

BEEF REPORT

2025



 **abiec**

Associação Brasileira das Indústrias Exportadoras de Carnes
Brazilian Beef Exporters Association



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Word from the President



It is with enthusiasm, responsibility, and deep respect for the history of ABIEC that I present the **Beef Report 2025**, an annual publication that brings together the most relevant and up-to-date data on Brazilian cattle farming. This edition marks a special moment: my first year as president of the Association, succeeding the notable management of **Antônio Jorge Camardelli**, who for more than a decade led the entity with excellence, consolidating its reputation as an international reference in exports, institutional dialogue, and technical defense of the sector.

I am pleased to take on this mission in a decisive year for Brazil on the international stage. In 2024, we reached a historic export record: **2.89 million tons of beef were shipped to 157 countries**, with revenue of **USD 12.8 billion**. This result represents significant growth of almost 22% in value and consolidates a continuous trajectory of expansion, with an accumulated increase of **more than 50% in the last five years**. We consolidated our position as the world leader in exports and the second largest global producer, with a commercial herd estimated at 194 million heads.



In the same year, Brazil will take a historic step forward: **it will be officially recognized by the World Organization for Animal Health (WOAH) as a country free of foot-and-mouth disease without vaccination.** This achievement, the result of decades of joint efforts between the public and private sectors, represents a new level of health confidence and positions us even more competitively in international markets.

But what makes us proud goes beyond the volumes. **In 2024, the beef chain generated around BRL 1 trillion, equivalent to 8.4% of the national GDP.** This performance is driven by consistent productivity gains: we reached the highest number of animals in the finishing feeding system under confinement in our history, with **8.8 million heads**, and a national average of almost **5 arrobas per hectare/year**, compared to **2.8 arrobas two decades ago.**

The expansion of production has occurred based on an increasingly efficient and sustainable model. Brazil has managed to **increase its production without expanding the pasture area**, adopting policies such as the **ABC+ Plan, the National Program for Conversion of Degraded Pastures (PNCPD), and the Monitoring Protocol for Cattle Suppliers (Boi na Linha) of the Federal Public Ministry.** These are concrete actions that reinforce our leadership in building modern, traceable and environmentally responsible livestock farming.

It is also essential to recognize the role of the domestic market, which absorbed around 70% of national beef production in 2024. Brazilian livestock farming is a force that moves the country from north to south — generating income, opportunities, and development in thousands of municipalities. It is a sector that employs, feeds, preserves, and grows responsibly.

ABIEC's mission remains firm: **to strengthen the image of Brazilian beef**, defend the interests of the sector, expand the presence of the product in the world and contribute to Brazil continuing to occupy a leadership position in global food security. We will continue to act with transparency, technical basis and constant dialogue with partners, governments, and society.

I invite all readers to explore the pages of the **Beef Report 2025** carefully. Here we gather data, analyses, and projections that reveal not only the size of the sector, but also the collective effort of a chain that has work, science, and trust as its greatest assets. May this report be useful, inspiring, and reaffirm our pride in producing **the best meat in the world.**



An aerial photograph of the ocean, showing deep blue water with small whitecaps. The horizon is visible in the distance under a cloudy sky.

CHAPTER 1

BRAZILIAN EXTERNAL MARKET

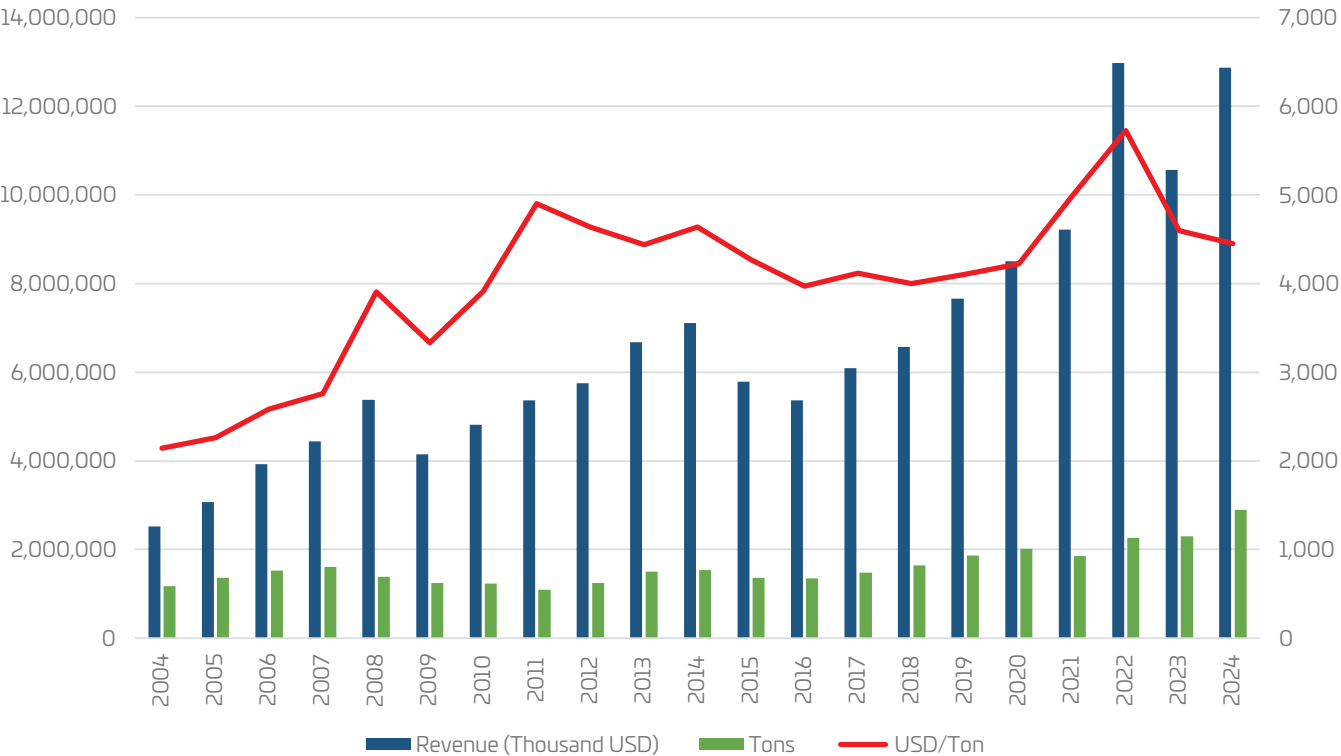


In 2024, Brazil exported **2.89 million tons** of beef, setting a new volume record, surpassing the results of the previous two years. Brazilian protein reached **157 international markets**, according to data from the Foreign Trade Secretariat (Secex), compiled and analyzed by ABIEC.

In terms of revenue, exports totaled **USD 12.8 billion**, the second highest result in the historical series, with growth of **almost 22% compared to 2023**. The average price of exported beef was **USD 4,448 per ton**, slightly lower than the previous year.

Fresh beef continues to be the main item on the export agenda, representing **88% of the total volume** shipped. China remained the main destination, responsible for **46% of Brazilian purchases**.

Evolution of Brazilian beef exports



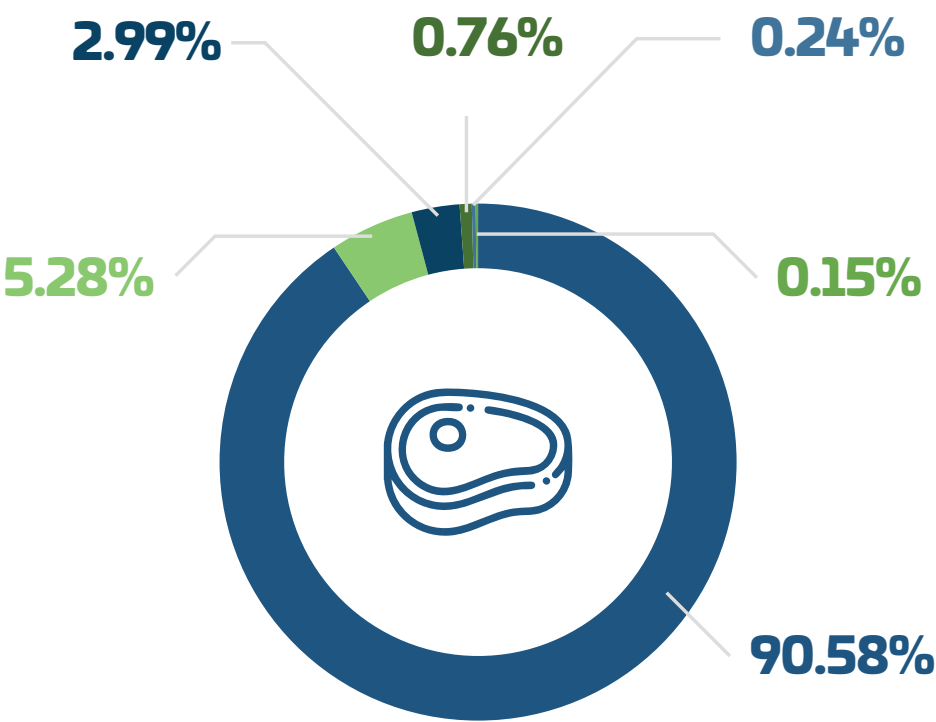
Source: Comexstat / Abiec

Beef exports in 2024 – by category

Category	Revenue (Thousand USD)	Tons
In Natura	11,657,264	2,545,929
Industrialized	679,502	99,292
Offal	384,995	193,599
Casings	97,196	31,480
Fat	30,734	19,229
Salty	19,239	3,580
Total	12,868,930	2,893,110

Source: Comexstat / Abiec

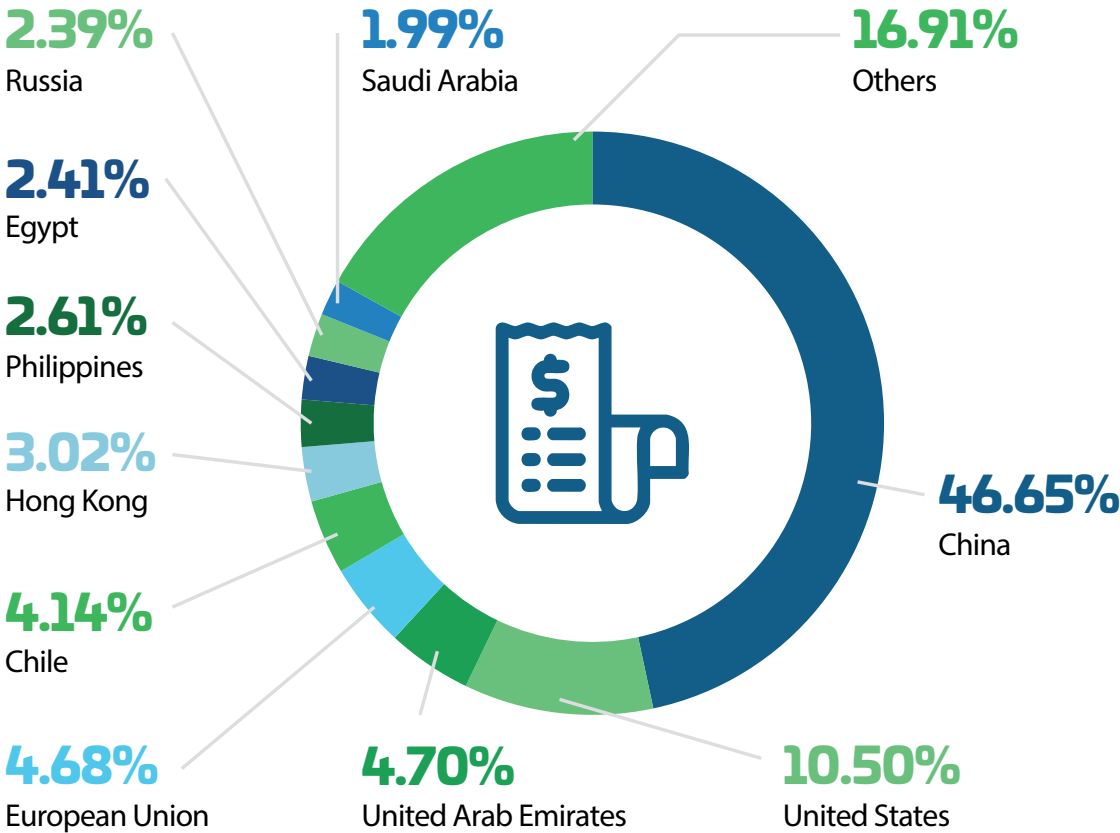
Export total revenue



Main destinations for Brazilian beef exported in 2024 (in revenue – thousand USD)

Categoria	Revenue (Thousand USD)
China	6,003,126
United States	1,351,158
United Arab Emirates	604,889
European Union	602,757
Chile	533,051
Hong Kong	388,564
Philippines	335,382
Egypt	310,418
Russia	306,929
Saudi Arabia	256,572
Others	2,176,084
Total	12,868,930

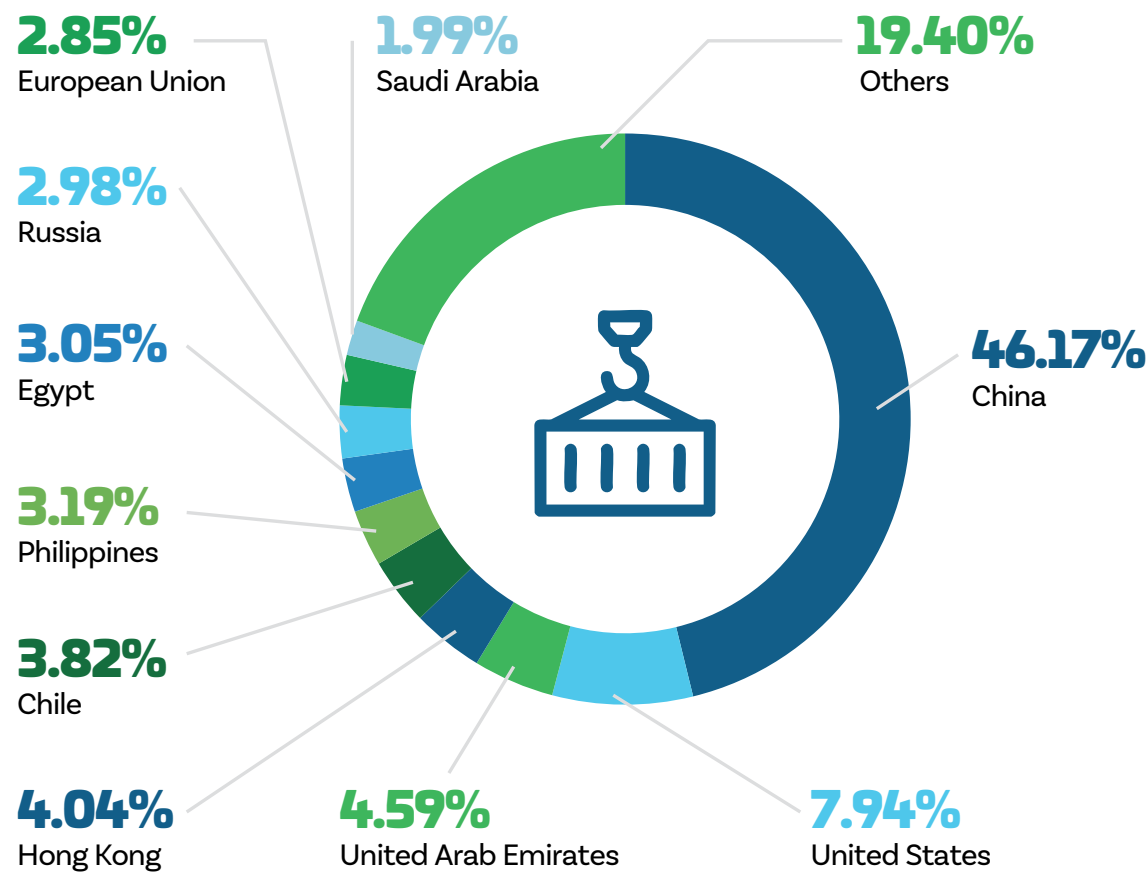
Source: Comexstat / Abiec



Main destinations for Brazilian beef exported in 2024 (in volume – tons)

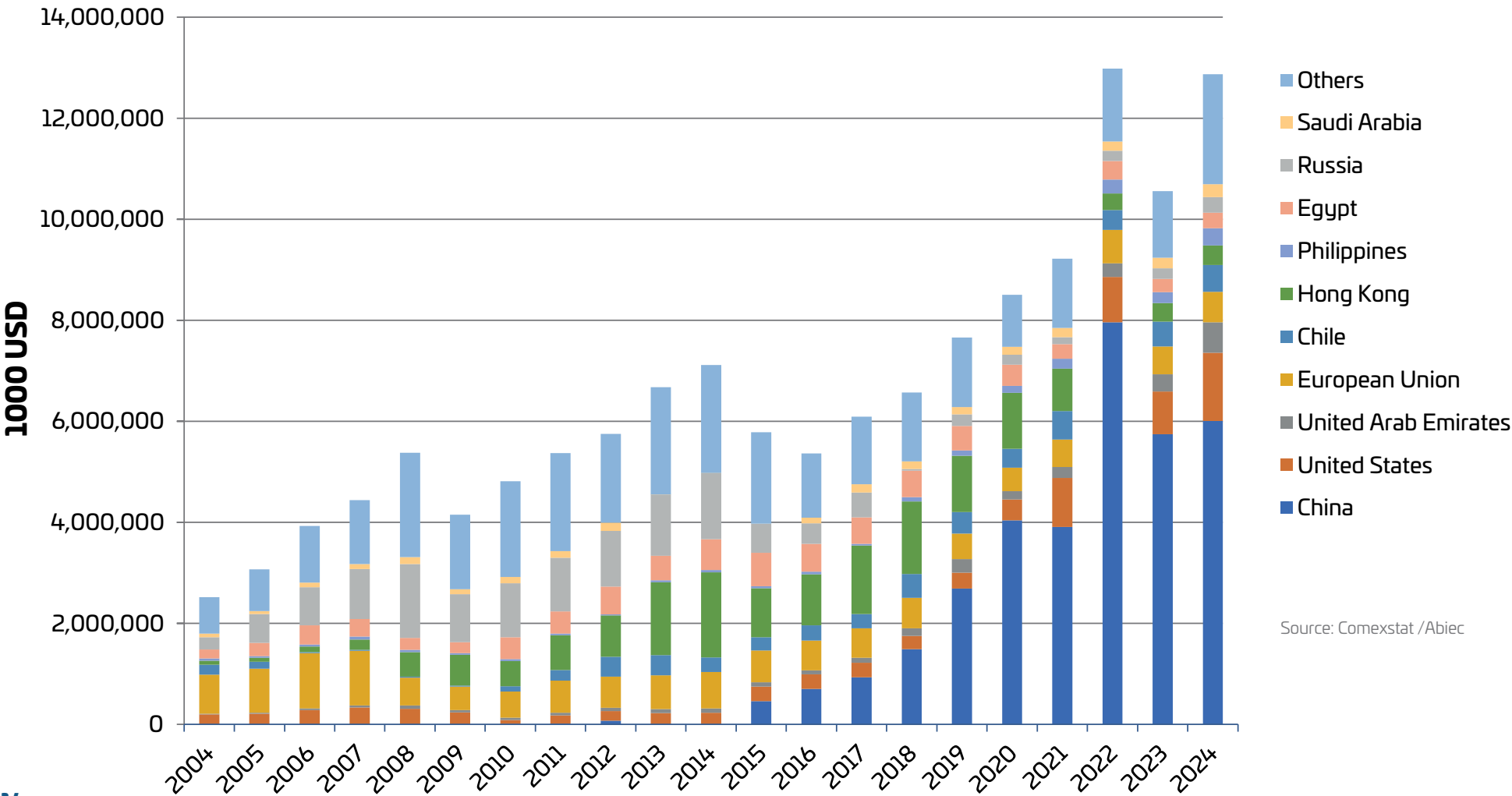
Categoria	Volume (ton)
China	1,335,660
United States	229,808
United Arab Emirates	132,683
Hong Kong	116,866
Chile	110,439
Philippines	92,297
Egypt	88,150
Russia	86,191
European Union	82,323
Saudi Arabia	57,431
Others	561,263
Total	2,893,110

Source: Comexstat / Abiec

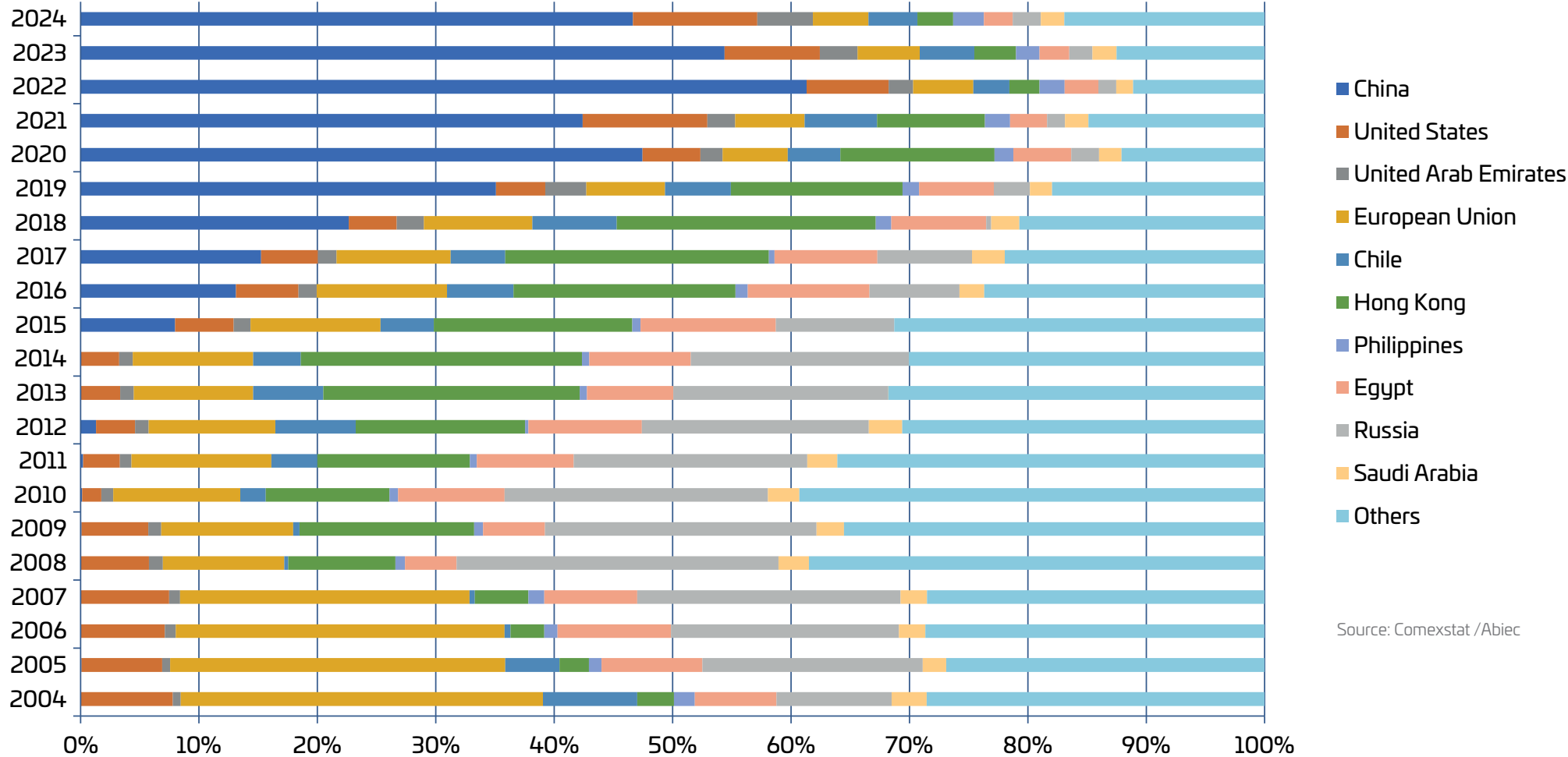


Evolution of the ranking of the largest importers of Brazilian beef – in terms of revenue

Largest importers of Brazilian beef – USD 1,000



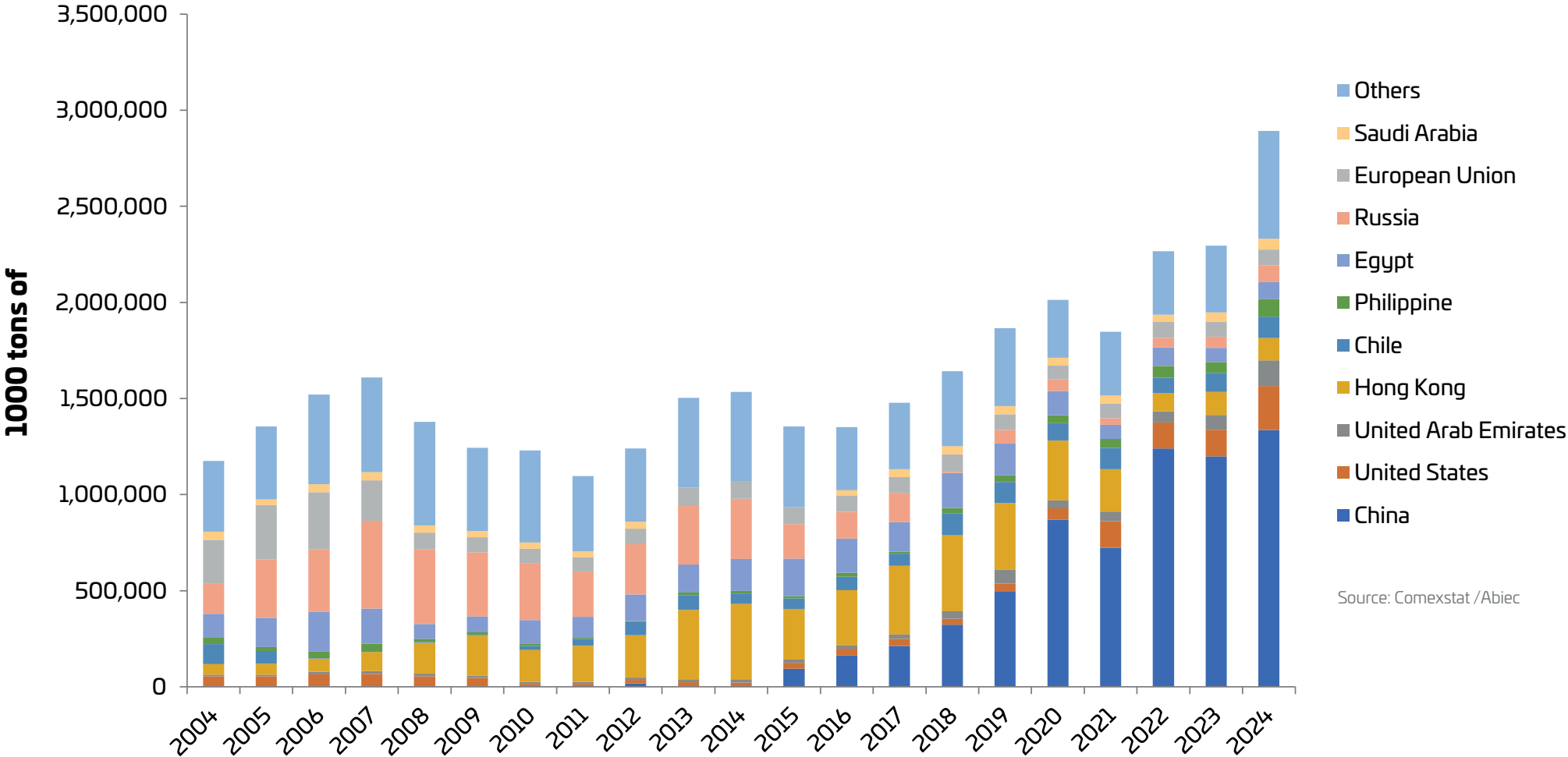
Largest importers of Brazilian beef – %



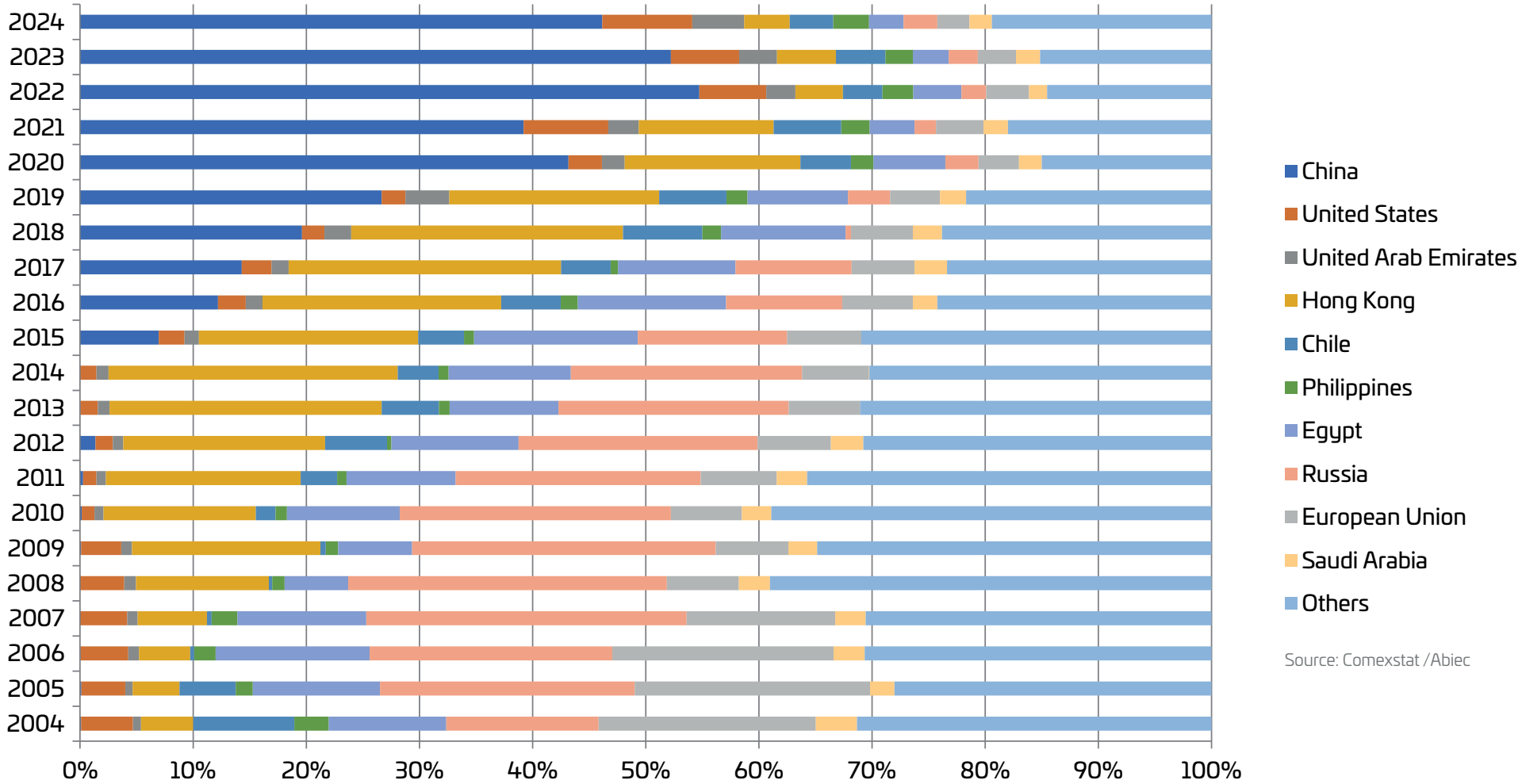
Source: Comexstat / Abiec

Evolution of the ranking of the largest importers of Brazilian meat – by volume

Largest importers of Brazilian meat – metric tons



Largest importers of Brazilian meat – %



Source: Comexstat / Abiec

Brazil beef exports 2024 – in tons

Country	Volume (ton)	Country	Volume (ton)	Country	Volume (ton)
China	1,335,660	Algeria	43,937	Paraguay	11,603
USA	229,808	Israel	34,217	Indonesia	11,418
UAE	132,683	Uruguay	31,623	Albania	10,419
Hong Kong	116,866	United Kingdom	27,002	Angola	10,359
Chile	110,439	Libya	24,137	Iraq	10,081
Philippines	92,297	Singapore	22,543	Canada	8,017
Egypt	88,150	Jordan	19,619	Peru	7,985
Russia	86,191	Malaysia	19,111	Palestine	7,854
European Union	82,323	Côte d'Ivoire	19,053	Georgia	7,680
Saudi Arabia	57,431	Lebanon	18,574	Laos	5,488
Türkiye	56,593	Ghana	16,557	Qatar	5,380
Mexico	46,074	Congo	15,760	Gabon	4,877

Source: Comexstat / Abiec

Country	Volume (ton)
Serbia	4,653
Puerto Rico	4,348
Thailand	4,229
Kuwait	3,479
Jamaica	3,435
Guinea	3,192
Sierra Leone	3,035
Curacao	2,281
Aruba	2,216
Vietnam	2,123
Tunisia	1,923
Bolivia	1,851
Morocco	1,558
Ukraine	1,399

Source: Comexstat / Abiec







CHAPTER 2

INDUSTRY

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 **46** cattle
million

2024 marked a historic performance for the Brazilian livestock industry, with the slaughter of almost **46 million cattle**, considering all types of inspection. The volume represents a growth of **9.5% compared to 2023**, also reflecting a **10.5% increase in beef production**.

The share of slaughters under the **Federal Inspection Service (SIF)** reached **62% of the total**, being responsible for **65% of the meat produced**.

Animals finished in confinement totaled **8.8 million heads**, or **19.2% of slaughters**, the highest volume ever recorded in the country.

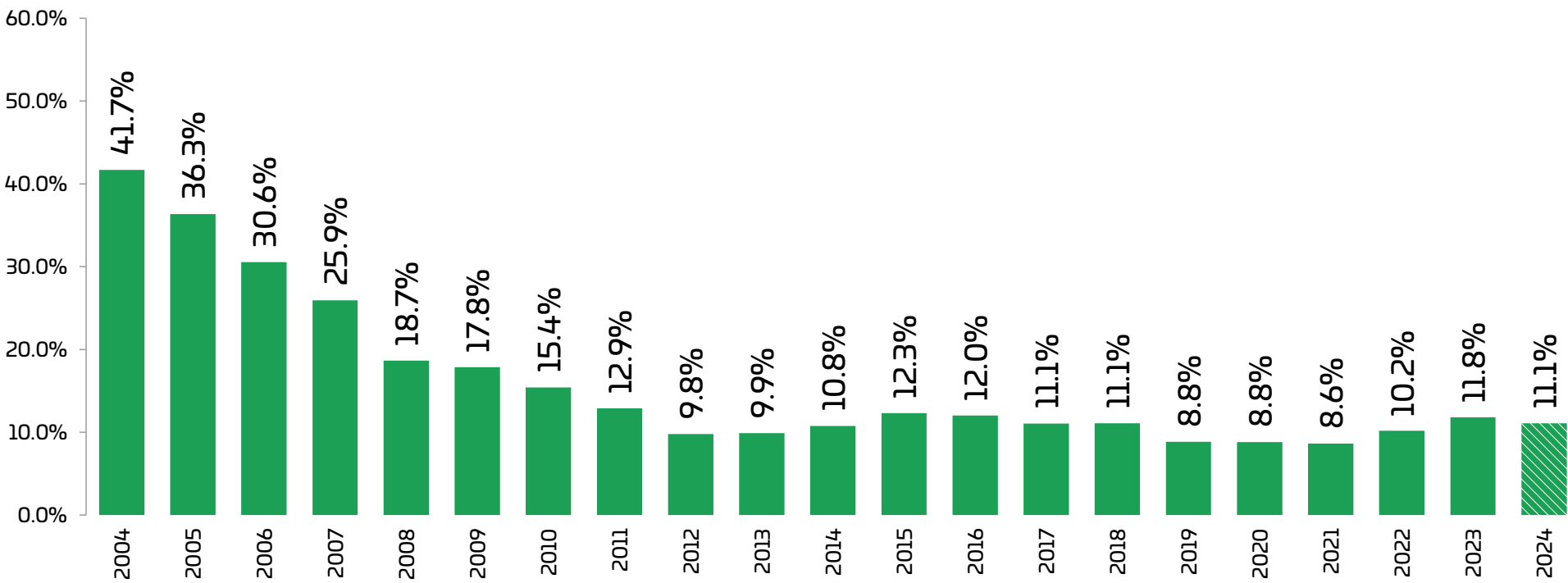
Brazil's trade surplus in 2024 was **USD 74 billion**, driven by agribusiness, whose positive balance reached **USD 145 billion**. Beef exports represented **almost 4% of the total exported by the country** (USD 337 billion) and **8% of the total exported by agriculture**.

Of the total Brazilian livestock exports in 2024, estimated at **USD 30.5 billion**, beef accounted for **42%**, followed by chicken (**31%**) and pork (**9.8%**).

These data reinforce the strategic relevance of the beef chain for the national economy.

Evolution of the slaughter of males over 36 months oldt

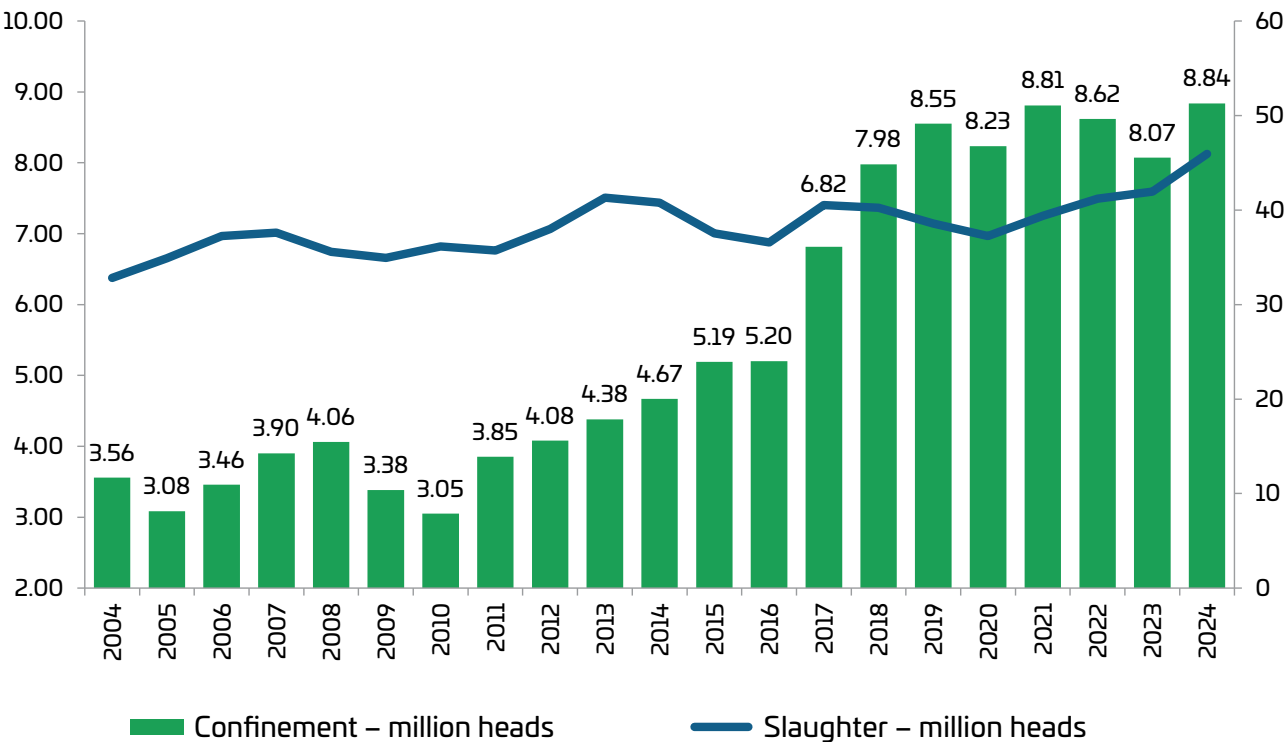
Percentage of steers (does not include bulls) finished at over 36 months of age out of the total number of males



Source: Athenagro, com base em dados do IBGE

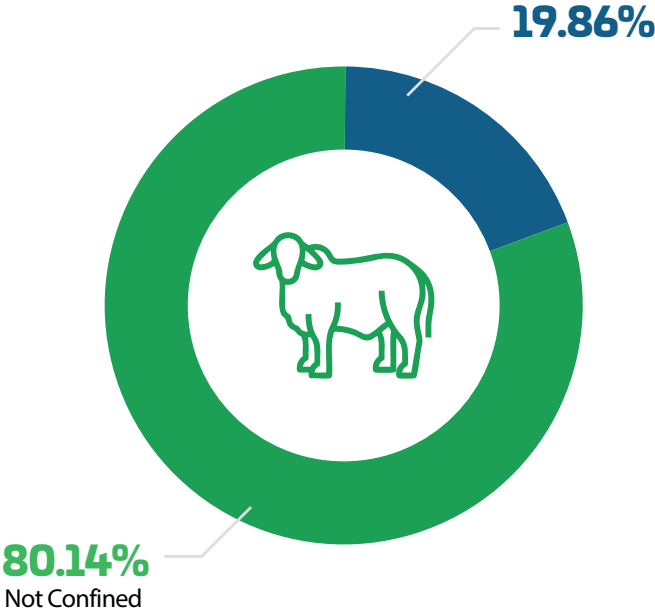
History of confined cattle and total slaughter in Brazil

Confined cattle X slaughter

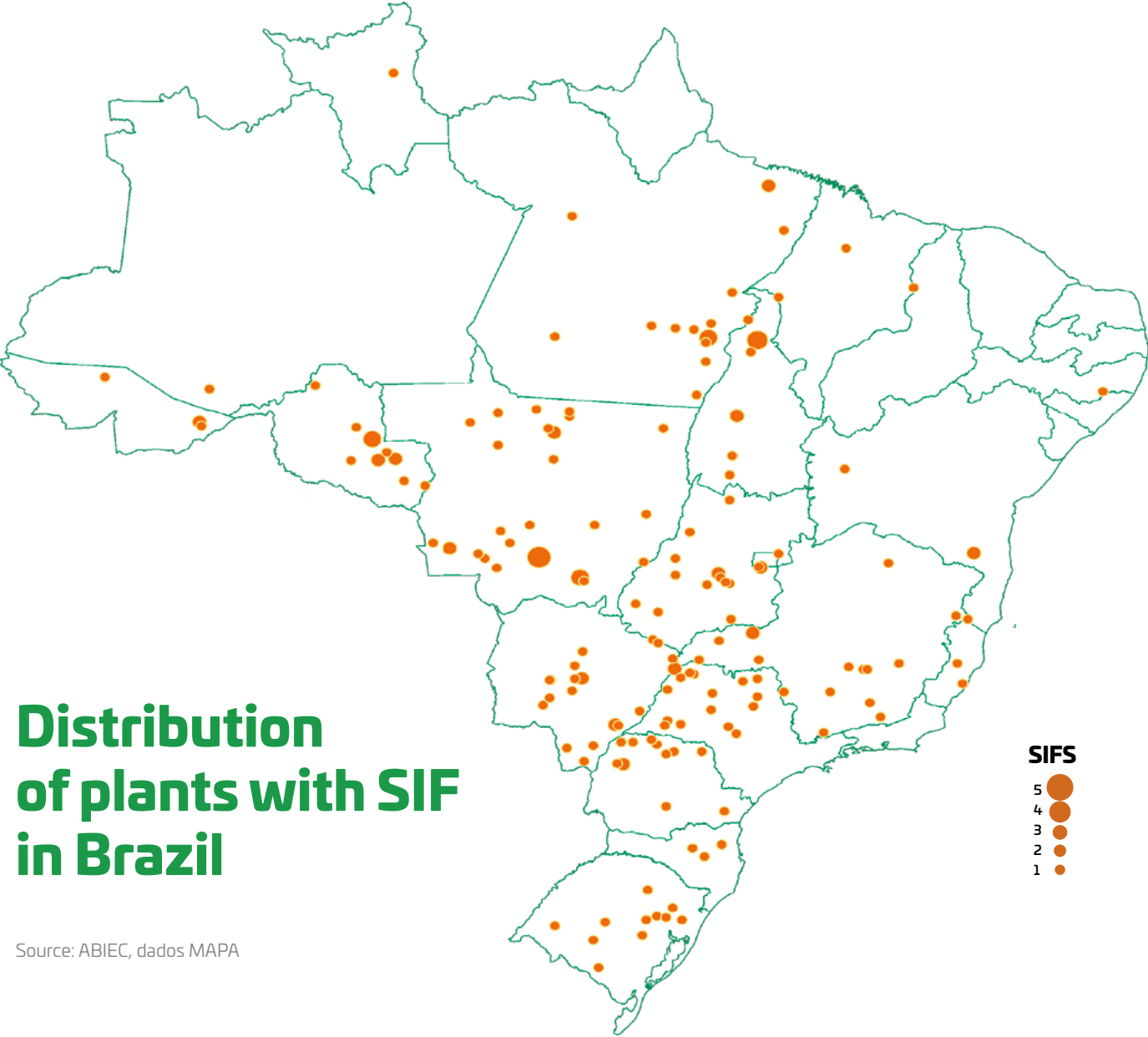


Source: Athenagro, dados IBGE, Rally da Pecuária

Origin of animals slaughtered in relation to the finishing feeding system



Source: Athenagro, dados IBGE, Rally da Pecuária

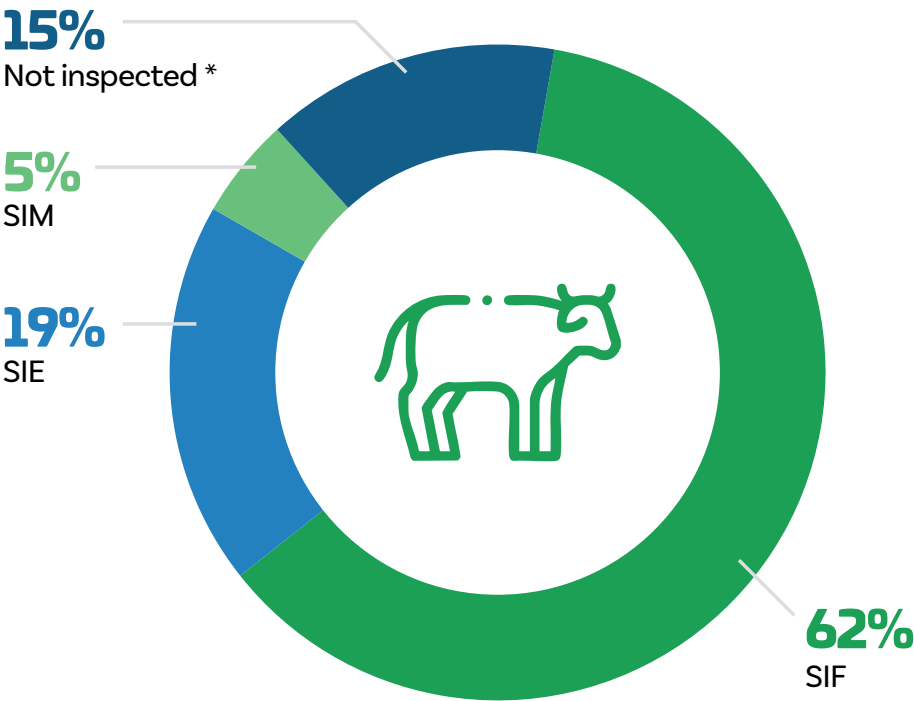


**Distribution
of plants with SIF
in Brazil**

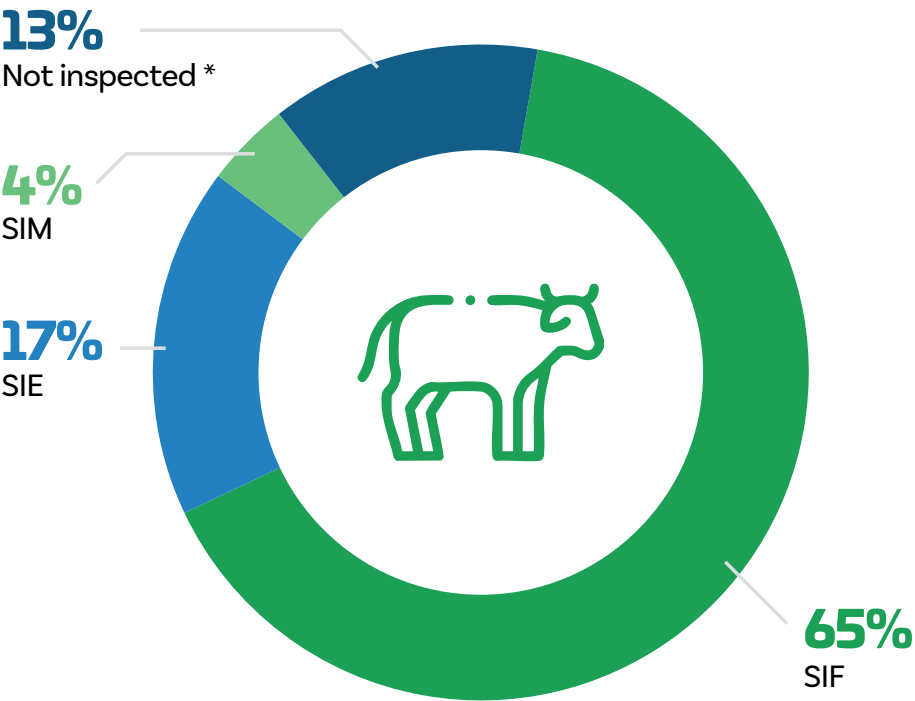
Source: ABIEC, dados MAPA

History of confined cattle and total slaughter in Brazil

Slaughter by type of inspection as a % of million heads – 2024



Production by type of inspection in % over million tons – 2024



Source: Athenagro, dados IBGE



Slaughter by type of inspection – 2024

2024	% slaughter	% meat	Million heads	Million tons
SIF	62%	65%	28.29	7.70
SIE	19%	17%	8.70	2.04
SIM	5%	4%	2.28	0.50
Not inspected*	15%	13%	6.66	1.57
Total	100%	100%	45.94	11.81

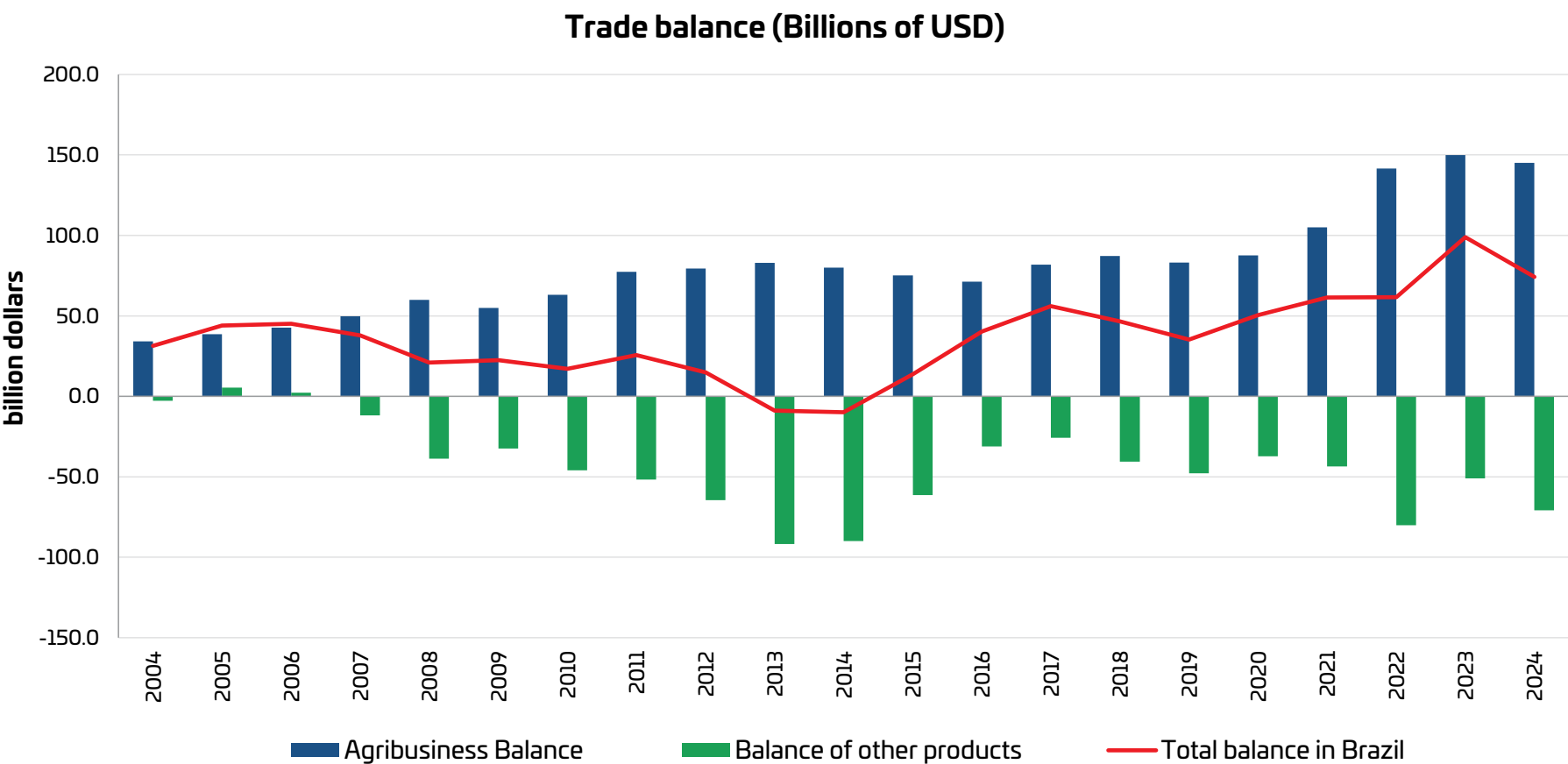
Source: Athenagro, dados IBGE

*Estimated values

Brazil's trade balance – USD billions

Ano	Exp. Total	Imp. Total	Total balance from Brazil	Exp. Agribusiness	Imp. Agribusiness	Balance of Agribusiness	Balance of others products	Exports of beef	% beef in total exported by agribusiness
2004	95.12	63.81	31.31	38.92	4.80	34.12	-2.81	2.51	6.44%
2005	118.60	74.69	43.91	43.59	5.07	38.52	5.39	3.05	7.00%
2006	137.58	92.53	45.05	49.42	6.65	42.77	2.28	3.91	7.91%
2007	159.82	122.04	37.77	58.36	8.69	49.67	-11.90	4.40	7.55%
2008	195.76	174.71	21.06	71.75	11.88	59.87	-38.81	5.29	7.37%
2009	151.79	129.40	22.39	64.74	9.90	54.84	-32.45	4.11	6.35%
2010	200.43	183.34	17.10	76.40	13.40	63.00	-45.90	4.78	6.26%
2011	253.67	227.97	25.70	94.92	17.51	77.41	-51.71	5.34	5.63%
2012	239.95	225.17	14.79	95.75	16.41	79.34	-64.55	5.73	5.98%
2013	232.54	241.50	-8.96	99.93	17.06	82.87	-91.83	6.65	6.65%
2014	220.92	230.82	-9.90	96.66	16.61	80.04	-89.94	7.09	7.33%
2015	186.78	173.10	13.68	88.17	13.07	75.10	-61.42	5.76	6.53%
2016	179.53	139.32	40.20	84.94	13.63	71.31	-31.10	5.34	6.29%
2017	214.99	158.95	56.04	96.01	14.15	81.86	-25.82	6.07	6.32%
2018	231.89	185.32	46.57	101.17	14.04	87.13	-40.56	6.54	6.47%
2019	221.13	185.93	35.20	96.85	13.78	83.07	-47.87	7.63	7.88%
2020	209.18	158.79	50.39	100.70	13.05	87.65	-37.25	8.48	8.42%
2021	280.81	219.41	61.41	120.52	15.53	104.99	-43.59	9.20	7.63%
2022	334.14	272.61	61.53	158.87	17.24	141.63	-80.10	12.96	8.16%
2023	339.70	240.79	98.90	166.49	16.61	149.88	-50.98	10.54	6.33%
2024	337.05	262.87	74.18	164.30	19.30	145.00	-70.82	12.83	7.81%

Source: Athenagro, Agrostat, SECEX, Conab



Source: Athenagro, Agrostat, SECEX, Conab

Total agribusiness exports, highlighting how much exports of beef and other beef derivatives represent in this total in 2024

LIVESTOCK EXPORTS	Millions USD	Thousand tons	% USD
Chicken	9,464.1	4,982.0	31.09%
<i>In natura</i>	9,054.7	4.855.5	29.75%
Industrialized	397.0	123.0	1.30%
Beef	12,827.2	2,872.6	42.14%
<i>In natura</i>	11,658.3	2.545.8	38.30%
Industrialized	667.5	98.2	2.19%
Miudezas de carne bovina	501.5	228.7	1.65%
Pork	2,992.0	1,307.5	9.83%
<i>In natura</i>	2,830.5	1.180.3	9.30%
Turkey	153.8	64.1	0.51%
<i>In natura</i>	142.4	60.5	0.47%
Industrialized	11.4	3.6	0.04%
Leather and its products	1,618.7	608.4	5.32%
Other livestock products	1,929.2	981.9	6.34%
Live animals	957.2	367.6	3.14%
Bovinos Vivos	829.6	365.8	2.73%
Fish	400.4	64.6	1.32%
Dairy products	96.6	36.1	0.32%
Total	30,439.26	11,284.79	100.00%

Source: Athenagro, Agrostat, SECEX, Conab

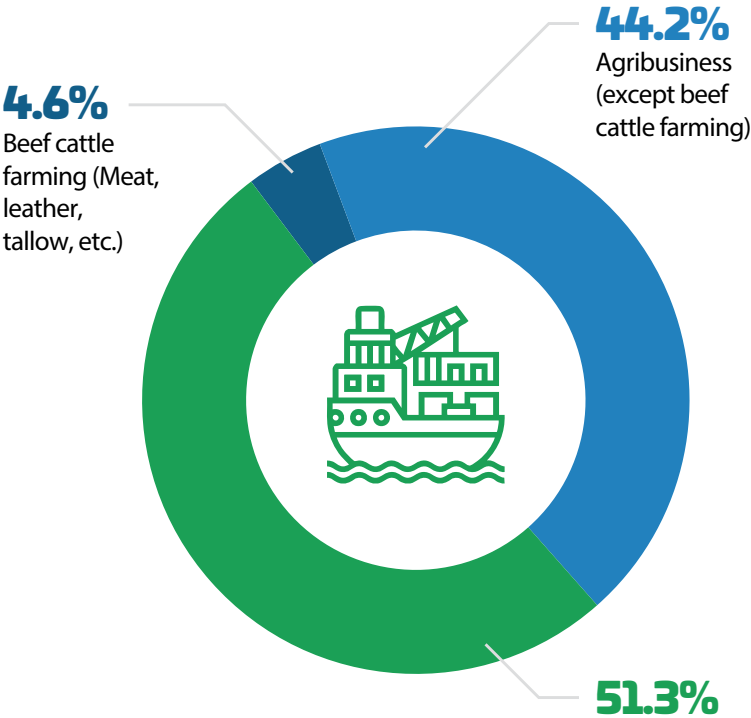
Export group – AGRIBUSINESS	USD Millions	Share
Beef cattle farming (Meat, leather, tallow, etc.)	15,403.09	9.4%
Other proteins of animal origin	15,036.17	9.2%
Other agribusiness sectors	133,865.11	81%
Total Agribusiness Exports	164,304.37	49%

Source: Athenagro, Agrostat, SECEX, Conab

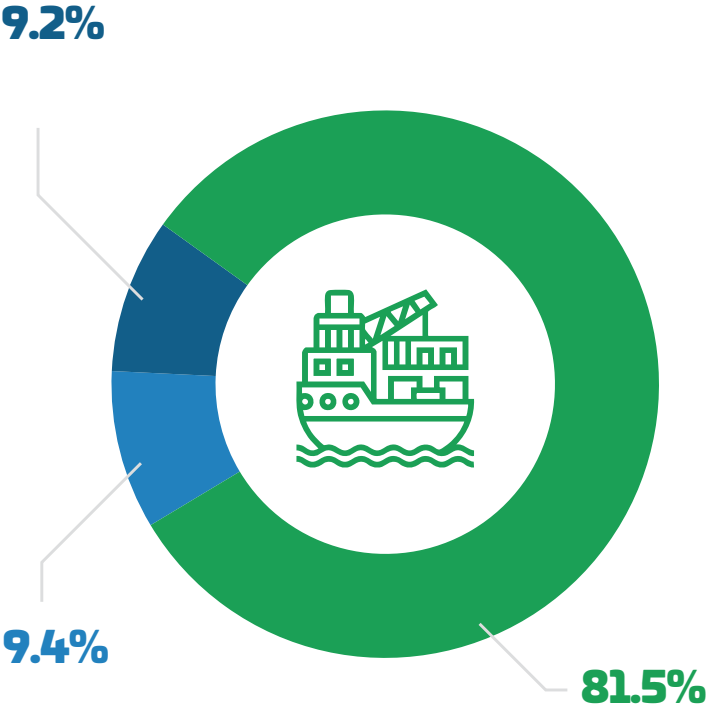
Export group – BRAZIL	USD Millions	Share
Beef cattle farming (Meat, leather, tallow, etc.)	15,403.09	4.6%
Agribusiness (except beef cattle farming)	148,901.28	44%
Other sectors of the economy	172,741.79	51%
Total exports from Brazil	337,046.16	100%

Source: Athenagro, Agrostat, SECEX, Conab

Share of Brazilian exports by sector



Participation of agribusiness exports



Source: Athenagro, dados IBGE







CHAPTER 3

WORLD LIVESTOCK FARMING



In 2024, Brazil remained the holder of the **largest commercial cattle herd in the world**, estimated at **194 million heads** — equivalent to **11.6% of the global herd**. Although India has larger absolute numbers, they include buffaloes and animals with no clear commercial purpose.

In meat production, Brazil consolidated its **second position in the world**, with **11.8 million tons of carcass equivalent (TCE)** — its largest historical production — representing almost **15% of global production**, behind only the United States (**12.3 million TCE**).

In the last ten years, Brazil has increased its production by **2.29 million TCE**, behind only **China**, whose growth was **2.35 million TCE** in the period.

In exports, Brazil maintained its **global leadership**, accounting for **21% of beef traded internationally**. In other words, **1 in every 5 kilos of meat exported in the world is Brazilian**.



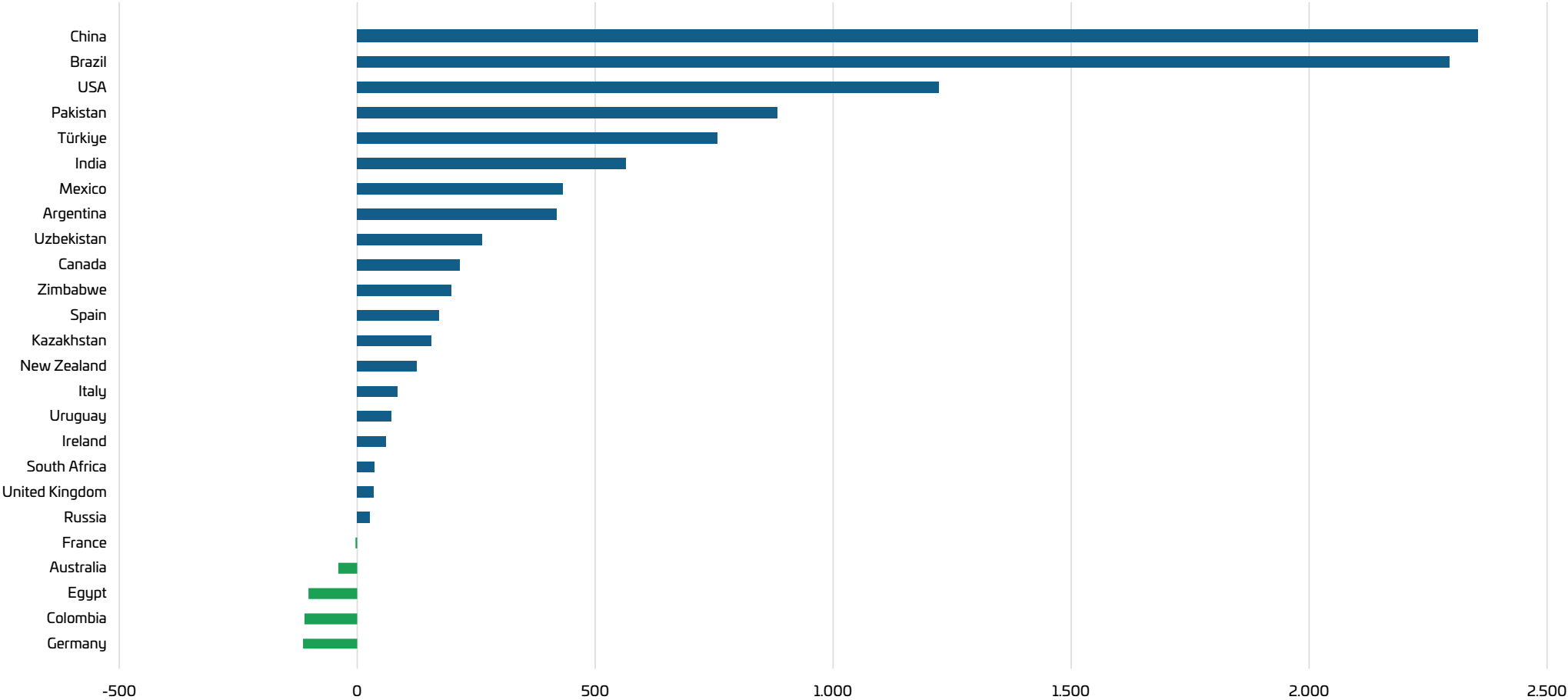
11.6% herd
global

Largest livestock and largest meat producers in the world in 2024

Country	Herd – considering buffalo in the countries of greatest expression – million heads	% world herd	Production of meat – 1000 TCE	% production worldwide
USA	86.0	5.15%	12,298	15.57%
Brazil	193.9	11.60%	11,812	14.96%
China	104.0	6.22%	8,513	10.78%
India	306.6	18.35%	4,565	5.78%
Argentina	54.7	3.27%	3,093	3.92%
Pakistan	98.4	5.89%	2,577	3.26%
Australia	29.8	1.78%	2,555	3.24%
Mexico	36.4	2.18%	2,259	2.86%
Russia	17.0	1.02%	1,681	2.13%
Türkiye	14.0	0.84%	1,640	2.08%
France	17.2	1.03%	1,407	1.78%
Canada	12.0	0.72%	1,284	1.63%
New Zealand	9.9	0.59%	754	0.95%
Colombia	29.2	1.75%	730	0.92%
Uruguay	11.4	0.68%	590	0.75%
Ethiopia	69.5	4.16%	420	0.53%
Tanzania	37.2	2.22%	520	0.66%
Chad	36.9	2.21%	510	0.65%
Bangladesh	25.8	1.55%	215	0.27%
Kenya	21.4	1.28%	265	0.34%
Nigeria	20.5	1.23%	360	0.46%
Indonesia	19.4	1.16%	365	0.46%
Others	484.4	28.99%	20,561	26.03%
World	1,671	100.0%	78,974	100.0%

Source: Athenagro, dados FAO, USDA, IBGE

Evolution of beef production between 2014 and 2024, in thousand TCE



Source: Athenagro, dados FAO, USDA, IBGE, OCDE

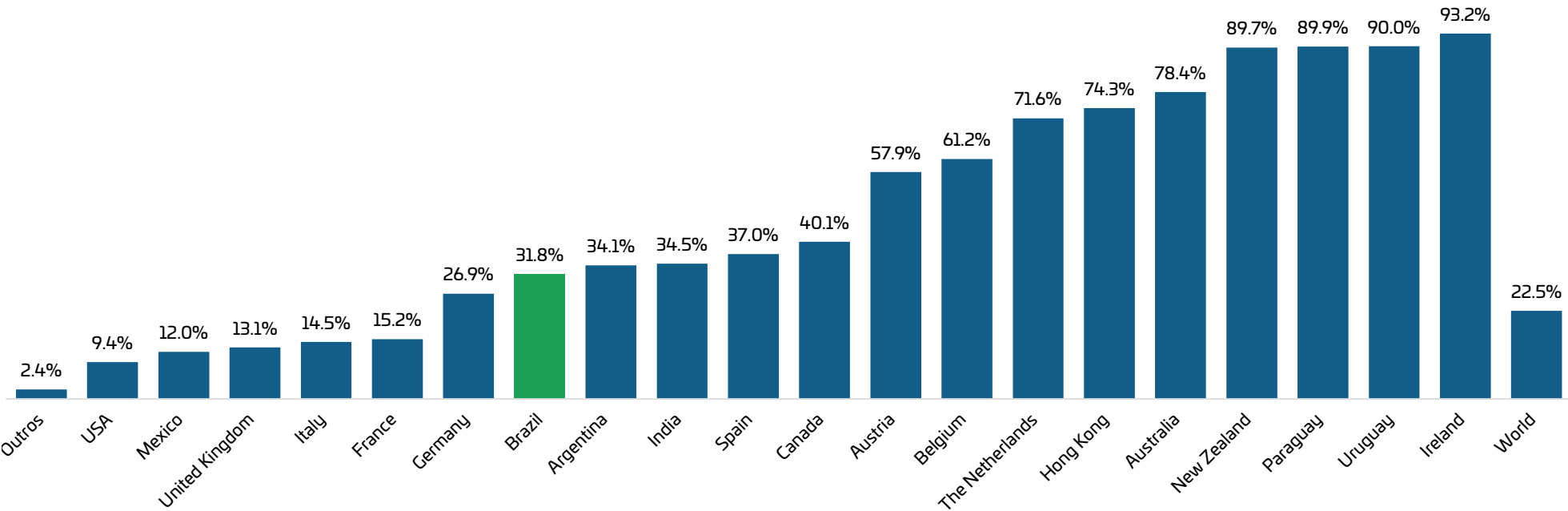


Largest beef exporters in 2024

2024 Ranking	Exports (1000 TCE)	Production (1000 TCE)	Imports (1000 TCE)	Export on Production + imports
Brazil	3,779.0	11,811.7	58.6	31.84%
Australia	2,012.3	2,555.0	12.9	78.36%
India	1,575.0	4,565.0	0.0	34.50%
USA	1,340.0	12,298.0	1,988.0	9.38%
Argentina	1,054.4	3,093.1	1.1	34.08%
New Zealand	686.2	754.1	11.1	89.67%
Poland	724.4	559.5	57.9	117.32%
The Netherlands	671.5	436.4	500.8	71.64%
Canada	627.9	1,284.3	282.3	40.08%
Ireland	644.7	642.2	49.2	93.24%
Uruguay	578.7	590.0	53.0	89.99%
Paraguay	485.8	523.9	16.2	89.95%
Germany	399.7	1,029.0	456.6	26.91%
Mexico	302.4	2,259.0	254.0	12.03%
France	278.8	1,407.5	424.0	15.22%
Spain	346.7	757.0	179.9	37.00%
Hong Kong	277.8	2.3	371.8	74.26%
Belgium	209.3	246.1	95.9	61.20%
Italy	182.6	794.2	461.7	14.54%
Austria	166.1	217.2	69.8	57.90%
Nicaragua	161.7	146.7	1.0	109.49%
United Kingdom	170.0	912.0	381.1	13.15%
Others	1,071.5	32,089.9	12,019.3	2.43%
World	17,746	78,974	17,746	22.47%

Source: Athenagro, dados FAO, USDA, OCDE, Secex

Quantity exported in relation to total meat availability (production + imports)



Source: Athenagro, dados FAO, USDA, Secex

Largest importers of beef and buffalo and representativeness of Brazilian meat in each market in 2024

2024 Ranking	Total import of beef in 2024 (1,000 TCE)	Beef import from Brazil in 2024 (thousand TCE)	% Brazil in total
China	3,584	1,720	47.98%
United States	1,988	343	17.28%
United Arab Emirates	290	172	59.30%
Chile	350	144	41.12%
Hong Kong	372	131	35.25%
Philippines	213	120	56.39%
Egypt	285	108	38.05%
Russia	328	106	32.35%
Saudi Arabia	243	74	30.54%
Türkiye	42	73	174.30%
Mexico	254	60	23.51%
United Kingdom	381	57	15.01%
Algeria	52	57	110.19%
Israel	128	44	34.56%
Uruguay	53	41	77.07%
Italy	462	36	7.89%
Netherlands (Holland)	501	31	6.26%
European Union	3,144	170	5.39%
Others	4,810	460	9.56%
World	16,039	3,779.0	23.56%

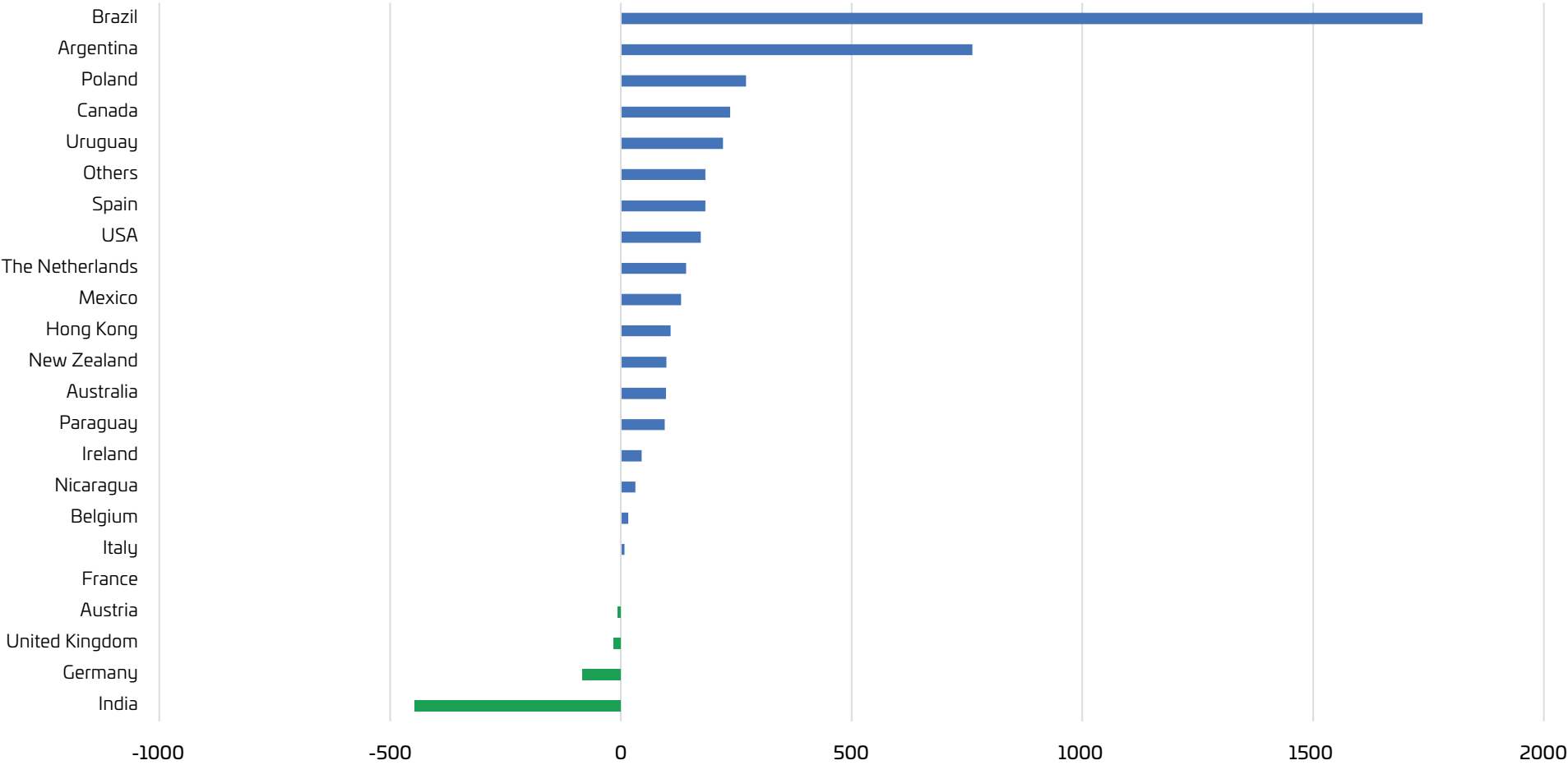
Source: Athenagro, dados FAO, Comexstat, USDA, OCDE

Evolution of beef exports between 2014 and 2024, in thousand TCE

2024 Ranking	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	Share in 2024	Evolution from 2014 to 2024
Brazil	2,042	1,828	1,825	1,968	2,194	2,483	2,691	2,478	3,018	3,030	3,779	21.29%	1,737
Australia	1,914	1,910	1,542	1,505	1,685	1,850	1,581	1,403	1,333	1,683	2,012	11.34%	98
India	2,022	1,754	1,709	1,786	1,511	1,494	1,284	1,397	1,442	1,552	1,575	8.88%	-447
USA	1,167	1,028	1,160	1,297	1,433	1,373	1,338	1,555	1,608	1,378	1,340	7.55%	173
Argentina	293	279	306	393	613	870	924	821	912	991	1,054	5.94%	762
New Zealand	587	646	597	577	614	636	650	685	650	693	686	3.87%	99
Poland	453	534	544	621	608	604	619	630	628	674	724	4.08%	271
The Netherlands	530	573	623	691	696	711	639	642	653	625	671	3.78%	141
Canada	391	401	445	472	497	547	529	628	628	614	628	3.54%	237
Ireland	599	576	643	660	645	639	630	563	597	600	645	3.63%	46
Uruguay	358	370	429	455	492	519	478	637	591	559	579	3.26%	221
Paraguay	391	381	390	378	367	355	386	452	477	456	486	2.74%	95
Germany	483	460	448	436	420	415	362	385	379	372	400	2.25%	-83
Mexico	171	202	230	250	278	316	339	365	392	352	302	1.70%	131
France	278	282	282	284	292	277	270	298	289	260	279	1.57%	1
Spain	164	202	211	218	208	243	247	267	284	323	347	1.95%	183
Hong Kong	170	279	140	69	226	271	35	71	169	259	278	1.57%	108
Belgium	193	212	222	243	240	209	193	205	199	195	209	1.18%	16
Italy	175	185	188	189	181	170	165	192	185	170	183	1.03%	8
Austria	173	174	165	153	157	171	158	161	152	155	166	0.94%	-7
Nicaragua	130	125	126	149	152	159	165	181	158	157	162	0.91%	32
United Kingdom	184	177	182	179	186	227	208	163	187	158	170	0.96%	-14
Others	888	925	981	933	998	1,145	1,051	1,160	1,108	1,116	1,072	6.04%	184
World	13,756	13,504	13,388	13,907	14,694	15,685	14,944	15,337	16,039	16,371	17,746	100.00%	3,991

Source: Athenagro, dados FAO, USDA, OCDE, Secex

Evolution of beef exports between 2014 and 2024, in thousand TCE.



Source: Athenagro, dados FAO, USDA, OCDE, Secex



Largest consumers of beef in 2024

2024 Ranking	Total consumption 1,000 TCE	Population millions	Availability per capita kg/ inhab./year	Comparison availability per capita relative to the average
USA	12,668	337	37.6	375.11%
China	11,955	1,409	8.5	84.61%
Brazil	8,095	213	38.1	379.85%
India	2,990	1,442	2.1	20.68%
Pakistan	2,476	236	10.5	104.67%
Mexico	2,152	132	16.3	162.27%
Argentina	2,042	47	43.3	431.75%
Russia	1,888	146	12.9	128.87%
Türkiye	1,636	86	19.1	190.10%
France	1,547	66	23.4	233.32%
Japan	1,255	124	10.1	101.04%
Uzbekistan	1,118	37	30.3	301.93%
United Kingdom	1,104	68	16.1	160.90%
Germany	1,104	85	13.0	129.80%
South Africa	1,025	63	16.2	161.79%
Italy	1,018	59	17.3	172.13%
Korea	980	52	18.9	188.92%
Canada	902	41	21.9	218.60%
Indonesia	873	282	3.1	30.90%
Egypt	857	107	8.0	79.63%
Zimbabwe	750	17	44.1	440.08%
Colombia	722	53	13.7	136.57%
Spain	569	48	11.8	117.27%
Australia	558	27	20.4	203.59%
Uruguay	138	4	38.6	384.66%
Others	18,692	2,699	6.9	69.06%
World	78,973.9	7,876.2	10.0	

Source: Athenagro, dados FAO, USDA, OCDE, IBGE







CHAPTER 4

LIVESTOCK FARMING IN BRAZIL





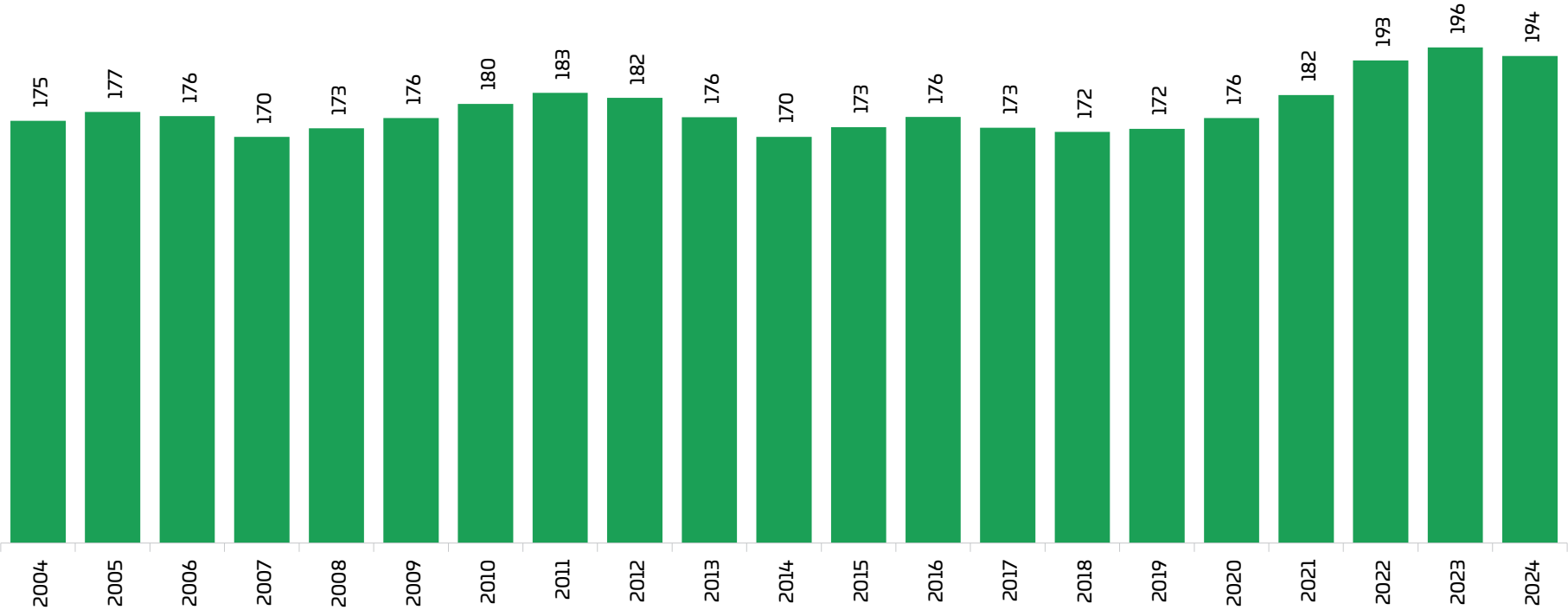
Between 2004 and 2024, the Brazilian cattle herd grew by **11%**, with an increase of **19 million heads**, totaling **194 million**.

The **Central-West region** concentrates the largest portion of the herd, with **62 million heads (32%)**, followed by the **North region**, with **more than 50 million** and a growth of **60% in the last 20 years**.

The **pasture area** was estimated at **160 million hectares** in 2024, with a reduction of 11% in two decades. In contrast, productivity grew by **more than 70%** in the period, rising from **2.8 arrobas per hectare/year** to almost **5 arrobas per hectare/year**, driven by technological advances.

Exports accounted for **32% of total beef production**, while the domestic market accounted for **68%**, demonstrating simultaneous growth in production, exports, and domestic consumption.

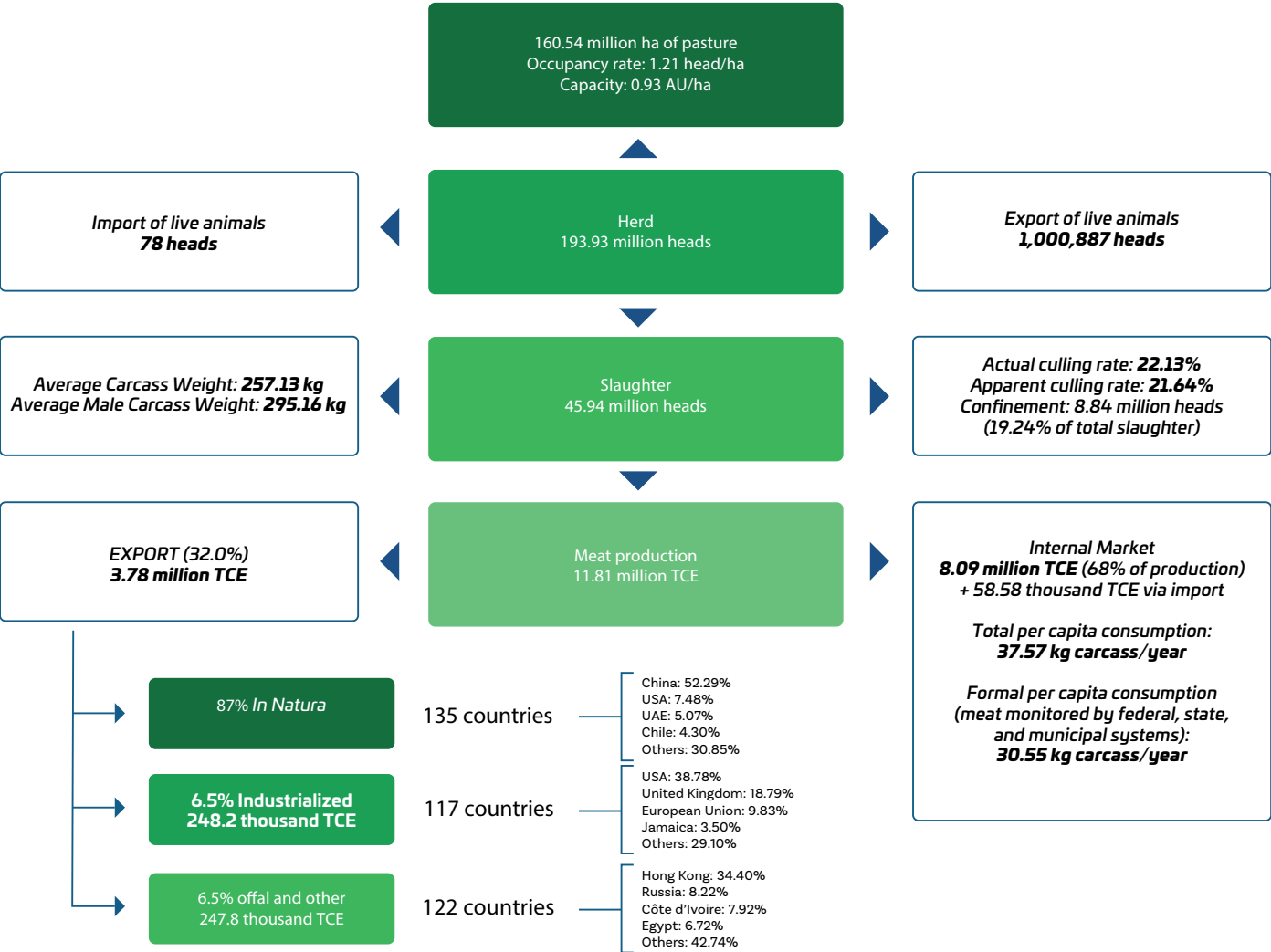
Evolution of the Brazilian cattle herd – in million heads*



Athenagro, Base Censo, PPM

Source: Athenagro, IBGE data (PPM, PPT and Census) * Preliminary estimate by Athenagro, based on the methodologies
* information on the herd calculation methodology can be found in "Note x: on revisions to herd numbers"

Brazilian Beef 2024 profile



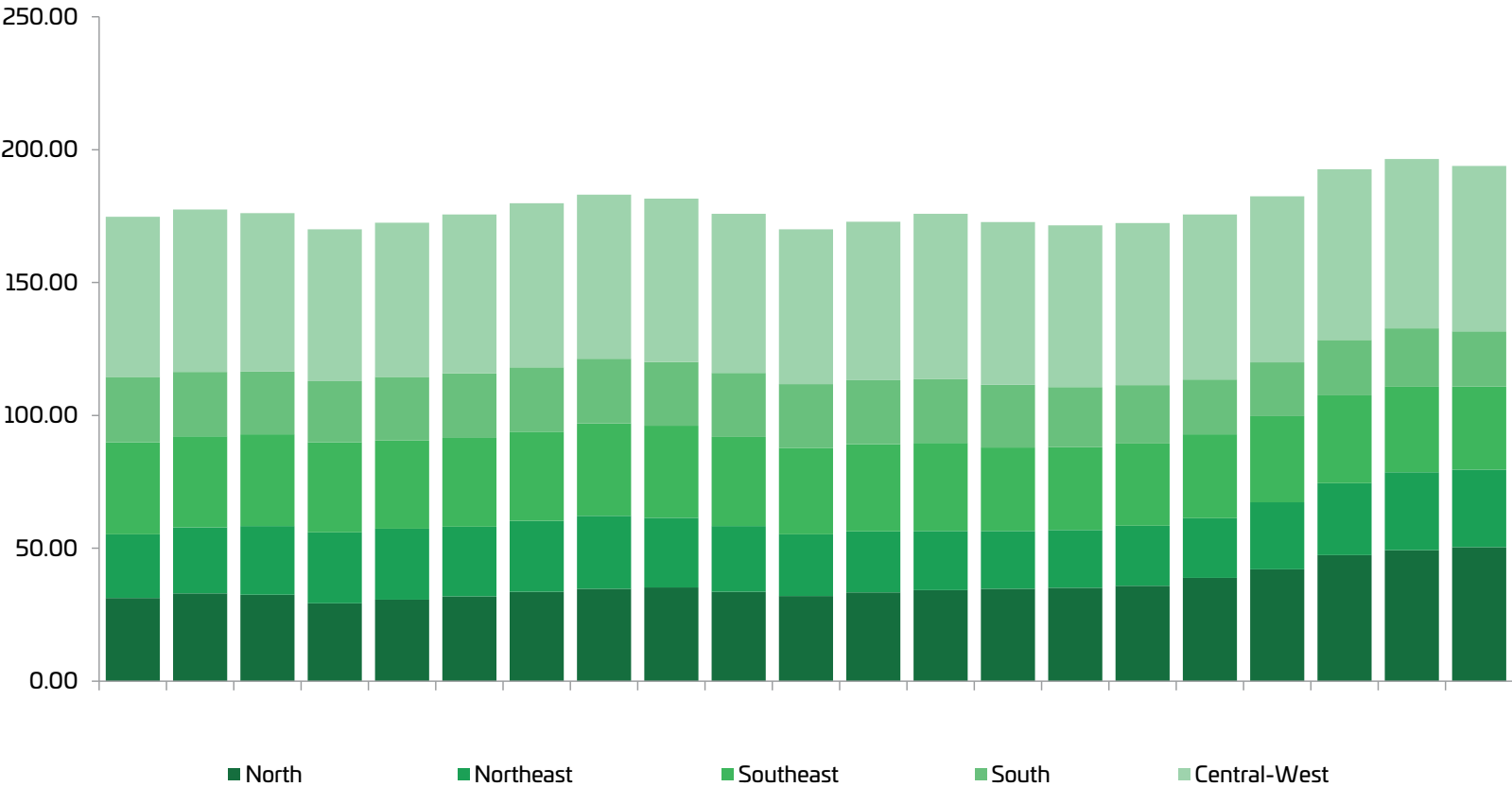
Source: Abiec, dados Secex, IBGE, Rally da Pecuária, Athenagro

Herd evolution Brazilian cattle by region – million heads

Year	Brazil	North	Northeast	Southeast	South	Central-West
2004	174.77	31.29	23.92	34.72	24.59	60.25
2005	177.42	32.99	24.92	34.29	24.15	61.07
2006	176.15	32.56	25.83	34.55	23.58	59.62
2007	170.01	29.37	26.66	33.93	22.88	57.17
2008	172.57	30.62	26.80	33.17	23.96	58.01
2009	175.57	31.94	26.24	33.36	24.28	59.74
2010	179.80	33.60	26.71	33.60	24.24	61.64
2011	183.08	34.74	27.54	34.68	24.37	61.74
2012	181.54	35.32	26.20	34.55	24.01	61.47
2013	175.81	33.70	24.72	33.54	23.99	59.86
2014	170.08	32.08	23.24	32.52	23.98	58.26
2015	172.93	33.43	22.98	32.80	23.99	59.73
2016	175.90	34.24	22.29	33.11	24.13	62.13
2017	172.72	34.76	21.68	31.54	23.58	61.15
2018	171.53	35.16	21.73	31.10	22.68	60.86
2019	172.42	35.94	22.49	31.04	21.95	60.99
2020	175.62	38.90	22.51	31.44	20.68	62.10
2021	182.41	42.05	25.22	32.46	20.24	62.44
2022	192.66	47.43	27.12	32.99	20.92	64.21
2023	196.45	49.36	29.26	32.21	21.88	63.73
2024	193.93	50.43	29.20	31.25	20.73	62.32

Source: IBGE, Athenagro

Evolution of the Brazilian cattle herd by region – million heads



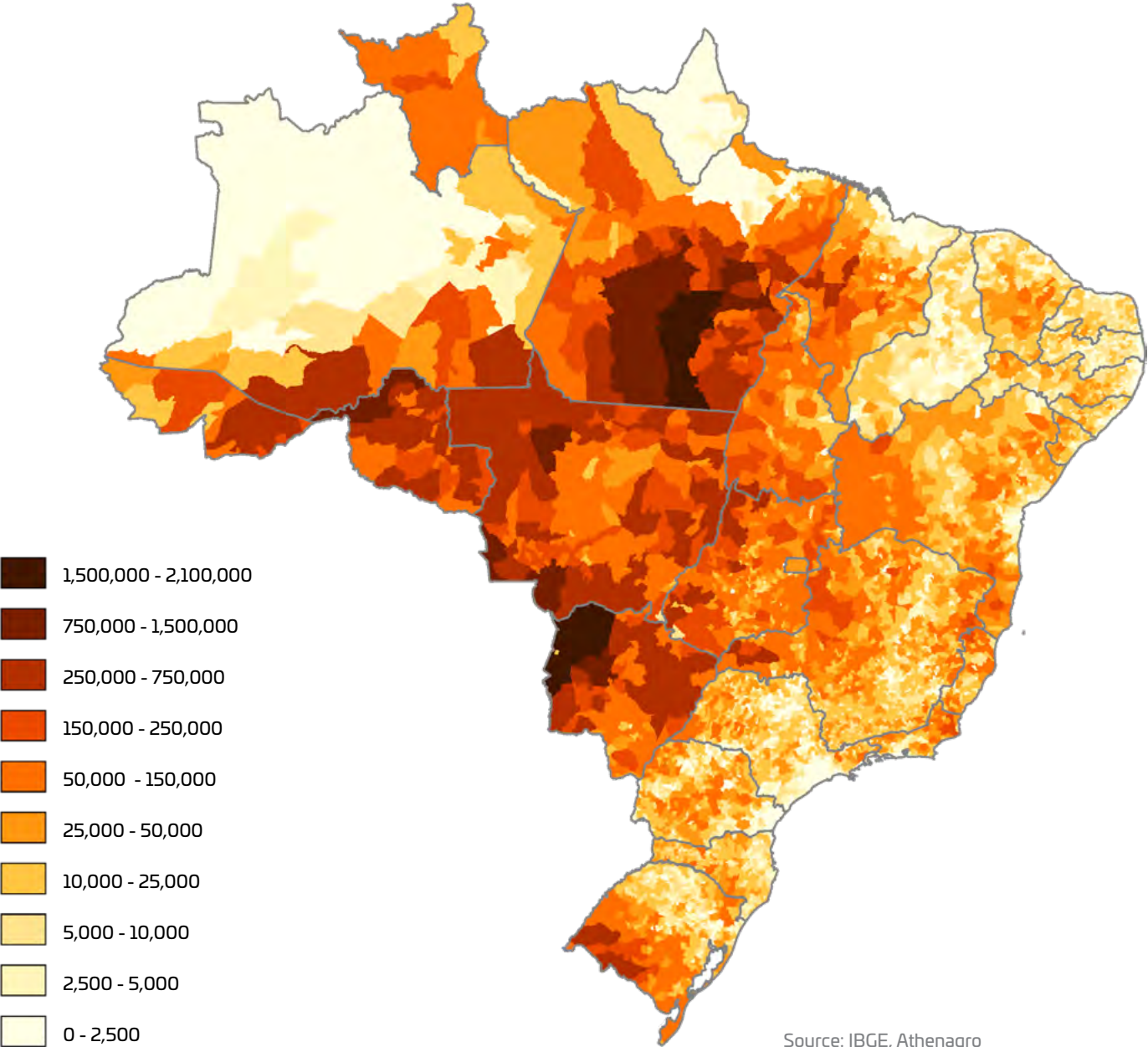
Source: IBGE, Athenagro

Evolution of the Brazilian cattle herd by state – million heads

State	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Rondônia	7.73	8.41	8.54	8.07	8.23	8.59	8.90	9.24	9.28	8.88	8.48	9.13	9.42	9.83	10.10	10.08	10.54	10.85	13.42	13.90	14.25
Acre	1.35	1.60	1.74	1.60	1.71	1.79	1.86	1.83	1.92	1.98	2.04	2.16	2.24	2.14	2.55	2.75	3.05	3.29	3.88	4.15	4.41
Amazonas	1.08	1.12	1.17	1.14	1.24	1.28	1.29	1.37	1.37	1.34	1.31	1.20	1.22	1.25	1.29	1.36	1.35	1.41	1.94	2.29	2.37
Roraima	0.49	0.53	0.54	0.51	0.50	0.50	0.60	0.68	0.71	0.67	0.63	0.69	0.67	0.68	0.71	0.77	0.82	0.83	1.03	1.08	1.11
Pará	13.86	14.50	13.93	11.79	12.67	13.29	14.07	14.69	15.04	14.36	13.68	14.04	14.24	14.35	14.39	14.72	16.25	17.75	18.62	18.87	19.07
Amapá	0.05	0.07	0.08	0.07	0.07	0.07	0.08	0.10	0.11	0.12	0.14	0.06	0.05	0.04	0.03	0.02	0.03	0.02	0.02	0.03	0.02
Tocantins	6.73	6.77	6.57	6.20	6.20	6.41	6.80	6.83	6.89	6.34	5.80	6.15	6.39	6.48	6.09	6.22	6.87	7.90	8.51	9.05	9.20
Maranhão	5.13	5.65	5.81	5.81	6.02	6.08	6.18	6.46	6.69	6.09	5.49	5.37	5.39	5.42	5.52	5.74	6.06	6.30	7.16	7.86	7.95
Piauí	1.66	1.66	1.67	1.57	1.58	1.51	1.51	1.52	1.52	1.49	1.46	1.45	1.44	1.43	1.27	1.25	1.23	1.22	1.21	1.19	1.12
Ceará	2.08	2.11	2.16	2.23	2.27	2.30	2.36	2.42	2.52	2.36	2.20	2.12	2.03	1.89	2.01	2.09	2.16	2.21	2.29	2.38	2.35
Rio Grande do Norte	0.82	0.86	0.91	0.89	0.91	1.03	0.94	0.93	0.74	0.80	0.86	0.81	0.73	0.76	0.75	0.82	0.88	0.90	0.95	1.06	1.06
Paraíba	1.26	1.31	1.35	1.40	1.46	1.50	1.50	1.62	1.23	1.11	0.99	1.02	1.04	1.05	1.09	1.14	1.19	1.22	1.22	1.26	1.25
Pernambuco	1.49	1.69	1.88	2.01	2.04	2.08	2.17	2.29	1.68	1.54	1.40	1.43	1.38	1.28	1.34	1.42	1.36	1.66	1.76	1.94	1.95
Alagoas	0.78	0.88	0.92	1.00	1.05	1.08	1.11	1.16	1.11	0.97	0.83	0.83	0.77	0.79	0.82	0.81	0.87	0.90	0.91	1.01	1.00
Sergipe	0.76	0.84	0.90	0.91	0.91	0.95	0.95	1.01	0.99	1.01	1.04	1.05	1.02	0.89	0.86	0.87	0.87	0.91	0.94	1.12	1.07
Bahia	9.93	9.93	10.23	10.85	10.56	9.70	9.99	10.13	9.72	9.34	8.96	8.90	8.50	8.18	8.06	8.35	7.89	9.90	10.67	11.43	11.45
Minas Gerais	19.75	19.53	20.33	20.70	20.50	20.60	20.83	22.04	22.10	21.70	21.31	21.37	21.24	19.58	19.41	19.63	19.77	20.46	20.60	20.10	19.42
Espírito Santo	1.60	1.70	1.79	1.81	1.79	1.86	1.87	1.90	1.96	1.98	2.01	1.94	1.76	1.65	1.69	1.72	1.82	1.93	1.94	1.89	1.85
Rio de Janeiro	1.89	1.92	1.92	1.91	1.97	1.99	1.99	2.01	2.03	1.93	1.83	1.80	1.86	1.98	2.00	1.98	2.06	2.13	2.15	2.22	2.19
São Paulo	11.48	11.14	10.51	9.51	8.90		8.91	8.74	8.47	7.92	7.37	7.69	8.25	8.33	7.99	7.71	7.79	7.95	8.29	8.00	7.79
Paraná	9.63	9.51	9.12	8.85	8.94	8.92	8.76	8.83	8.77	8.49	8.21	8.34	8.52	8.40	8.30	8.00	7.49	7.11	6.98	7.80	7.33
Santa Catarina	2.93	3.04	3.13	3.15	3.55	3.64	3.65	3.70	3.74	3.72	3.71	3.81	3.92	3.73	3.72	3.88	3.96	3.97	3.91	3.96	3.85
Rio Grande do Sul	12.03	11.60	11.33	10.88	11.48	11.73	11.83	11.84	11.50	11.78	12.06	11.84	11.69	11.46	10.65	10.07	9.23	9.16	10.04	10.12	9.55
Mato Grosso do Sul	21.62	21.41	20.63	18.74	19.27	19.23	19.26	18.46	18.41	18.71	19.01	19.37	19.81	19.49	18.91	17.42	17.04	16.62	16.44	16.90	15.92
Mato Grosso	20.52	21.25	20.67	20.28	20.62	21.96	23.36	23.87	23.34	23.26	23.18	23.95	24.88	24.31	24.78	26.24	26.92	27.01	28.83	28.58	28.43
Goiás	18.01	18.31	18.23	18.06	18.05	18.46	18.94	19.33	19.63	17.81	16.00	16.34	17.38	17.29	17.11	17.28	18.08	18.76	18.88	18.20	17.93
Distrito Federal	0.10	0.09	0.08	0.08	0.06	0.08	0.08	0.08	0.08	0.08	0.07	0.07	0.07	0.06	0.06	0.05	0.05	0.06	0.06	0.05	0.05
Brazil	174.77	177.42	176.15	170.01	172.57	175.57	179.80	183.08	181.54	175.81	170.08	172.93	175.90	172.72	171.53	172.42	175.62	182.41	192.66	196.45	193.93

Source: Athenagro, dados IBGE (Censo, PPM, PPT)

Evolution of the
Brazilian cattle
herd by region –
million heads



Source: IBGE, Athenagro

Herd suitability and number of properties by state

State	Herd in 2014 (million head)	Share of the State's livestock in Brazil's total in 2014 (%)	Herd in 2024 (million head)	Share of the State's livestock in Brazil's total in 2024 (%)	Herd growth in the last 10 years (%)	Share of animals exclusively destined for slaughter by State in 2024 (%)	Herd with genetic suitability for beef in 2024 (million heads)	Share of animals with suitability for beef in 2024 (%)	Number of properties with cattle (units)
Rondônia	8.48	4.99%	14.25	7.35%	68.04%	96.56%	14.14	99.19%	73,129
Acre	2.04	1.20%	4.41	2.27%	115.77%	98.10%	4.39	99.56%	22,649
Amazonas	1.31	0.77%	2.37	1.22%	80.47%	93.82%	2.34	98.55%	14,612
Roraima	0.63	0.37%	1.11	0.57%	76.71%	96.03%	1.10	99.07%	6,903
Pará	13.68	8.04%	19.07	9.83%	39.43%	91.33%	18.68	97.97%	97,769
Amapá	0.14	0.08%	0.02	0.01%	-83.34%	59.81%	0.02	90.57%	684
Tocantins	5.80	3.41%	9.20	4.74%	58.51%	89.50%	8.97	97.54%	50,451
Maranhão	5.49	3.23%	7.95	4.10%	44.83%	84.64%	7.66	96.40%	91,296
Piauí	1.46	0.86%	1.12	0.58%	-23.67%	87.91%	1.08	97.17%	70,480
Ceará	2.20	1.29%	2.35	1.21%	6.49%	41.26%	2.02	86.22%	114,714
Rio Grande do Norte	0.86	0.51%	1.06	0.55%	23.01%	52.50%	0.94	88.85%	39,150
Paraíba	0.99	0.58%	1.25	0.65%	26.01%	52.05%	1.11	88.75%	82,761
Pernambuco	1.40	0.82%	1.95	1.01%	39.53%	33.08%	1.65	84.29%	107,939
Alagoas	0.83	0.49%	1.00	0.52%	20.76%	45.10%	0.87	87.12%	42,300
Sergipe	1.04	0.61%	1.07	0.55%	3.11%	58.77%	0.97	90.32%	43,783
Bahia	8.96	5.27%	11.45	5.90%	27.71%	83.27%	11.00	96.08%	297,894
Minas Gerais	21.31	12.53%	19.42	10.01%	-8.88%	53.78%	14.80	76.23%	385,488
Espírito Santo	2.01	1.18%	1.85	0.95%	-7.84%	76.85%	1.75	94.57%	33,128
Rio de Janeiro	1.83	1.08%	2.19	1.13%	19.67%	71.68%	2.05	93.36%	32,273
São Paulo	7.37	4.33%	7.79	4.02%	5.69%	73.51%	6.91	88.75%	107,255
Paraná	8.21	4.83%	7.33	3.78%	-10.71%	60.63%	5.48	74.70%	170,296
Santa Catarina	3.71	2.18%	3.85	1.99%	3.85%	34.84%	2.56	66.55%	132,522
Rio Grande do Sul	12.06	7.09%	9.55	4.92%	-20.86%	67.97%	8.02	84.01%	261,717
Mato Grosso do Sul	19.01	11.18%	15.92	8.21%	-16.29%	98.23%	15.85	99.59%	54,931
Mato Grosso	23.18	13.63%	28.43	14.66%	22.65%	98.66%	28.34	99.69%	92,723
Goiás	16.00	9.40%	17.93	9.24%	12.06%	75.45%	16.48	91.93%	126,100
Distrito Federal	0.07	0.04%	0.05	0.03%	-28.82%	61.18%	0.02	38.82%	1,468
Brazil	170.08	100.00%	193.93	100.00%	14.02%	80.88%	179.20	92.41%	2,554,415

Source: Athenagro, dados IBGE

Herds of the largest livestock municipalities in Brazil and growth in the last 10 and 20 years

Municipality/State	Herd in 2004 (heads)	Herd in 2014 (heads)	Herd in 2024 (heads) *	Herd growth in 20 years (heads)	Herd growth in 10 years (heads)	Herd growth in 20 years (%)	Herd growth in 10 years (%)
Corumbá (MS)	2,138,510	1,880,436	2,062,992	-75,518	182,556	-3.53%	9.71%
São Félix do Xingu (PA)	1,394,377	1,375,526	1,673,113	278,736	297,587	19.99%	21.63%
Porto Velho (RO)	352,403	386,593	1,282,645	930,242	896,052	263.97%	231.78%
Altamira (PA)	695,207	685,808	1,154,902	459,696	469,095	66.12%	68.40%
Cáceres (MT)	674,965	762,308	1,120,479	445,514	358,171	66.01%	46.99%
Novo Repartimento (PA)	618,781	610,415	1,027,450	408,669	417,034	66.04%	68.32%
Vila Bela da Santíssima Trindade (MT)	720,062	813,241	1,002,159	282,097	188,918	39.18%	23.23%
Marabá (PA)	613,408	605,115	924,870	311,462	319,755	50.78%	52.84%
Aquidauana (MS)	882,065	775,618	798,761	-83,304	23,143	-9.44%	2.98%
Juara (MT)	650,497	734,673	778,230	127,733	43,556	19.64%	5.93%
Ribas do Rio Pardo (MS)	1,204,641	1,059,266	721,947	-482,695	-337,319	-40.07%	-31.84%
Nova Mamoré (RO)	236,589	259,542	710,132	473,543	450,589	200.15%	173.61%
Colniza (MT)	309,009	348,996	680,666	371,657	331,670	120.27%	95.04%
Nova Crixás (GO)	607,551	539,655	646,723	39,172	107,068	6.45%	19.84%
Porto Murtinho (MS)	718,021	631,371	625,918	-92,103	-5,453	-12.83%	-0.86%
Juína (MT)	460,899	520,541	619,462	158,563	98,921	34.40%	19.00%
Alta Floresta (MT)	521,816	589,341	603,319	81,503	13,978	15.62%	2.37%
Pacajá (PA)	367,197	362,233	602,505	235,308	240,272	64.08%	66.33%
Novo Progresso (PA)	419,844	414,168	587,597	167,754	173,430	39.96%	41.87%
Lábrea (AM)	189,879	230,225	582,973	393,094	352,748	207.02%	153.22%
Pontes e Lacerda (MT)	440,605	497,621	562,068	121,463	64,447	27.57%	12.95%
Aripuanã (MT)	370,731	418,705	561,377	190,647	142,673	51.42%	34.07%
Rio Branco (AC)	182,562	277,319	559,318	376,756	281,999	206.37%	101.69%
Porto Esperidião (MT)	377,701	426,577	552,567	174,866	125,990	46.30%	29.54%
Nova Bandeirantes (MT)	293,586	331,577	548,012	254,426	216,435	86.66%	65.27%
São Miguel do Araguaia (GO)	500,745	444,785	543,906	43,161	99,121	8.62%	22.29%
Jaru (RO)	345,670	379,207	537,790	192,120	158,583	55.58%	41.82%
Itupiranga (PA)	360,164	355,295	522,874	162,710	167,579	45.18%	47.17%
Vila Rica (MT)	434,425	490,641	507,122	72,697	16,481	16.73%	3.36%
Água Azul do Norte (PA)	432,642	426,793	503,816	71,174	77,023	16.45%	18.05%
Santana do Araguaia (PA)	407,968	402,452	497,868	89,901	95,416	22.04%	23.71%
Boca do Acre (AM)	175,276	212,519	494,571	319,295	282,052	182.17%	132.72%
Cocalinho (MT)	383,842	433,513	493,027	109,185	59,514	28.45%	13.73%
Rio Verde de Mato Grosso (MS)	591,908	520,477	492,498	-99,410	-27,979	-16.79%	-5.38%
Alta Floresta D'Oeste (RO)	251,566	275,972	490,486	238,920	214,514	94.97%	77.73%
Buritis (RO)	250,225	274,502	482,817	232,592	208,315	92.95%	75.89%
Santo Antônio do Leverger (MT)	370,533	418,482	480,433	109,900	61,951	29.66%	14.80%
Alegrete (RS)	605,546	607,123	478,262	-127,284	-128,861	-21.02%	-21.22%
Ariquemes (RO)	250,138	274,406	468,424	218,286	194,017	87.27%	70.70%
Rio Maria (PA)	328,659	324,216	465,342	136,683	141,126	41.59%	43.53%
Sena Madureira (AC)	110,871	168,418	465,314	354,443	296,896	319.69%	176.29%

Source: Athenagro, dados IBGE

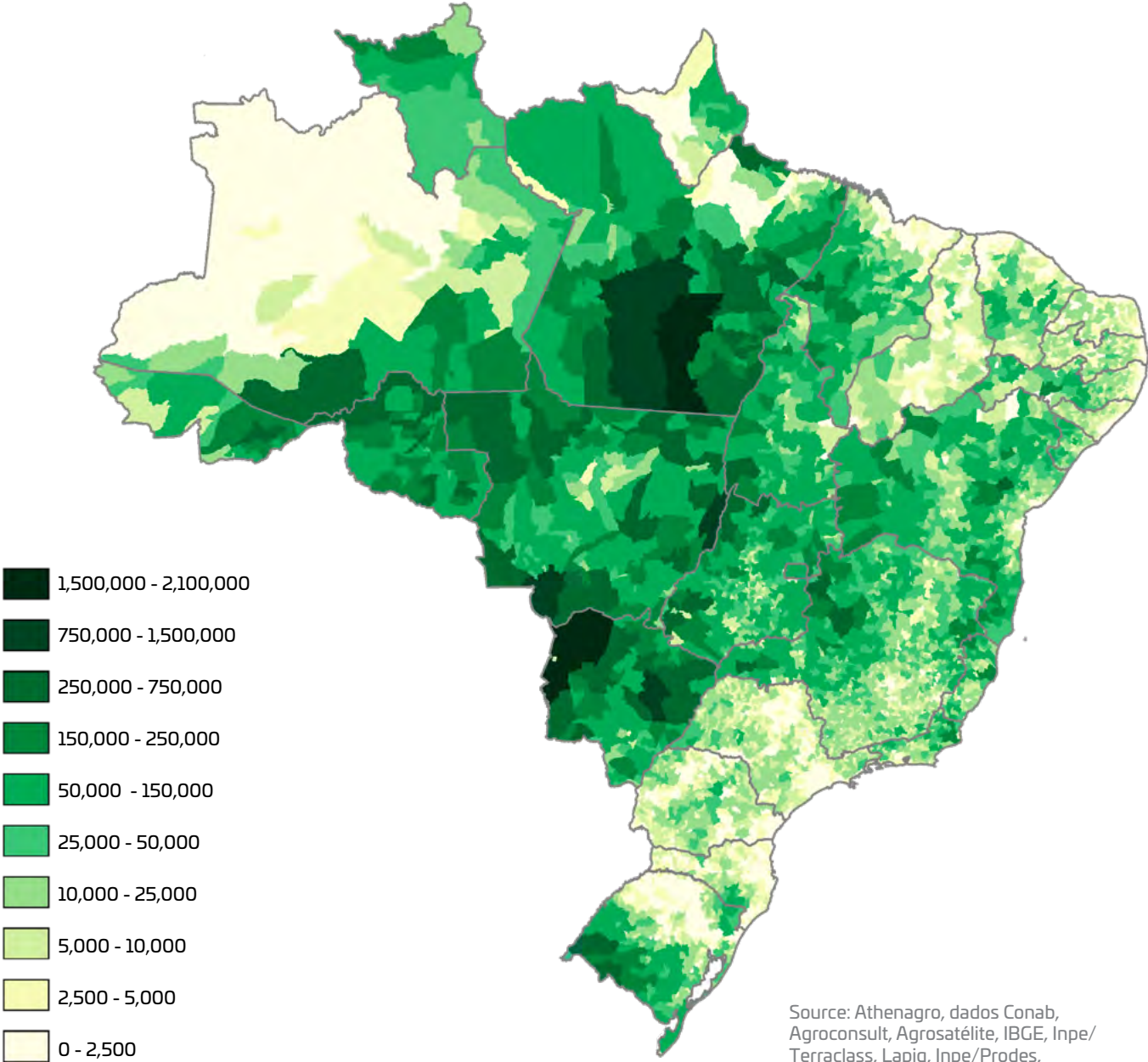
*Preliminary data

Evolution of pasture area in Brazil - million hectares

Pastures – Million hectares	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Rondônia	7.60	7.91	8.22	8.35	8.47	8.54	8.58	8.68	8.80	7.87	7.89	7.91	7.92	7.96	8.04	8.07	8.08	8.10	8.14	8.12	8.12
Acre	1.79	1.86	1.93	1.97	2.01	2.00	2.00	2.01	2.07	1.72	1.74	1.76	1.79	1.81	1.84	1.89	1.94	2.02	2.08	2.13	2.17
Amazonas	2.67	2.77	2.88	2.95	3.01	3.07	3.11	3.16	3.22	1.98	1.91	1.86	1.83	1.81	1.79	1.80	1.81	1.92	2.04	2.08	2.19
Roraima	0.80	0.74	0.76	0.80	0.87	0.89	0.91	0.92	0.91	0.69	0.69	0.70	0.69	0.68	0.67	0.71	0.70	0.72	0.73	0.74	0.78
Pará	17.03	17.22	17.67	18.26	18.86	17.37	17.54	17.56	17.50	17.39	17.22	17.15	17.14	17.13	17.12	17.20	17.33	17.57	17.71	17.78	17.97
Amapá	0.30	0.28	0.29	0.30	0.31	0.32	0.32	0.33	0.33	0.38	0.39	0.40	0.39	0.40	0.41	0.42	0.45	0.44	0.44	0.45	0.45
Tocantins	8.97	8.72	8.36	8.29	8.34	8.29	8.24	8.22	8.13	7.95	7.77	7.69	7.58	7.51	7.43	7.34	7.25	7.11	6.99	6.90	6.85
Maranhão	6.28	6.40	6.64	6.69	6.86	6.78	6.73	6.88	6.89	6.86	6.85	7.15	7.18	6.93	7.22	7.21	7.21	7.17	7.15	7.14	7.13
Piauí	3.11	3.20	3.34	3.31	3.25	3.25	3.13	3.12	3.03	3.26	3.06	2.93	2.67	2.46	2.33	2.07	1.89	1.65	1.44	1.25	1.23
Ceará	2.92	2.96	3.04	2.98	2.91	3.21	2.88	3.26	3.55	2.93	2.82	2.74	2.55	2.45	2.39	2.23	2.09	1.96	1.83	1.69	1.70
Rio Grande do Norte	1.39	1.40	1.44	1.45	1.44	1.56	1.48	1.60	1.63	1.51	1.46	1.40	1.30	1.17	1.08	0.98	0.90	0.81	0.73	0.64	0.64
Paraíba	1.93	1.93	1.95	1.94	1.95	2.10	1.90	2.11	2.10	1.94	1.94	1.87	1.86	1.78	1.76	1.72	1.70	1.67	1.64	1.61	1.61
Pernambuco	2.29	2.31	2.35	2.30	2.34	2.32	2.26	2.47	2.82	2.70	2.72	2.76	2.89	2.83	2.82	2.81	2.81	2.92	2.80	2.80	2.81
Alagoas	0.98	0.99	1.02	0.97	1.00	1.03	1.08	1.06	1.06	0.96	0.96	0.98	0.93	0.90	0.86	0.82	0.77	0.76	0.69	0.65	0.65
Sergipe	1.11	1.10	1.08	1.07	1.06	1.05	1.22	1.22	1.23	1.30	1.31	1.33	1.36	1.40	1.41	1.42	1.43	1.43	1.45	1.46	1.46
Bahia	14.53	14.50	14.44	14.34	14.39	14.41	14.17	14.24	14.38	16.09	16.20	16.72	17.28	17.47	17.64	17.87	17.98	18.07	18.25	18.43	18.38
Minas Gerais	18.81	18.79	18.72	18.54	18.44	18.36	18.20	17.96	17.77	19.16	19.37	19.46	19.53	19.66	19.84	19.99	19.94	19.95	20.16	20.27	20.22
Espírito Santo	2.04	2.06	2.12	2.14	2.16	2.18	2.19	2.18	2.19	2.05	2.06	2.05	2.06	2.06	2.09	2.10	2.08	2.06	2.05	2.03	2.03
Rio de Janeiro	1.41	1.40	1.36	1.48	1.48	1.48	1.52	1.49	1.51	1.69	1.73	1.78	1.81	1.84	1.84	1.85	1.86	1.88	1.90	1.91	1.91
São Paulo	7.56	7.38	7.09	6.05	5.80	6.10	6.01	5.99	5.55	5.36	5.47	5.41	5.29	5.26	5.16	5.06	4.83	4.74	4.59	4.19	4.23
Paraná	5.28	5.12	4.91	5.07	4.68	4.49	4.55	4.66	4.75	4.54	4.05	3.94	4.20	4.21	4.01	3.96	3.66	3.34	3.20	3.05	2.98
Santa Catarina	1.95	1.90	1.83	1.81	1.79	1.83	1.87	1.92	1.91	1.74	1.70	1.66	1.59	1.60	1.55	1.49	1.40	1.29	1.23	1.17	1.16
Rio Grande do Sul	9.75	9.51	9.14	8.95	8.74	8.89	8.75	8.59	8.17	8.27	7.92	8.08	7.92	7.91	7.87	7.67	7.20	6.82	6.56	6.43	6.32
Mato Grosso do Sul	21.43	21.35	21.11	20.89	20.87	20.77	20.62	20.53	20.29	20.01	19.44	18.95	18.55	17.95	17.40	16.83	16.14	15.56	15.12	14.63	14.56
Mato Grosso	21.97	21.99	22.06	21.70	22.07	21.90	21.49	21.00	20.43	20.70	20.70	20.88	20.85	20.71	20.42	20.17	20.14	19.89	19.77	19.81	19.75
Goiás + Distrito Federal	17.07	16.76	16.17	15.70	15.68	15.60	15.30	15.08	14.99	15.41	15.21	15.23	15.03	14.94	14.70	14.39	13.94	13.52	13.41	13.25	13.22
Brazil	180.97	180.54	179.92	178.32	178.77	177.80	176.04	176.22	175.22	174.49	172.60	172.80	172.18	170.84	169.69	168.05	165.53	163.36	162.13	160.61	160.54

Source: Athenagro, Conab data, IBGE (PPM, PAM, Census), INPE (Terraclass, Prodes), Lapiq, Livestock Rally

Distribution of pasture area – hectares



Evolution of beef production by state – 1,000 tons

States	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Rondônia	64.6	222.2	244.7	319.0	391.5	470.4	559.6	475.6	516.0	519.6	509.2	556.8	609.9	555.7	534.3	634.8	714.3	729.7	689.3	674.7	692.4	728.2	861.6	933.5
Acre	40.0	45.4	50.4	49.0	46.7	66.3	118.4	110.4	114.4	123.9	120.3	96.9	49.3	47.9	43.5	47.0	57.1	57.8	48.6	66.1	133.6	104.0	154.1	172.5
Amazonas	10.0	10.2	12.3	12.4	12.4	12.7	11.9	13.2	12.3	30.9	40.1	41.0	38.6	40.9	41.3	47.5	54.7	49.8	44.6	41.6	44.9	44.1	39.1	52.1
Roraima	6.0	5.6	5.5	5.5	5.5	8.8	5.2	5.5	4.9	5.8	6.1	6.3	5.3	5.4	5.0	5.9	9.2	9.0	7.0	8.1	14.0	13.7	10.2	10.3
Pará	373.9	426.6	474.3	552.1	611.0	664.0	672.1	635.3	634.6	635.6	638.1	663.8	714.3	741.8	754.6	808.5	878.2	883.6	770.2	772.8	908.8	949.4	965.5	1,068.2
Amapá	1.0	0.9	0.9	5.4	6.8	1.0	1.3	2.3	0.9	1.0	1.0	1.1	1.4	1.5	0.7	0.8	1.1	0.9	0.6	0.7	1.2	1.1	0.9	0.8
Tocantins	175.5	156.7	96.2	263.4	294.6	343.1	339.2	270.0	272.5	273.1	325.2	316.9	341.8	335.5	344.0	331.3	350.1	358.5	337.9	325.6	393.6	425.0	418.7	433.8
Maranhão	129.8	144.6	157.2	168.8	165.6	205.1	196.9	207.6	178.3	131.0	237.8	166.8	188.9	233.2	266.0	221.6	193.6	197.3	221.6	216.7	270.5	281.9	260.2	275.7
Piauí	51.1	49.6	48.4	46.9	48.1	50.3	51.0	50.4	47.5	46.9	20.3	18.7	17.9	17.8	15.5	17.1	24.5	21.8	16.2	18.5	26.9	22.8	14.6	13.6
Ceará	121.5	120.4	114.8	107.8	105.6	109.6	111.1	111.5	105.0	104.0	103.1	103.7	94.3	88.7	75.3	72.8	81.1	73.2	56.7	41.6	56.9	58.5	41.5	42.3
Rio Grande do Norte	24.8	26.5	26.2	25.8	30.0	34.2	36.9	36.6	35.8	38.4	32.9	37.0	37.5	17.4	14.0	13.9	19.7	16.2	11.4	10.8	16.2	18.1	23.6	25.3
Paraíba	27.1	26.2	24.8	23.6	23.4	23.8	23.4	24.6	23.1	22.0	24.6	21.6	22.3	29.1	34.5	38.6	27.3	22.8	24.9	23.6	31.4	28.1	15.8	21.7
Pernambuco	114.1	79.2	113.5	106.9	111.0	120.2	129.7	127.8	121.7	127.2	106.9	100.5	104.9	107.2	99.9	99.9	104.9	106.1	91.6	83.8	92.7	97.2	84.4	93.9
Alagoas	45.1	43.9	49.1	33.6	34.1	35.6	33.8	35.7	50.1	62.0	65.5	62.9	58.4	56.6	48.1	49.6	51.6	23.3	18.1	22.6	36.8	62.0	65.6	68.8
Sergipe	23.2	32.0	34.6	19.8	20.3	21.0	20.0	20.2	18.9	18.6	19.9	21.8	23.1	21.0	17.6	18.3	22.6	18.0	11.7	10.6	17.8	17.5	13.0	12.3
Bahia	198.2	192.0	195.1	216.4	300.9	332.4	362.2	371.4	368.9	371.9	363.0	368.2	404.4	420.0	382.2	365.1	408.2	409.5	385.2	300.6	333.1	361.6	328.7	368.7
Minas Gerais	501.8	518.9	569.1	608.7	646.0	757.5	786.0	836.3	755.3	736.1	676.7	772.3	901.4	941.1	831.4	769.6	918.5	894.0	868.1	867.5	988.8	1,030.6	1,005.4	1,156.5
Espírito Santo	36.1	44.6	53.1	52.2	60.6	79.2	69.9	73.7	96.4	105.7	63.2	63.9	69.8	75.9	69.6	62.6	72.1	66.1	60.4	51.0	55.0	77.1	69.7	74.8
Rio de Janeiro	28.7	27.7	23.6	34.9	32.8	21.7	39.0	42.5	40.3	58.3	50.1	48.9	56.5	17.7	14.8	16.6	26.1	23.2	17.1	18.4	30.9	30.3	22.6	21.4
São Paulo	923.2	982.5	971.1	1,191.2	1,161.2	1,087.6	1,083.5	973.9	972.7	965.8	889.5	910.3	970.5	968.6	873.4	832.9	897.4	925.4	972.8	947.9	956.2	1,094.1	1,043.7	1,194.7
Paraná	330.9	346.1	343.7	390.4	418.5	422.7	392.5	373.4	364.4	417.4	361.0	396.4	413.7	411.4	362.3	358.9	412.3	436.7	415.8	419.3	399.3	415.2	393.3	428.0
Santa Catarina	86.8	89.2	91.3	89.1	100.5	109.8	107.6	119.4	114.1	151.5	129.7	131.1	125.5	130.6	130.3	127.2	150.0	155.8	157.3	173.5	176.7	174.5	165.6	183.7
Rio Grande do Sul	457.6	436.5	477.3	560.3	602.0	624.1	471.0	486.3	487.8	568.7	557.9	566.8	568.5	550.9	506.3	533.1	597.9	613.4	530.0	523.5	527.5	530.6	516.5	472.6
Mato Grosso do Sul	1,013.7	996.0	995.7	1,086.1	1,066.5	1,049.0	1,050.1	940.6	960.6	964.1	932.9	1,104.4	1,154.2	1,124.1	992.3	984.7	1,109.2	1,038.6	1,054.5	1,045.0	1,044.9	1,125.0	1,060.6	1,183.4
Mato Grosso	639.3	734.7	859.0	1,049.9	1,171.5	1,321.8	1,329.3	1,160.1	1,226.7	1,250.0	1,250.6	1,435.9	1,669.3	1,558.2	1,371.7	1,442.5	1,623.8	1,705.1	1,762.5	1,685.7	1,759.5	1,772.1	1,961.6	2,240.0
Goiás	632.7	637.3	716.5	781.2	807.6	843.4	835.1	895.6	777.0	813.5	833.5	876.3	1,003.2	1,011.4	929.3	897.3	1,069.9	1,044.5	951.4	934.0	1,005.5	1,093.0	1,154.2	1,262.4
Distrito Federal	0.9	1.0	1.0	1.0	0.8	0.8	0.8	0.6	1.7	4.0	8.5	6.8	0.7	5.9	15.2	0.6	0.9	0.8	0.5	0.5	0.9	0.8	0.6	0.5
Brazil	6,057.6	6,396.2	6,749.3	7,801.5	8,275.4	8,816.4	8,837.8	8,400.5	8,302.0	8,546.9	8,367.6	8,897.3	9,645.6	9,515.6	8,772.9	8,798.4	9,876.5	9,880.9	9,526.2	9,284.9	10,016.1	10,556.2	10,691.4	11,811.7

Source: Athenagro, Conab data, IBGE (PPM, PAM, Census), INPE (Terraclass, Prodes), Lapig, Livestock Rally

Number of establishments and herd by producer size by state – base year 2017 and 2024 statistics

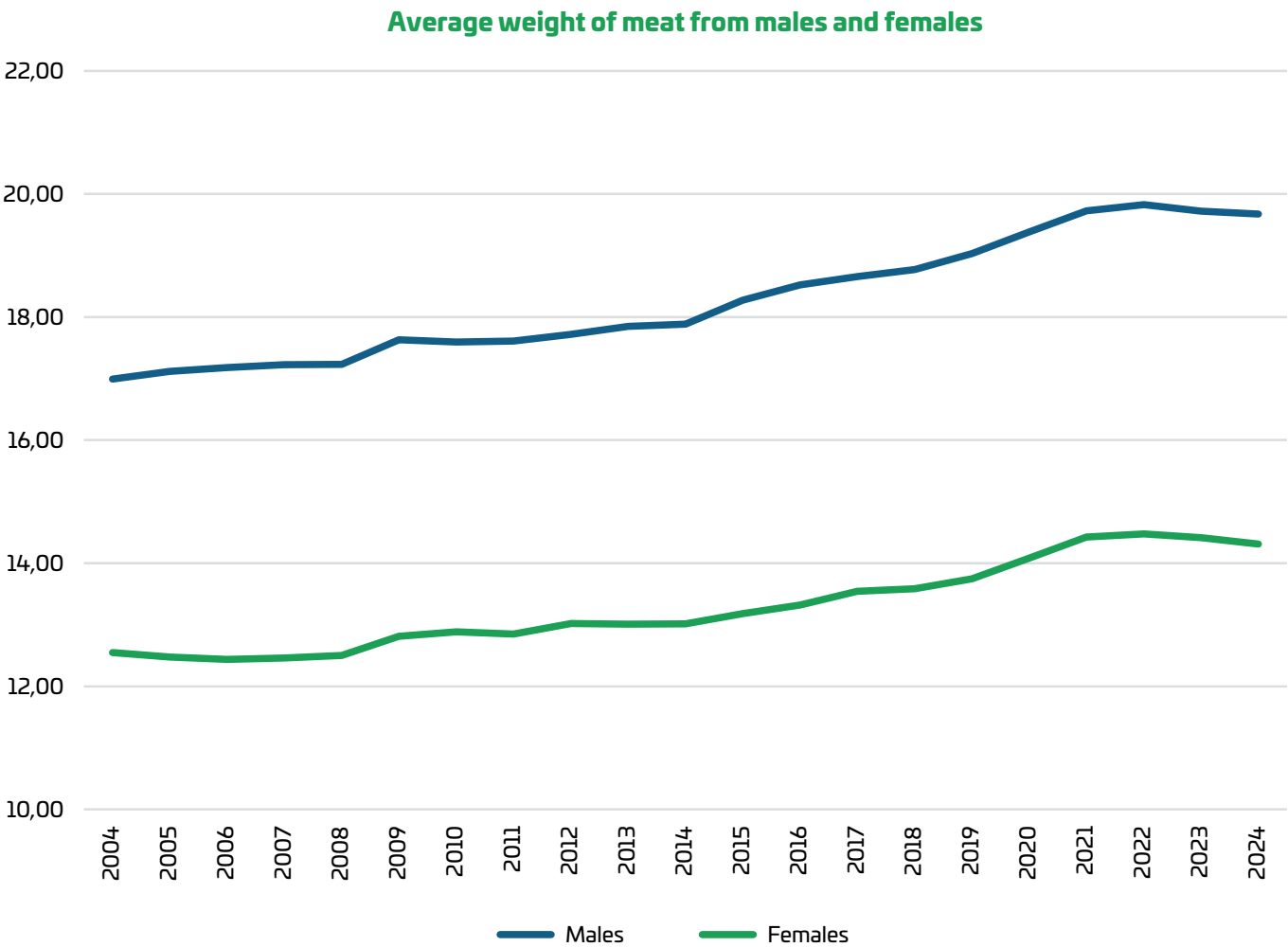
States	Pasture area (hectares) (Athenagro 2024)	Number of establishments by Area (hectares) – 2017 Census						Number of establishments by Area (hectares) – 2017 Census					
		Less than 20	Between 20 and 200	Between 200 and 1000	Between 1000 and 2500	Greater than 2500	Total	Less than 20	Between 20 and 200	Between 200 and 1000	Between 1000 and 2500	Greater than 2500	Total
Rondônia	8,118,481	16,456	49,576	6,034	810	296	73,172	420,749	4,608,652	2,679,524	1,083,202	1,034,904	9,827,031
Acre	2,169,757	3,848	15,344	2,973	309	166	22,640	46,280	826,846	548,786	254,973	455,864	2,133,001
Amazonas	2,189,335	3,540	8,882	1,875	235	122	14,654	63,712	436,554	352,030	149,386	211,550	1,253,852
Roraima	777,496	855	4,453	1,160	302	131	6,901	11,477	206,122	197,781	129,780	127,634	674,501
Pará	17,966,348	11,119	70,210	12,851	2,366	1,280	97,826	206,556	4,195,235	4,653,473	2,432,668	3,810,681	15,298,613
Amapá	452,168	83	412	146	23	21	685	1,614	13,031	13,742	4,237	3,120	36,481
Tocantins	6,851,981	5,094	34,218	8,454	1,860	782	50,409	98,733	1,556,513	1,829,102	1,272,519	1,580,812	6,340,469
Maranhão	7,130,483	34,138	48,482	7,423	918	391	91,352	374,589	2,018,399	1,556,745	652,671	809,615	5,412,019
Piauí	1,231,230	31,910	33,819	4,096	463	220	70,508	321,402	653,908	253,590	73,184	126,009	1,428,093
Ceará	1,700,913	71,796	38,002	4,545	341	72	114,756	619,358	840,549	319,667	76,344	39,135	1,895,053
Rio Grande do Norte	642,246	22,830	13,992	2,066	241	44	39,173	180,025	313,930	186,188	60,529	17,273	757,945
Paraíba	1,609,033	60,213	19,962	2,442	173	25	82,815	368,749	429,128	208,099	35,682	8,363	1,050,021
Pernambuco	2,805,440	81,665	24,274	1,978	122	31	108,070	508,839	529,138	197,536	38,122	0	1,283,872
Alagoas	654,195	34,432	7,033	813	72	16	42,366	237,643	274,834	191,086	61,907	0	785,836
Sergipe	1,464,228	32,486	10,370	929	43	8	43,836	271,693	350,744	207,621	38,757	17,644	886,459
Bahia	18,382,187	164,189	118,603	13,083	1,753	645	298,273	1,364,508	3,177,101	2,109,429	841,185	678,962	8,171,185
Minas Gerais	20,222,231	170,376	185,559	26,488	2,545	599	385,568	2,170,415	8,789,883	6,001,837	1,651,409	880,743	19,494,287
Espírito Santo	2,027,957	15,421	15,971	1,620	135	22	33,169	188,637	716,868	506,397	179,938	55,438	1,647,278
Rio de Janeiro	1,914,254	17,104	13,047	1,948	140	32	32,271	302,809	851,950	619,929	148,456	55,877	1,979,021
São Paulo	54,234,839	55,693	43,832	7,018	667	146	107,356	1,194,763	3,458,926	2,607,212	708,812	358,958	8,328,671
Paraná	2,981,091	104,654	57,523	7,358	728	111	170,374	1,596,047	3,185,950	2,603,293	752,347	0	8,395,422
Santa Catarina	1,155,875	81,132	48,649	2,505	258	46	132,590	1,130,974	1,950,794	477,288	116,935	0	3,725,827
Rio Grande do Sul	6,321,643	148,107	98,862	12,021	2,330	575	261,895	1,549,430	3,550,249	3,203,782	1,988,502	1,151,524	11,443,487
Mato Grosso do Sul	14,558,647	21,166	18,034	9,215	3,750	2,166	54,331	415,316	1,292,198	4,187,627	4,612,382	7,651,515	18,159,792
Mato Grosso	19,751,795	14,369	58,821	12,478	3,890	3,218	92,776	280,134	4,677,606	4,808,744	3,804,701	10,546,187	24,118,840
Goiás + DF	13,221,940	33,638	72,312	17,251	3,327	1,039	127,567	661,648	4,787,034	5,683,966	3,271,039	2,927,410	17,331,112
Brazil	160,535,795	1,236,314	1,110,242	168,770	27,801	12,204	2,555,333	14,591,533	53,692,142	46,204,474	24,439,667	32,927,852	171,858,168

Source: Athenagro, IBGE (2006 Census, 2017 Census, and 2017 PPM)

Note: The Census data are official and therefore no adjustment calculation was used in the sum of the states and in the sum of the area groups. Discrepancies occur in the number of establishments and in the herd where the sum of the state data and area groups does not match the total value made available by IBGE.

Average carcass weight Brazil – in @

Year	Males	Females
2004	16.99	12.55
2005	17.12	12.48
2006	17.18	12.44
2007	17.23	12.46
2008	17.23	12.50
2009	17.63	12.81
2010	17.59	12.89
2011	17.61	12.85
2012	17.72	13.02
2013	17.85	13.01
2014	17.88	13.01
2015	18.28	13.18
2016	18.52	13.32
2017	18.66	13.54
2018	18.77	13.58
2019	19.03	13.75
2020	19.38	14.08
2021	19.72	14.43
2022	19.83	14.48
2023	19.72	14.42
2024	19.68	14.31



Source: IBGE, Athenagro

Average male and female carcass weight by state – in @

	2014		2015		2016		2017		2018		2019		2020		2021		2022		2023		2024	
States	Males	Females	Males	Females	Males	Females	Males	Females	Males	Females	Males	Females	Males	Females	Males	Females	Males	Females	Males	Females	Males	Females
Rondônia	18.02	12.91	18.36	12.94	18.91	13.22	18.90	13.36	18.90	13.33	19.19	13.34	19.54	13.64	19.93	14.04	20.09	14.08	19.62	13.91	19.51	13.91
Pará	18.13	12.97	18.56	12.95	18.84	13.18	19.02	13.07	19.13	13.19	19.32	13.49	19.62	14.12	19.74	14.50	19.98	14.32	19.98	14.17	19.82	13.92
Tocantins	18.29	12.50	18.76	12.82	19.05	12.77	18.87	13.16	19.26	12.86	19.54	13.46	19.96	13.92	20.23	14.29	20.38	14.40	20.28	14.24	20.31	14.15
Minas Gerais	17.24	12.79	17.56	13.02	17.66	13.04	17.67	13.24	17.71	13.33	18.26	13.52	18.69	13.78	19.25	14.18	19.14	13.82	18.69	13.91	18.61	13.95
São Paulo	18.75	13.67	19.25	13.97	19.56	14.01	19.61	14.18	19.66	14.19	19.97	14.55	20.21	15.13	20.38	15.44	20.48	15.13	20.30	15.00	20.22	15.03
Paraná	17.60	13.27	18.03	13.65	18.14	13.77	18.29	13.71	18.46	13.86	18.61	14.14	18.83	14.25	19.28	14.44	19.37	14.46	19.15	14.71	19.46	14.83
R. Grande do Sul	15.78	14.19	15.68	14.07	15.81	14.14	15.75	14.20	16.02	14.24	16.00	14.26	16.24	14.56	16.70	15.32	16.74	15.34	16.82	15.45	16.84	15.29
M. Grosso do Sul	18.75	13.63	19.10	13.69	19.16	14.04	19.44	14.16	19.34	14.30	19.62	14.50	19.91	14.80	20.17	14.96	20.43	15.22	20.65	15.47	20.64	15.46
Mato Grosso	19.15	13.51	19.68	13.80	20.19	14.00	20.49	14.32	20.60	14.40	20.76	14.52	21.10	14.88	21.47	15.15	21.68	15.39	21.40	15.22	21.32	15.21
Goiás	18.77	12.97	19.12	13.11	19.31	13.10	19.43	13.48	19.48	13.52	19.94	13.37	20.22	13.71	20.62	14.37	20.43	14.33	20.43	14.43	20.20	14.29
Brazil	17.88	13.01	18.28	13.18	18.52	13.32	18.66	13.54	18.77	13.58	19.03	13.75	19.38	14.08	19.72	14.43	19.83	14.48	19.72	14.42	19.68	14.31

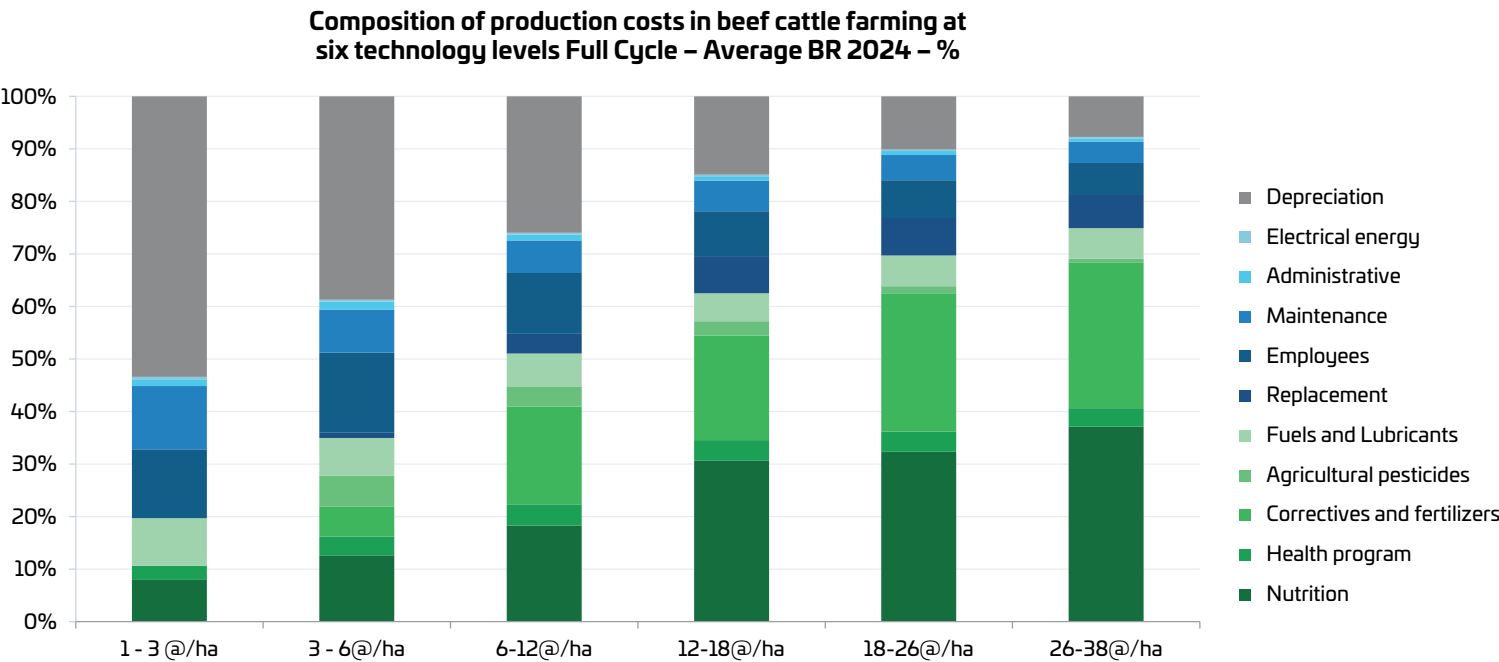
Source: Athenagro, IBGE data



Results
in full-cycle
livestock
farming
- 2024

Composition Intensive	Extractivist 1 - 3 @/ha	Low TCE 3 - 6 @/ha	Average TCE 6-12 @/ha	Suitable 12-18 @/ha	High TCE 18-26 @/ha	Results 26-38 @/ha
Nutrition	20.22	23.57	32.09	53.08	56.76	63.75
Health program	6.84	6.69	7.11	6.70	6.79	6.07
Correctives and fertilizers	0.00	10.69	32.68	34.46	46.18	47.56
Agricultural pesticides	0.00	11.05	6.74	4.73	2.35	1.40
Fuels and Lubricants	23.20	13.39	10.98	9.25	10.33	9.92
Reproduction	0.00	1.88	6.59	12.20	12.51	11.21
Employees	33.39	28.56	20.39	14.80	12.64	10.09
Maintenance	30.64	15.36	10.83	10.06	8.46	7.07
Administrative	3.34	2.86	2.04	1.48	1.26	1.01
Electric energy	1.16	0.67	0.55	0.46	0.52	0.50
Depreciations	136.10	72.44	45.63	25.82	17.79	13.27
Total operating costs	254.89	187.15	175.62	173.04	175.58	171.84

Source: Athenagro



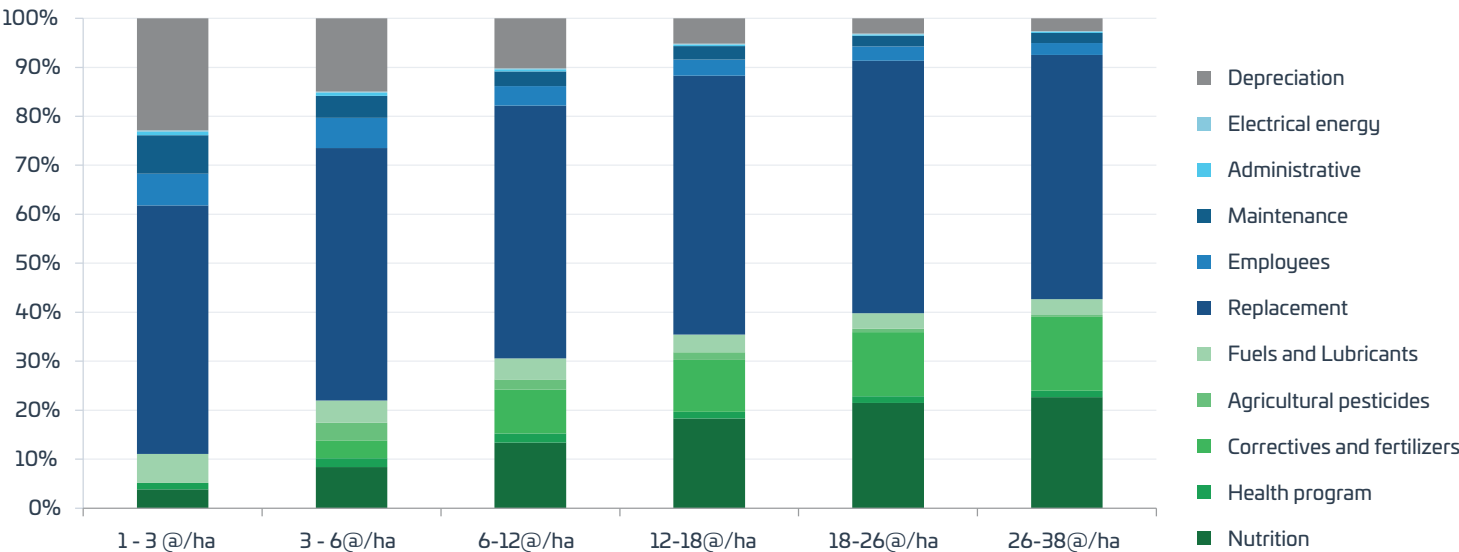
Source: Athenagro

Results in livestock breeding and fattening - 2024

Composition Intensive	Extractivist 1 - 3 @/ha	Low TCE 3 - 6@/ha	Average TCE 6-12@/ha	Suitable 12-18@/ha	Suitable 18-26@/ha	Results 26-38@/ha
Nutrition	8.27	17.13	26.74	34.98	40.68	42.92
Health program	2.80	3.62	3.71	2.69	2.57	2.50
Correctives and fertilizers	0.00	7.24	17.93	20.22	24.72	28.49
Agricultural pesticides	0.00	7.48	4.14	3.04	1.37	0.79
Fuels and Lubricants	12.76	9.29	8.58	6.81	5.96	6.06
Replacement	108.87	104.84	102.93	101.09	97.61	94.35
Employees	13.90	12.62	7.91	6.28	5.45	4.69
Maintenance	16.91	9.10	6.04	5.26	4.15	3.80
Administrative	1.39	1.26	0.79	0.63	0.54	0.47
Electric energy	0.64	0.46	0.43	0.34	0.30	0.30
Depreciations	49.15	30.44	20.38	9.90	5.91	4.92
Total operating costs	214.67	203.48	199.58	191.25	189.25	189.29

Source: Athenagro

Composition of production costs in beef cattle farming at six levels of technology: breeding and fattening – Average BR 2024 – %

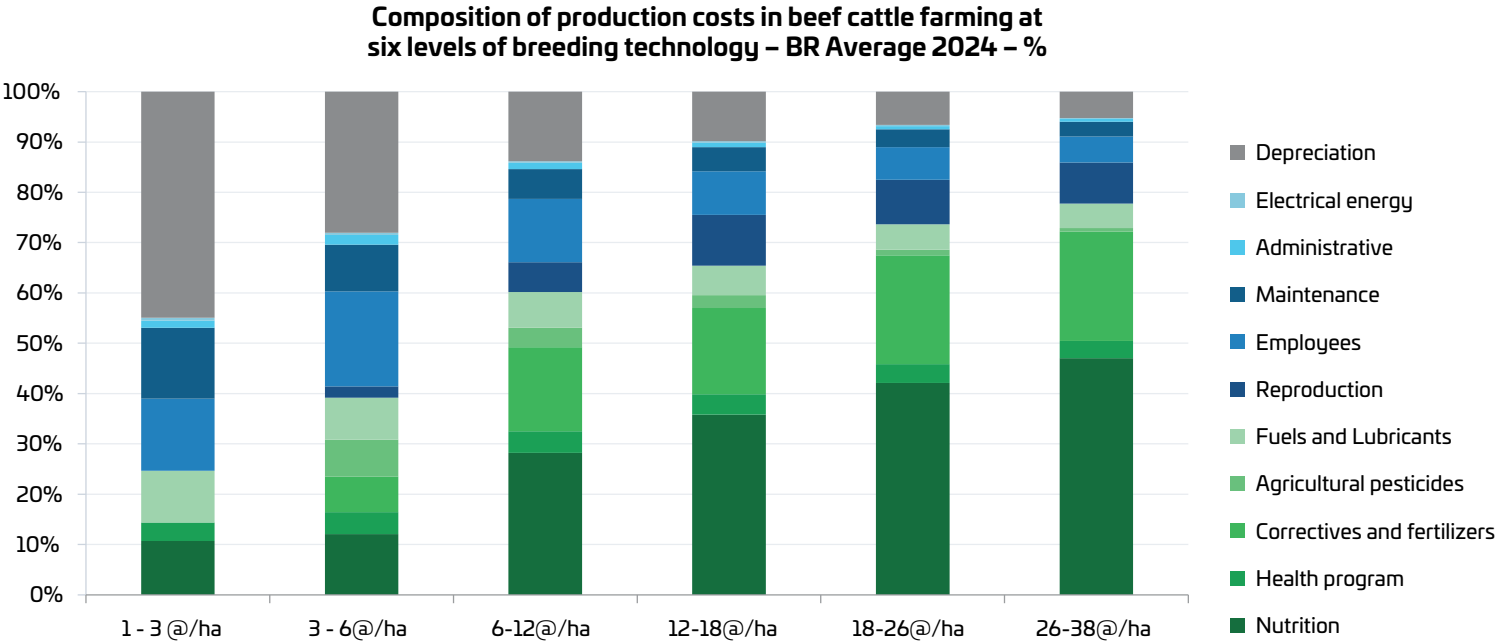


Source: Athenagro

Results in
livestock
farming –
2024

Composition Intensive	Extractivist 1 – 3 @/ha	Low TCE 3 – 6@/ha	Average TCE 6-12@/ha	Suitable 12-18@/ha	High TCE 18-26@/ha	Results 26-38@/ha
Nutrition	17.01	17.97	53.80	72.40	90.99	106.09
Health program	5.87	6.47	8.22	8.22	8.11	7.80
Correctives and fertilizers	0.00	10.52	31.93	34.64	46.73	49.03
Agricultural pesticides	0.00	10.87	7.37	5.21	2.39	1.49
Fuels and Lubricants	16.37	12.43	13.50	11.83	11.03	10.98
Reproduction	0.00	3.34	11.26	20.40	19.09	18.36
Employees	22.80	28.10	24.05	17.43	14.00	11.75
Maintenance	22.42	13.89	11.27	9.76	7.65	6.61
Administrative	2.28	2.81	2.41	1.74	1.40	1.18
Electric energy	0.82	0.62	0.67	0.59	0.55	0.55
Depreciations	71.48	41.76	26.34	19.96	14.22	11.74
Total operating costs	159.04	148.77	190.84	202.18	216.16	225.58

Source: Athenagro



Source: Athenagro





CHAPTER 5

QUANTIFICATION OF THE CHAIN

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In 2024, the **beef agro-industrial system** generated around **BRL 987.36 billion**, equivalent to **8.4% of Brazilian GDP**. In dollars, the value corresponds to approximately **USD 183 billion**.

Compared to 2023, there was a 5.5% increase in **total revenue**, driven mainly by the appreciation of beef and meat in the domestic and foreign markets.



Beef cattle agribusiness turnover in 2024 – BRL 987.36 billion

Inputs and services for livestock production BRL 154.90 billion	Total revenue in livestock farming BRL 207.57 billion	Industrial supplies and services BRL 54.27 billion	Slaughterhouse Revenue BRL 252.43 billion	Retail supplies and services BRL 21.769 billion	Total retail revenue BRL 294.21 billion
Nutrition BRL 24,274.1 million	Slaughtered cattle BRL 165,936.5 million	Packaging BRL 2,768.2 million	Meat domestic market BRL 151,611.9 million	Retail meat sales BRL 255,028.3 million	Retail meat sales BRL 255,028.3 million
Protocols, materials, and semen BRL 1,475.6 million		Electric Energy BRL 2,376.1 million	Meat exports BRL 66,622.4 million		
Animal health BRL 6,147.8 million		PPE BRL 114.2 million	Leather exports BRL 6,696.0 million		
Fuels, lubricants and electrical energy BRL 19,004.6 million	Replacement animals BRL 33,492.0 million	Operating inputs BRL 4,918.5 million	Leather in the domestic market BRL 1,193.9 million	Tallow in the domestic market BRL 3,012.5 million	Sales of other products BRL 39,180.599 million
Fertilizers, pesticides, and seeds BRL 27,667.4 million		Services provided BRL 1,419.6 million	Other Byproducts BRL 23,292.5 million		
Maintenance, services, parts, and expenses BRL 16,655.5 million		Live cattle transportation costs BRL 3,330.2 million			
Employees, payroll taxes, and management compensation BRL 24,609.0 million	Animals for improvement BRL 3,461.1 million	Meat transportation costs BRL 114.2 million			
Bulls BRL 3,905.6 million		Hired employees BRL 17,356.7 million			
Machinery, equipment, and animals for work BRL 5,311.9 million		Administrative, memberships, and marketing BRL 2,871.2 million			
Improvements and construction materials BRL 11,145.6 million		Other fixed costs BRL 19,000.9 million			
		Other livestock income BRL 67.1 million			

Source: Athenagro/ Data: Athenagro, Abiec, Secex, IBGE, Cepea, BNDES

New methodology: Prepared by Athenagro, based on the livestock universe and technical and market indicators

Data checking: carried out using information from Sindrachões, Conab, CNA, Sindan, Asbram, Asbia, BNDES, Balance Sheet of Slaughterhouses, Firjan, and Athenagro

Beef cattle agribusiness movement in 2024 – BRL 987.36 billion

Services for supply and farm support	BRL million	Industrial demands for inputs	BRL million	Retail services and costs	BRL million
Auctions and brokers	1,882.5	Advertising, marketing, and events	1,621.9	Employees and services	20,104.6
Transportation supplies	7,583.0	Private studies and research	81.1	Packaging and intra-retail transportation costs	826.0
Technical services	442.7	Support services	510.9	Services and supplies in butcher shops	838.5
Administrative and accounting services	119.7				
Live animal transportation costs between farms	653.0				
Cattle for slaughter on the property	4,018.3				
Estimation of social impacts related to the production chain *		BRL million		Valuation of herd stock BRL 2,691.95 million Calculated by the average stock in arrobas weighted by the price of each category	
Taxes and union dues **		151,174.3			
External wages created by income effect ***		42,837.9			

Source: Athenagro/ Data: Athenagro, Abiec, Secex, IBGE, Cepea, BNDES
New methodology: Prepared by Athenagro, based on the livestock universe and technical and market indicators
Data checking: carried out using information from Sindirações, Conab, CNA, Sindan, Asbram, Asbia, BNDES, Balance Sheet of Slaughterhouses, Firjan, and Athenagro

Other socio-economic impacts related to the production chain * Taxes and union dues **
External wages created by income effect ***
* item not added to the production chain movement / ** total is already included in prices and costs
*** Estimated by income effect; the total will comprise other production chains, proportionally

Beef agro-industrial system in 2024 – USD 183.20 billion

Inputs and services for livestock production USD 28.74 billion	Total revenue in livestock farming USD 38.51 billion		Industrial supplies and services USD 10.07 billion	Slaughterhouse Revenue USD 46.84 billion	Retail supplies and services USD 4.039 billion	Total retail revenue USD 54.59 billion
Nutrition USD 4,504.0 million		Slaughtered cattle USD 30,789.4 million Males USD 20,038.6 million Females USD 10,750.8 million	Packaging USD 513.6 million	Meat domestic market USD 28,131.5 million		Retail meat sales USD 47,320.4 million
Protocols, materials, and semen USD 273.8 million			Electric Energy USD 440.9 million	Meat exports USD 12,361.7 million		Sales of other products USD 7,269,938 million
Animal health USD 1,140.7 million			PPE USD 21.2 million	Leather exports USD 1,242.4 million		
Fuels, lubricants and electrical energy USD 3,526.3 million			Operating inputs USD 912.6 million	Leather in the domestic market USD 221.5 million		
Fertilizers, pesticides, and seeds USD 5,133.7 million	Replacement animals USD 6,214.4 million Males USD 4,873.9 million Females USD 1,340.5 million		Services provided USD 263.4 million	Tallow in the domestic market USD 559.0 million		
Maintenance, services, parts, and expenses USD 3,090.4 million			Live cattle transportation costs USD 617.9 million	Other Byproducts USD 4,321.9 million		
Employees, payroll taxes, and management compensation USD 4,566.2 million		Live cattle exports USD 851.1 million	Meat transportation costs USD 21.2 million			
Bulls USD 724.7 million	Animals for improvement USD 642.2 million		Hired employees USD 3,220.5 million			
Machinery, equipment, and animals for work USD 985.6 million		Semen exports USD 4.6 million	Administrative, memberships, and marketing USD 532.8 million			
Improvements and construction materials USD 2,068.1 million		Other livestock income USD 12.4 million	Other fixed costs USD 3,525.6 million			

Source: Athenagro/ Data: Athenagro, Abiec, Secex, IBGE, Cepea, BNDES
 New methodology: Prepared by Athenagro, based on the livestock universe and technical and market indicators
 Data checking: carried out using information from Sindrãoes, Conab, CNA, Sindan, Asbram, Asbia, BNDES, Balance Sheet of Slaughterhouses, Firjan, and Athenagro

Beef Agro-industrial System in 2024 – USD 183.20 billion

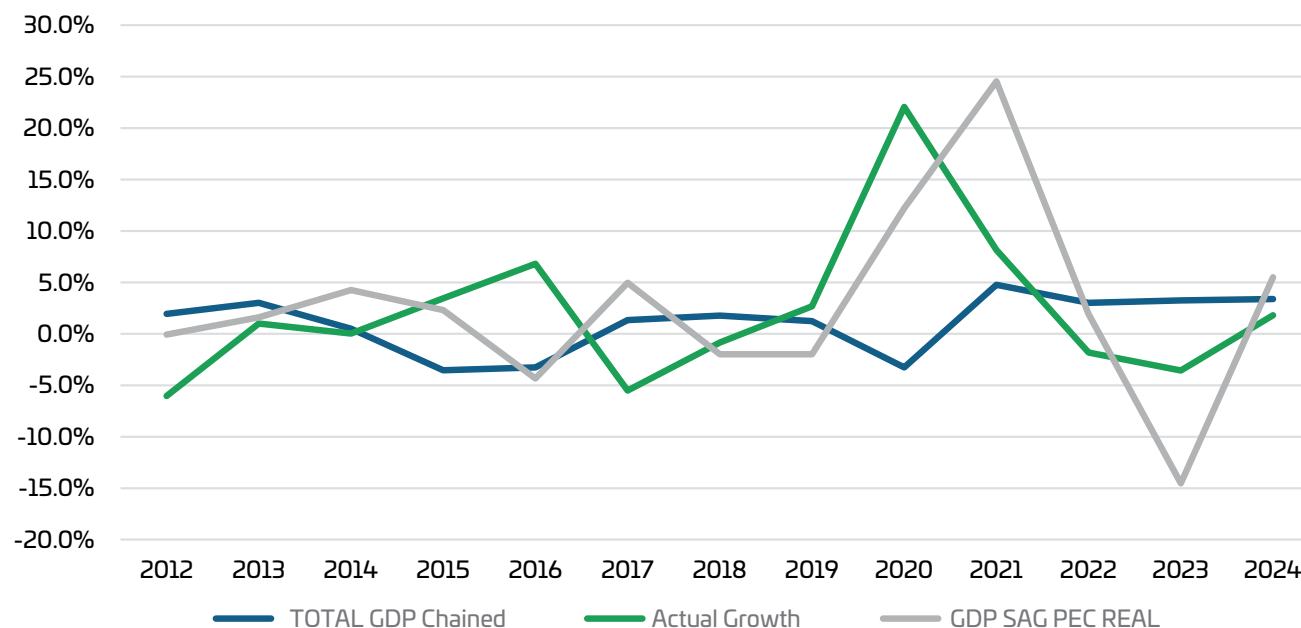
Services for supply and farm support	USD millions	Industrial demands for inputs	USD millions	Retail services and costs	US\$ milhões
Auctions and brokers	349.3	Advertising, marketing, and events	300.9	Employees and services	3,730.4
Transportation supplies	1,407.0	Private studies and research	15.0	Packaging and intra-retail transportation costs	153.3
Technical services	82.1	Support services	94.8	Services and supplies in butcher shops	155.6
Administrative and accounting services	22.2				
Live animal transportation costs between farms	121.2				
Cattle for slaughter on the property	745.6				
Estimation of social impacts related to the production chain *	USD millions				
Taxes and union dues **	28,050.3				
External wages created by income effect ***	7,948.6				
			Valuation of herd stock		USD 499.49 million Calculated by the average stock in arrobas weighted by the price of each category

Source: Athenagro/ Data: Athenagro, Abiec, Secex, IBGE, Cepea, BNDES
New methodology: Prepared by Athenagro, based on the livestock universe and technical and market indicators
Data checking: carried out using information from Sindirações, Conab, CNA, Sindan, Asbram, Asbia, BNDES, Balance Sheet of Slaughterhouses, Firjan, and Athenagro

Other socio-economic impacts related to the production chain * Taxes and union dues **
External wages created by income effect ***
* item not added to the production chain movement / ** total is already included in prices and costs
*** Estimated by income effect; the total will comprise other production chains, proportionally

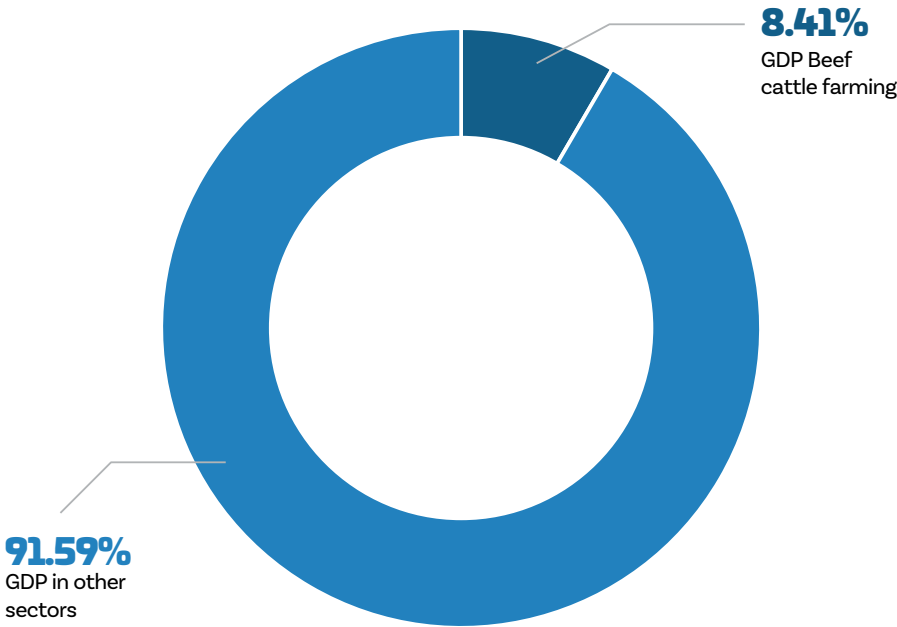
Total GDP, agribusiness GDP, and livestock GDP (current and real values based on 1996 and 2024) – BRL billions

Year	Total GDP (Real)	Agribusiness Total	GDP SAG PEC
2007	8,740.62	1,980.42	640.13
2008	9,185.88	2,073.26	743.96
2009	9,174.32	1,954.95	695.58
2010	9,864.99	2,116.11	718.41
2011	10,257.07	2,121.84	736.46
2012	10,454.12	1,993.61	735.90
2013	10,768.25	2,013.29	747.79
2014	10,822.52	2,013.92	779.59
2015	10,438.78	2,083.10	797.46
2016	10,096.81	2,224.67	762.96
2017	10,230.38	2,101.85	800.86
2018	10,412.85	2,083.68	784.94
2019	10,539.97	2,139.72	769.23
2020	10,194.60	2,611.58	863.01
2021	10,680.13	2,824.26	1,074.77
2022	11,002.32	2,772.56	1,095.15
2023	11,358.97	2,673.19	935.99
2024	11,744.71	2,721.55	987.36

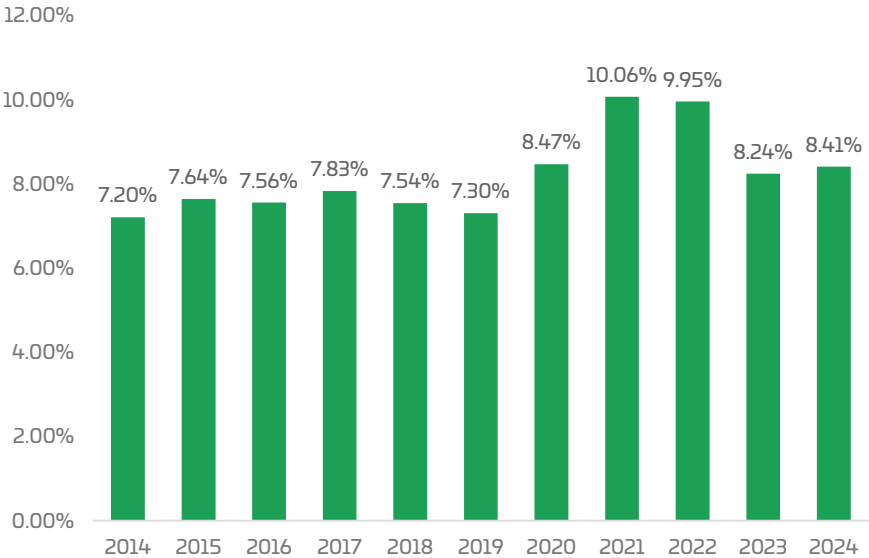


Source: Athenagro, CEPEA data, IBGE

Share of GDP of beef cattle farming in Brazil's total GDP



Evolution of the share of GDP of livestock farming cattle farming in Brazil's total GDP



Source: Athenagro/ Data: Athenagro, IBGE







CHAPTER 6

RETROSPECTIVE AND PROJECTIONS OF LIVESTOCK



Between 2004 and 2024, Brazilian cattle farming advanced in productivity, efficiency, and sustainability. Beef production grew by more than 25%, accompanied by a reduction in pasture area of more than 11%, highlighting the process of intensification and adoption of technologies in the field.

In 2024, the country produced **11.8 million tons of carcass equivalent (TCE)**, the highest volume ever recorded, with emphasis on the advancement of intensive finishing systems. Confinement reached a record, with **8.8 million heads**, representing around 19% of the total slaughtered, and the national average productivity reached almost **5 arrobas per hectare/year**.

The evolution is also reflected in exports. In the last five years, the volume shipped has grown by more than 50%, reaching **2.89 million tons in 2024**. Brazil maintained its global leadership in exports and consolidated its presence in 157 countries, with record revenues of **USD 12.8 billion**.

For the coming years, projections are for sustained growth. Estimates indicate that production could reach more than **13 million tons of TCE by 2034**, maintaining the stability of the pasture area and further increasing productivity. Brazilian livestock farming will continue to be driven by public policies, advances in management, genetics, and health.

The consolidation of traceability, associated with the status of a country **free from foot-and-mouth disease without vaccination**, tends to expand access to premium markets and strengthen the image of Brazilian products abroad. Based on these foundations, Brazilian livestock farming is on its way to consolidating itself as the most efficient and sustainable on the planet.





Historical information and projections on livestock farming up to 2034

Variable	Unit	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Total Herd	1,000 heads	174,774	177,418	176,148	170,013	172,568	175,569	179,802	183,077	181,540	175,810	170,079	172,933	175,904
Formal meat production beef (inspected)	1,000 TCE	5,906	6,346	6,887	7,049	6,621	6,662	6,977	6,784	7,351	8,167	8,063	7,493	7,359
Total beef production (formal + informal + consumption on farms)	1,000 TCE	7,802	8,275	8,816	8,838	8,401	8,302	8,547	8,368	8,897	9,646	9,516	8,773	8,798
Exports	1,000 TCE	1,699	1,944	2,186	2,302	1,978	1,764	1,696	1,492	1,679	2,003	2,042	1,828	1,825
Imports	1,000 TCE	56	54	28	32	32	41	41	45	6	57	77	59	64
Domestic Consumption	1,000 TCE	6,159	6,385	6,659	6,568	6,454	6,580	6,892	6,920	7,279	7,700	7,551	7,004	7,037
Exports on the total production	Percentage	22%	29%	25%	26%	24%	21%	20%	18%	19%	21%	21%	21%	21%
Availability per capita	kg carcass/inhab/year	34	34	36	35	34	34	35	35	37	39	38	35	35
Estimated consumption of beef	kg of meat/inhab/year	27	28	29	28	27	27	28	28	30	31	30	28	28
Formal slaughter of cattle (supervised)	1,000 heads	25,937	28,030	30,374	30,713	28,700	28,063	29,278	28,824	31,119	34,412	33,908	30,652	29,702
Total slaughter of cattle (formal + informal + consumption on farms)	1,000 heads	32,819	34,912	37,256	37,595	35,582	34,945	36,160	35,706	38,001	41,294	40,790	37,534	36,584
Pasture Area	1,000 heads	180,967	180,541	179,922	178,318	178,773	177,801	176,043	176,220	175,215	174,491	172,599	172,800	172,177
Occupancy rate	heads/ha	0.97	0.98	0.98	0.95	0.97	0.99	1.02	1.04	1.04	1.01	0.99	1.00	1.02
Capacity rate	animal units/ha	0.80	0.81	0.80	0.78	0.78	0.78	0.81	0.82	0.82	0.79	0.77	0.79	0.81
Average carcass weight	kg/head slaughtered	237.72	237.03	236.65	235.08	236.09	237.58	236.36	234.35	234.14	233.58	233.28	233.73	240.50
Culling rate (kill rate)	Percentage	19%	20%	21%	22%	21%	20%	20%	20%	21%	23%	24%	22%	21%

Source: Athenagro. IBGE data. Secex. INPE. Lapia. Embrapa Territorial. Livestock Rallu

2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
172,719	171,529	172,416	175,622	182,407	192,665	196,451	193,925	192,542	196,071	198,971	196,500	198,023	200,772	199,955	203,853	203,031	201,223
7,682	7,990	8,219	7,825	7,456	8,012	8,962	10,238	10,213	10,427	10,696	10,881	11,084	11,490	11,765	12,017	12,472	12,709
9,876	9,881	9,526	9,285	10,016	10,556	10,691	11,812	11,489	11,775	11,900	12,487	12,592	12,882	13,494	13,128	14,051	14,602
1,968	2,194	2,483	2,691	2,478	3,018	3,030	3,779	4,051	4,193	4,340	4,491	4,649	4,811	4,980	5,154	5,334	5,521
57	47	50	63	71	81	62	59	58	58	57	57	57	56	56	55	55	55
7,966	7,734	7,093	6,657	7,609	7,619	7,724	8,091	7,496	7,640	7,617	8,053	8,000	8,127	8,570	8,029	8,771	9,135
20%	22%	26%	29%	25%	29%	28%	32%	35%	36%	36%	36%	37%	37%	37%	39%	38%	38%
39	37	34	32	36	36	36	38	35	35	35	37	36	36	38	35	38	40
31	30	27	26	29	29	29	30	28	28	28	29	29	29	31	29	31	32
30,867	32,043	32,446	29,887	27,705	29,948	34,102	39,275	38,646	38,850	39,306	39,442	39,632	40,506	40,901	41,200	42,165	42,377
40,507	40,257	38,557	37,236	39,377	41,203	41,959	45,937	44,448	44,792	44,699	46,355	45,997	46,481	48,181	45,822	48,476	49,805
170,843	169,690	168,053	165,532	163,356	162,126	160,608	160,536	159,730	158,655	157,659	156,856	156,065	155,150	154,227	153,601	152,665	151,698
1.01	1.01	1.03	1.06	1.12	1.19	1.22	1.21	1.21	1.24	1.26	1.25	1.27	1.29	1.30	1.33	1.33	1.33
0.80	0.80	0.80	0.82	0.87	0.92	0.94	0.93	0.93	0.95	0.97	0.97	0.98	1.00	1.00	1.02	1.03	1.03
243.82	245.45	247.07	249.35	254.36	256.20	254.80	257.13	258.47	262.89	266.21	269.39	273.75	277.15	280.07	286.49	289.85	293.18
23%	23%	22%	21%	22%	21%	21%	24%	23%	23%	22%	24%	23%	23%	24%	22%	24%	25%





CHAPTER 7

HEALTH

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Health has always been the greatest pillar of the competitiveness of Brazilian beef, since its participation as a founding member country of the OIE, Brazil has strived to improve its animal health controls and programs. In a country with a herd of approximately 200 million cattle, Brazil maintains an exemplary health record, following the strictest control of all diseases subject to mandatory notification. The national agricultural defense system has advanced in terms of structuring and surveillance, preparing the country for yet another status of international recognition.

In 2025, Brazil will officially receive recognition from the World Organization for Animal Health (WOAH) as being free from foot-and-mouth disease without vaccination. This recognition crowns the joint effort of producers, industries, state, and federal governments, and represents an advance on the health frontier.

Slaughter under the Federal Inspection Service (SIF) represented 64% of national production in 2024, reflecting the high degree of inspection and compliance with international standards, ensuring the standardization of production processes and food safety throughout the national territory.

In 2024, the national program for the individual identification of cattle and buffaloes was also launched, moving from a model for controlling the movement of herds to an individualized control system being implemented at the national level.

The combination of active surveillance, modern protocols, control of animal movement and adoption of good practices guarantees Brazilian beef one of the best health profiles in the world. This differential will continue to be strategic to consolidate Brazil as a world leader in the supply of safe, traceable, and sustainable food.



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CHAPTER 8

CLARIFICATIONS

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Sustainability

Meat sector reinforces commitment to sustainability and announces special edition of Beef Report for COP30

The beef agro-industrial system in Brazil plays a central role in the country's sustainable development. Abiec, as a representative of the industrial segment in the chain, has been a protagonist in all discussions involving climate and sustainability in livestock farming and the meat industry.

We see the market as a major driver promoting the efficiency of production systems and consequently reducing environmental impact. Brazil has developed low-carbon models for tropical agricultural production, and the productivity of our livestock has been growing over the last decade. Since 2009, the meat industry has also made progress in improving socio-environmental controls and supply chain traceability, in constant dialogue with civil society. The outcomes of this collaboration generated protocols for monitoring suppliers and multi-sector dialogue platforms, in addition to various actions in the field by slaughterhouses, producers, non-governmental organizations, and other links in the chain.





The sector recognizes the complexity of the livestock chain in Brazil, with a strong presence of small and medium-sized producers and structural challenges, many of which require efficient public policies around controlling illegality, land management, and the management, integration, and transparency of public data. The resumption of Deforestation Prevention and Control Plans in the Amazon, Cerrado, and other biomes, and recent signals from the Ministry of Agriculture, through the announcement of the National Plan for Individual Identification of Cattle and the Agro Brasil+ Sustainable Platform, both with the support and participation of the industry, bring positive perspectives. Subnational initiatives, such as the Livestock Chain Integrity Program in Pará, also bring positive advances.

It is only through joint public and private efforts that we will overcome the challenges for the necessary transition in production.

Considering the need for food security at a global level, we continue to believe that Brazil is very well positioned to continue guaranteeing a supply of protein for the global market while at the same time reducing its impact on climate and biodiversity.

As part of this vision, Abiec will launch a special edition of the sustainability chapter, focusing on COP30, with the aim of presenting the sector's advances and actively contributing to the global debate on responsible production and environmental preservation.

Abiec remains firm in its purpose of collaborating with real and effective solutions for the socio-environmental challenges of Brazilian livestock farming.

Note 1

About using Beef Report

An annual publication by **ABIEC**, with support from **ApexBrasil**, the Beef Report seeks to consolidate and update the main statistics of the Brazilian livestock chain. Preparing diagnoses in the sector is a constant challenge, given **the territorial and productive complexity of Brazil**, with more than 2 million properties with herds distributed across all biomes.

Most producers own areas of up to **100 hectares**, which represents almost **60 million heads**. Furthermore, methodological issues such as the use of INCRA's **IN No. 11/2003**, which considers the age of animals in the productivity estimate, affect the accuracy of the data.

The **constant revisions in official statistics**, associated with the delay in the publication of surveys such as the **IBGE PPM**, require the adoption of complementary methodologies. For this reason, ABIEC, with technical support from **Athenagro**, began using alternative **methods to estimate the herd and pasture area**, also updating data from previous editions. The recommendation is to always compare data from the same edition.





Note 2

Revisions to herd numbers

As of 2021, the inconsistency of official data on herd size became evident, with estimates ranging from 175 to 238 million head. Athenagro started using two methodologies:

- **The main methodology, based on the 2017 Census and annual municipal variations of the PPM-IBGE, points to a herd of 193.9 million head in 2024.**
- **The second methodology, discontinued in 2023, included part of the slaughtered animals, but generated distortions by state.**

Since 2024, the first methodology was officially adopted, also accepted by the USDA after technical meetings with ABIEC and Athenagro.

Note 3

Changes in pasture data

The pasture area is estimated based on the **Lapig** database, adjusted with deforestation data (Prodes/INPE), agricultural expansion (Conab, Agroconsult), and analyses from the **Livestock Rally**. Data were backdated to the 1980 and 1990 censuses for greater consistency, identifying areas undergoing regeneration or with severe degradation.





Note 4

Export data (TCE)

The Ton of Carcass Equivalent (TCE) indicator standardizes the different types of exported products:

- 1 kg = 1 kg of fresh meat with bone
- 1 kg of boneless meat = 1.3 kg carcass equivalent
- 1 kg of processed meat = 2.5 kg carcass equivalent

Conversion is essential for global comparative analysis and for estimating actual production equivalent to shipments.



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