

Food and Agribusiness Concepts and Chain Methods

(Slides das Aulas 1, 2, 3 e 4)

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Business School - University of São Paulo (USP) at Ribeirão Preto, since 1995

Business School – Fundação Getulio Vargas (FGV) at São Paulo, since 2018

Center for Agricultural Business - Purdue University (Indiana/USA), since 2013

School of Agronomy (PAA) – University of de Buenos Aires (Argentina), since 2006

University of Pretoria (South Africa), since 2019

Founder of Markestrat Projects Organization (www.markestrat.com.br) in 2004

Specialist in Agribusiness Strategic Planning

www.doutoragro.com



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Por Marcos Fava Neves



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Agenda

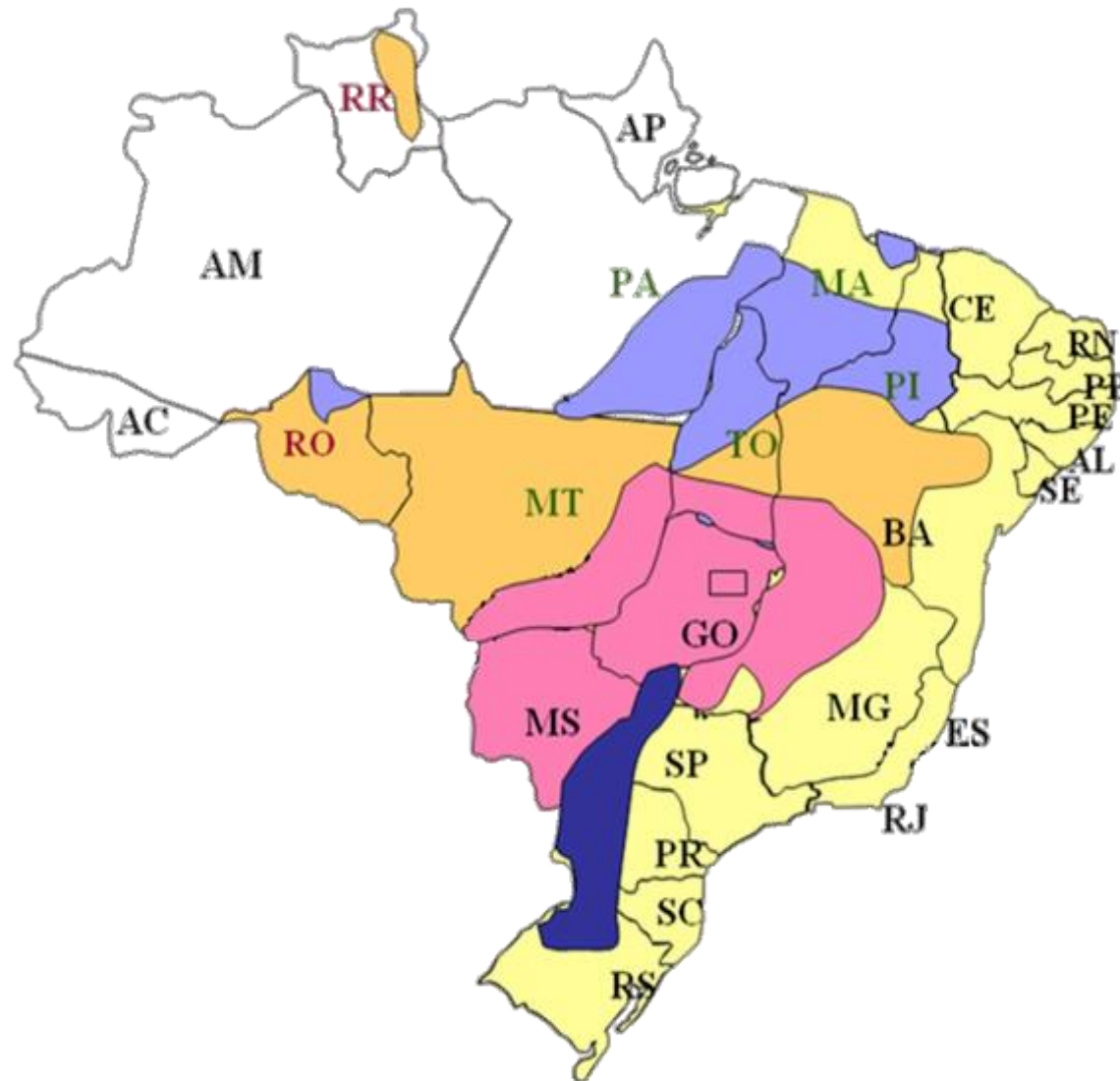
- 1 - Setting the Stage: The Importance of Food & Agribusiness to Brazil
- 2 - The Major Concepts of Food, Agribusiness, Chains, Systems...
- 3 - How to Describe and Understand a Food & Biofuel Chain (*Quantification Method*)
- 4 - How to do a Strategic Plan for a Food & Biofuel Chain (*ChainPlan Method*)
- 5 - Cases of Chain Projects (Collective Actions) for Value Creation



The Past of Brazilian Food, Agribusiness and Biofuels Production



Evolution of Food Production and Agricultural Development in Brazil

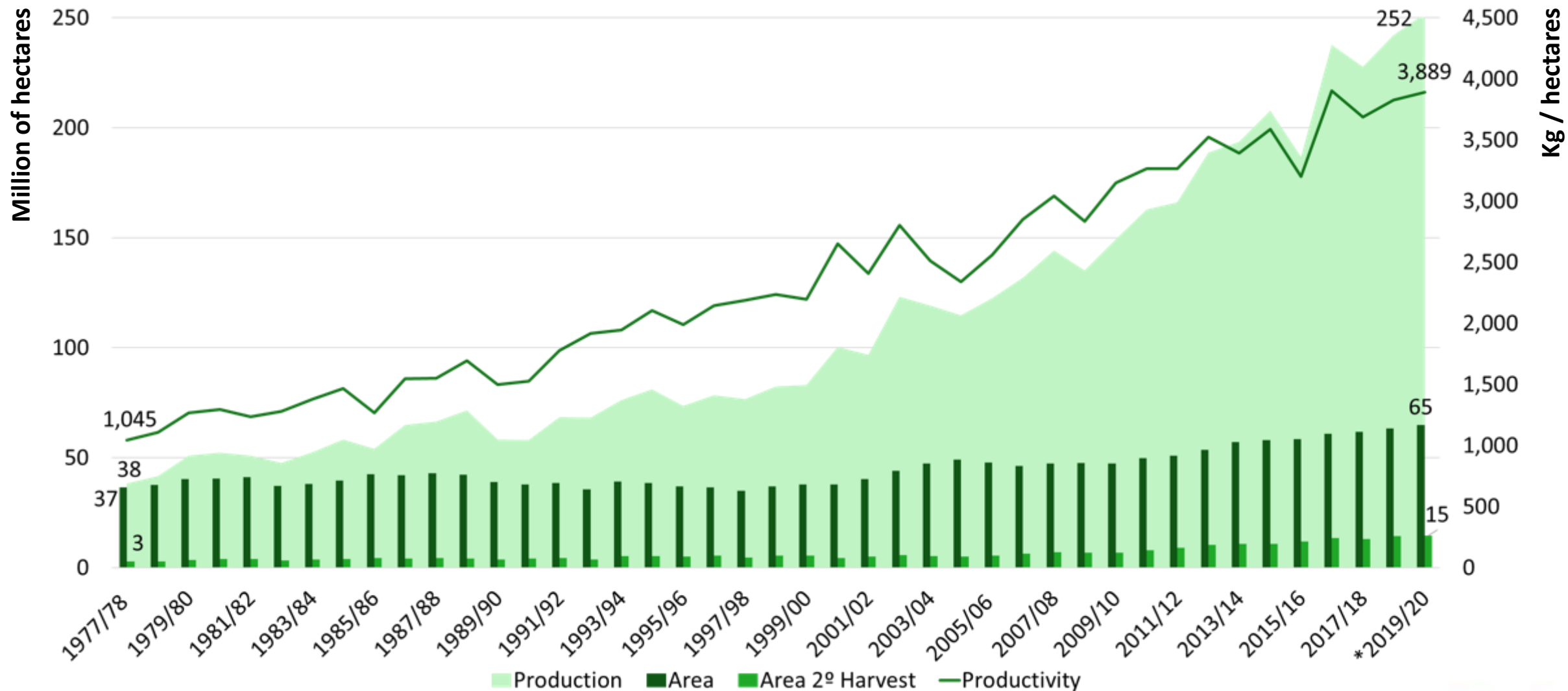


Which Export Products? To Which Countries (USD million)?

º	PRODUCTS	1999	2009	2019
1º	SOY COMPLEX	3,757	17,236	32,635
2º	MEATS (BEEF, POULTRY, PORK)	1,938	11,765	16,523
3º	FORESTRY – PAPER/PULP	3,852	7,222	12,899
4º	CEREALS (MOSTLY CORN)	65	1,818	8,127
5º	SUGAR CANE COMPLEX	1,982	9,727	6,256
6º	COFFEE	2,458	4,278	5,131
7º	TEXTILES AND FIBERS	672	1,260	3,044
8º	TABACCO	961	3,046	2,139
9º	JUICES	1,289	1,752	2,110
10º	LEATHER AND ITS PRODUCTS	1,780	2,040	1,552
	TOTAL	20,470	64,741	96,788

º	PAÍSES	1999	2009	2019
1º	CHINA	320	8,914	31,014
2º	EUROPEAN UNION	8,412	19,128	16,740
3º	UNITED STATES	3,498	4,555	7,183
4º	JAPAN	1,017	1,789	3,344
5º	IRAN	464	1,112	2,209
6º	HONG KONG	313	1,707	2,101
7º	SOUTH KOREA	230	1,305	2,031
8º	VIETNAM	12	272	1,805
9º	SAUDI ARABIA	307	1,503	1,778
10º	EGYPT	192	789	1,457
11º	THAILAND	77	810	1,370
12º	ARABE EMITES	110	1,143	1,315
13º	TURKEY	42	254	1,309
14º	MEXICO	97	277	1,288
15º	RUSSIA	719	2,783	1,266

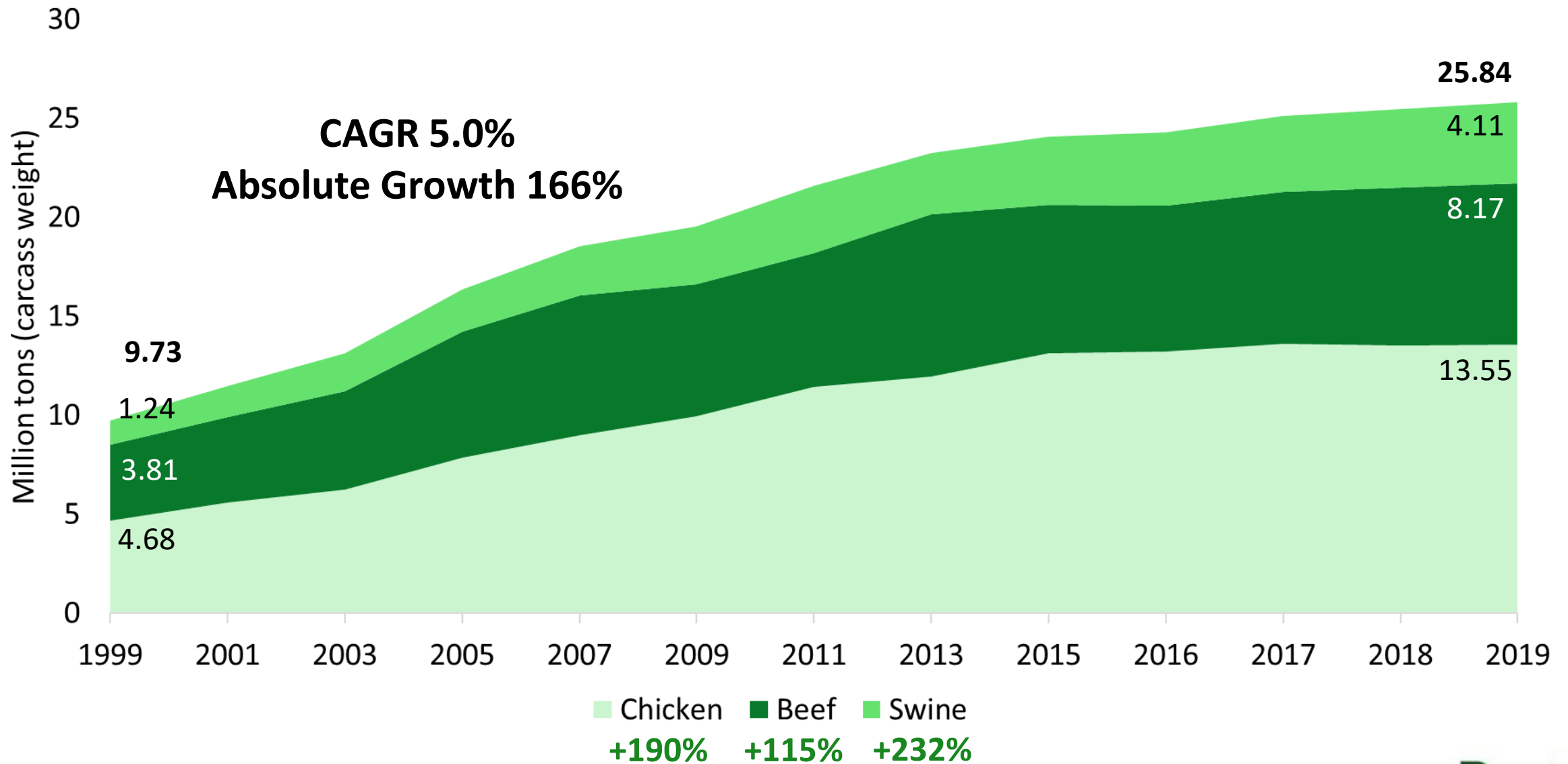
Evolution of Grains Planted Area, Production and Productivity



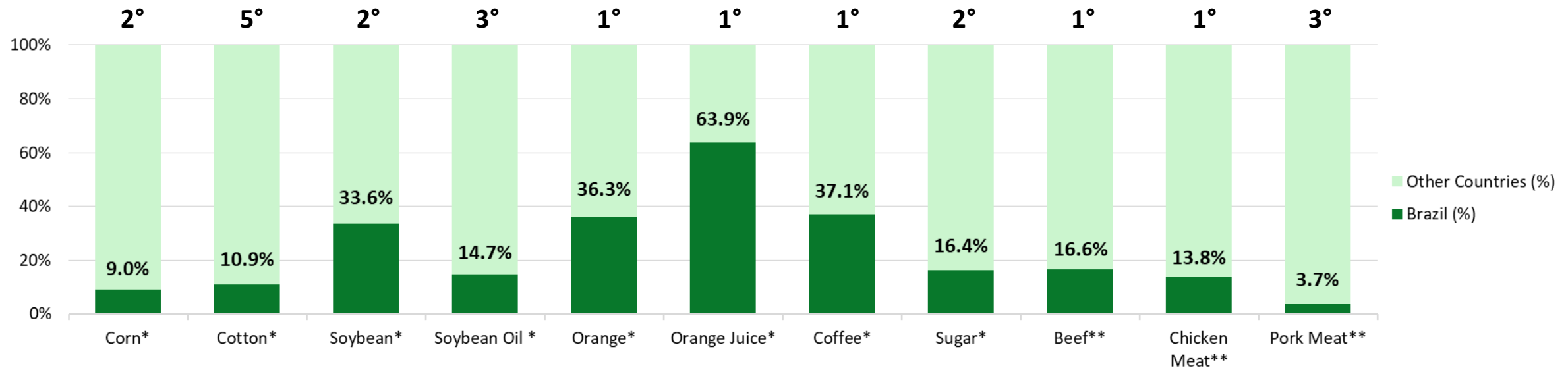
+560% **+77%** **+402%** **+272%**

Source: Elaborated by Prof. Marcos Fava Neves based on Conab. *March 2020

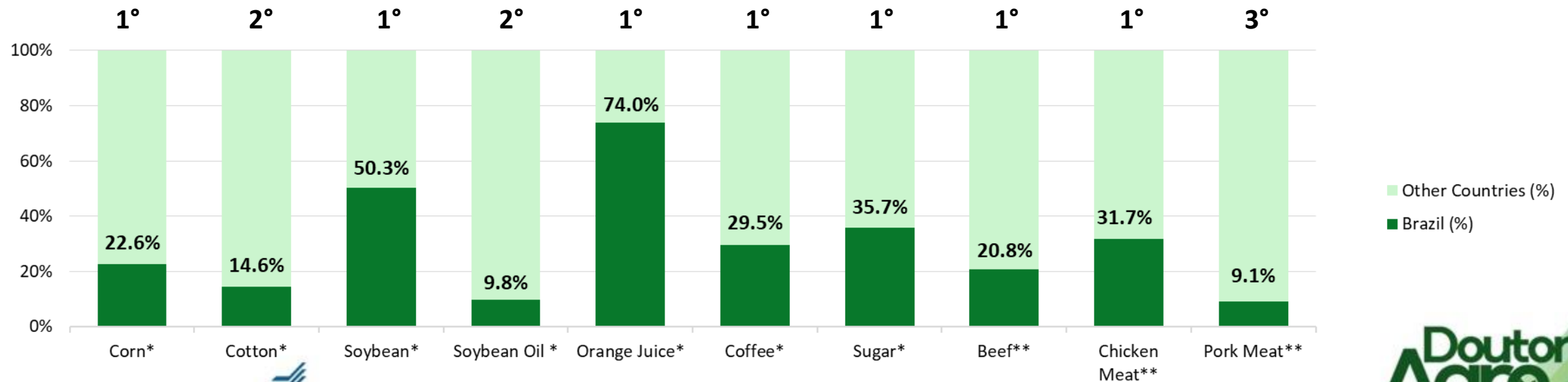
Evolution of Brazilian Meat Production



Brazilian Share of Global Production in 2018/19 Season



Brazilian Share of Global Exports in 2018/19 Season



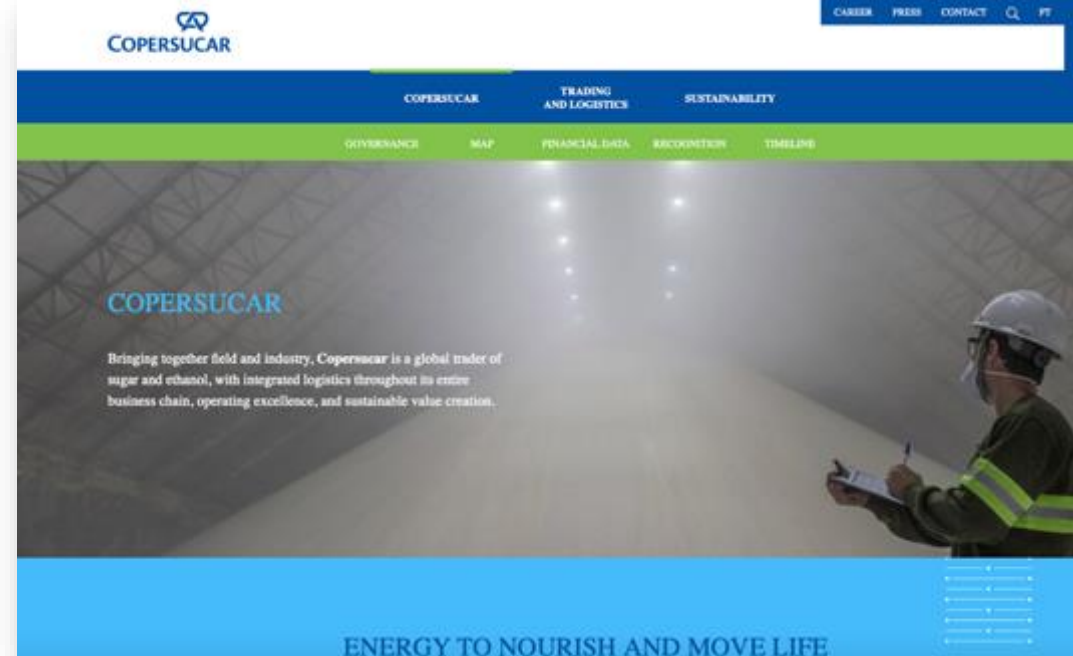
Source: Elaborated by the author based on USDA

**Do we have Brazilian food
and agribusiness
companies as leaders?**





JBS, a company with over 60 years' experience, is a global food industry leader with over 230 thousand employees worldwide. JBS operates production platforms and commercial offices in 16 countries and has a diverse product portfolio that includes dozens of instantly recognizable global brands. The company is also active in other sectors related to its core business, such as leather, biodiesel, collagen, soaps, glycerin and natural casings and owns waste management, metal packaging and shipping businesses that support its global operations. The company's diverse portfolio includes brands such as Swift, Swift, Friboi, Doriana, May Park, Pilgrim's, Primo, Gold Kist, Piarce and 1855, among others. This range of products and its global footprint means JBS is able to serve over 275 thousand customers in more than 190 countries. JBS went public in 2007 and its stock is traded on the BVMF/Bovespa's New Market, which offers the highest level of corporate governance on Brazil's capital market. In 2016, the company recorded BRL 170.3 billion in net revenues.



Institucional

Dentro do nosso processo produtivo, na busca pela excelência, procuramos sempre produzir com Qualidade, Produtividade e Eficiência, preservando o Meio Ambiente e atuando de forma Sustentável.

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25/06/2019 - 1.0055 US\$/PS
Média Safra - 1.3099 US\$/PS

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Les données du « Monde »

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Economie française

Entreprises

Emploi

ÉDITION
ABONNÉS

Le secteur agricole, nouveau moteur de l'économie brésilienne

Le pouvoir veut favoriser la filière, quitte à reléguer au second plan les questions environnementales et le droit du travail.

LE MONDE ÉCONOMIE | 20.10.2017 à 11h30 |

Par Claire Gatténois (Sao Paulo, correspondante)

« Nous avons eu une récolte parfaite », commente Marcos Fava Neves, ingénieur agronome et professeur à l'université de Sao Paulo (USP). Mais les températures et les pluies idéales n'expliquent pas tout. « Le secteur, ultra-compétitif, utilise les technologies de pointe, exporte vers la Chine et l'Afrique ; il est riche en emplois et permet de développer les villes de l'intérieur du pays », précise-t-il.

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IN DEPTH | PLOWED UNDER

U.S. Farmers, Who Once Fed the World, Are Overtaken by New Powers

Bumper soybean and wheat harvests in Brazil and Russia push down global prices, imperiling America's growers; 'hard for our psyche'

By Jesse Newman and Jacob Bunge

April 20, 2017 11:02 a.m. ET

GREENVILLE, Ill.—On a pancake-flat stretch of land not far from the Mississippi River, Illinois farmer Jerry Gaffner thumbs through weather forecasts and crop reports on his tablet computer, searching for clues about when to market his soybean crop.



3 Ladrões da Sua Energia

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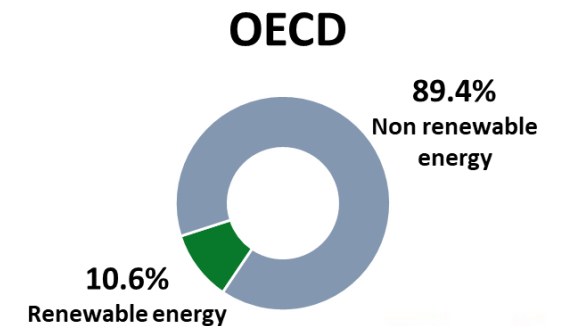
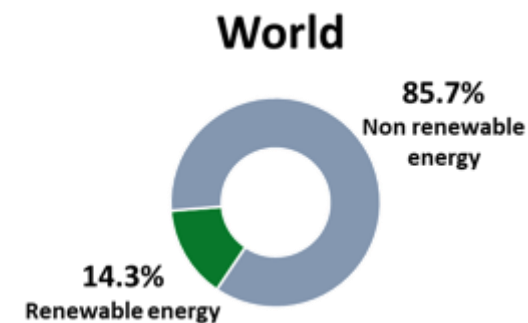
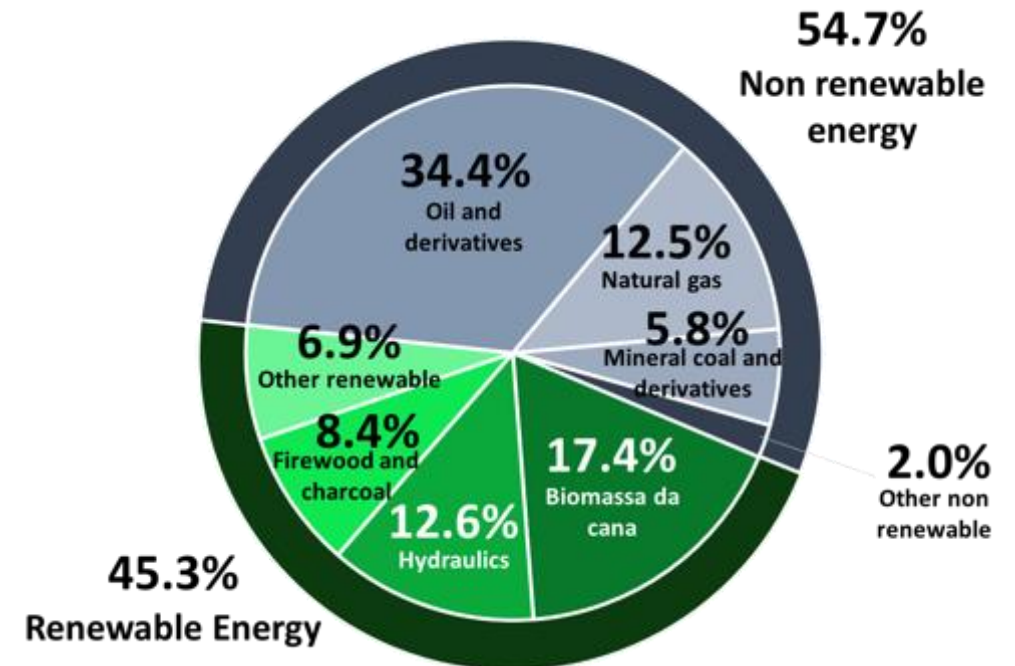
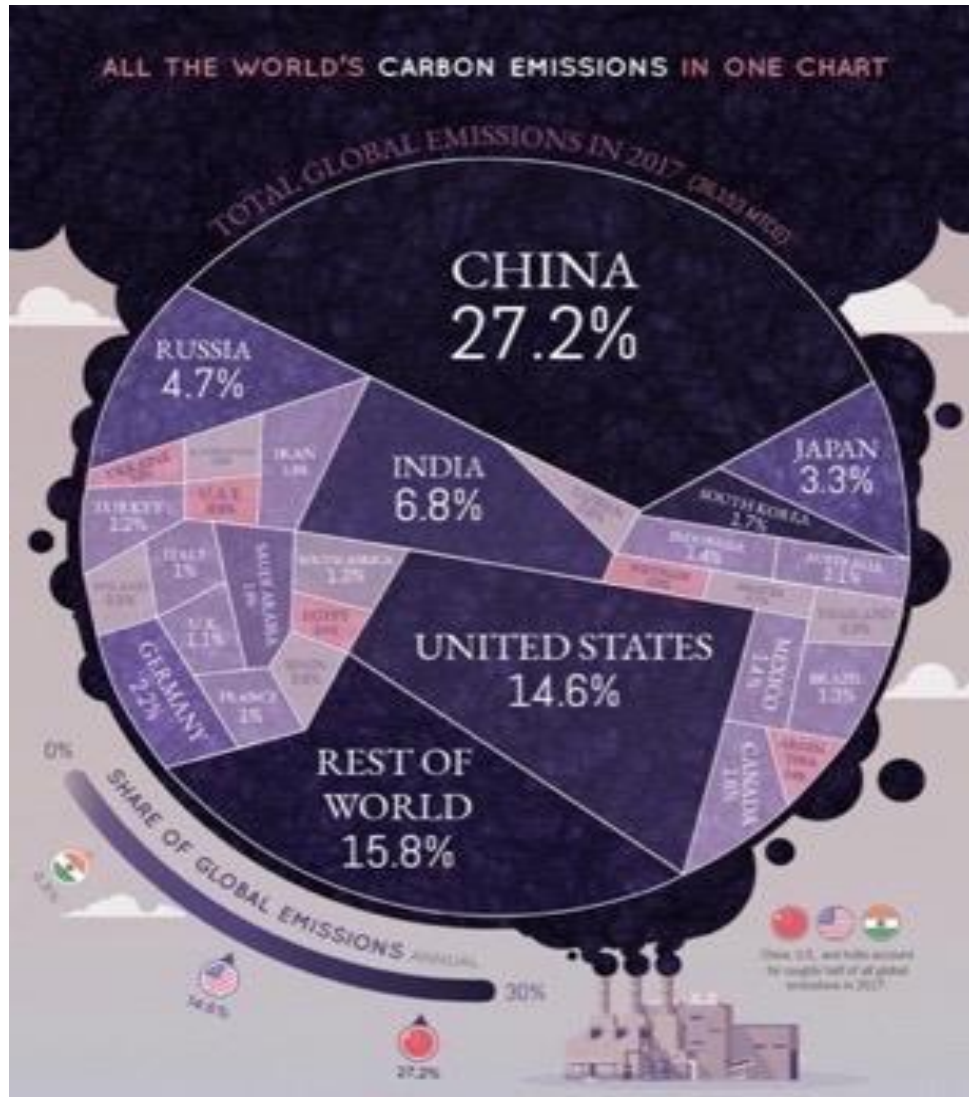
Agriculture Is Brazil's One Bright Spot

Record soybean crop leads strong farm performances to make sector the only one grower recession and political uncertainty



Soybeans being harvested in February at a farm near Itapetininga, Brazil. This year's yield is expected to break records. PHOTO: PAULO FRIDMAN/BLOOMBERG NEWS

Carbon Emissions and Global Warming – Payment for Environmental Services



Carbon Emissions and Global Warming – Payment for Environmental Services

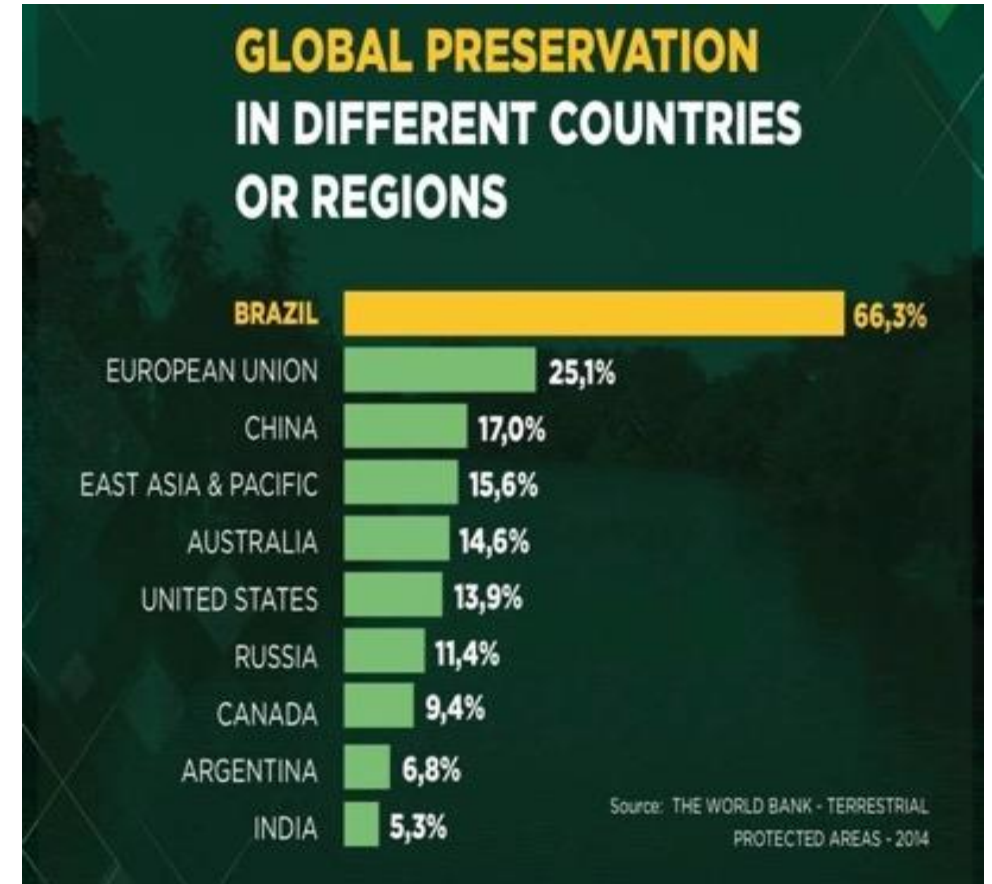
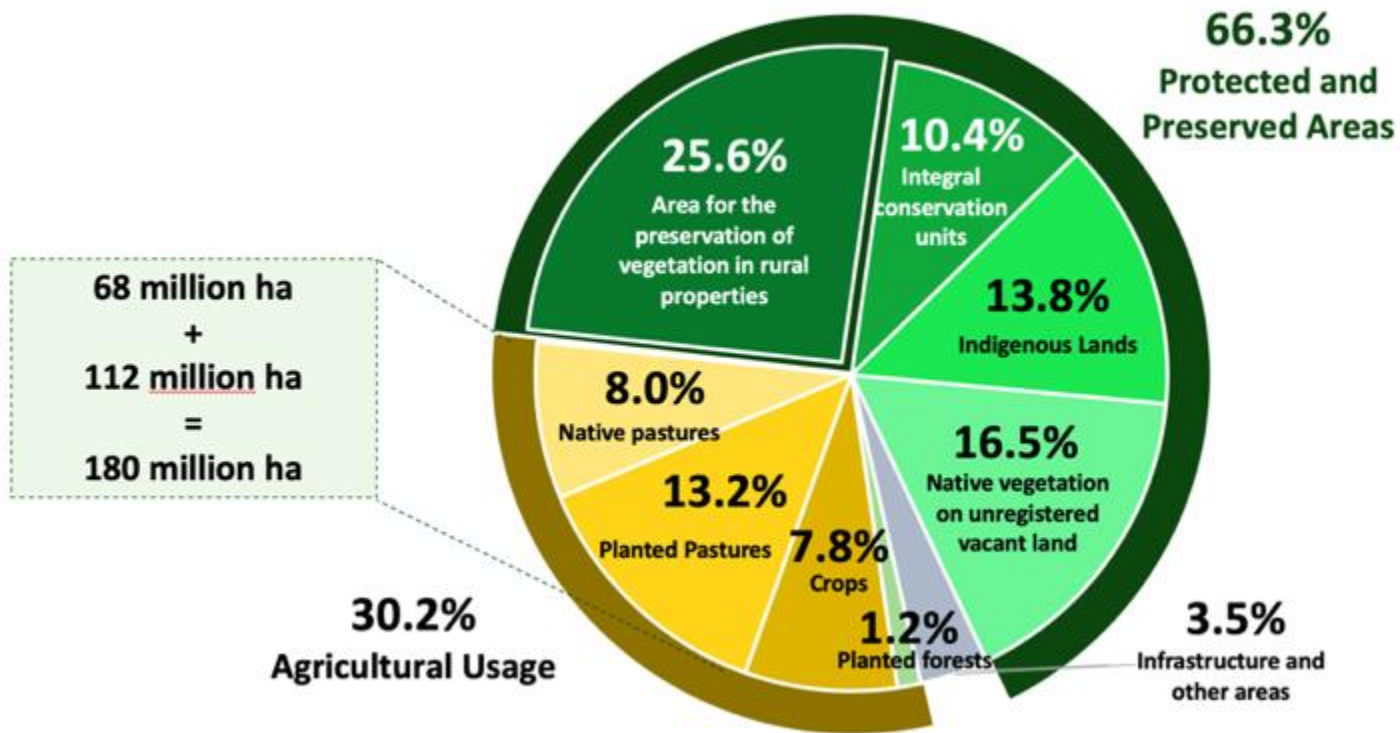


To apply a Forest Code like the one Brazil has in other large food producing countries is a next step in the global environmental agenda, but it may cause cost increase in agriculture until technology bridges the gap, we should be aware.

Agriculture's huge future potential do receive payment for environmental services



2019 Brazil Land Usage



A Mão da Sustentabilidade Ambiental do Agro do Brasil

Principais Indicadores na Busca dos Recursos Verdes

EMISSÕES/REMOÇÕES DE GASES DE EFEITO
ESTUFA PER CAPITA

% DE USO DE BIOCOMBUSTÍVEL
NA MATRIZ DE COMBUSTÍVEIS

% DE ENERGIA RENOVÁVEL
NA MATRIZ ENERGÉTICA
DO PAÍS

% DE COBERTURA DO TERRITÓRIO COM FLORESTAS OU
VEGETAÇÃO ORIGINAL, ÍNDICES DE REFLORESTAMENTO E
DESMATAMENTO ILEGAL
E FORÇA DE CÓDIGO FLORESTAL/AMBIENTAL

INOVAÇÕES & TECNOLOGIAS LIMPAS

- Integração lavoura pecuária floresta
- Indicadores de certificação ou rastreabilidade
- Conversão de áreas
- Agricultura regenerativa
- Tratamento de resíduos e reciclagem
- Economia circular
- Bioinsumos e controle biológico
- Processos (plantio direto e outros)
- Agricultura de precisão (m2)
- Outras

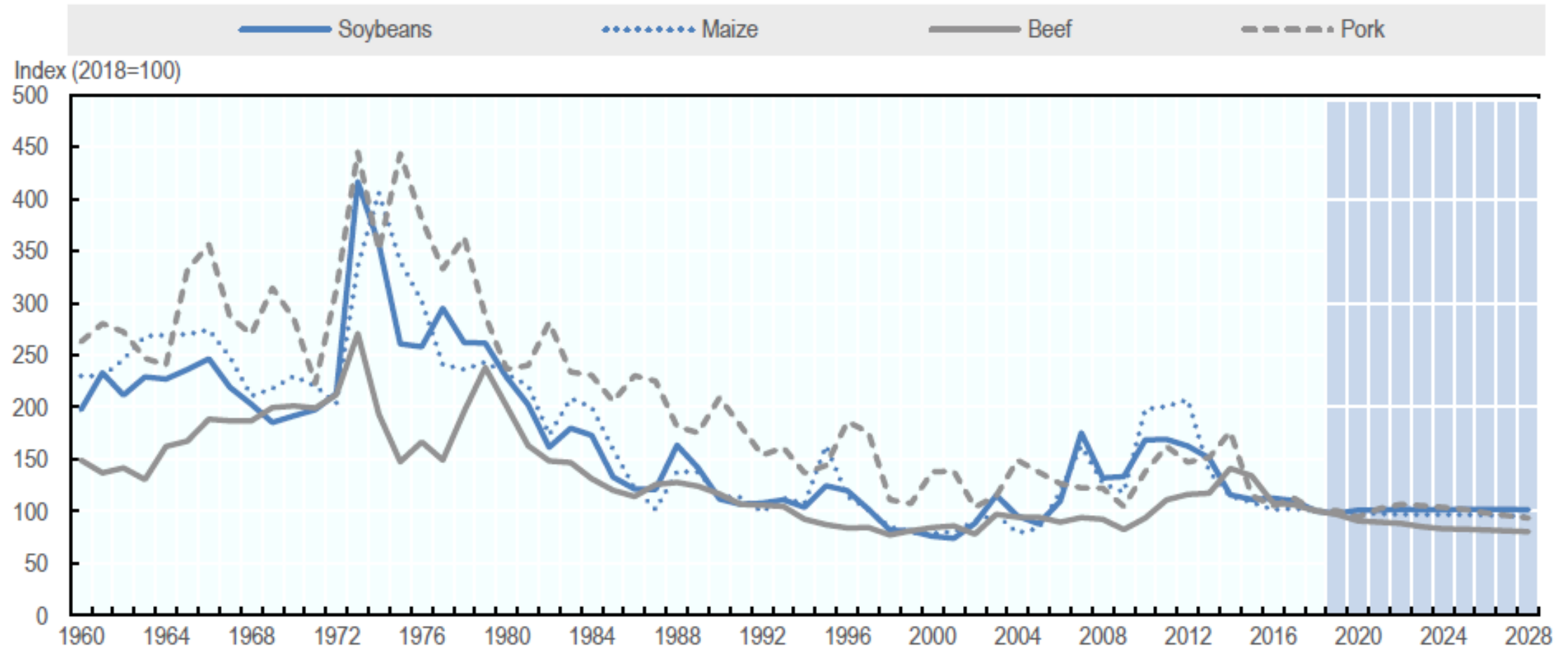




The Future of Brazilian Food, Agribusiness and Biofuels Production

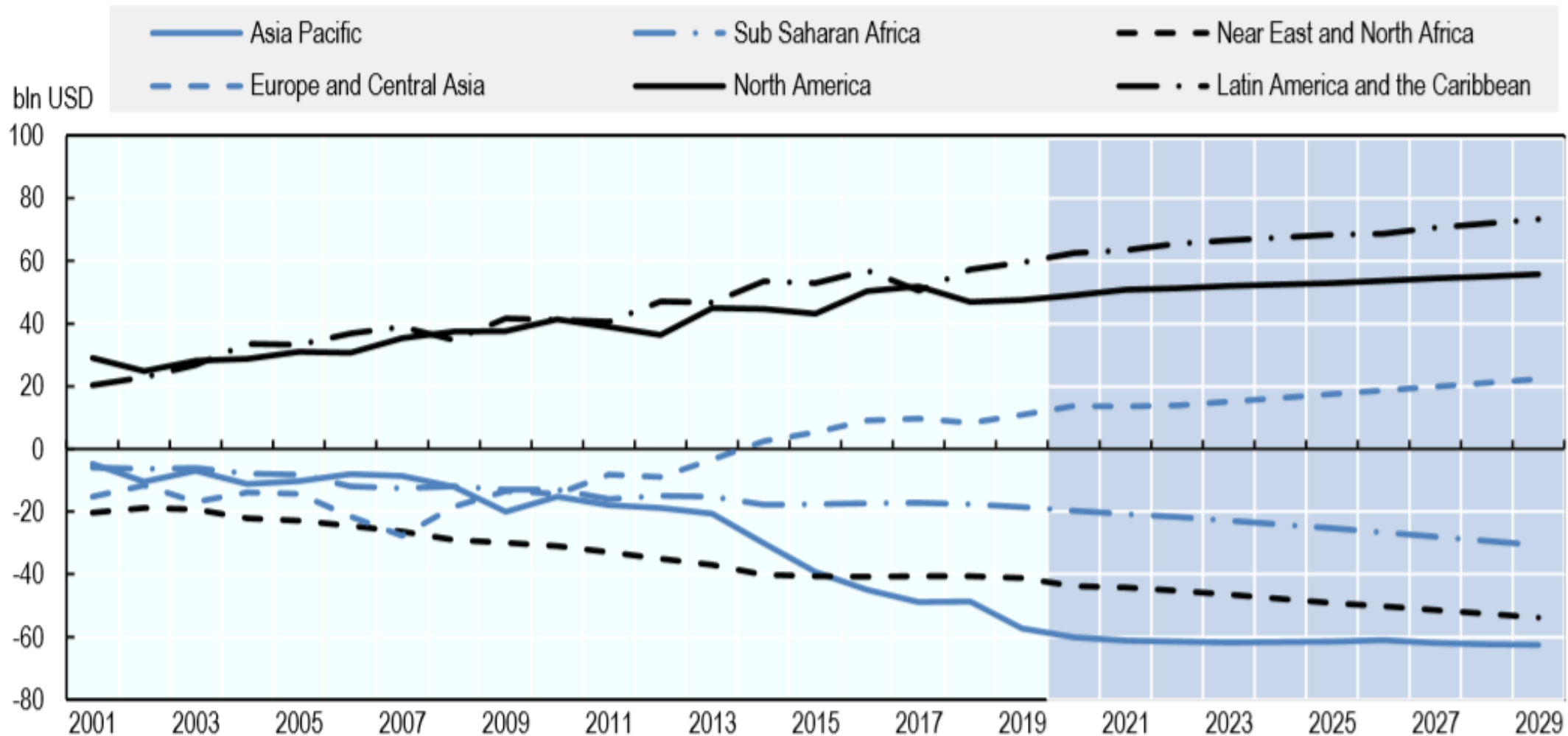


Long Term Evolution of Selected Commodity Prices, in Real Terms



Source: OECD/FAO (2019), "OECD-FAO Agricultural Outlook", OECD Agriculture statistics (database)

Balança Comercial do Agro por Região (Valores Constantes) (Agri-Food Business Trade per Regions Until 2029)

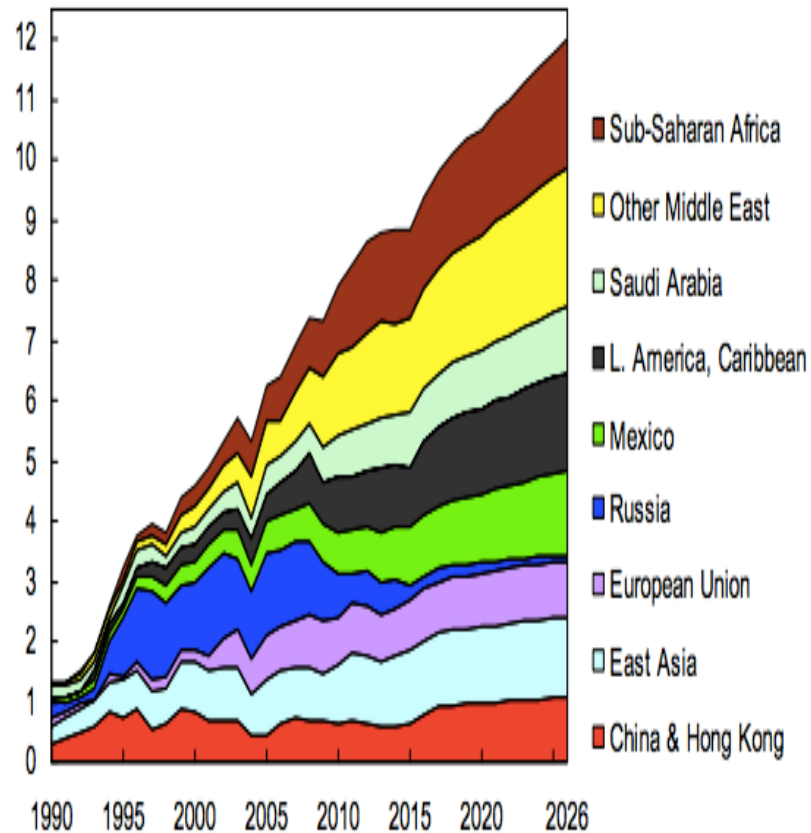


Nota: Comércio líquido (exportações menos importações) de commodities cobertas pelo Outlook Agrícola da OCDE-FAO, medido em US\$ 2004-06 constantes.

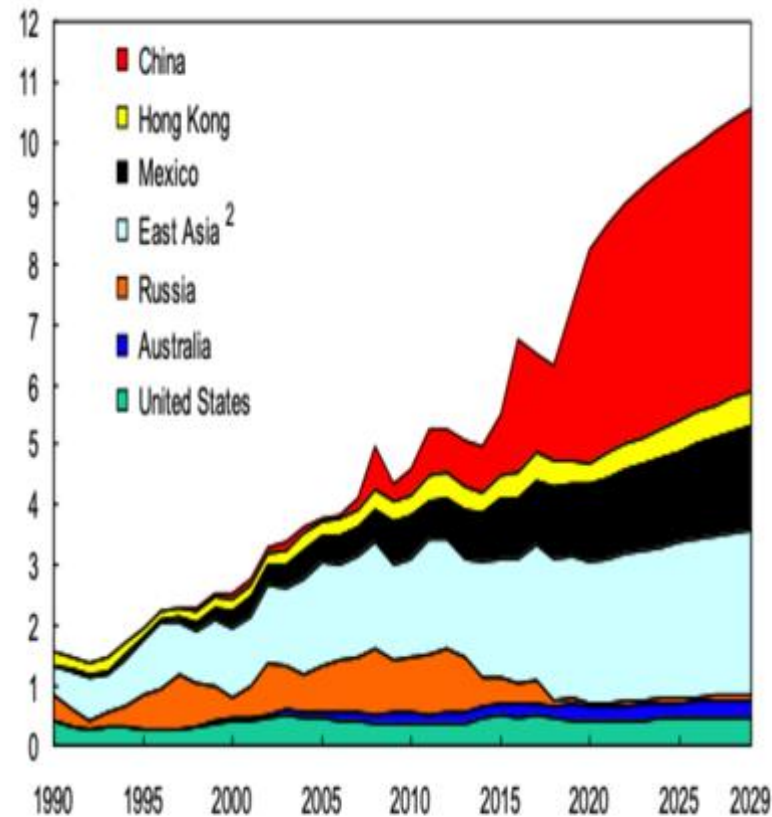
Importações Mundiais de Frango (Esquerda) Suínos (Centro) e Bovinos (Direita)

USDA, em milhões de toneladas

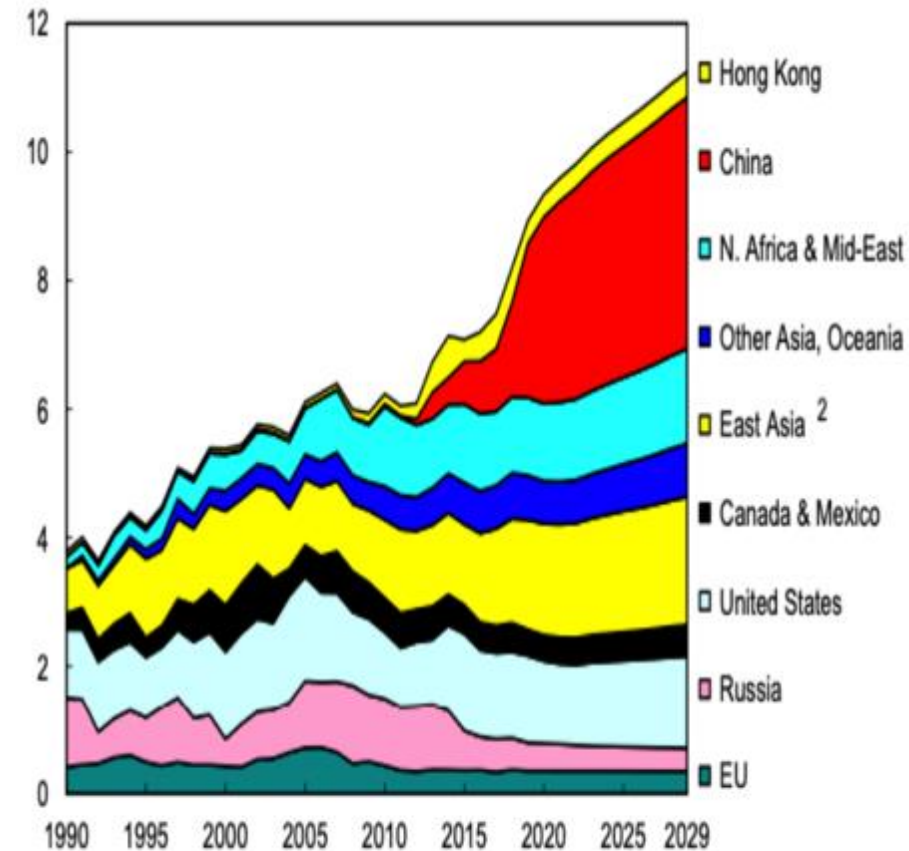
(Imports of Poultry, Pork and Beef in Million Tons for the next 6/7 years)



¹ Selected importers, not world total.



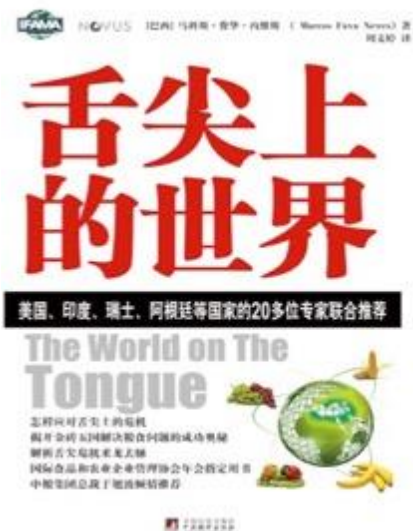
¹ Selected importers, not world total. ² Japan, Korea, & Taiwan.



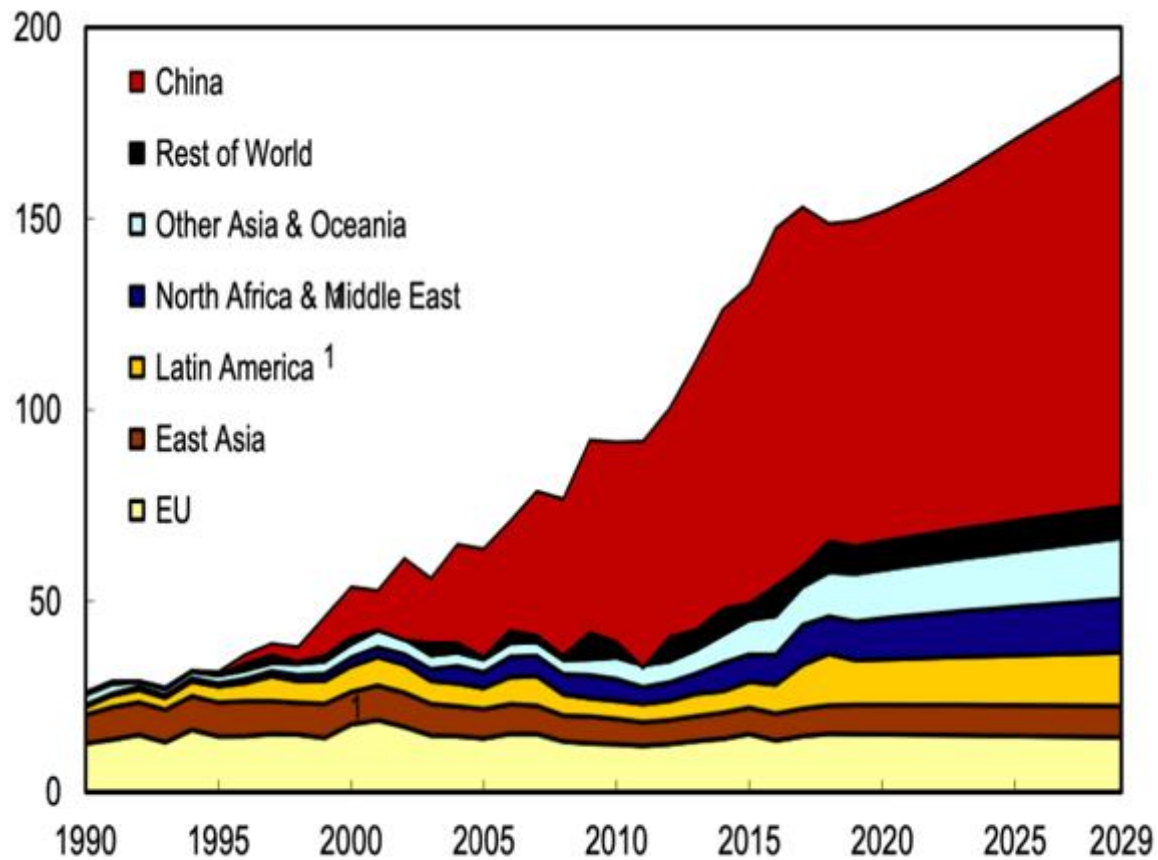
¹ Selected importers, not world total. ² Japan, Korea, & Taiwan.



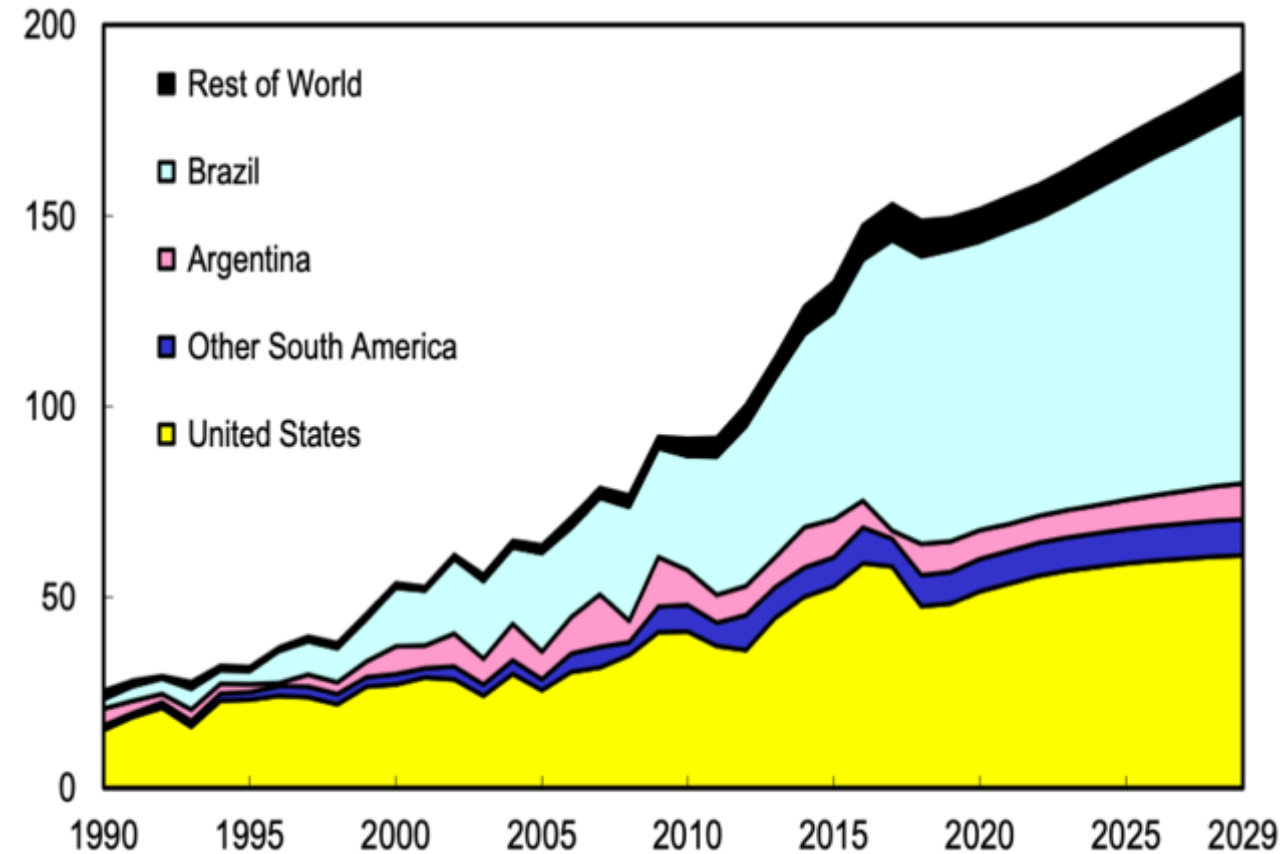
E como isto impacta nos
crescimentos esperados no
Brasil na produção de
grãos e áreas?



Importações e Exportações de Soja até 2029 (em milhões de toneladas)

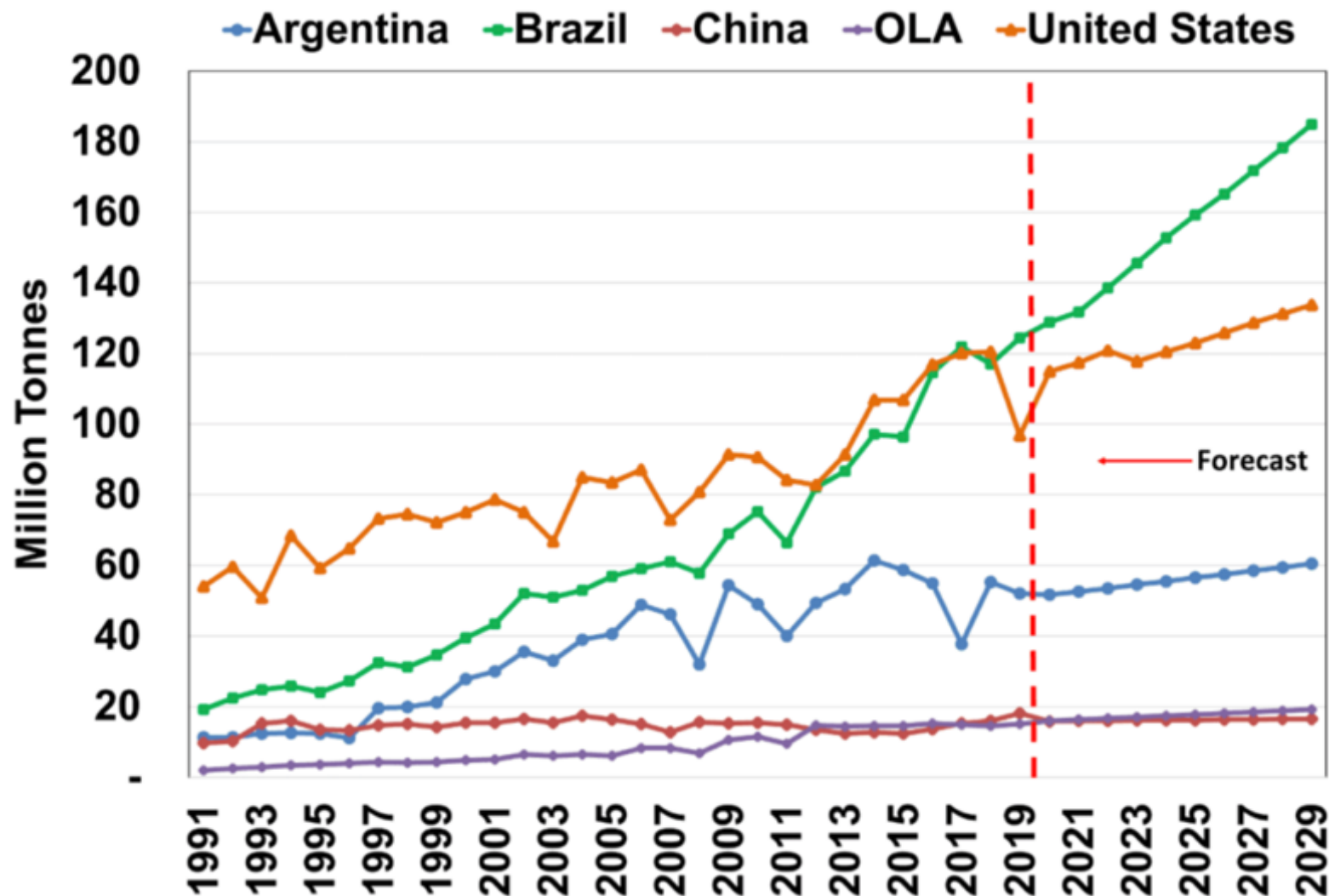


¹ Includes Mexico.



Perspectivas para a Produção Mundial de Soja

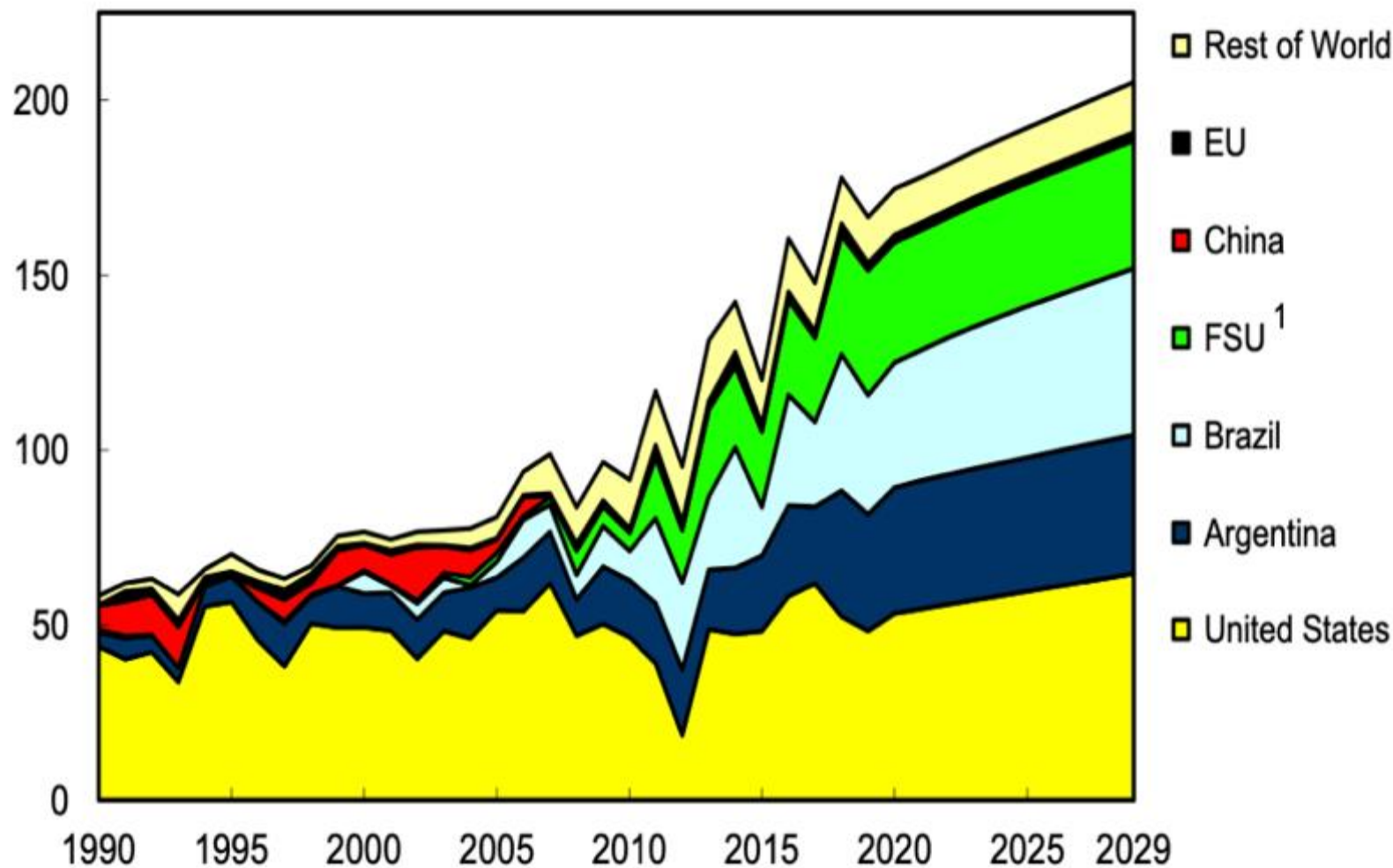
(World Soy Production Until 2029)



Elaboração do Gráfico: USSoy

Principais Exportadores de Milho (major corn exporters)

(em milhões de toneladas)



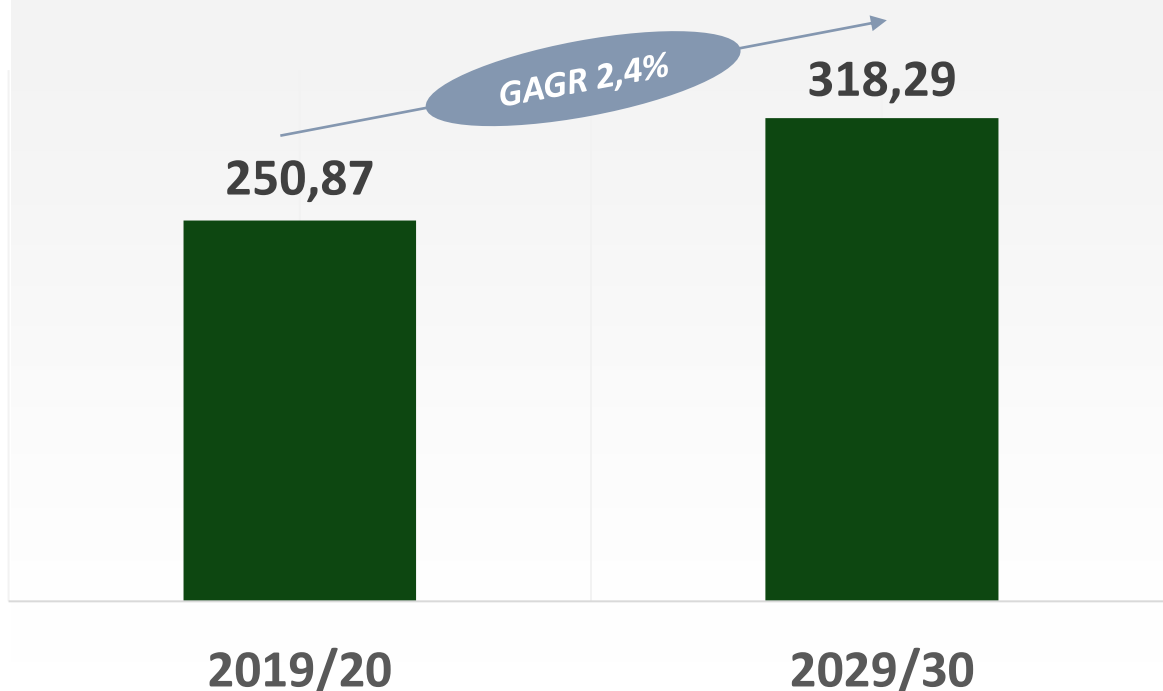
¹ Former Soviet Union.

Projeção de Grãos* Brasil 2019/20 a 2029/30



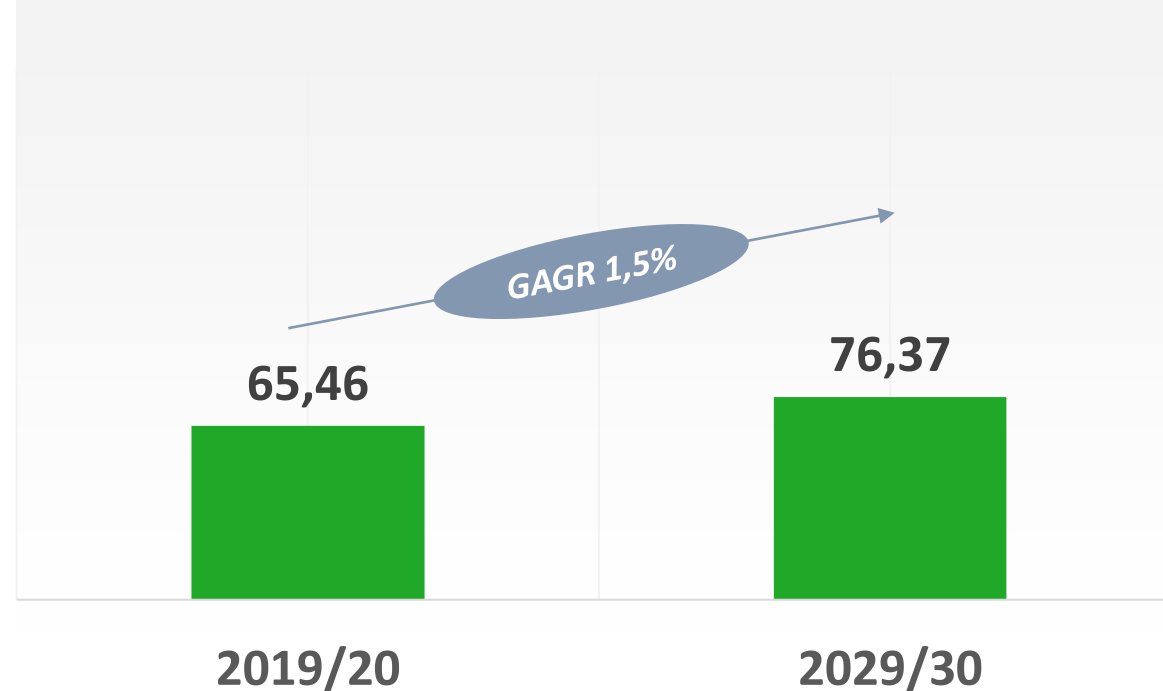
Produção (milhões ton)

Crescimento Absoluto 67 milhões tons ou +27%



Área Plantada (mil hectares)

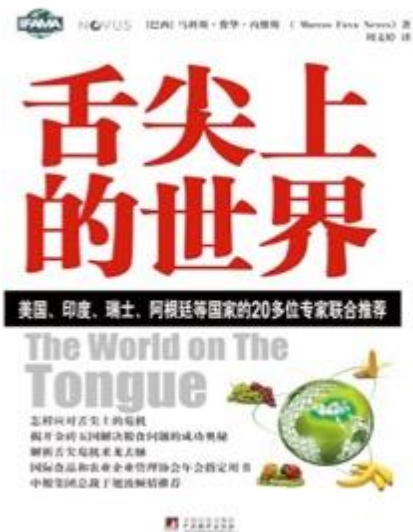
Crescimento Absoluto +10,9 mil hectares ou +17%



*algodão, amendoim, arroz, aveia, canola, centeio, cevada, feijão, girassol, mamona, milho, soja, sorgo, trigo e triticale



E como isto impacta nos
crescimentos esperados no
Brasil na produção de
carnes?
(meat production in Brazil)

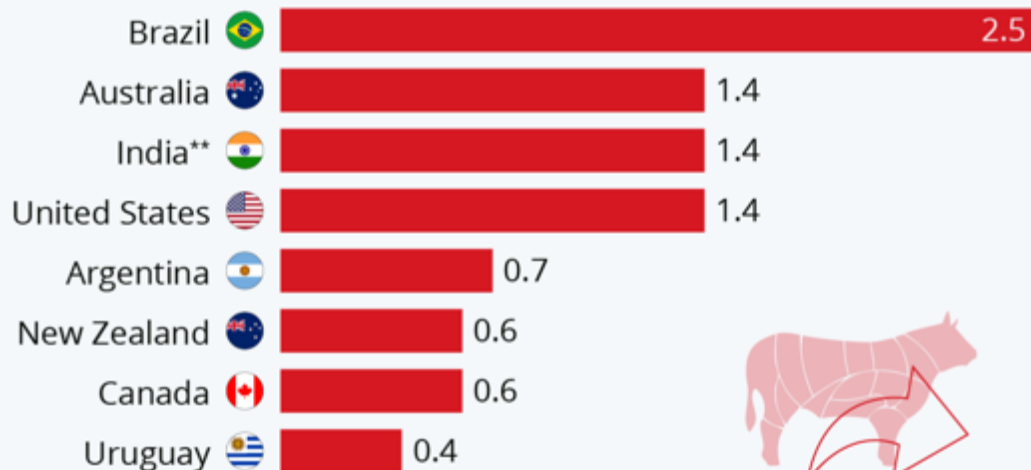


Exportações de Carne Bovina

(milhões de toneladas métricas na esquerda e mil toneladas à direita)
(beef exporters)

The Biggest Exporters of Beef in the World

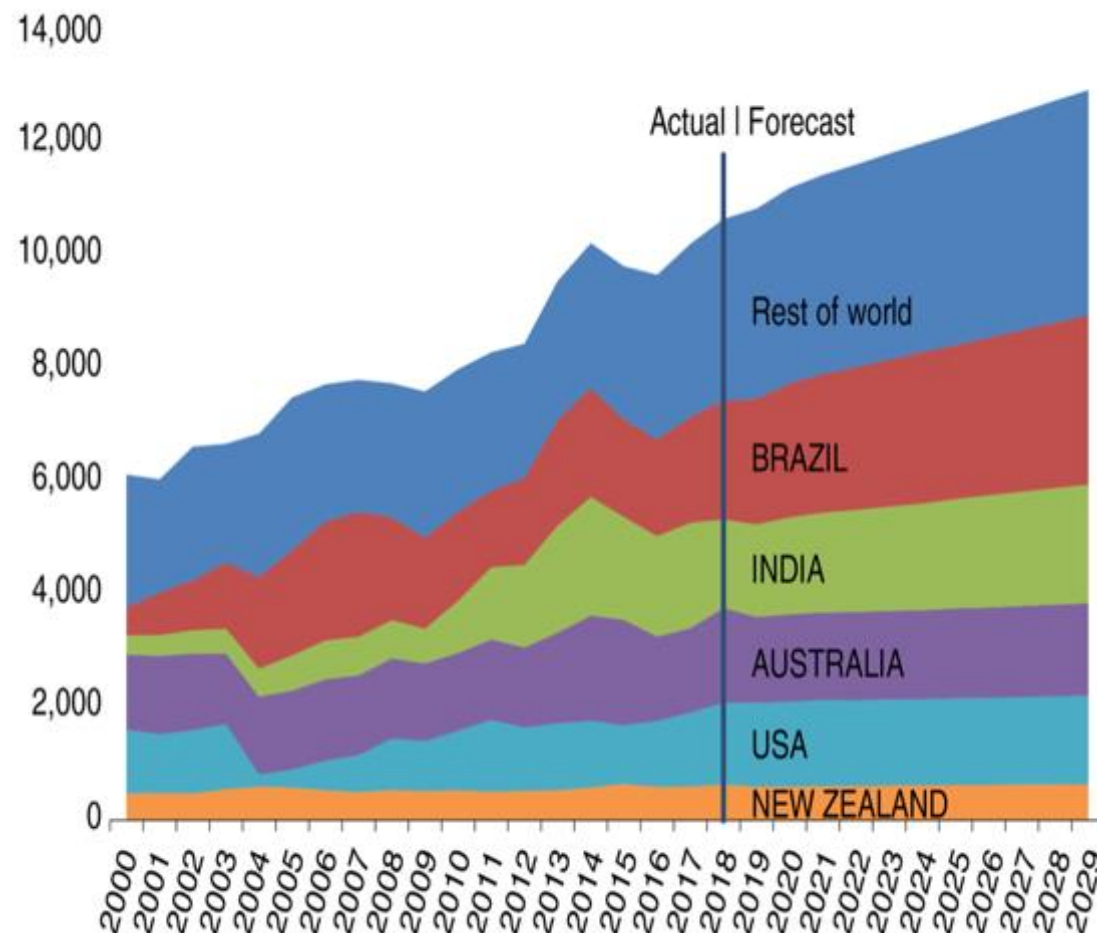
Export volume of beef and veal in 2020*, by country (in million metric tons)



* Forecast as of April 2020

** Includes other bovines (water buffalo)

Sources: US Department of Agriculture; USDA Foreign Agricultural Service

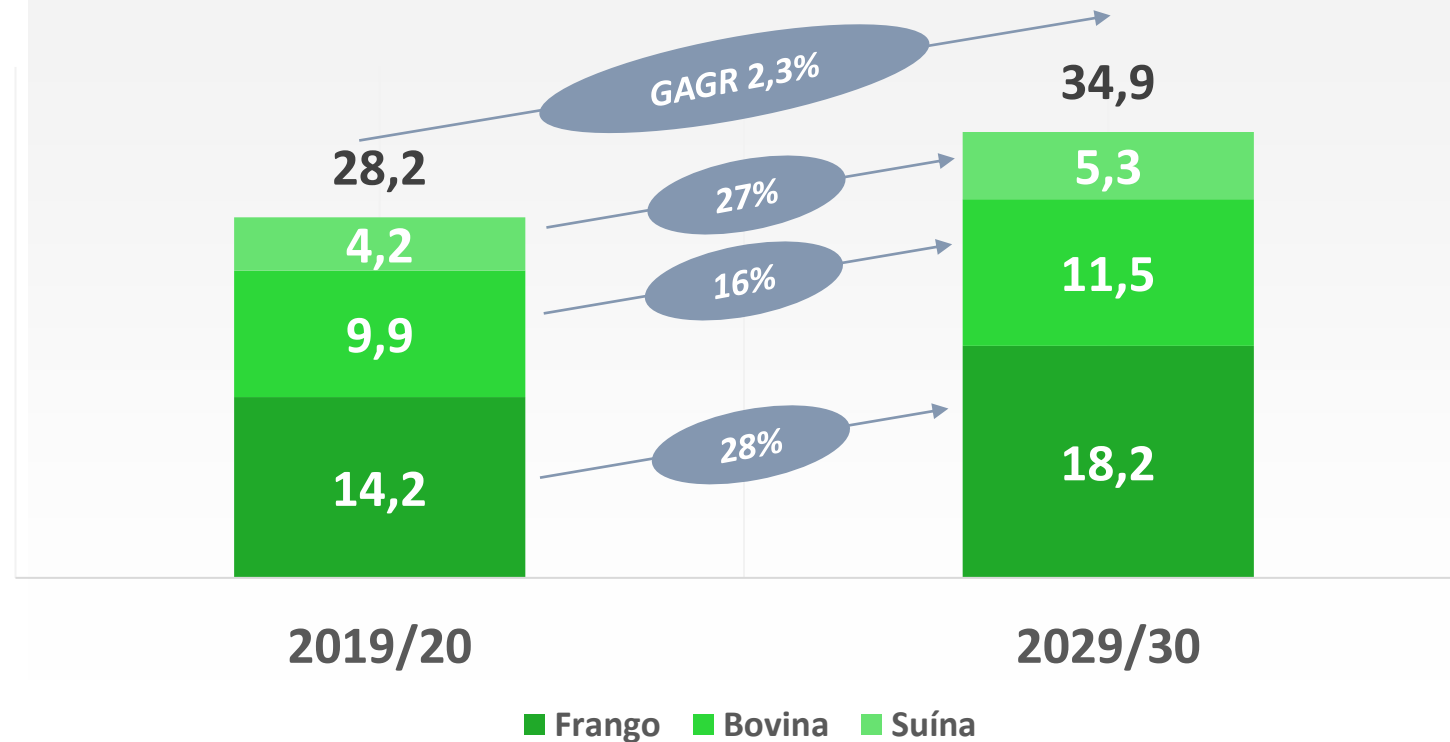


Projeções da Produção Brasileira de Alimentos 2019/20 a 2029/30 (milhões toneladas)



Carnes

Crescimento Absoluto +7 milhões tons ou +24%





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YouTube





Brazilian Agribusiness - Entrepreneurship, Preservation and Transformation



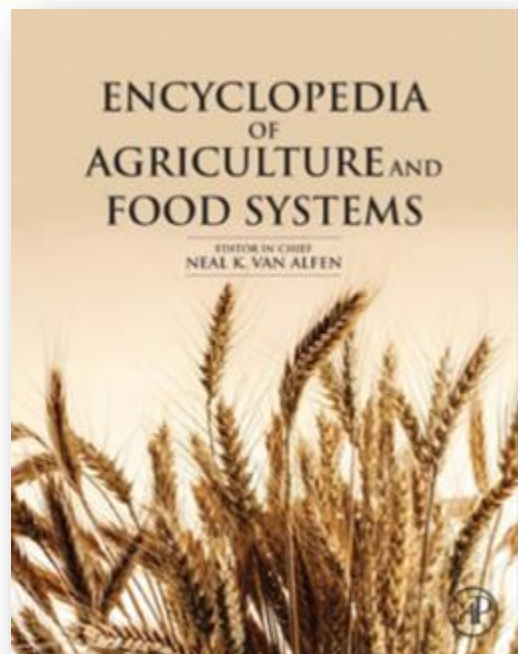
What are your impressions
of the food and
agribusiness in Brazil?



Agenda

- 1 - Setting the Stage: The Importance of Food & Agribusiness to Brazil
- 2 - The Major Concepts of Food, Agribusiness, Chains, Systems...
- 3 - How to Describe and Understand a Food & Biofuel Chain (*Quantification Method*)
- 4 - How to do a Strategic Plan for a Food & Biofuel Chain (*ChainPlan Method*)
- 5 - Cases of Chain Projects (Collective Actions) for Value Creation





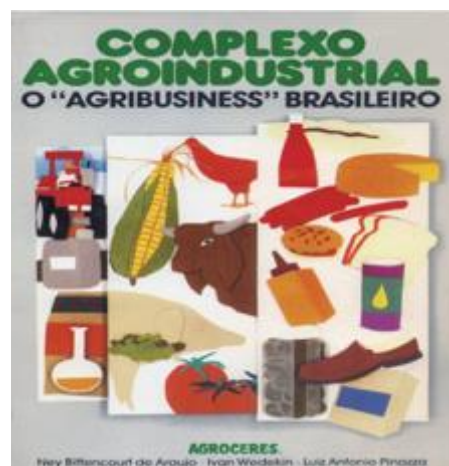
Agribusiness Organization and Management

MA Gunderson and MD Boehlje, Purdue University, West Lafayette, IN, USA

MF Neves, University of São Paulo, Ribeirão Preto, SP, Brazil

ST Sonka, University of Illinois, Champaign, IL, USA

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Food, Agribusiness and Biofuels Chains

MACROENVIRONMENT: POLITICAL/REGULATORY, ECONOMIC/NATURAL, CONSUMER MOVEMENTS (SOCIO-CULTURAL) AND TECHNOLOGICAL



Channels Dealer



Cooperatives



Input Suppliers



Farmers



Tradings



Cooperatives



Agro-industry
Biofuel Industry



Food-industry



Distribution
Retail



Foodservice



Final Consumer



Associations and Service Providers (Facilitators)

Flows of Products, Services and Communications

Flows of Information and Payments

Orange Juice Chain

Como funciona a indústria brasileira de suco de laranja

Durante o processo de fabricação de suco de laranja, todas as partes do fruto são aproveitadas e a água e a energia são usadas de forma sustentável.

1 COLHEITA

A maior parte da produção brasileira de laranja concentra-se no interior do Estado de São Paulo. Nas fazendas, a colheita é feita manualmente, com o uso de colheitas para facilitar os frutos.

2 RECEBIMENTO

As fábricas ficam estrategicamente localizadas para que as laranjas não percam qualidade entre a colheita e o recebimento. Os caminhões são elevados em rampas inclinadas para facilitar a descarga dos frutos.

3 INSPEÇÃO

Antes de entrar nas linhas de produção, as laranjas passam por uma inspeção de qualidade. As laranjas são selecionadas e as defeituosas são descartadas.

4 BINS

As laranjas são lavadas por correntes de água e depois passam por uma inspeção de qualidade. As laranjas são selecionadas e as defeituosas são descartadas.

5 LAVAGEM E SELEÇÃO

Antes de entrar nas linhas de produção, as laranjas passam por um processo de lavagem com água e desinfetante para eliminação de impurezas. Em seguida, as laranjas são selecionadas e as defeituosas são descartadas.

6 EXTRAÇÃO

As laranjas são lavadas e selecionadas. Depois, cada laranja passa por um processo de extração de suco. O suco é separado do bagaço e a polpa é descartada.

7 TUDO SE APROVEITA

De uma laranja podem ser extraídos até três subprodutos: o suco, o bagaço e a polpa. O suco é usado para a produção de suco de laranja. O bagaço é usado para a produção de energia. A polpa é usada para a produção de suco de laranja.

8 FINALIZAÇÃO

O suco é separado do bagaço e da polpa. O suco é então pasteurizado e armazenado em tanques. O bagaço e a polpa são descartados.

9 NFC

O suco que vai dar origem ao produto não concentrado (NFC, de Not From Concentrate) passa por uma pasteurização, ou seja, é aquecido a 70°C por 30 segundos para destruir as bactérias que poderiam causar a deterioração do suco.



Das laranjas da planta até o armazenamento em tanques próprios nos portos estrangeiros, em todas as etapas é empregada a tecnologia brasileira.



O Brasil exporta mais de 1 milhão de toneladas de suco de laranja por ano. Um navio comporta até 40 mil toneladas de concentrado, o equivalente a mais de 32 milhões de garrafas de 1 litro.

De cada 5 copos de suco de laranja que se bebem no mundo 3 são de suco brasileiro.



SUSTENTABILIDADE

- Utilizam-se apenas 0,3% das suas terras anuais, o Brasil. Todas as partes da laranja que não vão para o suco são aproveitadas para a fabricação de diversos subprodutos, não havendo resíduos sólidos.
- Desde 2003 houve um aumento de 20% na produtividade das pomares de laranja, com aumento da área de plantio.
- A energia empregada nas fábricas é proveniente de fontes renováveis, como hidrelétricas.
- Mais de metade de toda a água utilizada nas fábricas é reciclada e reutilizada. Em outros setores, a água é tratada e reutilizada, com 25% de economia.
- Parte do fruto leve das indústrias é moído e atado. Em outros setores, a água é tratada e reutilizada, com 25% de economia.

7 DESAERACÃO

Por conter mais água, o NFC passa por um processo de desaeração, ou seja, é submetido a um vácuo para remover o oxigênio dissolvido no líquido. Dessa forma, impede-se que a laranja se torne ácida ao longo do processo.

8 FCOJ

Amor partido suco, que é usado na produção de FCOJ (Frutas Concentradas Orange Juice), segue o mesmo processo de desaeração, mas com a adição de açúcar para equilibrar o sabor.

9 TANK BLENDERS

O FCOJ passa então por um processo de mistura em tanques, onde é adicionado o suco de laranja para equilibrar o sabor.

10 CONDIÇÕES IDEAIS

O FCOJ e o NFC são armazenados em tanques refrigerados a -10°C para garantir a qualidade do produto.

11 TANQUES REFRIGERADOS

No porto, os produtos são armazenados em tanques refrigerados para garantir a qualidade do produto.

12 TRANSPORTE MARÍTIMO

O suco é transportado em navios para os portos estrangeiros, onde é armazenado em tanques refrigerados.

13 CONSUMO

O NFC e o FCOJ são vendidos aos varejistas, que os distribuem para os consumidores finais.

14 LIDERANÇA

O suco de laranja brasileiro é líder no mercado internacional, com uma participação de mais de 30% no total.



MELHORES PRÁTICAS AGRÍCOLAS



**VIVEIROS TOTALMENTE DEDICADOS ÀS
FAZENDAS DA EMPRESA**



**PESQUISA E DESENVOLVIMENTO:
VANTAGEM COMPETITIVA NO CAMPO**



**ATÉ 20 VARIEDADES DE LARANJA EM
DIFERENTES PORTA ENXERTOS**



**300 TRABALHADORES
ESPECIALIZADOS NOS VIVEIROS**

PRODUÇÃO E COLHEITA

COLHEITA



TRANSFERÊNCIA DE FRUTA DA FAZENDA
PARA A FÁBRICA



9 FÁBRICAS QUE PROCESSAM 200 MILHÕES DE CAIXAS DE LARANJA POR ANO

ARARAQUARA - BRASIL



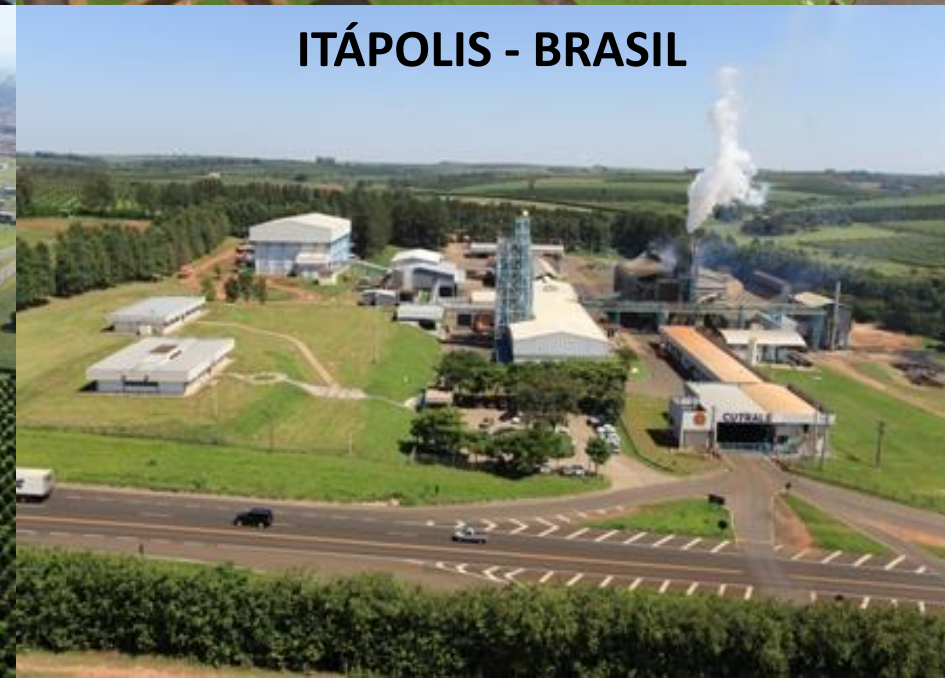
COLINA - BRASIL



CONCHAL - BRASIL



ITÁPOLIS - BRASIL



DISTRIBUIÇÃO MUNDIAL DE SUCO DE LARANJA



TERMINAL MARÍTIMO GUARUJÁ



TERMINAL MARÍTIMO NEWARK 1- EUA 6



**ARMAZENAGEM NA FÁBRICA DE
AUBURNDALE - FLÓRIDA**



TERMINAL MARÍTIMO ROTTERDAM - NL

**CARGA ÚNICA
RETORNO VAZIO AO
BRASIL**

**ROTAS NO ATLÂNTICO NORTE
14 DIAS ATÉ O DESTINO
32 DIAS PARA RETORNAR**

**ROTAS NO PACÍFICO
35 DIAS ATÉ O DESTINO
78 DIAS PARA RETORNAR**

**ALOCÇÃO DA
PRODUÇÃO AMERICANA:**

- EUA e Canada: 96%
- Outros: 4%

**ALOCÇÃO DA
PRODUÇÃO BRASILEIRA:**

- Europa: 71%
- América do Norte: 12%
- China: 4%
- Brasil: 3%
- Outros: 10%





13/12/2011 07:28



13/12/2011 09:58





13/12/2011 08:56

Food and Agribusiness Concepts



The image is a screenshot of the Wikipedia article titled "Agribusiness". The page layout includes a sidebar on the left with navigation links, a top navigation bar with "Article" and "Talk" tabs, and a main content area. The article text defines agribusiness as the business of agricultural production, mentioning its origin in 1957 and listing various components like agrichemicals, breeding, crop production, distribution, farm machinery, processing, seed supply, marketing, and retail sales. It also discusses the term's use in the agriculture industry, academic degrees, trade associations, and the role of the UN's Food and Agriculture Organization (FAO). The article concludes by contrasting large-scale industrialized agribusiness with smaller family-owned farms.


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Agribusiness

From Wikipedia, the free encyclopedia

Agribusiness is the [business](#) of agricultural production. The term was coined in 1957 by Goldberg and Davis. It includes [agrichemicals](#), [breeding](#), [crop](#) production ([farming](#) and [contract farming](#)), distribution, [farm machinery](#), [processing](#), and [seed](#) supply, as well as [marketing](#) and [retail](#) sales. All agents of the food and fiber value chain and those institutions that influence it are part of the agribusiness system.

Within the agriculture [industry](#), "agribusiness" is used simply as a [portmanteau](#) of agriculture and business, referring to the range of activities and disciplines encompassed by modern food production. There are [academic degrees](#) in and departments of agribusiness, agribusiness [trade associations](#), agribusiness [publications](#), and so forth, worldwide.

The UN's [Food and Agriculture Organization](#) (FAO) operates a section devoted to agribusiness development^[1] which seeks to promote food industry growth in developing nations.

In the context of agribusiness management in academia, each individual element of agriculture production and distribution may be described as agribusinesses. However, the term "agribusiness" most often emphasizes the "interdependence" of these various sectors within the production chain.^[2]

Among critics of large-scale, industrialized, [vertically integrated](#) food production, the term *agribusiness* is used negatively, synonymous with [corporate farming](#). As such, it is often contrasted with smaller [family-owned farms](#).

Agribusiness Organization and Management

MA Gunderson and MD Boehlje, Purdue University, West Lafayette, IN, USA

MF Neves, University of São Paulo, Ribeirão Preto, SP, Brazil

ST Sonka, University of Illinois, Champaign, IL, USA

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Figure 6 Example logos of food and agribusiness firms.



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Tracing the truth



What are your
impressions?



Agenda

- 1 - Setting the Stage: The Importance of Food & Agribusiness to Brazil
- 2 - The Major Concepts of Food, Agribusiness, Chains, Systems...
- 3 - How to Describe and Understand a Food & Biofuel Chain (*Quantification Method*)
- 4 - How to do a Strategic Plan for a Food & Biofuel Chain (*ChainPlan Method*)
- 5 - Cases of Chain Projects (Collective Actions) for Value Creation

A method for strategic planning of food and bioenergy chains (CHAINPLAN) applied to the sugarcane chain in Brazil

Marcos Fava Neves, Vinicius Gustavo Trombin and Marco Antonio Conejero

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Markestrat (Marketing & Strategic Projects and Research Center), Av. dos Bandeirantes, 3900, FEARP, Bloco C, sl 64, 14.040-900
Ribeirão Preto, SP, Brazil*

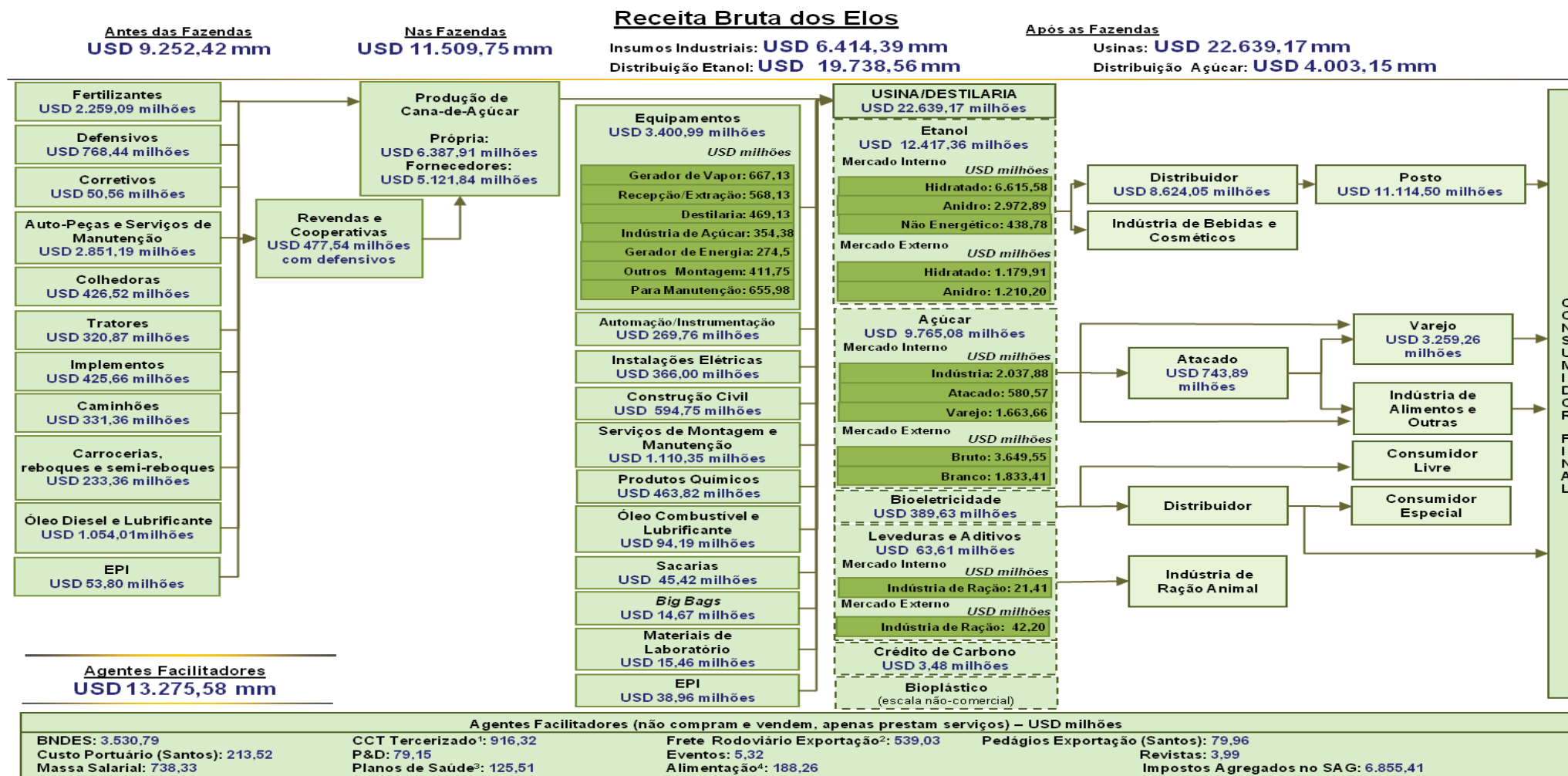
Abstract

Global competition and environmental factors make it increasingly necessary in many countries to establish a strategic plan for various national food and bioenergy chains. Neves (2007) developed a simple method (CHAINPLAN) to help in the process of developing a strategic plan for a food chain, which has been applied to chains in various countries. The objective of this paper is to report the results of a new application of (part of) this method: to the sugarcane chain in Brazil. As this chain has an important trade association (UNICA – Brazilian Sugarcane Industry Association) for coordination of collective actions, the paper focuses on two specific steps: the mapping and quantification of the chain; and the elaboration of the strategic plan. The chain mapping and quantification procedure, which is the second step of the method, quantifies an industry's contribution to the country's GDP, as well as to job creation, tax generation, and the distribution of economic activities. In relation to the sugarcane chain in Brazil, it was found that the sugar-energy sector GDP in 2008 was US\$ 28.15 billion, equivalent to 2% of the total Brazilian GDP. The estimated total value of sales of the various links that comprise the sugarcane chain reached US\$ 86.8 billion. Completion of step 2 of the CHAINPLAN method allows the chain's agents to conduct a macro-environmental and internal analysis of the chain to identify strategic projects (collective actions) to improve the chain's competitiveness. This step was also carried out on the Brazilian sugarcane chain.

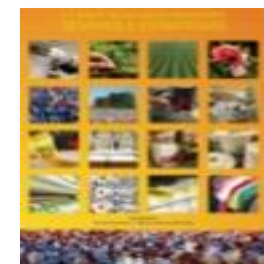
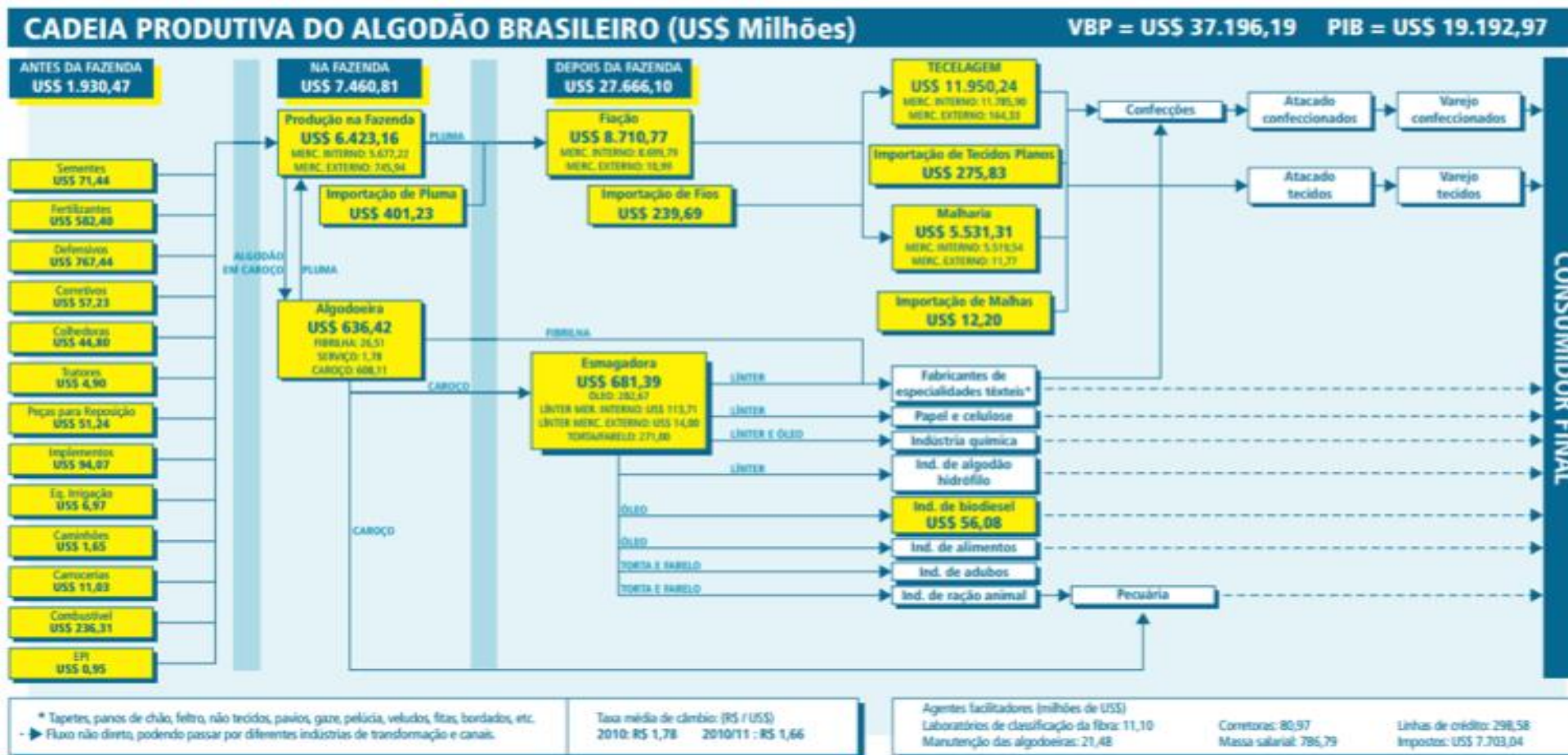
Sugarcane Agroindustrial System - 2009

PIB em 2008: US\$ 28,1 bilhões

VALOR TOTAL MOVIMENTADO em 2008: US\$ 86,8 bilhões

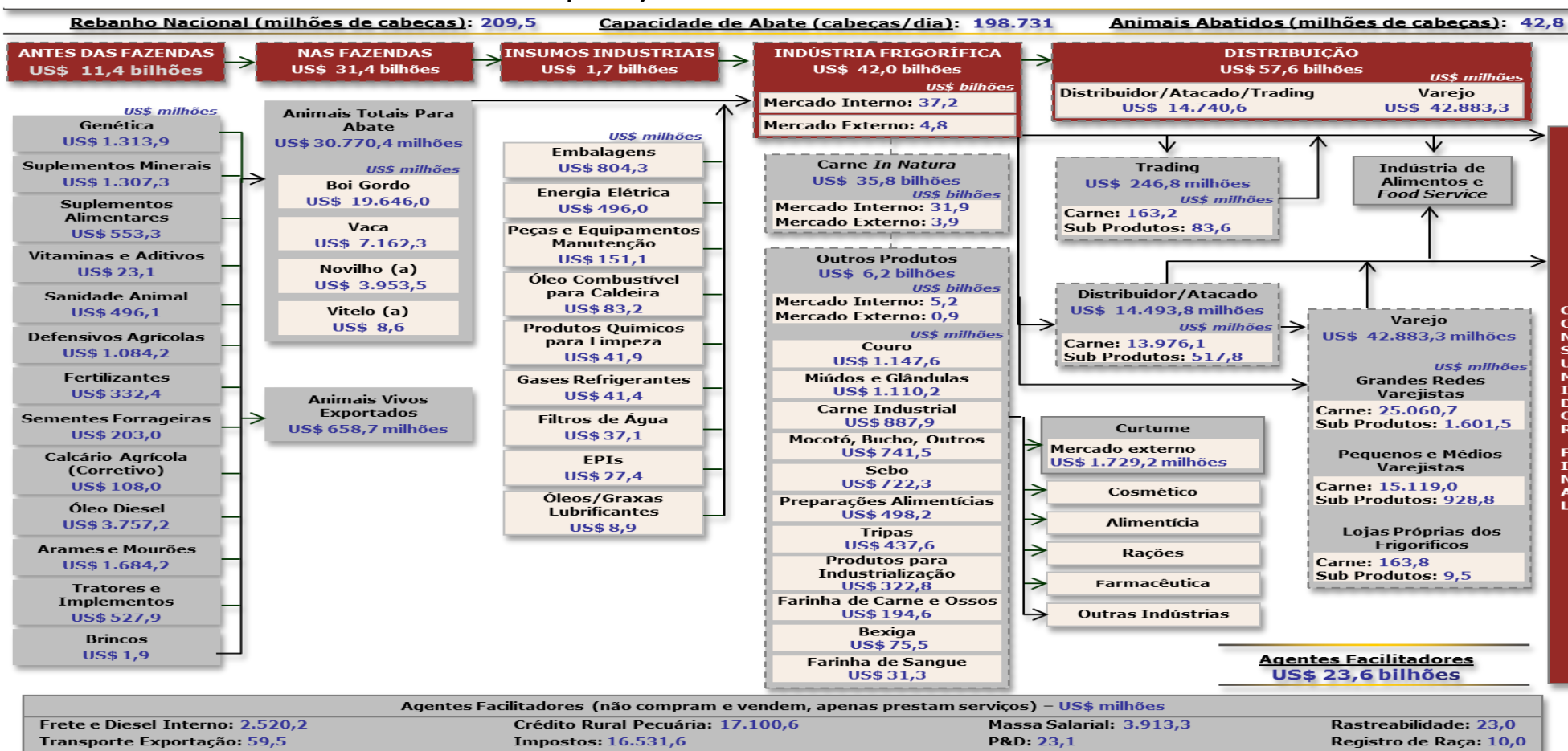


Cotton Agroindustrial System - 2011 and 2013

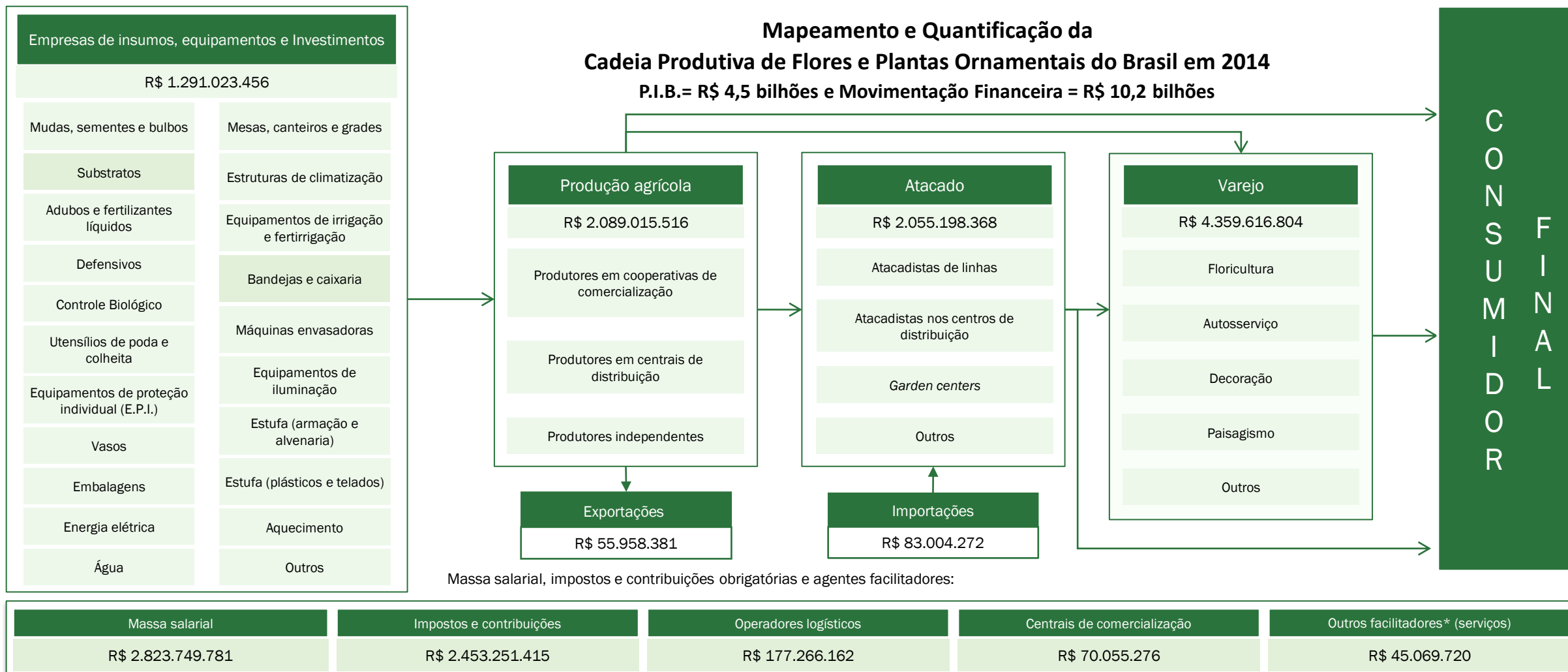


Beef Agroindustrial System - 2012

CADEIA PRODUTIVA DA CARNE BOVINA US\$ 167,8 bilhões movimentados em 2010



Flower Chain Mapping and Quantification - 2014



Agronegócios

PIB das flores atingiu R\$ 4,5 bi em 2014, aponta estudo

Cenários

Fernando Lopes
De São Paulo

Com um Produto Interno Bruto (PIB) de R\$ 4,5 bilhões, a cadeia produtiva de flores e plantas ornamentais do país movimentou R\$ 10,2 bilhões no ano passado, quando gerou quase 190 mil empregos diretos e R\$ 2,5 bilhões em impostos e contribuições.

Essas são algumas das conclusões de um amplo estudo sobre o segmento que será divulgado nesta terça-feira, em Holambra (SP), durante o 4º Seminário do Instituto Brasileiro de Floricultura (Ibraflor), com o objetivo de chamar a atenção para a importância da atividade e nortear políticas públicas e estratégias privadas capazes de impulsioná-la. Financiado por meio de um

Flores e plantas ornamentais

PIB da cadeia no Brasil em 2014 - em R\$ milhões

Floricultura	982,4
Decoração	2.332,1
Paisagismo	648,8
Auxílio-serviço	304,8
Atacados para o consumidor final	120,7
Produtor para o consumidor final	60,3
Exportação	56,0
Importação	83,0
Total*	4.507,0

Fonte: Markestrat, Fundação FEA-RP e O setor total decorre de importações. ** Em 2014

Cadeia produtiva	
Movimentação financeira** - R\$ milhões	
Antes das fazendas	1.291,0
Nas fazendas	2.089,0
Depois das fazendas	6.403,2
Agentes facilitadores	292,4
Importações	83,0
Exportações	56,0
Total	10.214,6

convênio entre o Ministério da Agricultura e a Organização das Cooperativas do Estado de São Paulo (Ocesp), o estudo foi elaborado ao longo dos últimos oito meses por pesquisadores da consultoria Markestrat e da Fundação para Pesquisa e Desenvolvimento da Administração, Con-

tabilidade e Economia (Fundace), ambos criados por docentes da Faculdade de Economia e Administração da Universidade de São Paulo (FEA/USP) de Ribeirão Preto (SP).

Conforme destaca Marcos Fava Neves, professor titular da FEA em Ribeirão Preto e coordenador

do trabalho, a área de decoração liderou o PIB total do segmento de flores e plantas ornamentais em 2014, com R\$ 2,3 bilhões, seguida pelos negócios da floricultura (R\$ 982,4 milhões) e do paisagismo (R\$ 648,8 milhões). O PIB, lembra, é a soma dos produtos finais da cadeia produtiva.

Já a movimentação financeira, que inclui o faturamento anual de todos os elos da cadeia, ficou mais concentrada no atacado e no varejo "depois das fazendas" (R\$ 6,4 bilhões no conjunto das duas frentes), enquanto o valor estimado para essa movimentação "antes das fazendas" foi de R\$ 1,3 bilhão.

Fava Neves realça, ainda, que o alicerce da cadeia produtiva são as cooperativas. As três principais do país (Veiling Holambra, Cooperflora e SP Flores) têm sede em São Paulo, que representa 40% do mercado nacional de flores. Fora do Estado, a produção de flores segue pulverizada e, em geral, atrai tecnologia e investimentos limitados.

"O estudo nos mostra que o cooperativismo é o caminho para que a cadeia produtiva de flores se expanda no Brasil. O potencial de avanço do cooperati-

vismo no segmento de flores é um dos maiores quando comparado a outras cadeias do agronegócio", diz Edvaldo Del Grande, presidente da Ocesp.

O estudo ("Mapeamento e Quantificação da Cadeia Produtiva de Flores e Plantas Ornamentais do Brasil em 2014") contempla entrevistas com mais de 100 representantes de todos os elos da cadeia e identificou a comercialização de mais de 2 mil espécies.

Entre os principais gargalos identificados pelo trabalho, destaca a Ocesp, estão transporte e armazenagem deficientes, carência de profissionais especializados, poucas fontes de financiamento e um controle fitossanitário que deixa a desejar. Melhorias nesses pontos podem ajudar a estimular o consumo de flores, restrito a US\$ 9 por habitante ao ano, ante US\$ 58 nos EUA e US\$ 25 na Argentina.

MAPEAMENTO E QUANTIFICAÇÃO DA CADEIA DE FLORES E PLANTAS ORNAMENTAIS DO BRASIL



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Prefícios: Arnaldo Jardim - Secretário de Agricultura e Abastecimento do Estado de São Paulo
Edvaldo Del Grande - Presidente da OCESP (Organização das Cooperativas do Estado de São Paulo)



REVENUES OF THE CHAIN (MILLIONS US\$) 44,893.4

GDP OF THE CHAIN (MILLIONS US\$) 18,744.55

WAGE BILL (MILLION US\$) 1,000.43

TAXES (MILLION US\$) 5,751.31

BEFORE THE FARMS (Million US\$)

4,240.17

Genetics	135.94
Boar	20.64
Sows	66.20
Grandparents	35.59
Semen	7.06
Importation of Live Pigs	1.03
Materials for Artificial Insemination	5.42

Drugs and Vaccines	182.80
Vaccines	50.58
Endoparasiticide	0.77
Ectoparasiticide	0.40
Endectocide	0.71
Antimicrobial	62.82
Therapeutic	6.02
Supplement	1.41
Products of Environmental Use	3.59
Additives of Performance	15.96
Other	40.56

Animal Feed	3,706.24
Corn	1,618.03
Soy Bran	1,166.45
Other Concentrated	368.73
Amino Acids	118.32
Dairy	87.29
Premix	347.42

Overhead Costs	78.88
Electricity	34.58
Fuel	12.23
Repairs and Maintenance	32.07

Infrastructure	135.66
PPU	84.74
Finishing	51.46

Number of sows 1,720,255

ON THE FARMS (Million US\$)

4,828.40

Slaughter Pigs	4,826.14
Piglets 6 kg	84.68
Piglets 22 kg	1,000.06

Live Animals Exported	2.25
------------------------------	-------------

INDUSTRIAL INPUTS (Million US\$)

737.15

Electricity	138.39
Fuel for Boilers	19.47
Chemical Products for Cleaning	15.10
Oils and Greases	2.53
Water Filters	0.06
Refrigerant Gases	0.26
Parts and Maintenance Equipment	103.40
PPEs	12.29
Packaging	445.68

FACILITATING AGENTS (Million US\$)

548.4

Genealogical Registry	1.19	Technical Assistance	21.45	Management Software	2.84
Transport	494.71	Port Costs	22.40		

Animals Slaughtered 39,263,964

SLAUGHTER INDUSTRY (Million US\$)

12,092.19

Slaughterhouses	12,092.19
External market	1,279.00
Domestic market	10,813.19
Whole carcass	185.36
Half carcass	247.15

In Natura Products	2,695.48
Leg (ham)	539.86
Pork Carré	479.37
Pancetta	323.56
Pork spine	246.95
Loin	244.62
Rib	246.05
Boston butt	185.83
Pork Shoulder	113.93
Filet	92.84
Jowl	24.25
Pork belly	8.78
Pork Scraps	3.53
Other	185.89

Processed Products	7,685.20
Fresh sausage	1,739.08
Bacon	1,187.20
Smoked sausage	851.94
Seasoned products	1,336.15
Ham	658.10
Luncheon meat	428.61
Salami	414.73
Salted products	360.31
Capicola (Coppa)	219.85
Rib	96.74
Tenderloin	108.10
Large Pork Sausage	47.08
Mortadella	31.77
Sausage	1.71
Other	203.83

DISTRIBUTION (Million US\$)

Distributor/Wholesale: 4,889.1 Retail: 17,557.8

Wholesale	
Fresh meat	768.77
Processed meat	4,120.33

Retail	17,557.81
Fresh meat	4,354.62
Processed meat	13,203.19

Food Service	N/A
---------------------	------------

FINAL CONSUMER



MAPPING OF
BRAZILIAN
PORK CHAIN



29/11/2016 às 05h00

Mapa da cadeia produtiva de suínos indica movimentação de quase R\$ 150 bi em 2015

Por Luiz Henrique Mendes | De São Paulo



Responsável por abastecer cerca de 40% do consumo global de carnes, a suinocultura ostenta números expressivos também no Brasil. Com mais de 1 milhão de empregos gerados direta e indiretamente, o segmento movimentou R\$ 149,8 bilhões do campo à mesa dos consumidores e registrou Produto Interno Bruto (PIB) da ordem de R\$ 62,5 bilhões no ano passado.

Os números integram um mapeamento inédito sobre a cadeia produtiva da suinocultura no Brasil, o quarto maior produtor mundial de carne suína. O estudo, que será lançado hoje, foi encomendado pela Associação Brasileira de Criadores de Suínos (ABCS) e pelo Serviço Brasileiro de Apoio às Micro e Pequenas Empresas (Sebrae) à consultoria Markestrat e à FEA/USP de Ribeirão Preto (SP).

Suinocultura no país

Movimentação financeira na cadeia produtiva em 2015

Atividade	Valor (R\$ bilhões)	Valor (US\$ bilhões)
Agentes facilitadores	1,031	0,548
Antes das granjas	34,155	1,240
Nas granjas	30,338	4,029
Depois das granjas	117,762	35,276

Indústria frigorífica

Movimento em 2015 (US\$ bilhões)

Divisão

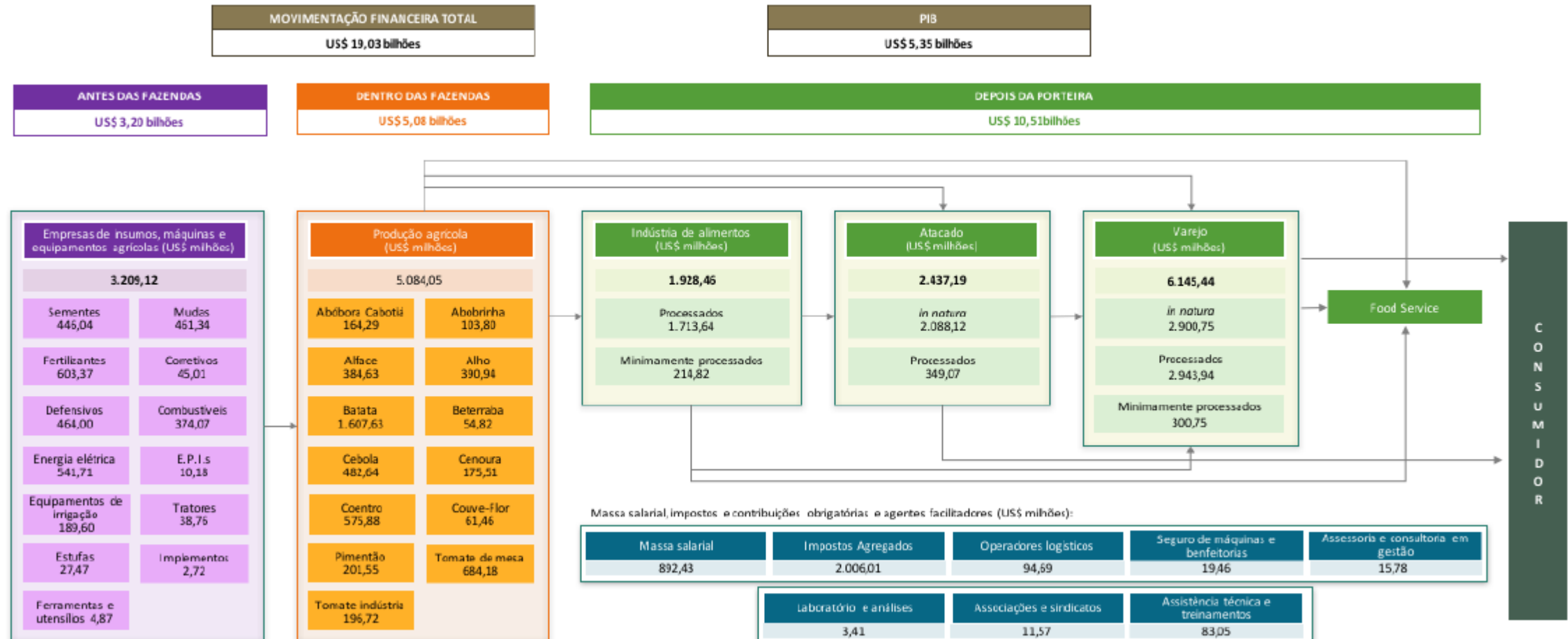
Abates sob SIF

Divisão por empresa em 2015 (%)

28 BRF 34 Outros

Do montante movimentado anualmente pela suinocultura, a maior parte se dá no processamento da proteína e na comercialização. De acordo com dados do estudo, o faturamento estimado do segmento "depois da granja" foi de R\$ 117,7 bilhões em 2015, quase 80% do total.

Vegetable Chain Mapping and Quantification 2016





Cadeia de hortaliças gira US\$ 20 bi, e 32% ficam com o varejo

Por Cleyton Vilarino | De São Paulo



Apenas um quarto do valor gerado pela cadeia de hortaliças no Brasil fica com os agricultores, segundo estudo que será divulgado hoje, em Brasília, pela Confederação da Agricultura e da Pecuária (CNA). Encomendado pela entidade à consultoria Markestrat, com sede em Ribeirão Preto (SP) o levantamento, que adaptou a metodologia aplicada pela empresa a culturas como cana-de-açúcar, laranja e soja, aponta que o segmento movimentou US\$ 20 bilhões em 2016 no país, dos quais 45% ficaram concentrados na cadeia de distribuição, principalmente no varejo (32%).

De acordo com Luciano Vilela, presidente da Comissão Nacional de Hortaliças e Flores da CNA, o peso do varejo reflete o elevado custo e as perdas com transporte e armazenamento dentro e fora das fazendas. "Por serem produtos perecíveis, a logística é muito especializada. Com isso, o transporte se torna um custo muito grande nessa categoria e, consequentemente, acaba sendo cobrado no elo seguinte, que é a distribuição", afirma Vilela.



De um universo de mais de 100 produtos, o trabalho se concentrou nas cadeias produtivas de alface, tomate, batata, alho, cenoura, beterraba, abóbora, cebola, abobrinha, pimentão, couve-flor e coentro. Juntas, essas culturas respondem por cerca de 65% da área plantada de hortaliças no país e geram um PIB de R\$ 18,63 bilhões (US\$ 5,3

Agenda

- 1 - Setting the Stage: The Importance of Food & Agribusiness to Brazil
- 2 - The Major Concepts of Food, Agribusiness, Chains, Systems...
- 3 - How to Describe and Understand a Food & Biofuel Chain (*Quantification Method*)
- 4 - How to do a Strategic Plan for a Food & Biofuel Chain (*ChainPlan Method*)
- 5 - Cases of Chain Projects (Collective Actions) for Value Creation

Strategic Planning and Management of Food and Agribusiness Chains: The *ChainPlan* Method (Framework)

Marcos Fava Neves

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Purdue University, West Lafayette, USA

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Review of Business
 Management

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ChainPlan – Agribusiness Strategic Planning

Marcos Fava Neves / Rafael Bordonal Kalaki / Jonny Mateus Rodrigues / Allan Wayne Gray

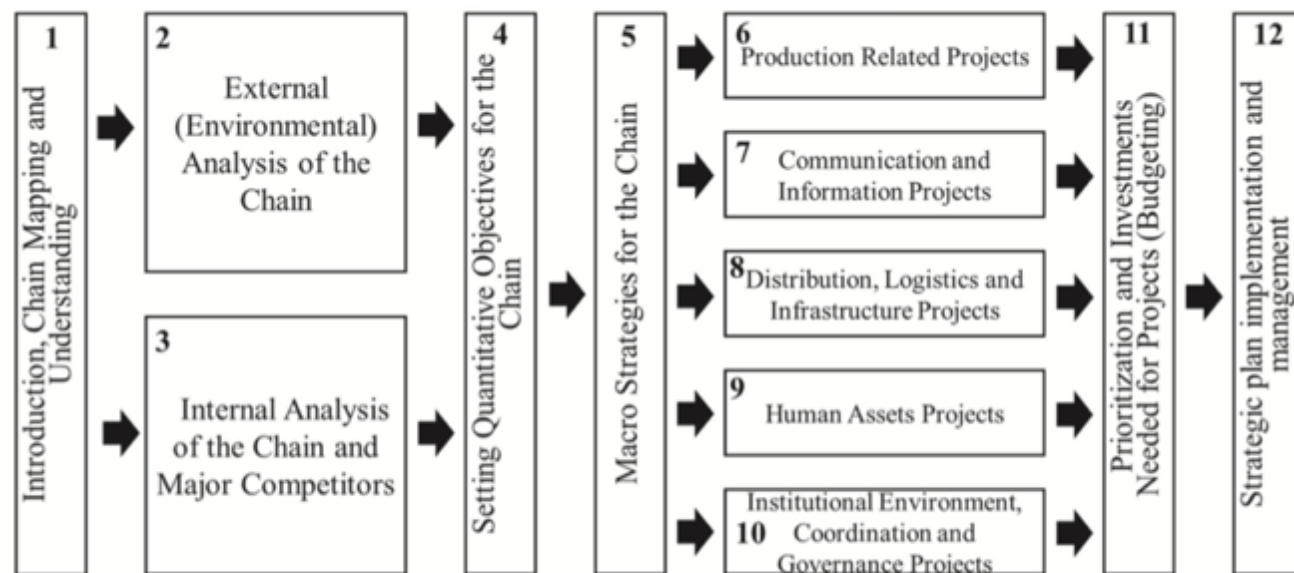


Figure 1. ChainPlan - stages for the strategic planning and management of food and agribusiness chains.

Abstract

Purpose – The objective of this paper is to improve the method for the strategic planning and management of food and agribusiness chains.

Design/methodology/approach – Several research methodologies are used to develop the *ChainPlan* methodology. The theory (literature review) provided the basis on which to build a preliminary framework ten years prior. Then, empirical application of the initial method provided insights regarding needed additions to and subtractions from the original method. These insights, combined with continued research on advances in the theories, contributed to further development of the *ChainPlan* methodology

Findings – A method is proposed to fill the theoretical gap regarding the strategic planning applied to agribusiness chains. The *ChainPlan* method is a theoretical-empirical method, built based on the academic literature and perfected over the years through its application in several productive chains

Originality/value – Many authors have proposed a method to build strategic plans in organizations, but when planning agribusiness chains is concerned, the academic discussion revolves around the coordination of agribusiness chains and analyses to be applied in this sector. This article fills this theoretical gap and proposes a tool, which is a specific strategic planning method to be applied in agribusiness chain

Keywords – strategic planning and management, agribusiness, systems

Guidelines for Food and Agribusiness Chains Strategic Planning and Management The ChainPlan Method (Framework)

Stage	What has to be done?
1. Introduction, chain mapping and understanding	✓ Build the team that will participate in the planning process; ✓ Identify any previously developed plans for the chain and study them. Alternatively, interview the participants to understand their current chain planning process; ✓ Search for plans done for similar agribusiness chains in other countries; ✓ Search for research organizations, government and private sector materials and publications; ✓ Identify the main specialists in the production chain; ✓ Do a first description (design) of the chain using boxes, reflecting the flow of products ranging from inputs until the final consumer; ✓ Try to measure the size of the chain, searching for data about all the industries involved in order to know its size, contribution to GDP, to employment, to tax collection and others. Interviews with specialists will contribute significantly to these measures.
2. External (environmental) analysis of the chain	✓ Market data and trends for the chain's products (production, consumption, exports, imports, trade, prices and others); ✓ Build a chain information system, looking for national and international quantitative and qualitative data; ✓ Understand the main competitors and their strategies; ✓ Understand the trade barriers (tariff and non-tariff) and check collective actions to reduce them; ✓ Analyze consumer behavior, buying decision processes and trends; ✓ Raise the threats and opportunities arising from uncontrollable variables (PEST); ✓ Develop a scenario matrix combining the most important factors from the opportunity and threat analysis to develop a series of possible industry outcomes over the next ten years.

Orange Juice Consumption in the 40 Major Markets

M ORANGE JUICE CONSUMPTION Marketrestrat™ TOP 40 COUNTRIES SUMMARY		2003		2004		2005		2006		2007		2008		2009		2010		2011		2012		2013		2014		2015		2016		2017		2003	
		100 Tons de FCOJ Equiv. 66°B	Thousand Tons FCOJ 66°B Equiv.	Annual Growth Rate	Thousand Tons FCOJ 66°B Equiv.	Annual Growth Rate	Thousand Tons FCOJ 66°B Equiv.	Annual Growth Rate	Thousand Tons FCOJ 66°B Equiv.	Annual Growth Rate	Thousand Tons FCOJ 66°B Equiv.	Annual Growth Rate	Thousand Tons FCOJ 66°B Equiv.	Annual Growth Rate	Thousand Tons FCOJ 66°B Equiv.	Annual Growth Rate	Thousand Tons FCOJ 66°B Equiv.	Annual Growth Rate	Thousand Tons FCOJ 66°B Equiv.	Annual Growth Rate	Thousand Tons FCOJ 66°B Equiv.	Annual Growth Rate	Thousand Tons FCOJ 66°B Equiv.	Annual Growth Rate	Thousand Tons FCOJ 66°B Equiv.	Annual Growth Rate	Thousand Tons FCOJ 66°B Equiv.	Annual Growth Rate	Thousand Tons FCOJ 66°B Equiv.	Annual Growth Rate	to 2017 Variance		
RANK	SELECTED COUNTRIES	2,399	2,406	0.30%	2,391	-0.63%	2,342	-2.07%	2,294	-2.04%	2,242	-2.28%	2,268	1.19%	2,249	-0.83%	2,218	-1.39%	2,111	-4.83%	2,104	-0.34%	2,042	-2.96%	1,979	-3.06%	1,956	-1.15%	1,882	-3.81%	-21.57%		
1	USA	1,001	1,028	2.68%	988	-3.86%	924	-6.45%	882	-4.52%	826	-6.39%	851	3.06%	807	-5.22%	791	-2.00%	704	-11.02%	728	3.55%	695	-4.61%	637	-8.38%	630	-1.11%	570	-9.53%	-43.08%		
2	GERMANY	250	228	-8.89%	207	-9.03%	209	0.97%	198	-5.32%	196	-0.98%	185	-5.79%	185	0.18%	181	-2.41%	167	-7.50%	159	-5.04%	153	-3.53%	152	-1.08%	149	-1.72%	142	-4.44%	-42.98%		
3	FRANCE	152	147	-3.46%	153	4.18%	158	3.15%	163	3.08%	163	-0.08%	168	3.02%	165	-1.34%	159	-3.67%	158	-0.85%	149	-5.47%	147	-1.70%	142	-3.37%	136	-4.13%	134	-1.41%	-11.95%		
4	CHINA	46	49	6.42%	57	16.32%	64	12.64%	75	17.33%	85	12.81%	94	11.62%	118	24.51%	126	7.05%	124	-1.30%	136	9.60%	132	-3.19%	131	-0.89%	129	-1.44%	130	1.02%	183.76%		
5	UNITED KINGDOM	143	136	-4.72%	136	-0.05%	139	1.76%	130	-6.50%	140	7.85%	136	-2.67%	135	-0.66%	133	-1.39%	127	-4.69%	123	-3.34%	115	-6.57%	109	-5.16%	110	1.06%	111	0.65%	-22.64%		
6	CANADA	116	119	2.26%	135	13.70%	111	-17.95%	106	-4.03%	103	-3.11%	107	4.29%	109	1.38%	111	2.08%	109	-1.78%	112	2.49%	113	0.94%	107	-5.54%	105	-1.61%	105	0.00%	-9.58%		
7	BRAZIL	42	34	-19.32%	34	0.04%	36	5.55%	33	-10.07%	33	2.93%	36	8.40%	39	8.07%	42	7.45%	48	13.81%	53	10.82%	62	17.09%	63	1.33%	67	6.39%	69	3.44%	63.49%		
8	RUSSIA	51	59	15.56%	63	6.48%	74	17.51%	79	7.11%	78	-1.18%	73	-7.02%	64	-11.39%	65	0.48%	68	4.27%	62	-7.51%	60	-3.70%	65	7.21%	59	-7.93%	57	-4.17%	11.30%		
9	JAPAN	92	97	5.54%	95	-2.11%	95	0.27%	92	-3.50%	78	-14.95%	76	-2.09%	75	-1.71%	64	-14.72%	64	0.33%	54	-16.20%	49	-7.96%	51	2.16%	51	1.52%	52	0.94%	-43.43%		
10	AUSTRALIA	53	55	4.17%	56	2.11%	57	2.05%	59	3.46%	58	-2.73%	57	-1.14%	57	0.54%	57	-0.56%	58	0.89%	50	-12.35%	47	-6.62%	47	-0.85%	47	-0.36%	46	-0.80%	-12.61%		
11	SAUDI ARABIA	15	16	6.30%	17	11.23%	19	9.38%	21	9.93%	22	4.21%	23	2.86%	26	16.87%	27	3.92%	29	5.16%	33	16.22%	34	2.88%	36	4.89%	37	1.36%	37	1.66%	151.52%		
12	SPAIN	43	45	5.74%	47	2.89%	46	-1.68%	46	0.40%	47	1.22%	47	1.14%	48	1.73%	46	-4.53%	39	-15.02%	38	-2.19%	37	-2.83%	39	4.97%	37	-4.23%	35	-4.64%	-17.33%		
13	POLAND	32	33	2.27%	34	1.70%	34	0.99%	33	-4.05%	33	2.58%	34	3.20%	36	3.89%	33	-8.79%	30	-8.66%	32	8.59%	34	4.15%	35	4.26%	35	0.38%	35	-0.80%	7.76%		
14	MEXICO	31	29	-7.28%	30	3.54%	30	-2.17%	32	7.16%	30	-6.30%	32	6.96%	30	-3.98%	30	-0.59%	32	5.06%	30	-5.45%	27	-10.93%	26	-3.68%	30	16.49%	32	7.31%	2.50%		
15	SOUTH AFRICA	20	21	4.80%	20	-0.34%	21	2.09%	21	-0.25%	21	2.85%	23	5.28%	24	4.84%	25	5.55%	25	1.67%	29	14.69%	31	4.98%	28	-8.88%	28	0.29%	28	-1.02%	40.63%		
16	ARGENTINA	4	5	24.03%	5	1.18%	6	37.44%	9	39.69%	11	22.06%	13	19.37%	17	30.54%	19	8.44%	23	25.48%	25	7.64%	24	-4.06%	28	16.43%	27	-3.51%	26	-3.12%	600.87%		
17	ITALY	33	33	-1.16%	33	1.11%	31	-6.46%	30	-4.62%	29	-0.96%	29	-1.27%	29	0.13%	29	0.23%	28	-3.58%	26	-8.12%	25	-3.78%	25	0.61%	23	-7.18%	23	0.31%	-30.14%		
18	NETHERLANDS	36	37	1.64%	35	-6.10%	35	1.61%	32	-8.47%	32	-1.61%	32	0.71%	32	-0.56%	32	0.42%	30	-4.86%	29	-5.75%	28	-2.22%	28	1.84%	25	-13.62%	22	-10.55%	-39.42%		
19	INDONESIA	2	3	18.43%	3	-1.75%	3	11.76%	4	10.25%	4	24.67%	6	43.10%	8	22.29%	8	9.60%	9	5.74%	10	12.11%	11	11.17%	20	80.63%	22	6.88%	21	-2.27%	752.42%		
20	SOUTH KOREA	45	43	-3.99%	42	-2.83%	40	-3.36%	39	-2.88%	39	-0.68%	38	-1.28%	38	-1.77%	37	-2.61%	37	1.13%	25	-32.48%	24	-4.24%	22	-6.91%	21	-4.90%	20	-4.67%	-54.67%		
21	SWEDEN	26	24	-9.92%	24	0.41%	25	5.40%	25	-1.66%	24	-2.52%	24	-1.41%	23	-1.82%	22	-3.53%	20	-12.20%	19	-6.07%	17	-7.42%	17	-0.45%	17	-0.55%	17	-0.59%	-35.87%		
22	BELGIUM	22	22	-0.16%	22	1.24%	24	5.48%	23	-0.97%	23	-1.89%	23	-0.23%	23	-2.12%	23	0.62%	22	-3.42%	21	-5.46%	20	-1.28%	19	-8.39%	18	-5.56%	17	-4.78%	-24.42%		
23	CHILE	6	6	11.13%	7	12.73%	8	11.92%	9	16.26%	11	17.21%	11	-0.87%	11	6.78%	14	20.19%	15	13.04%	16	2.82%	15	-3.89%	16	5.68%	16	0.52%	16	-1.25%	184.60%		
24	AUSTRIA	19	18	-8.29%	18	0.84%	17	-3.14%	17	-2.19%	17	-2.06%	17	1.29%	17	0.35%	18	5.68%	17	-2.71%	15	-11.20%	15	-6.00%	14	-1.37%	14	-1.93%	14	-1.81%	-28.91%		
25	SWITZERLAND	15	14	-4.21%	14	-1.03%	14	-4.41%	14	2.09%	14	0.44%	14	0.27%	14	0.89%	14	0.31%	14	-0.44%	14	0.14%	14	-0.22%	13	-3.48%	13	-1.09%	13	-1.30%	-11.80%		
26	NORWAY	12	13	12.60%	14	9.25%	15	4.80%	15	2.33%	17	7.09%	17	2.70%	17	-1.85%	13	-19.94%	14	3.06%	13	-2.59%	13	-4.66%	13	0.47%	12	-3.31%	12	-3.06%	2.77%		
27	GREECE	12	11	-4.55%	12	4.30%	12	-0.79%	12	-0.79%	11	-8.29%	11	2.78%	11	-0.16%	10	-10.64%	9	-7.88%	9	5.11%	9	-5.17%	12	38.22%	12	-3.21%	11	-4.46%	-3.73%		
28	DENMARK	12	12	3.84%	12	-0.94%	12	-2.36%	12	-2.36%	11	-5.67%	11	-1.41%	11	-2.24%	10	-2.64%	10	-4.91%	9	-4.41%	10	1.81%	10	1.17%	10	-1.80%	10	2.34%	10	-1.76%	-18.45%
29	INDIA	1	1	29.46%	1	30.72%	3	101.47%	4	52.69%	4	1.47%	4	2.63%	5	24.03%	7	27.66%	7	2.29%	7	-2.57%	7	9.12%	8	11.65%	9	8.60%	9	2.55%	1059.75%		
30	FINLAND	16	13	-16.25%	14	7.55%	13	-6.89%	11	-16.63%	10	-7.45%	11	9.96%	11	-3.43%	11	-0.29%	10	-4.31%	10	-4.15%	9	-9.99%	9	-1.97%	9	1.96%	9	-2.55%	-46.07%		
31	TURKEY	3	4	35.22%	5	33.08%	7	44.18%	7	-4.60%	7	-0.08%	7	-2.11%	7	10.05%	7	0.00%	11	51.01%	10	-3.44%	11	5.92%	9	-15.04%	9	-8.64%	8	-3.54%	208.04%		
32	IRELAND	13	13	5.25%	14	4.38%	14	-0.39%	14	2.12%	14	-0.36%	13	-11.35%	11	-9.81%	10	-8.44%	10	-8.12%	9	-7.33%	8	-8.68%	7	-9.22%	7	-4.76%	7	-1.62%	-45.98%		
33	PHILIPPINES	3	3	-5.90%	3	1.03%	3	8.89%	4	3.17%	4	1.88%	4	-2.61%	4	2.46%	4	2.19%	4	14.04%	5	30.03%	6	5.16%	6	4.68%	6	7.89%	7	5.57%	106.27%		
34	MOROCCO	1	1	8.90%	2	138.69%	2	30.67%	3	29.67%	4	26.47%	4	14.00%	6	37.37%	7	12.76%	7	-1.89%	8	17.71%	9	8.39%	7	-20.85%	7	-2.62%	6	-1.45%	835.28%		
35	UKRAINE	6	10	55.30%	12	25.17%	14	16.50%</																									

FCOJ Equivalent Consumption Volumes Do Not Include Orange Juice Used For CSD Syrups For Entire Industry

Guidelines for Food and Agribusiness Chains Strategic Planning and Management The ChainPlan Method (Framework)

Stage	What has to be done?
3. Internal analysis of the chain and major competitors	✓ Identify the main producing regions for the core product including particularities and trends; ✓ Map the contracts and existing forms of coordination; ✓ Map, analyze and understand possible substitute products; ✓ Evaluate public policies and incentives in the chain; ✓ Describe existing governance structures with the characteristics of the transactions; ✓ Analyze the competitiveness of the chains (Porter's 5 forces, Porter's diamond, key success points); ✓ Analyze chain value creation, resources skills; ✓ Analyze critical success factors of the chain; ✓ Select, among other countries chains sources of benchmark.
4. Setting Quantitative objectives for the chain	✓ Proposed objectives must be clear and quantifiable; - Production, consumption, exports, imports, sales, GDP generated, costs, employment generation, taxes collected and others ✓ Next ten years. Ideally, scenario analysis and include an expected, worst case, and best case
5. Macro strategies for the chain	✓ To list the major strategies (actions) to be used to achieve the objectives proposed at stage 04 in terms of leadership, positioning, value capture and market segmentation; ✓ Porter's generic strategies, concepts of resource-based view, core competencies, BSC's view, others

Guidelines for Food and Agribusiness Chains Strategic Planning and Management The ChainPlan Method (Framework)

Stage	What has to be done?
6. Production related projects	✓ Analyze production processes and production capacities; ✓ Map and plan production risks (sanitary and others); ✓ Areas for production expansion; ✓ Smart production concepts; ✓ Circular economy concepts and integrated production systems; ✓ Financing of investments (public and private credit, private sources (barter) or other) and special lines for smallholders; ✓ Insurances and price policies (minimum prices and other discussions); ✓ Irrigation incentives and policies; ✓ Adopt a vision of continuous product improvement; ✓ Products and product lines as well as complementary product lines for expansion decisions, opportunities in value adding; ✓ Raise innovation opportunities in the chain, stimulating start-ups and other forms; ✓ Research and development issues and ideas, partnerships with universities, research institutes and other; ✓ Analyze partnerships for complementary solutions; ✓ Services that are being and will be offered; ✓ Brands, country of origin, labeling, logos and others; ✓ Sustainability, renewable sources of energy and certification processes, climate related issues, payment for environmental services and biodiversity related issues; ✓ Long term analysis and competitiveness of inputs (crop protection, fertilizers, others) ✓ Adapt products to standards and institutional environment; ✓ Packaging (labels, materials, design);



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Stage	What has to be done?
7. Communication and information projects	✓ Build a chain information system, establishing information that will be collected and distributed to enhance chain transparency; ✓ Build the information distribution systems using appropriate media platforms; ✓ Connectivity and access to digital services; ✓ Build a chain communication plan, identifying the target audiences that will receive the communication (messages), develop the desired goals for this communication (product knowledge, product reminders, persuasion, among others), try to achieve positioning and message of products generated by the chain, set the content of communication that will be used; ✓ Do benchmark of films and international materials used by other agribusiness systems; ✓ Indicate how communication results will be measured so that the system can learn to use the best tools and get return on investment; tell the story; ✓ Chain identity, brand and image; ✓ Creation of joint symbols and certifications; ✓ Create institutional communication material for the chain (benefits, contributions, advantages, strengths); ✓ Create specific communication campaigns for the foreign market, direct consumers, influencers, facilitators, the general public; ✓ Communicate the benefits of the chain in terms of sustainable inclusion; tax generation and other contributions (impact on GDP, employment); ✓ Relationship programs with NGO's and other chain influencers (medical and nutritional areas, others); ✓ Consider the role of government agencies in promoting communication activities;

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Guidelines for Food and Agribusiness Chains Strategic Planning and Management The ChainPlan Method (Framework)

Stage	What has to be done?
8. Distribution, logistics and infrastructure projects	✓ Analyze logistics of all the chain and improvement possibilities (modal integration, rural roads, logistical hubs and others) ✓ Analyze storage capacities and needs; ✓ Analyze the distribution channels of products and seek new ones, setting distribution objectives such as presence in markets, type and number of points of sale, services to be offered, market information, product promotion and incentives; ✓ Identify the possible wishes of international distributors and consumers to suit the services provided; ✓ Articulate search for improvements in infrastructure; ✓ Concepts of sharing economy (models like Uber) that could be used by the chain; ✓ Raise collective actions that can be done in international markets; ✓ Raise synergies with other food chains; ✓ Design international strategies for exports like franchising, joint ventures or other contractual forms, or even vertical integration; ✓ Consider the critical role of governments in logistics (financing, data management, governmental structures, privatization, public private partnerships and others) and in promoting competition and free markets for transport services; ✓ Leverage favorable government agencies in promoting access to international markets (agreements, trade zones and others);



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I got lost... where are we?



Strategic Planning and Management of Food and Agribusiness Chains: The *ChainPlan* Method (Framework)

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Abstract

Purpose – The objective of this paper is to improve the method for the strategic planning and management of food and agribusiness chains.

Design/methodology/approach – Several research methodologies are used to develop the *ChainPlan* methodology. The theory (literature review) provided the basis on which to build a preliminary framework ten years prior. Then, empirical application of the initial method provided insights regarding needed additions to and subtractions from the original method. These insights, combined with continued research on advances in the theories, contributed to further development of the *ChainPlan* methodology

Findings – A method is proposed to fill the theoretical gap regarding the strategic planning applied to agribusiness chains. The *ChainPlan* method is a theoretical-empirical method, built based on the academic literature and perfected over the years through its application in several productive chains

Originality/value – Many authors have proposed a method to build strategic plans in organizations, but when planning agribusiness chains is concerned, the academic discussion revolves around the coordination of agribusiness chains and analyses to be applied in this sector. This article fills this theoretical gap and proposes a tool, which is a specific strategic planning method to be applied in agribusiness chain

Keywords – strategic planning and management, agribusiness, systems



Review of Business Management

DOI:10.7819/rbgn.v21i4.4012

ChainPlan – Agribusiness Strategic Planning

Marcos Fava Neves / Rafael Bordonal Kalaki / Jonny Mateus Rodrigues / Allan Wayne Gray

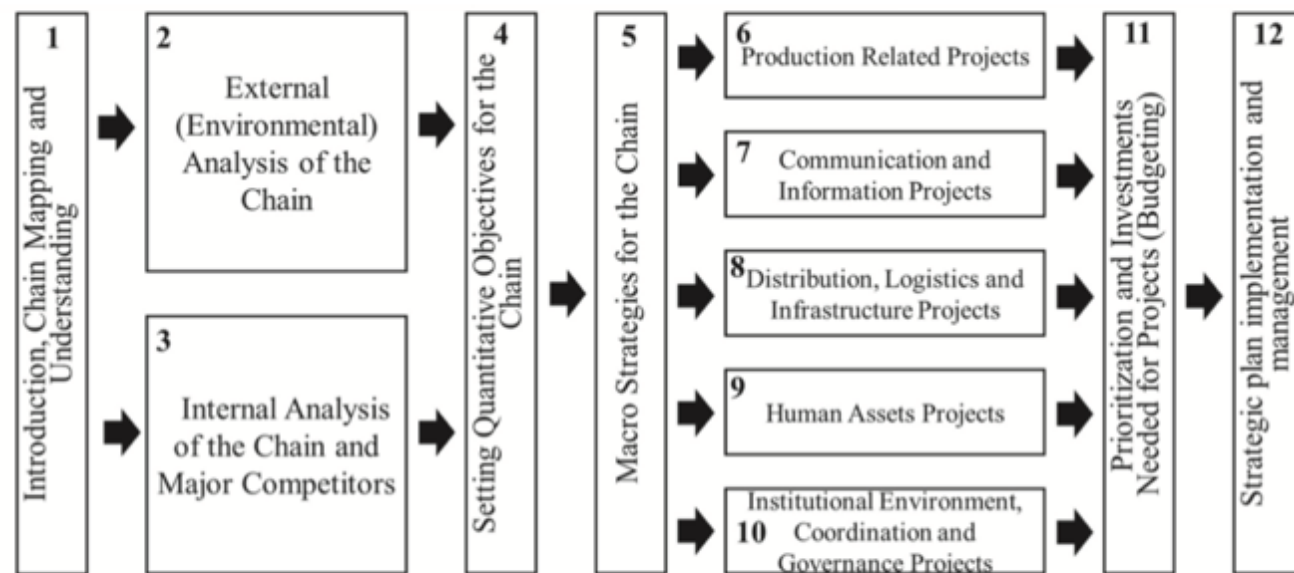


Figure 1. ChainPlan - stages for the strategic planning and management of food and agribusiness chains.

Guidelines for Food and Agribusiness Chains Strategic Planning and Management The ChainPlan Method (Framework)

Stage	What has to be done?
9. Human assets projects	✓ Examine critical labor issues, labor laws, rural labor retirement programs and potential improvements; ✓ Conduct an analysis of education needs incorporating a holistic view of education needs and offerings at all levels (municipalities, state, federal) ✓ Design training strategies in production, manufacturing, quality, safety, sustainability and management for participants in the agribusiness chain to gain efficiency and enhance innovation; ✓ Programs for rural schools; ✓ Develop a chain education platform, with topics, institutions, responsibilities; ✓ Promote extension services and programs; ✓ Leverage the role of Universities and technical schools; ✓ Distance education programs; ✓ Leverage the role of associations, cooperatives, federations and other organizations. ✓ Create communication plans to increase awareness of employments opportunities in the chain, attract and retain talent in the industry, and create public support for human capital in the industry.

Guidelines for Food and Agribusiness Chains Strategic Planning and Management The ChainPlan Method (Framework)

Stage	What has to be done?
10. Institutional environment, coordination and governance projects	✓ Public and private credit projects; ✓ Role of Government, agencies and other public institutions; ✓ Mapping and role of cooperatives, associations and other collective organizations; ✓ Taxes, policies and incentives; ✓ Regulatory issues (harmonization, natural resources, safety, products registering, environment, licenses, forestry codes, water resources and protection, storage, land acquisition and others); ✓ Security and crime related topics; ✓ Land ownership, land rights and issues linked to minorities; ✓ Chain code of conduct and chain dispute resolution mechanisms ✓ Seek reduction of bureaucracy; ✓ Projects to increase consumption; ✓ Sanitary and certification issues; ✓ Develop project for tax reduction in the agribusiness system; ✓ Develop projects for trade and investment projects; ✓ Equipment import incentives; ✓ Trade policies and negotiations; ✓ Standardization of products and product names; ✓ Modernization and transparency in legislation; ✓ Public and private conflict resolution systems with proposals for coordination and contracts. ✓ Public services driven by needs of private sector



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Soy Water? Almond Juice? Virginia Could Be Next State To Declare Milk Must Come From Animals

Martin Austermuhle

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Grocery stores in the Commonwealth could one day sell dairy milk alternatives by a different name; think soy drink, water or fluid — you name it, just not milk.
Martin Austermuhle / WAMU

At some point in the future in Virginia, oat milk may simply have to be called something else.

The Virginia General Assembly has [approved a bill](#) that, if signed by Gov. Ralph Northam, would eventually limit the use of the term “milk” on labels and cartons to the “lacteal secretion of a healthy hooved mammal.” So if it comes from a cow, goat or even yak, it can be marketed and sold as milk. But if it’s from soy, almond, oat or any other plant-based source, it can’t. (Human breast milk could still be called milk.)

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Guidelines for Food and Agribusiness Chains Strategic Planning and Management The ChainPlan Method (Framework)

Stage	What has to be done?
11. Prioritization and investments needed for the strategic projects (Budgeting)	✓ All projects need formal project descriptions including: - analysis and description of objectives, actions, implementation suggestions, performance indicators, inter-relations, teams, deadlines, budgets and forms of management; ✓ It is necessary to prioritize them; ✓ Prioritization can be done in a chain workshop, in order to have a democratic decision, using criteria of: - urgency (should be done immediately, related to time), - relevance (related to the potential positive impacts); - relatedness (related to how projects are connected to and reinforce impacts) - investment (related the amount of resources needed). ✓ The ones that receive the higher ratings of relevance, urgency, and relatedness, combined with a lower investment need, receive higher priority. ✓ After, prepare budgets for all of the projects and the total budget of the strategic plan to decide what projects to execute. ✓ Executing the prioritized projects in waves is a suggestion here.

Guidelines for Food and Agribusiness Chains Strategic Planning and Management The ChainPlan Method (Framework)

Stage	What has to be done?
12. Strategic plans implementation and management	✓ Effective strategic planning process; ✓ Implementation is at least as important as building the strategic plan for the chain, in other words, success comes when the chain makes it happen not when they develop the plan. ✓ Suggest the following for strategic plan implementation - Develop a governance structure and an implementation process; - Evaluate and adapt the resources; - Involve different levels and agents in the execution process to gain align across agents in the chain; - Build and motivate the teams for the strategic projects; - Define goals and objectives for people; - Build a committee to discuss specific issues and solve problems; - Seek public-private partnerships; - Communicate the plan to the different organizations and agents involved; - Review the <i>ChainPlan</i> plan constantly. ✓ A vertical organization can help implement the <i>ChainPlan</i>

Guidelines for Food and Agribusiness Chains Strategic Planning and Management The ChainPlan Method (Framework)

Ten years of experience designing chain plans and facilitating implementation has led to several observations about the speed and success of implementation including:

- ✓ a lack of participant understanding of planning and strategy concepts;
- ✓ not anticipating problems and conflict of priorities;
- ✓ finding key volunteer leaders with motivation;
- ✓ inadequate leadership ability among the leaders;
- ✓ lack of discipline/motivation of members and organizations;
- ✓ political and cultural issues within participants;
- ✓ poor team integration;
- ✓ different agents seeking their own objectives;
- ✓ allowing some to believe they are owners of the collective;
- ✓ lack of understanding and clarity of goals and objectives;
- ✓ lack of established indicators to be monitored;
- ✓ lack of standards for implementation;
- ✓ Not creating a simplified version of the detailed plan communicated in an executive

Overcoming the difficulties to implement the ChainPlan

Agenda

- 1 - Setting the Stage: The Importance of Food & Agribusiness to Brazil
- 2 - The Major Concepts of Food, Agribusiness, Chains, Systems...
- 3 - How to Describe and Understand a Food & Biofuel Chain (*Quantification Method*)
- 4 - How to do a Strategic Plan for a Food & Biofuel Chain (*ChainPlan Method*)
- 5 - Cases of Chain Projects (Collective Actions) for Value Creation



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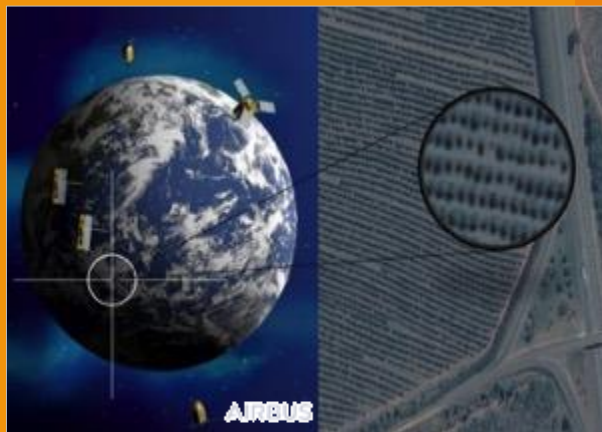
CURSOS E
TREINAMENTOS



PES

Data collection and disclosure on orange production in São Paulo and West-Southwest of Minas Gerais Citrus Belt since 2015

www.fundecitrus.com.br/pes/estimativa



ORGANIZATIONAL STRUCTURE

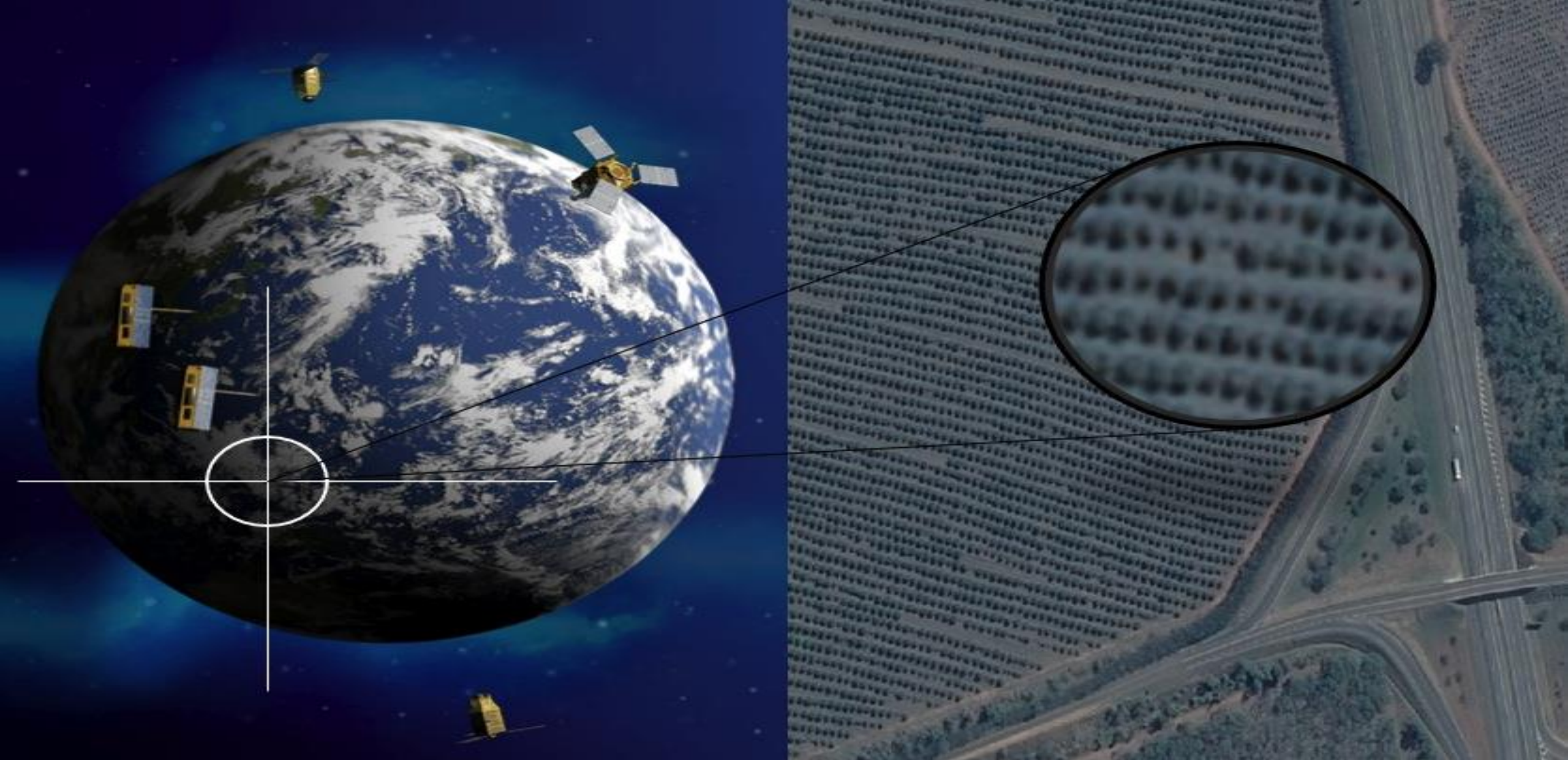
- Budget of R\$ 5.272 million¹
- 120 professionals in 2017

Highlights

- 502 thousand kilometers in only 3 months
- 2,625 blocks counted
- 2,560 stripped trees



¹ Junho/2016 a Maio/2017 (inclui a pesquisa de monitoramento de queda e peso de frutos em 900 talhões que embasaram as reestimativas da safra 2016/2017).



Satellite images purchased from Airbus



May 19th 2015 9:00 hs – Final meeting for first production forecast

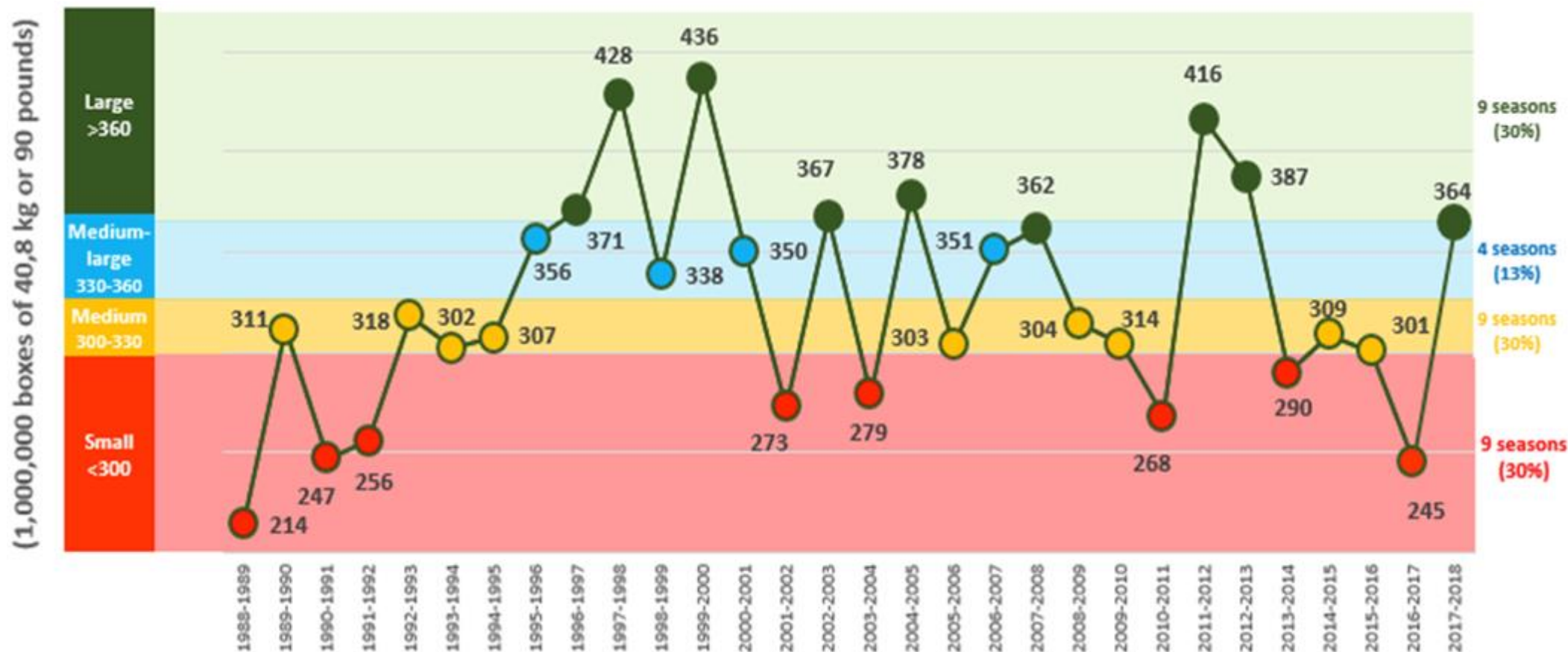


Confidentiality



10hs – Communication to the press and chain participants, live on TVs and internet

Final Orange Production of the Crop Years 1988-1989 Through 2016-2017 and Forecast for The 2017-2018 Season



Average of last 10 years = 320 million boxes

Source: CitrusBR (1998/89 to 2014/15) and Fundecitrus (2015/16 to 2017/18).



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Orange Juice Futures Climb on Brazil Crop Forecast

Smaller crop expected, lifting futures off an almost two-month low

By JULIE WERNAU

May 19, 2015 4:25 p.m. ET

0 COMMENTS

A smaller orange-crop forecast for Brazil emboldened investors Tuesday, pushing orange-juice futures off an almost two-month low.

The July frozen concentrated orange juice contract rose 4.1% to end at \$1.1335 a pound on the ICE Futures U.S. exchange, extending gains made before the forecast's release. On Monday, the contract had finished at its lowest since March 19.

Fundecitrus said Tuesday that Brazil's main orange-growing region would produce 279 million boxes of oranges in the coming harvest, which starts at the end of May. It was the Brazilian orange industry group's first forecast for the region and would be a 9.4% drop from the previous harvest based on an estimate provided by CitrusBR, which represents the nation's three biggest juice exporters. Each box of oranges weighs 90 pounds.



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Orange Juice Sinks on Brazil Forecast; Cotton Lower Ahead of Crop Estimate

By Julie Wernau | Published May 10, 2017 | [Features](#) | Dow Jones Newswires

Orange-juice futures sank Wednesday after a Brazilian association released a robust estimate for the upcoming orange crop in Brazil, the world's largest growing region.

Frozen concentrated orange juice for July lost 3.9% to \$1.4265 a pound on the ICE Futures U.S. exchange.

Fundecitrus, a citrus growers and juice manufacturers association from the state of Sao

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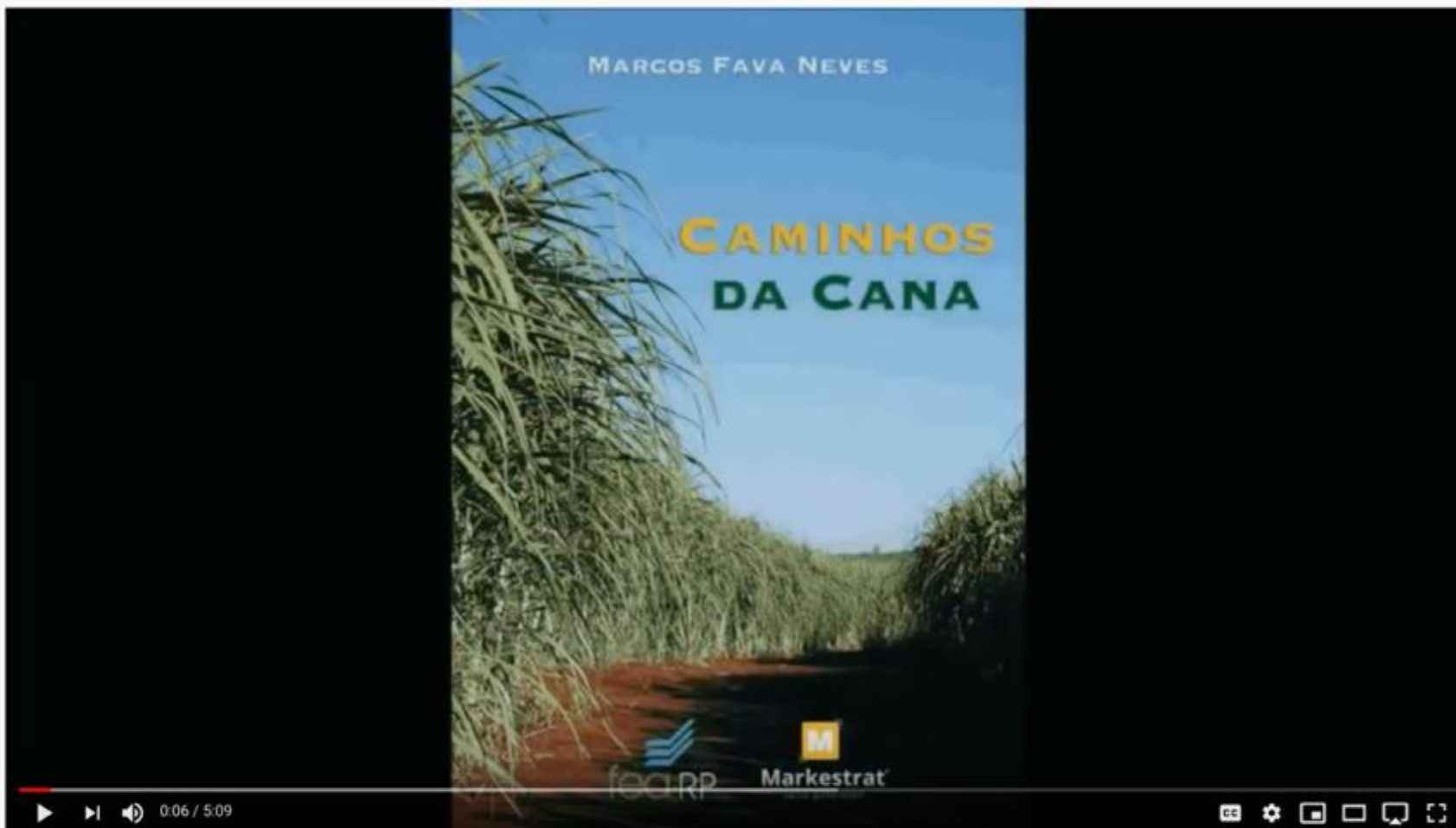
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What we take home and next steps?

Prof. Marcos Fava Neves

favaneves@gmail.com | www.favaneves.org



- ❑ Marcos Fava Neves is an *international expert* on global agribusiness issues and a part-time professor of planning and strategy at the School of Business (FEARP) of the University of São Paulo (USP) and FGV Business School, both in Brazil. He graduated as an agronomic engineer from ESALQ/USP - Piracicaba in 1991. He earned his master's degree in 1995 and his doctorate in management in 1999 from the FEA/USP School of Economics and Business – São Paulo. Marcos completed postgraduate studies in European agribusiness at ESSEC-IGIA in France in 1995 and in chains/networks at Wageningen University, in the Netherlands (1998-1999). In 2013 he spent the year as a visiting international professor at Purdue University (Indiana, USA) where he maintains the linkage as a permanent International Adjunct Professor. Since 2006 he is an international professor at the University of Buenos Aires, Argentina.
- ❑ He has *specialized in strategic-planning* processes for companies and food chains and works as a board member of both public and private organizations, being member of more than 10 international boards since 2004. Also in 2004, he created the Markestrat think tank with other partners, today employing around 60 people and doing international projects, studies and research in strategic planning and management for more than 250 agri-food business organizations. Some of these projects were very important in suggesting public policies for food chains that were implemented in Brazil with economic and social impacts.
- ❑ Also as an experience in the private sector, from 1992 to 1993 he worked in citrus juice exporter and from 1994 to 1995 in a veterinarian company. In 2008, he became CEO of Brazil's second-largest biofuel holding company, a position he occupied until 2009, when he returned to the University of São Paulo (USP) and Markestrat.
- ❑ At the academic side, since 1995 (when he was hired by USP), Marcos has advised more than 30 doctorate dissertations and master's theses and helped to form around 1200 Bachelors in Business Administration in Brazil with around 120 courses taught to undergraduates at USP.
- ❑ His writings are strongly focused on supplying simple and effective methods for business. He has published more than 100 articles in international journals and has been author and editor of 63 books by 10 different publishers in Brazil, Uruguay, Argentina, South Africa, Singapore, Netherlands, China, the United Kingdom and the United States. He is also a regular contributor for China Daily Newspaper and has written two case studies for Harvard Business School (2009/2010), one for Purdue (2013) and five for Pensa/USP in the nineties. Recognized as the Brazilian academic with the largest number of international publications about orange juice and sugar cane chain and one of the top 3 most cited Brazilian authors in the area of food and agribusiness. He has reached more than 4000 citations in Google Scholar index.
- ❑ Marcos is one of the most active Brazilian speakers, having done more than 1050 lectures and presentations in 25 countries. He received around 150 recognitions from Brazilian and international organizations, and is considered a "Fellow" of the IFAMA (International Food and Agribusiness Management Association), title received in Minneapolis - 2015.
- ❑ Coming from a family of farmers, he is a worldwide defender of agriculture and farmer's role in the development of the society. In the social side, together with his parents, Marcos is one of the creators and maintainers of Mucapp, a NGO that in 20 years has built more than 450 houses for families in Brazil that face very unfavorable conditions.