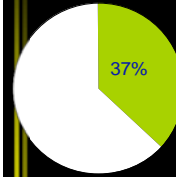


BRAZIL: AGRICULTURE AND COTTON INDUSTRY OVERVIEW



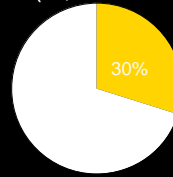
The importance of agribusiness in Brazil

Employment - 2004



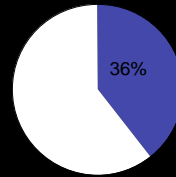
17.7 million of people

GDP - 2004
(US\$ 604 billion)



US\$ 182 billion

Exports - 2005

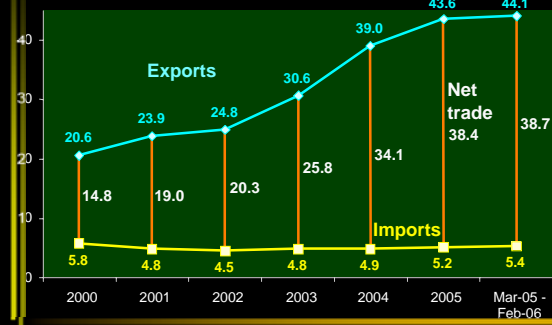


US\$ 43.6 billion

Agribusiness = inputs + farming + processing + distribution

Sources: MDIC, IBGE, CNA and IPEA

Brazilian agribusiness balance of trade (US\$ billion)



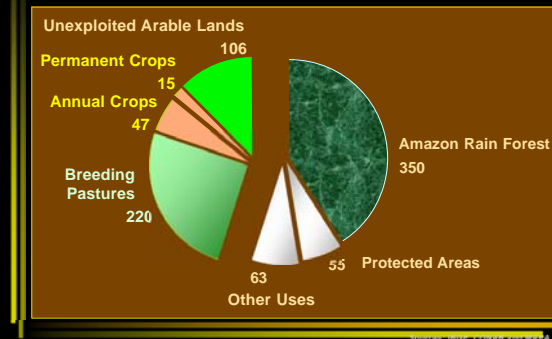
Source: Secex/MDIC. Elaboration: SPC/MDA

Brazil world agricultural ranking

Product	Production	Export
Sugar	1 st	1 st
Orange Juice	1 st	1 st
Coffee	1 st	1 st
Soybeans	2 nd	1 st
Beef	2 ⁿ	1 st
Broiler	2 nd	1 st
Corn	3 rd	4 th
Cotton	6 rd	4 th

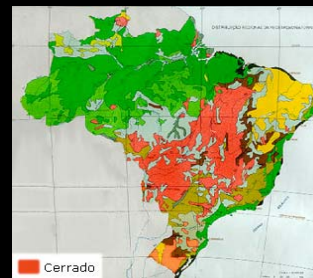
Source: MAPA

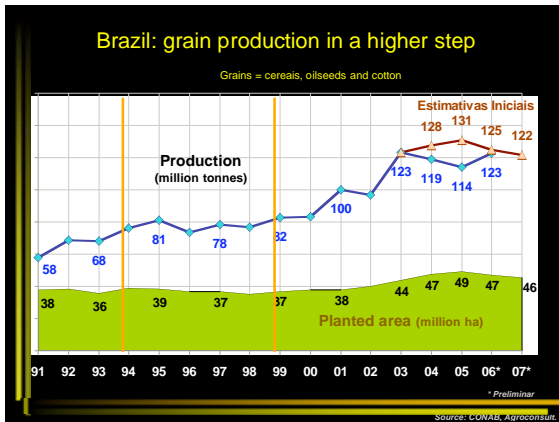
Current Uses of the Brazilian Territory (million ha)



Source: IBGE, CONTA TERRA

The Cerrado Region (High Savannahs) of Brazil





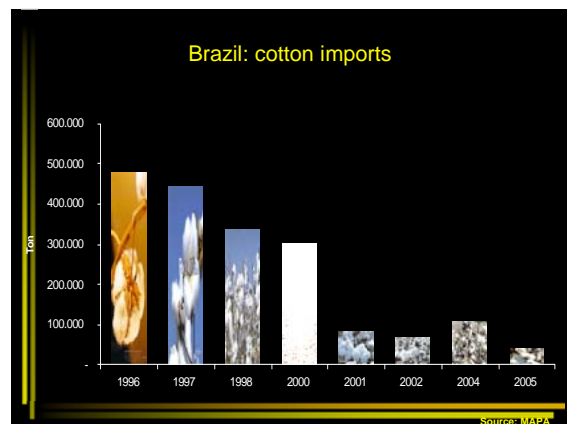
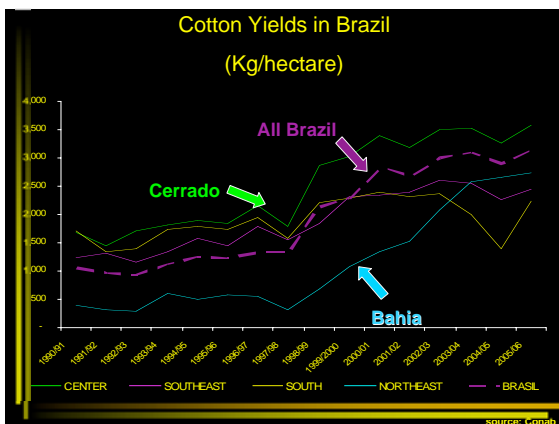
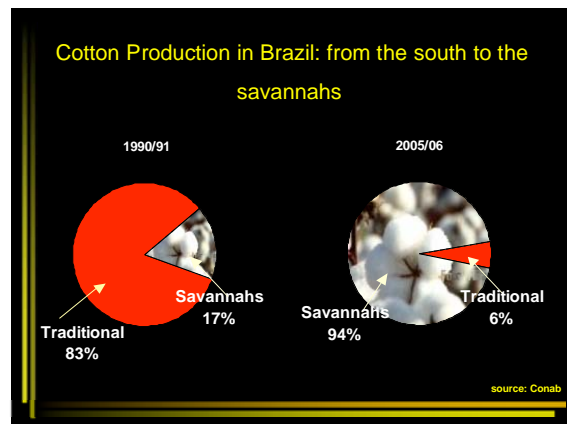
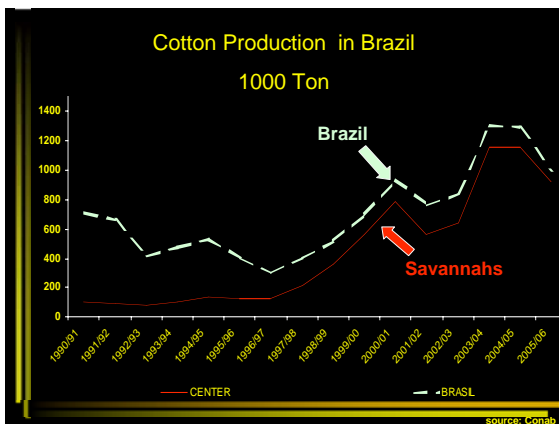
Brazilian grain production by crop

(Million tonnes)

Product	2004-05	2005-06	2006-07*
Cotton (core)	2,1	1,6	1,9
Rice	13,2	11,5	11,2
Bean	3,0	3,1	4,0
Corn (total)	35,1	40,9	40,7
Corn (1 st crop)	27,3	31,9	8,9
Soybeans	51,5	57,2	54,7
Wheat	5,8	4,9	5,1
Other	3,1	3,4	4,0
Total	113,9	122,6	121,6

Forecast (Agroconsult)

Sources: Conab and Agroconsult

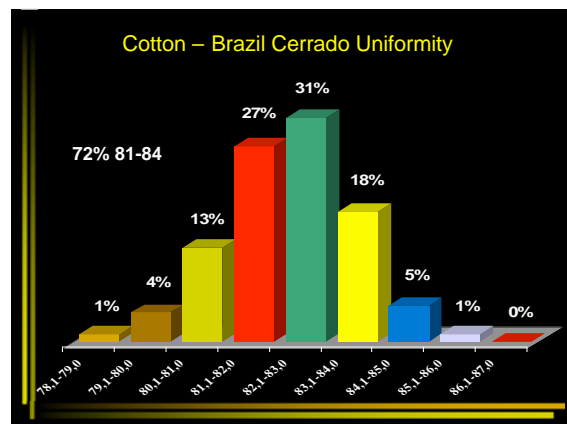
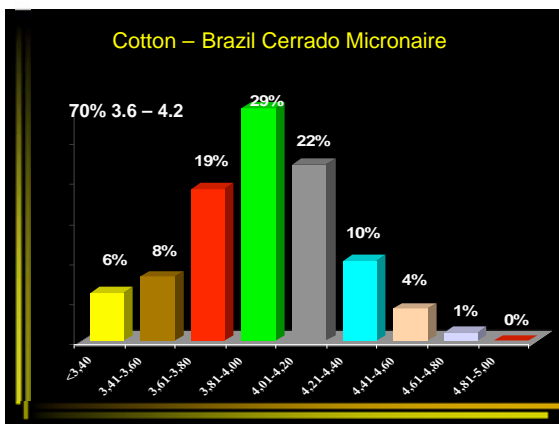
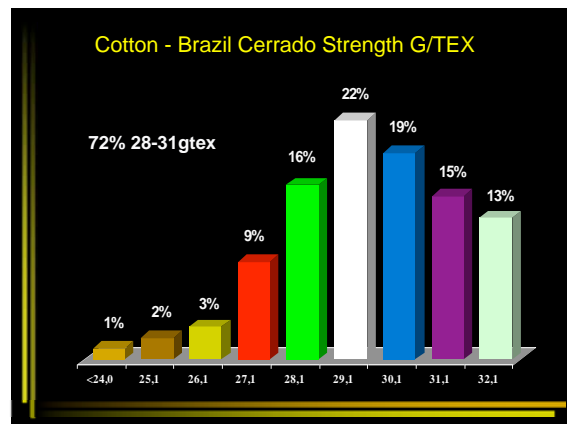
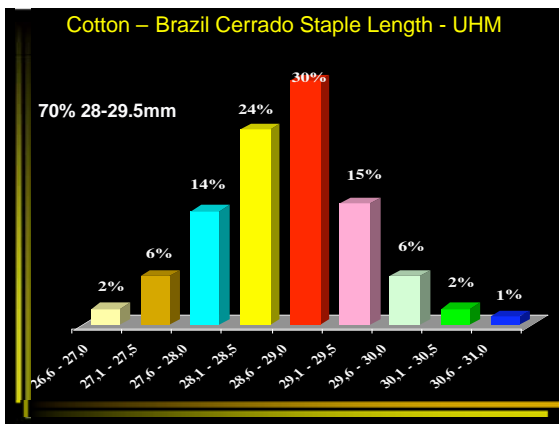




Brazil: Cotton Supply/Demand

CROESTOQUE YEARINICIAL	PRODUÇÃO	IMPORT	CONSUMPTION	EXPORT	ENDING STOCK
2002/03	847,5	118,9	800,0	175,4	86,2
2003/04	1.309,4	105,2	900,0	331,0	269,8
2004/05	1.286,7	60,0	900,0	390,0	296,5
2005/06	1.002,5	196,0	900,0	385,0	188,6

Source: CONAB





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Elaboração:
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