



## **BRAZIL & SOUTH KOREA: STRATEGIC PARTNERSHIP AND COMPLEMENTARITY**

Ricardo Santin  
President



The Association represents the Brazilian poultry and pork industries  
**ABPA has 130 associates of the whole production chain**



**Producers and exporters of poultry, pork, eggs and poultry genetic material**



**State and suppliers associations**



**Equipments**



**Certifying bodies**



**Inputs**



**Laboratories and other parts of the production chain**

## INTERNATIONAL BRANDS



**4 Offices**

 **São Paulo**  
 **Brasília**  
 **Brussels**  
 **Beijing**

# Characteristics

The Brazilian poultry and pork sectors are one of the most advanced agricultural industries in the world!



**NATURAL  
RESOURCES**



**GRAIN  
AVAILABILITY**



**INTEGRATED  
PRODUCTION**



**SANITARY  
STATUS**



**FLEXIBILITY  
AND VARIETY OF  
MARKETS**



**INVESTMENT IN  
TECHNOLOGY**

## COMBINATION OF FACTORS



# INTEGRATED SYSTEM

Higher Quality and  
Risk Control



Connects thousands of small  
local producers to the global  
agribusiness







# **SUSTAINABILITY**

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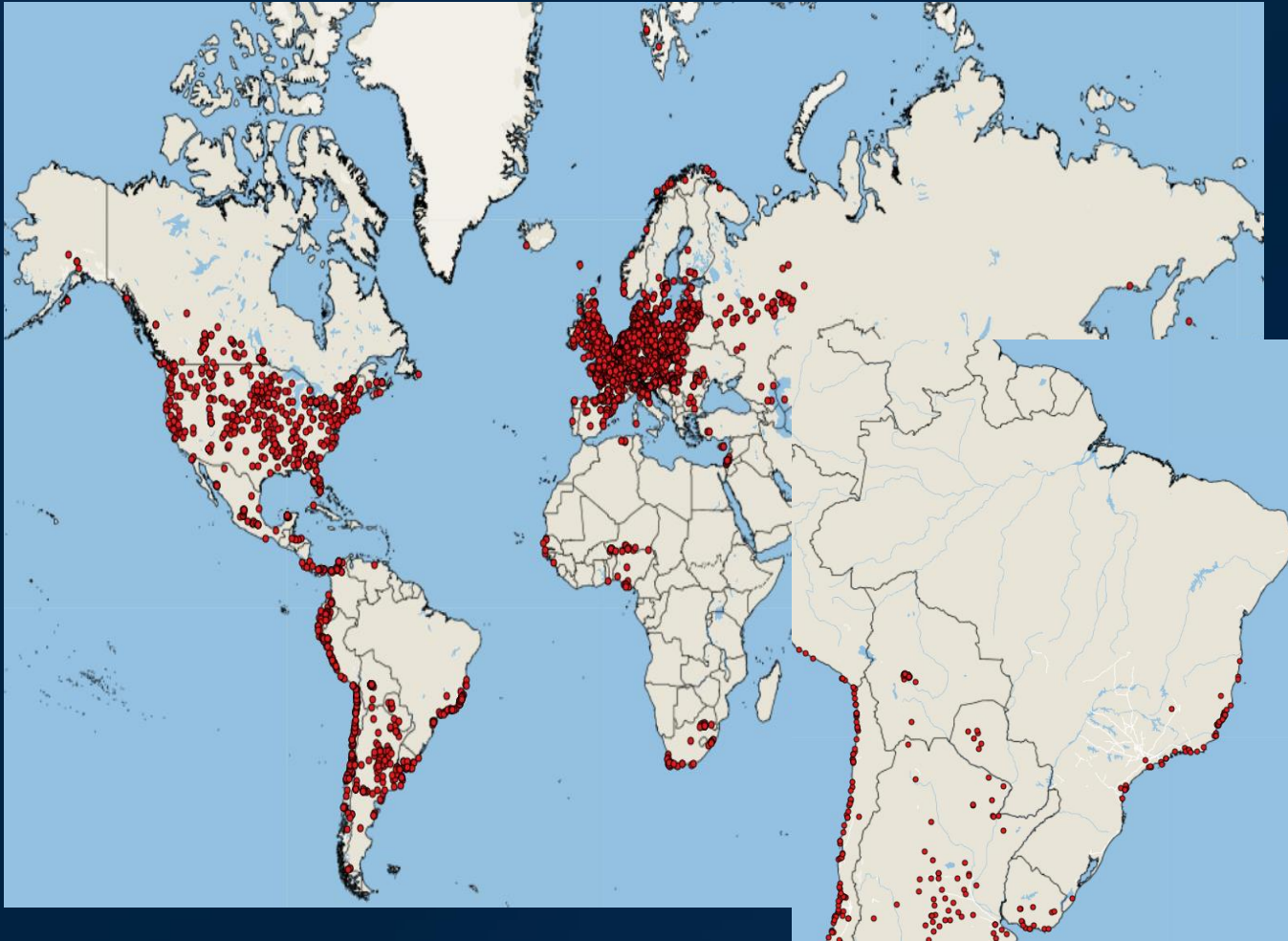
## **A Brazilian Differential**

- Use of solar energy
- Biodigesters
- Inputs produced in Brazil
- Production mostly outside the Amazon Biome
- Favorable climatic conditions
- Use of technologies to obtain productive gains
- Resource optimization: water, grains, energy



# SANITARY STATUS

## AVIAN INFLUENZA



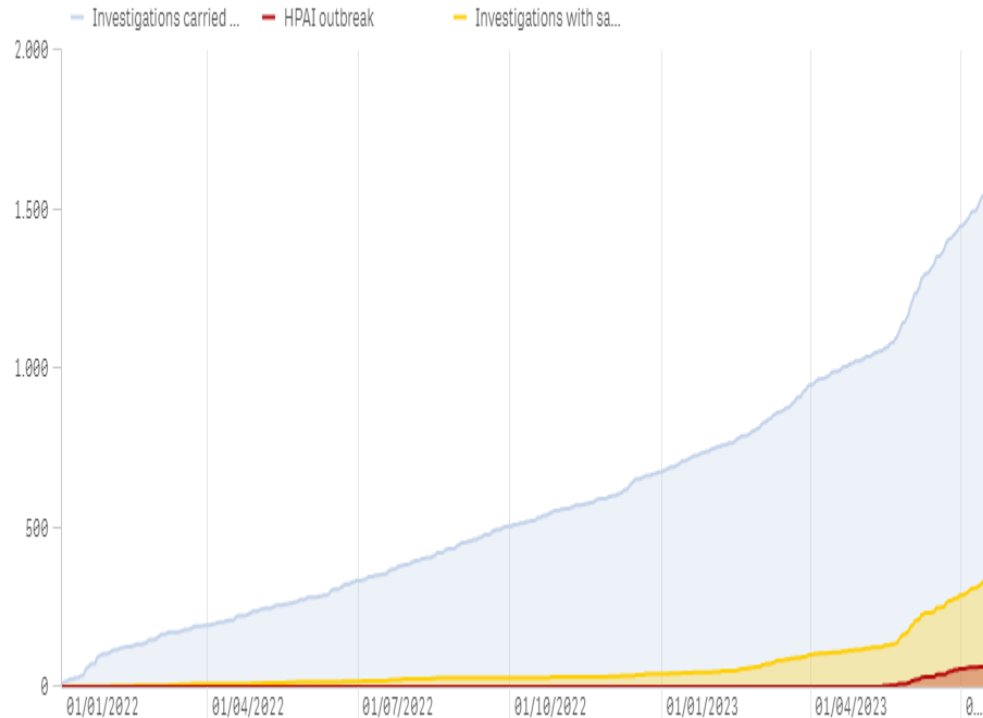
62 outbreaks of highly pathogenic avian influenza in wild birds, in the states of Bahia, Espírito Santo, Rio de Janeiro, São Paulo, Paraná, Santa Catarina and Rio Grande do Sul.  
2 outbreaks of HPAI in backyard birds in the states of Espírito Santo and Santa Catarina.

**THE OUTBREAKS DID NOT OCCUR WITHIN THE  
BRAZILIAN INDUSTRIAL SYSTEM, WHICH FOLLOWS THE  
STRICTEST BIOSECURITY PROTOCOLS**

The Ministry of Agriculture and Livestock of Brazil (MAPA) is acting in the communication and adoption of measures to monitor and control the disease  
To date more than 40,000 laboratory tests for avian influenza have been carried out, and testing will continue

# AVIAN INFLUENZA IN BRAZIL

## Investigations and outbreaks



## Outbreaks by type of bird

### Wild

Date of first confirmation: 05/15/2023

62

### Backyard

Date of first confirmation: 27/06/2023

2

### Poultry

0

**UPDATED IN 19/07/23: 64  
OUTBREAKS**

ESPÍRITO SANTO: 29  
RIO DE JANEIRO: 13  
BAHIA: 4  
RIO GRANDE DO SUL: 1  
PARANÁ: 7  
SÃO PAULO: 8  
SANTA CATARINA: 2



# SANITARY STATUS

## AFRICAN SWINE FEVER



**THERE HAVE BEEN NO CASES OF  
AFRICAN SWINE FEVER IN BRAZIL  
FOR DECADES!**

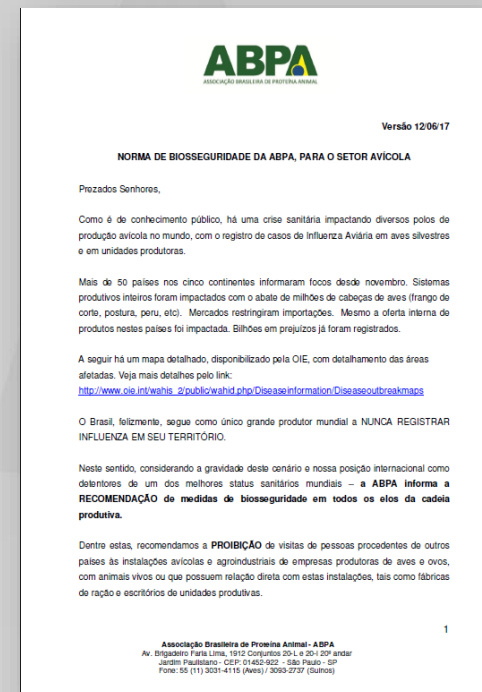
**CURRENTLY THERE ARE 39  
COUNTRIES WITH AFRICAN  
SWINE FEVER OUTBREAKS IN  
THE WORLD**



# BIOSECURITY AT BRAZILIAN FARMS



## ABPA Biosecurity Procedures: prevention guidelines



# CONTROL, SAFETY AND QUALITY

- ☐ Federal Inspection System (SIF)
- ☐ National Poultry Health Program: ND and AI
- ☐ National Swine Health Program: FMD and CSF
- ☐ Control of residues and pollutants: from the farm to the consumer
- ☐ Tools to ensure quality and safety: GPP, GMP, HACCP
- ☐ Production follows the UN SDG

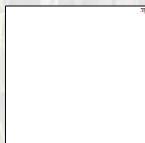




# QUALITY



The system is inspected by the Brazilian Ministry of Agriculture and by the +150 import markets



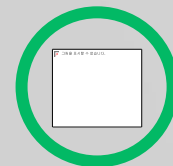
Constant training based on concepts required by the various markets

- ✓ **Good Manufacturing Practices**
- ✓ **Traceability**
- ✓ **PNCRC: National Plan for Control of Residues and Contaminants**



**Follows the norms of  
CODEX ALIMENTARIUS**

**More than  
1000 audit missions  
and private visits**  
(before COVID-19)



International Certifications  
by Autonomous bodies  
**GlobalGap, IFS, AloFree, BRC etc.**



**ALO  
FREE**





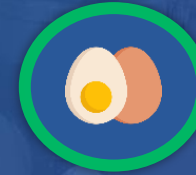
# OVERVIEW OF THE BRAZILIAN INDUSTRY



## Chicken Meat



## Pork



## Eggs

From 2000 to 2022 the sector generated more than **US\$169 billion in foreign exchange revenue!**

Over **3.8 million containers exported!**

The sectors generated **+4 million jobs in Brazil!**

GDP **R\$ 164 billion**

Share in Agribusiness GDP: **13.7%**

Share in Agribusiness Exports: **7.6%**

**2° largest producer in the world**

**14.5 Million tonnes** produced in 2022

**1° largest exporter in the world**

**4.8 Million tonnes** exported in 2022 to **+150 countries**

Destination of Production:  
Exports: **32.2%**  
Domestic Market: **67.8%**

Share in Agribusiness GDP: **9.4%**  
Share in Agribusiness Exports: **6.0%**

**4° largest producer in the world**

**5 Million tonnes** produced in 2022

**4° largest exporter in the world**

**1.1 Million tonnes** exported in 2022 to **+80 countries**

Destination of Production:  
Exports: **24.2%**  
Domestic Market: **75.8%**

Share in Agribusiness GDP: **2.7%**  
Share in Agribusiness Exports: **1.6%**

**5° largest producer in the world**

**52 Billion units** produced in 2022

Eggs Exports:

**9.5 Thousand tonnes** exported in 2022 to **+80 countries**

Destination of Production:  
Exports: **0.5%**  
Domestic Market: **99.5%**

Share in Agribusiness GDP : **1.7%**  
Share in Agribusiness Exports : **0.014%**

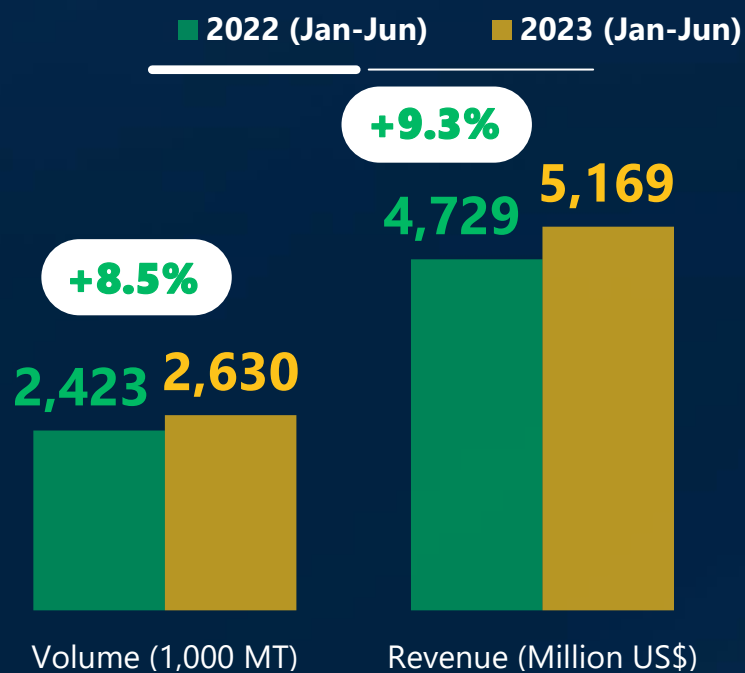
# FROM BRAZIL TO THE WORLD!



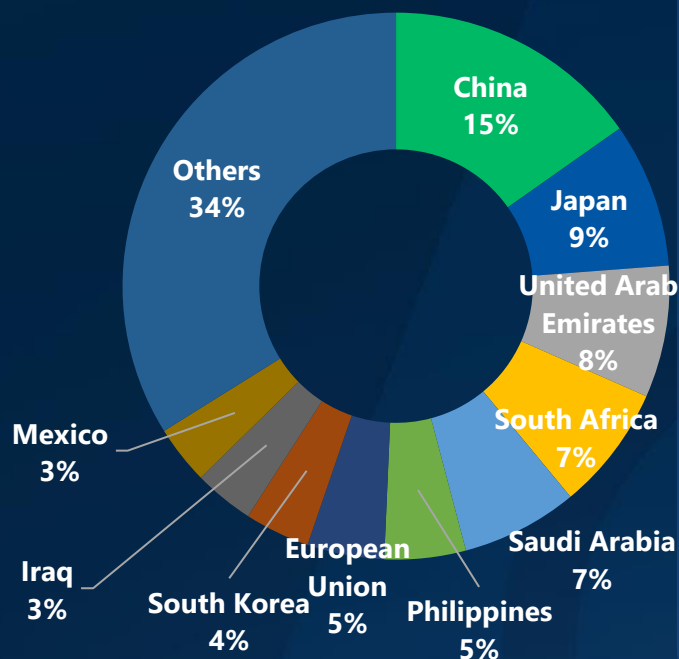


# CHICKEN MEAT EXPORTS

2022 x 2023



Main Destinations in  
Volume  
2023 (Jan-Jun)



## VOLUME IN TONNES

DESTINATION	2022 (JAN-JUN)	2023 (JAN-JUN)	var.%
China	293,909	390,779	33.0%
Japan	202,743	219,879	8.5%
United Arab Emirates	245,034	200,100	-18.3%
South Africa	162,792	189,732	16.5%
Saudi Arabia	163,135	176,861	8.4%
Philippines	116,804	123,293	5.6%
European Union	121,854	117,053	-3.9%
South Korea	82,316	98,820	20.0%
Iraq	23,619	91,048	285.5%
Mexico	81,859	88,980	8.7%
Others	852,384	869,293	2.0%

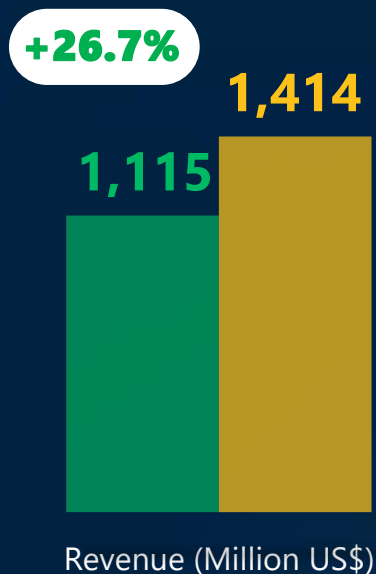
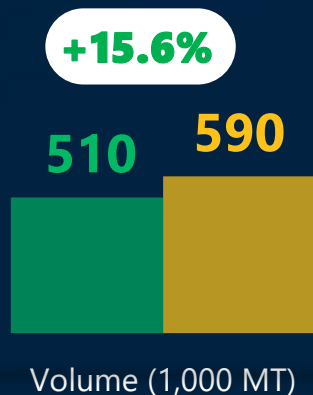




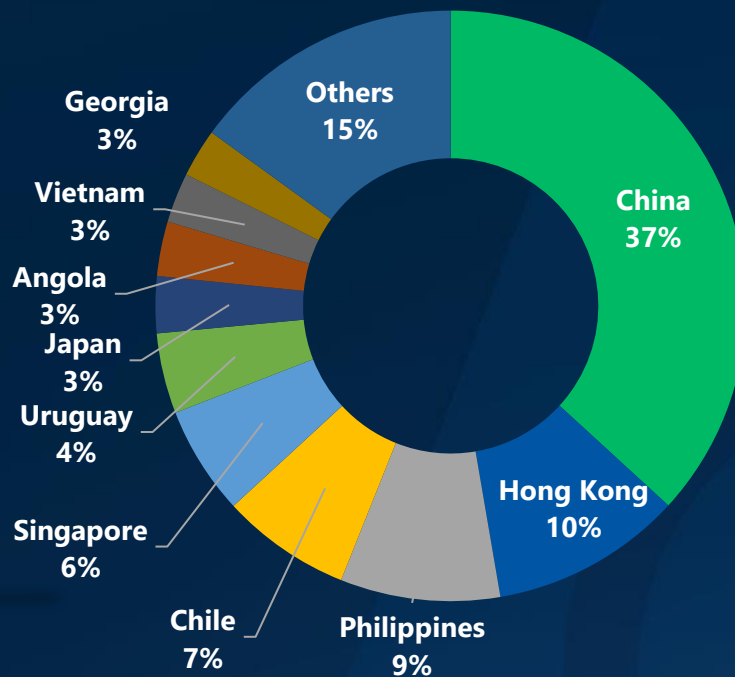
# PORK EXPORTS

2022 x 2023

■ 2022 (Jan-Jun) ■ 2023 (Jan-Jun)



## Main Destinations in Volume 2023 (Jan-Jun)



## VOLUME IN TONNES

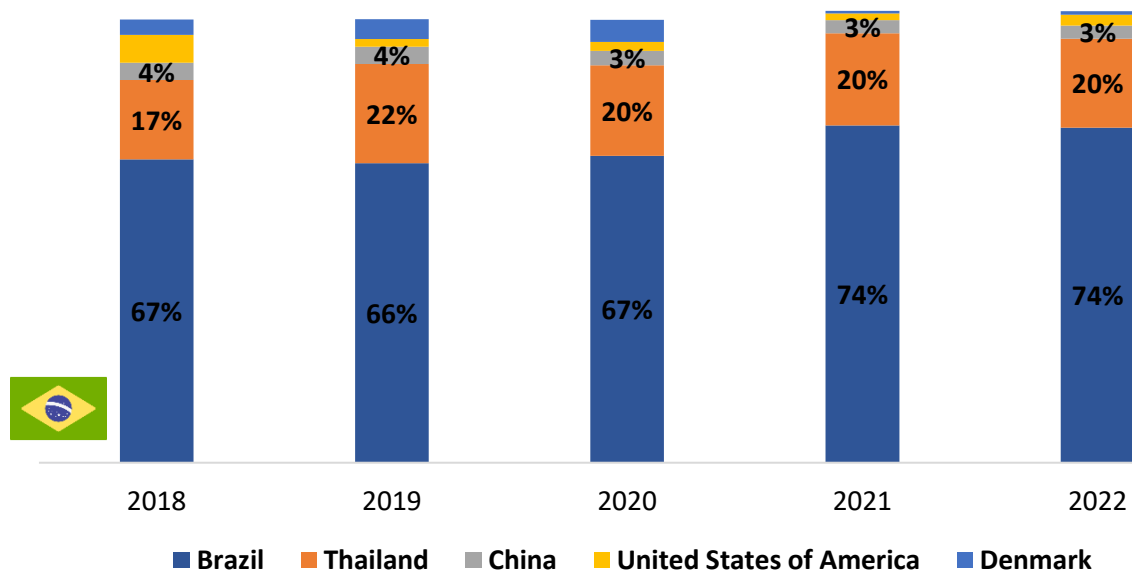
DESTINATION	2022 (JAN-JUN)	2023 (JAN-JUN)	var.%
China	183,182	214,494	17.1%
Hong Kong	50,298	61,153	21.6%
Philippines	41,863	50,992	21.8%
Chile	23,239	41,366	78.0%
Singapore	31,767	34,699	9.2%
Uruguay	21,776	25,659	17.8%
Japan	12,201	18,123	48.5%
Angola	13,407	17,423	30.0%
Vietnam	16,981	15,903	-6.4%
Georgia	8,368	15,428	84.4%
Others	98,615	87,486	-11.3%

# SOUTH KOREA: CHICKEN MEAT AND PORK IMPORTS



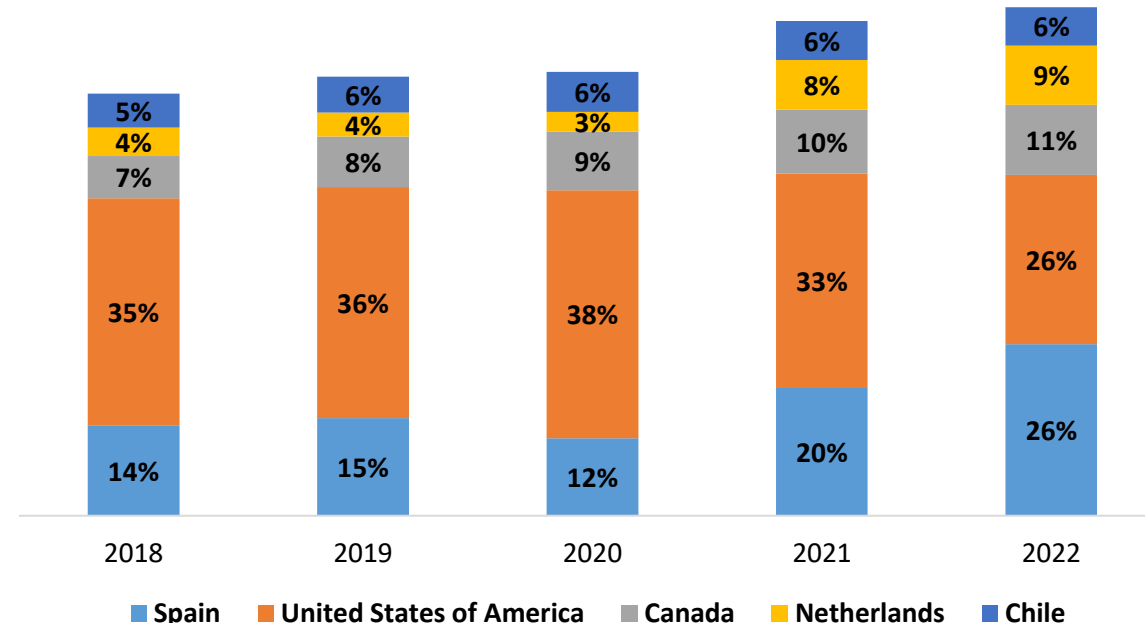
Brazil represents 74% of South Korea's chicken meat imports!

## CHICKEN MEAT



Brazil is the 12th main partner of South Korea, representing 2% of the imports!

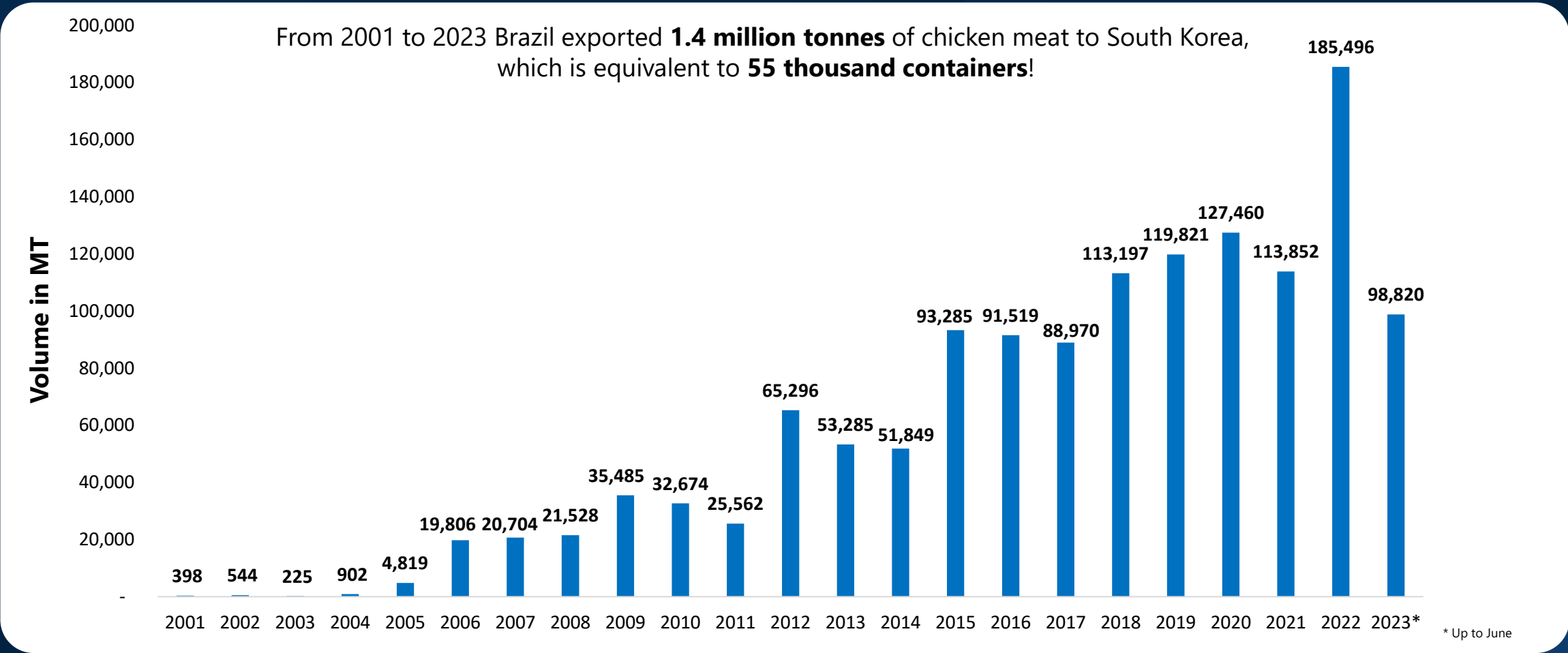
## PORK



# BRAZILIAN CHICKEN MEAT EXPORTS TO SOUTH KOREA



## A HISTORICAL PARTNERSHIP



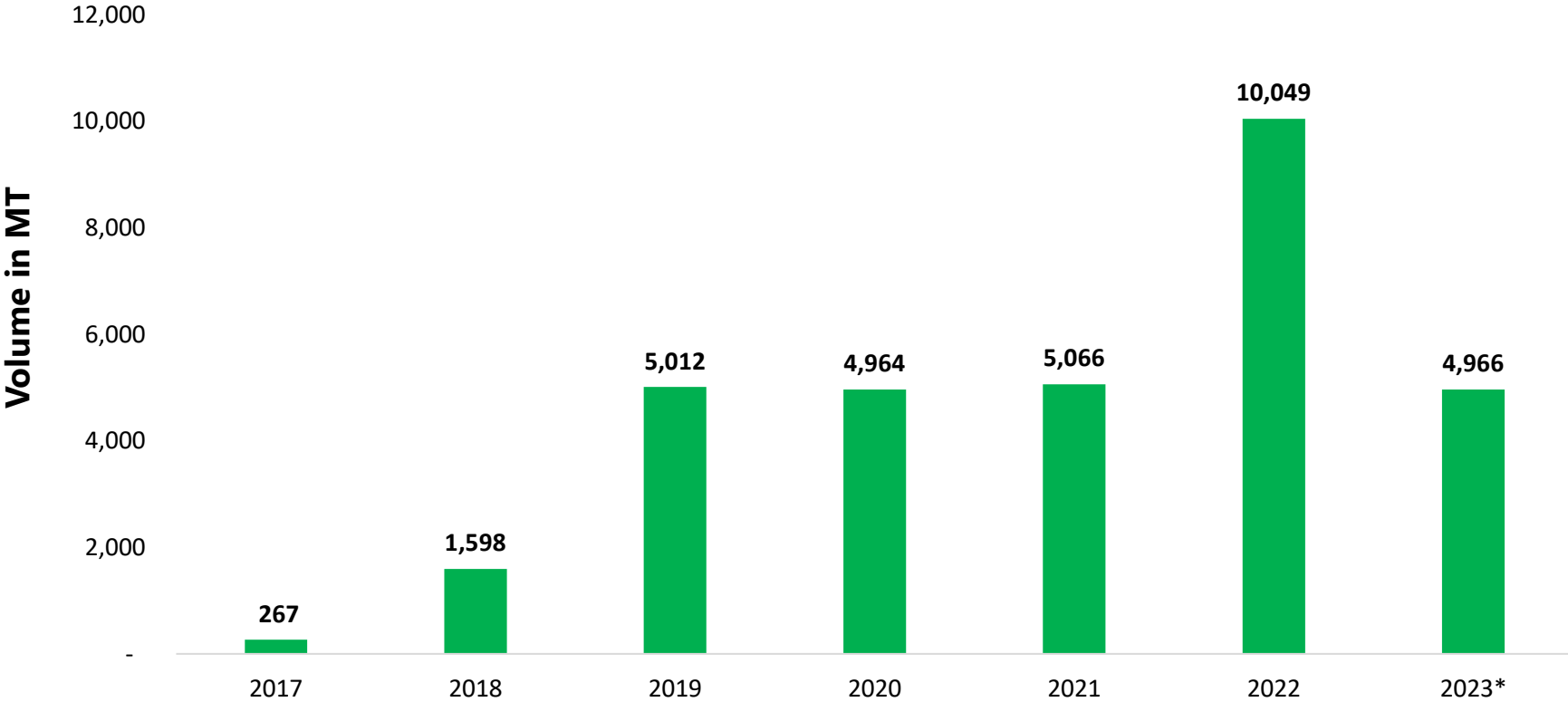
Source: SECEX



# BRAZILIAN PORK EXPORTS TO SOUTH KOREA



South Korea's market was opened in 2017 to the Brazilian exports of pork. From 2017 to 2023 Brazil exported **32 thousand tonnes** of pork to South Korea, which is equivalent to **1.3 thousand containers**!



\* Up to June

# BRAZILIAN POULTRY EXPORTING COMPANIES TO SOUTH KOREA



AD'ORO



AGROARAÇÁ



AGROSUL



AVENORTE



BELLO



BRF



C.VALE



COASUL



COPACOL



LAR



AURORA



GT FOODS



SÃO SALVADOR



SEARA



UNIÃO  
AVÍCOLA



UNIFRANGO



VIBRA



VOSSKO

32  
Establishments  
Approved

# BRAZILIAN PORK EXPORTING COMPANIES TO SOUTH KOREA



BRF



AURORA



PAMPLONA



SEARA



BMG FOODS

➔ **11**  
**Establishments**  
**Approved**





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BRAZILIAN ASSOCIATION OF ANIMAL PROTEIN

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