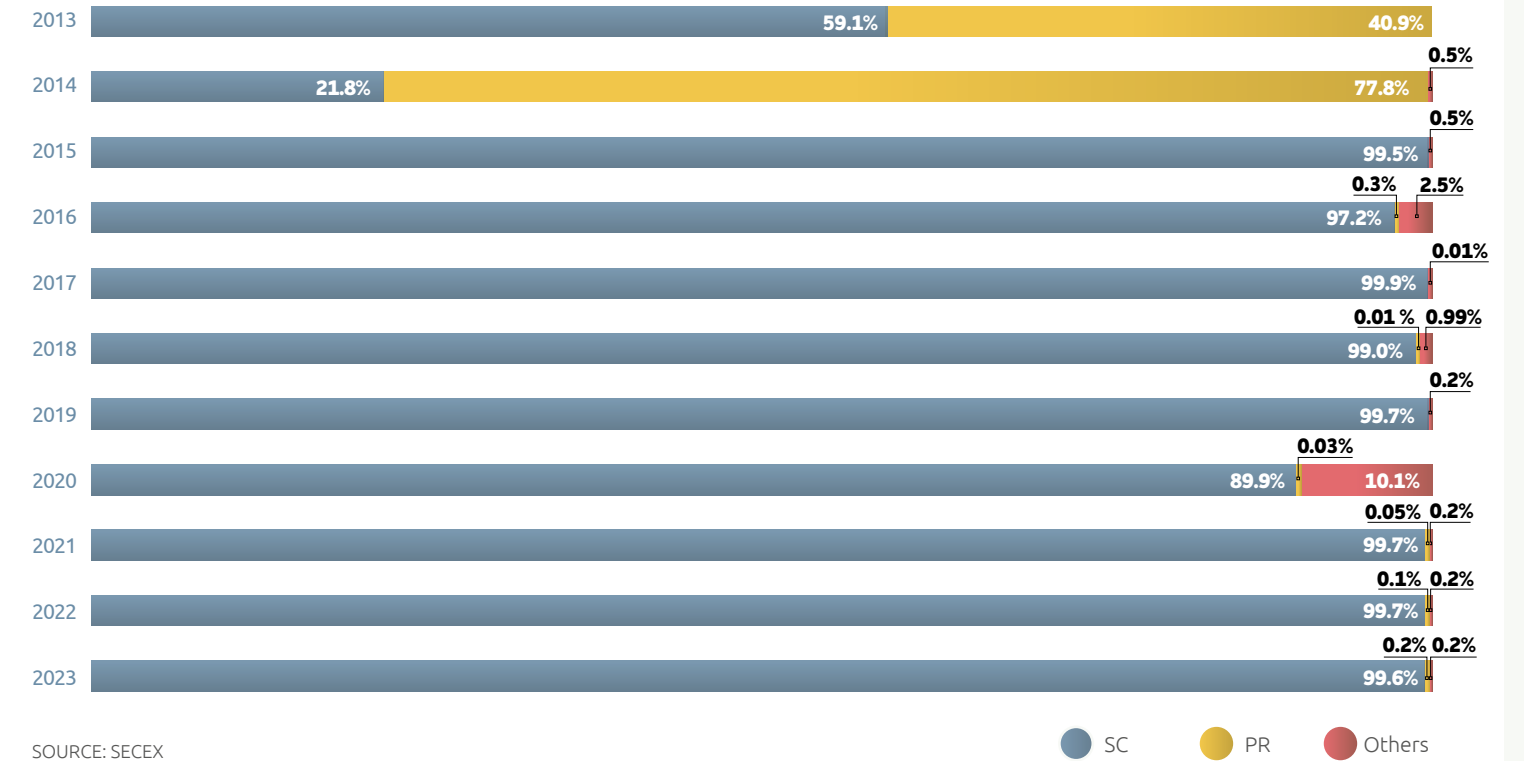
NCM Codes of Duck and Other Poultry Meat: 0207.41.00, 0207.42.00, 0207.43.00, 0207.44.00, 0207.45.00, 0207.51.00, 0207.52.00, 0207.53.00, 0207.54.00, 0207.55.00, 1602.39.00.



SOURCE: SECEX

● Volume (MT) ● Revenue (1,000 US\$)

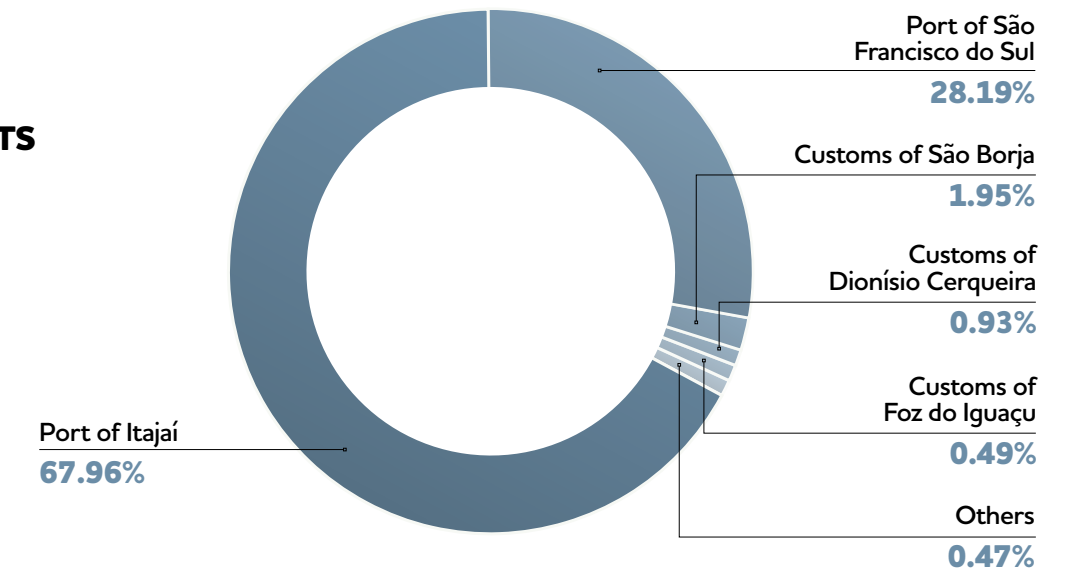
BRAZILIAN DUCK AND OTHER POULTRY MEAT EXPORTS BY FEDERAL UNIT between 2013 and 2023



SOURCE: SECEX

● SC ● PR ● Others

BRAZILIAN DUCK AND OTHER POULTRY MEAT EXPORTS BY CUSTOMS in 2023



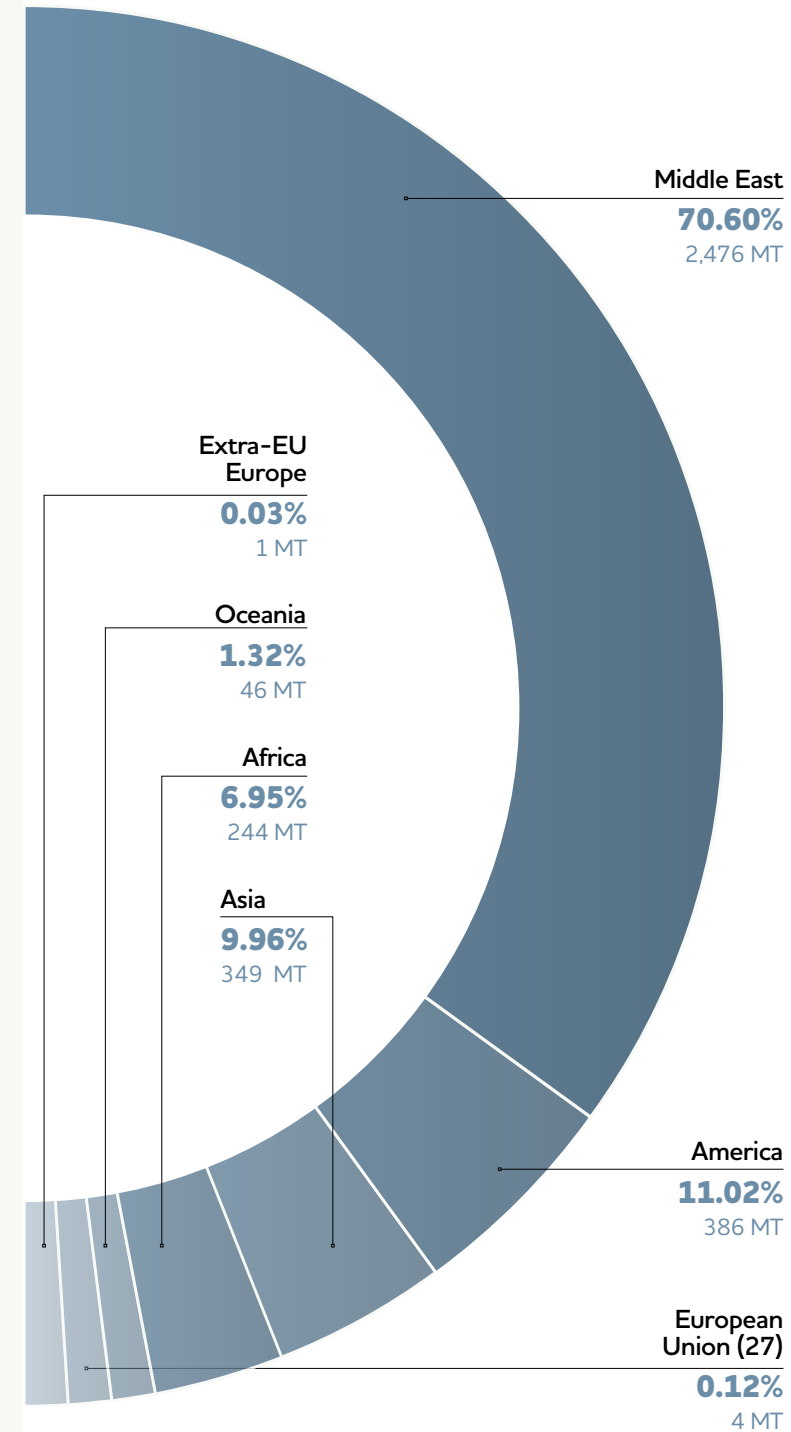
SOURCE: SECEX

BRAZILIAN DUCK AND OTHER POULTRY MEAT EXPORTS 2022 x 2023 (MT)

	WHOLE			CUTS			PROCESSED			TOTAL		
	2022	2023	VAR. (%)	2022	2023	VAR. (%)	2022	2023	VAR. (%)	2022	2023	VAR. (%)
JAN	230	280	21.83	3.86	24	526.66	0.13	0.04	(68.42)	234	304	30.12
FEB	286	257	(10.16)	2.80	6.96	148.39	0.06	0.15	145.00	289	264	(8.59)
MAR	269	353	31.17	5.14	50	881.42	0.12	0.09	(27.12)	274	403	47.07
APR	279	227	(18.60)	0.18	26	14,708.52	0.10	0.22	126.53	279	253	(9.26)
MAY	92	206	125.10	0.19	31	15,979.90	0.06	0.26	332.79	92	238	158.73
JUN	391	268	(31.42)	33	22	(31.69)	0.14	1.04	640.43	424	292	(31.22)
JUL	244	223	(8.46)	37	52	41.16	0.06	0.48	750.00	280	275	(1.81)
AUG	222	285	28.57	36	27	(24.84)	0.20	1.81	790.64	258	314	21.69
SEP	152	156	2.01	46	35	(23.57)	0.11	0.91	694.74	199	192	(3.56)
OCT	163	238	45.73	51	9.14	(82.02)	0.10	1.05	991.67	214	248	15.87
NOV	225	213	(5.09)	3.25	25	663.26	0.05	0.89	1,542.59	228	239	4.80
DEC	144	411	185.24	34	72	112.58	0.16	0.64	307.01	178	484	171.47
TOTAL	2,697	3,118	15.60	252	382	51.42	1.29	7.57	486.29	2,950	3,507	18.87

SOURCE: SECEX

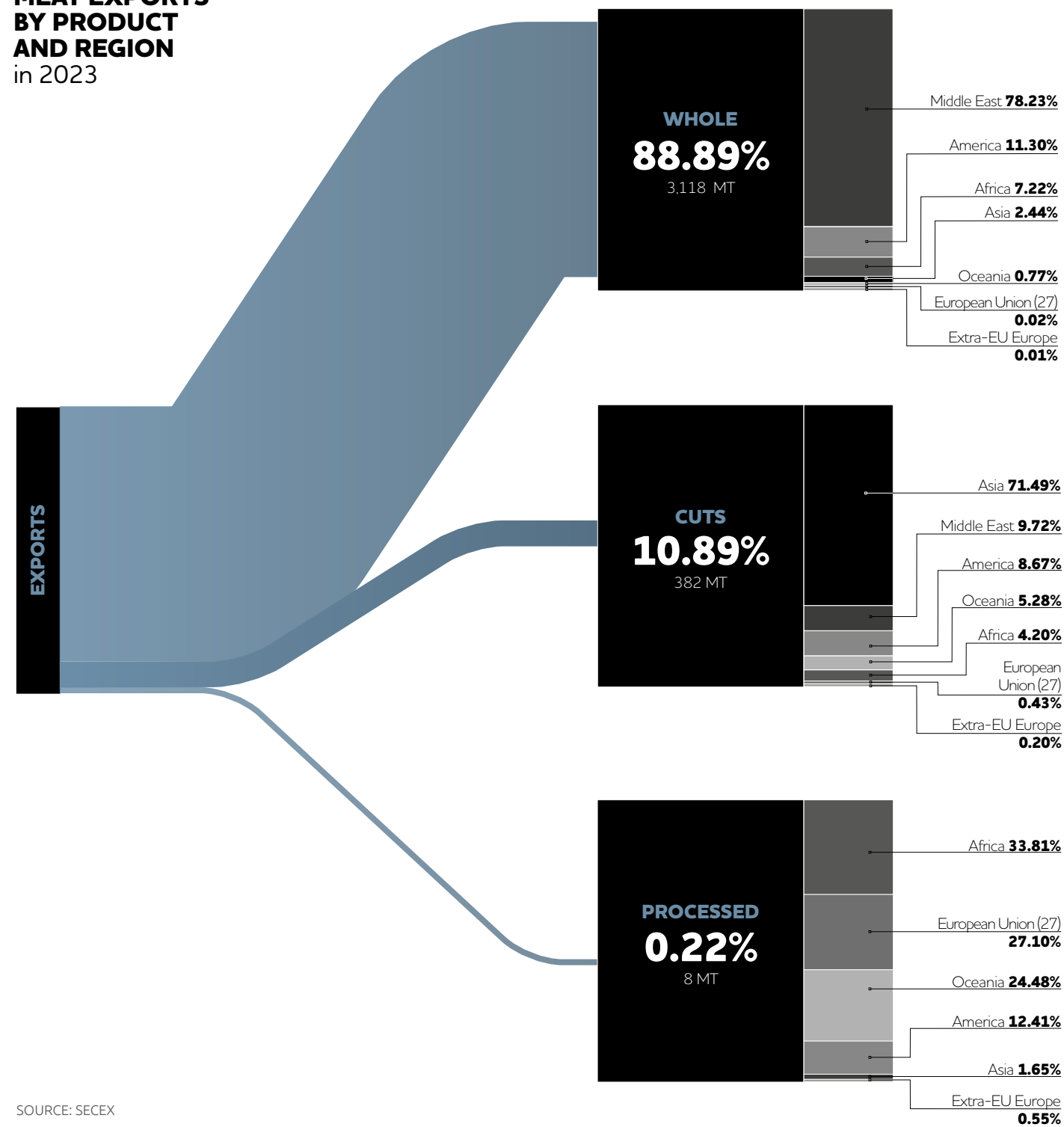
BRAZILIAN EXPORTS OF DUCK AND OTHER POULTRY MEAT BY REGION in 2023



SOURCE: SECEX



BRAZILIAN DUCK AND OTHER POULTRY MEAT EXPORTS BY PRODUCT AND REGION in 2023



SOURCE: SECEX

IMPORTING COUNTRIES OF BRAZILIAN DUCK AND OTHER POULTRY MEAT in 2023

42 MARKETS!

AFRICA

- Angola
- Liberia
- Libya
- Mauricio Islands
- Tunisia

AMERICA

- Antigua and Barbuda
- Bahamas
- Barbados
- Bermuda
- Canada
- Chile
- Mexico
- Panama
- Paraguay

- Saint Vincent and the Grenadines

ASIA

- China
- Hong Kong
- Japan
- Singapore
- South Korea
- Thailand
- Vietnam

EXTRA-EU EUROPE

- Isle of Man
- Norway
- United Kingdom

OCEANIA

- Marshall Islands
- New Caledonia
- Palau

MIDDLE EAST

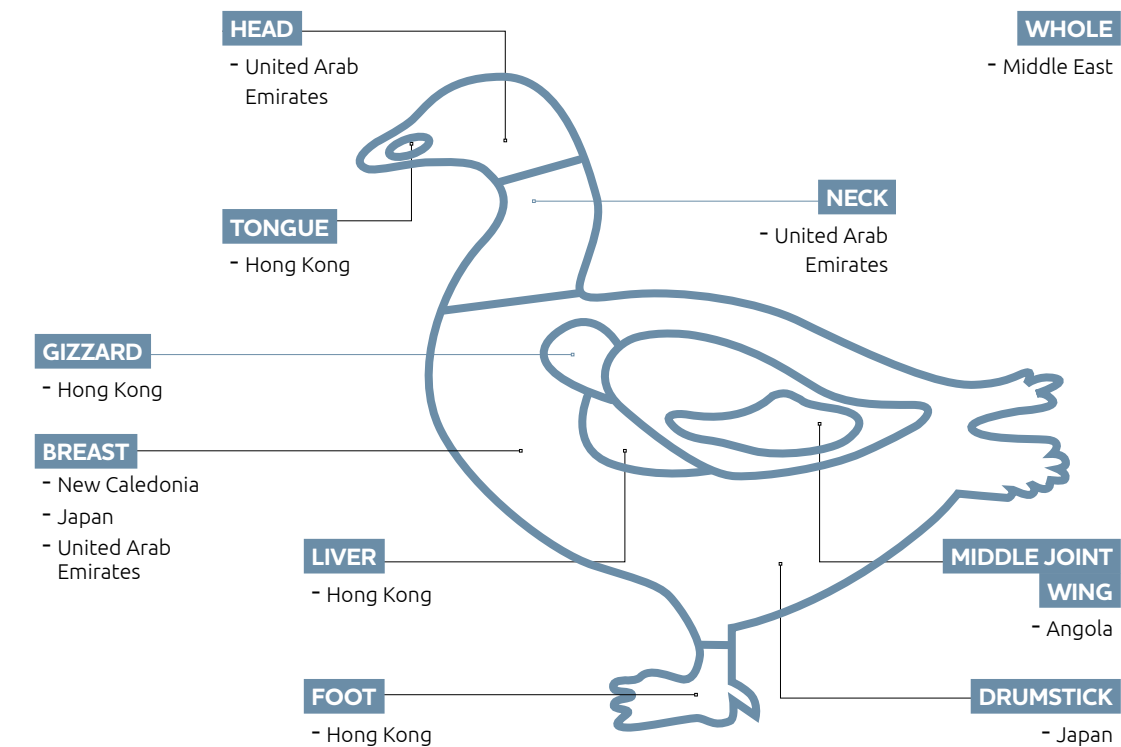
- Kuwait
- Qatar
- Saudi Arabia
- United Arab Emirates

EUROPEAN UNION (27)

- Belgium
- Cyprus
- Denmark
- France
- Germany
- Greece
- Italy
- Luxembourg
- Malta
- Portugal

SOURCE: SECEX

MAIN IMPORT MARKETS BY TYPE OF DUCK CUT



**MAIN DESTINATIONS OF BRAZILIAN EXPORTS
OF DUCK AND OTHER POULTRY MEAT (MT)**

	DESTINATION	TOTAL					WHOLE			CUTS			PROCESSED		
		2022	2023	SHARE (%)	VAR. (%)		2022	2023	VAR. (%)	2022	2023	VAR. (%)	2022	2023	VAR. (%)
1°	SAUDI ARABIA	1,004	986	28.13	(1.73)		1,004	980	(2.33)	-	6.04	-	-	-	-
2°	UNITED ARAB EMIRATES	692	916	26.13	32.31		671	885	31.85	21	31	46.87	-	-	-
3°	QATAR	306	422	12.02	37.62		305	422	38.38	1.69	-	-	-	-	-
4°	MEXICO	240	266	7.59	10.67		233	248	6.46	7.25	18	145.92	-	-	-
5°	JAPAN	154	238	6.78	54.09		-	21	-	154	216	40.24	-	-	-
6°	ANGOLA	160	163	4.65	1.73		133	158	18.23	27	5.69	(79.08)	-	-	-
7°	KUWAIT	171	152	4.33	(11.03)		171	152	(11.03)	0.003	-	-	-	-	-
8°	CHILE	33	101	2.87	205.74		30	88	189.76	2.56	13	394.95	-	0.01	-
9°	MAURICIO ISLANDS	30	57	1.62	91.41		20	50	147.49	9.60	7.08	(26.22)	-	-	-
10°	HONG KONG	0.48	56	1.60	11,690.36		0.33	0.38	14.80	0.10	56	58,001.04	0.05	0.08	66.00
11°	SINGAPORE	28	55	1.56	96.77		27	54	97.76	0.41	0.54	31.31	0.02	0.04	100.00
12°	NEW CALEDONIA	34	43	1.22	25.10		8.58	23	170.03	26	20	(23.27)	-	-	-
13°	PARAGUAY	-	17	0.49	-		-	15	-	-	2.05	-	-	-	-
14°	TUNISIA	-	15	0.42	-		-	12	-	-	2.75	-	-	-	-
15°	LIBYA	-	5.06	0.14	-		-	5.06	-	-	-	-	-	-	-

SOURCE: SECEX

**MAIN DESTINATIONS OF BRAZILIAN EXPORTS
OF DUCK AND OTHER POULTRY MEAT (MT)**

	DESTINATION	TOTAL					WHOLE			CUTS			PROCESSED		
		2022	2023	SHARE (%)	VAR. (%)		2022	2023	VAR. (%)	2022	2023	VAR. (%)	2022	2023	VAR. (%)
16°	EUROPEAN UNION (27)	1.25	4.20	0.12	235.04		0.66	0.49	(25.15)	0.33	1.66	401.82	0.27	2.05	668.16
17°	LIBERIA	1.19	3.80	0.11	220.32		0.72	0.71	(1.80)	0.13	0.53	323.20	0.34	2.56	659.35
18°	MARSHALL ISLANDS	1.60	3.22	0.09	101.76		0.75	0.92	22.33	0.50	0.45	(9.26)	0.35	1.85	429.14
19°	PANAMA	1.29	2.00	0.06	55.63		1.01	0.89	(11.58)	0.14	0.28	101.45	0.14	0.83	498.56
20°	NORWAY	0.33	0.82	0.02	146.99		0.22	0.07	(67.89)	0.11	0.71	556.48	0.01	0.04	583.33
	SUBTOTAL	2,859	3,506	99.96	22.60		2,607	3,117	19.56	251	381	51.78	1.17	7.47	539.01
	OTHERS	91	1.49	0.04	(98.37)		90	0.60	(99.33)	1.11	0.79	(29.26)	0.12	0.10	(18.85)
	TOTAL	2,950	3,507	100.00	18.87		2,697	3,118	15.60	252	382	51.42	1.29	7.57	486.29

SOURCE: SECEX