

**The Forestry Sector in**

**BRAZIL**





# Content

- 1| Overview of Brazilian Forest Sector
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# Overview

## Planted forest area by country

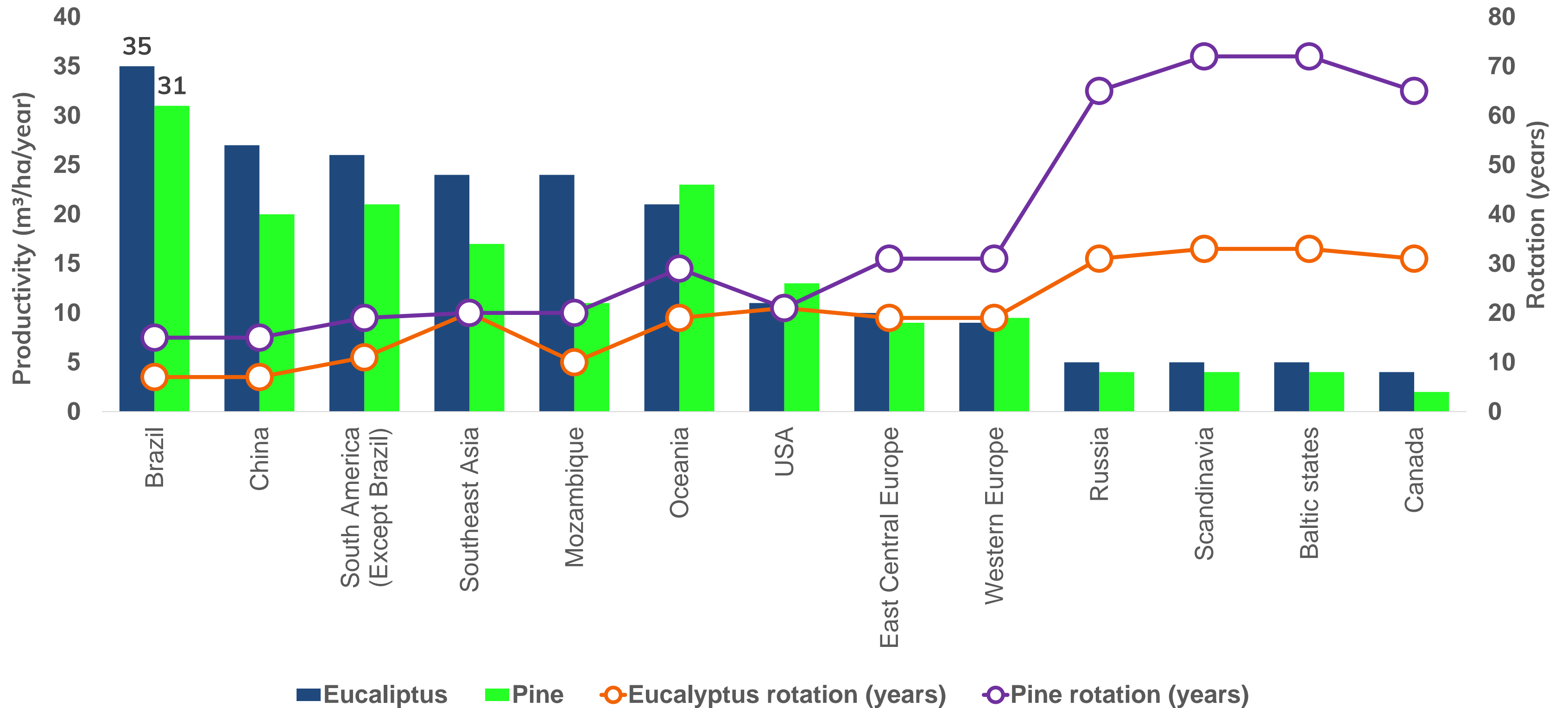
#	Country	Area of Planted Trees (1000 ha)					
		1990	2000	2005	2010	2015	2020
1	China	41,950	54,394	67,219	73,067	78,982	84,696
2	USA	17,938	22,560	24,425	25,564	26,364	27,521
3	Russia	12,651	15,360	16,963	19,613	19,841	18,880
4	Canada	4,578	9,345	11,710	13,975	15,784	18,163
5	Sweden	7,399	9,839	11,099	12,564	13,737	13,912
6	India	5,716	7,167	9,486	11,139	12,031	13,269
7	Japan	10,287	10,330	10,324	10,292	10,270	10,184
8	Brazil	4,984	5,176	5,620	6,973	7,736	9,537
9	Poland	8,511	8,645	8,767	8,877	8,957	9,337
10	Finland	4,390	4,953	5,901	6,775	6,775	7,368
11	Sudan	5,424	5,639	5,854	5,940	6,121	6,068
12	German	5,388	5,416	5,278	5,290	5,295	5,710
13	Others	46,902	59,431	67,830	77,126	77,706	67,567
	<b>TOTAL</b>	<b>171,332</b>	<b>214,619</b>	<b>242,960</b>	<b>264,001</b>	<b>289,599</b>	<b>292,212</b>

Source: Malinovski, adapted from FAO/FRA (2020) and IBÁ (2021)

# Productivity

Brazil x Other players

Forest production in Brazil versus other significant players worldwide



Source: Malinovski (2022)

# Brazilian forest sector

Brazil has **9.55 million** hectares of planted forests, **78% Eucalyptus**, **18% Pine** and 4% other species.

**Forestry GDP** – the Brazilian planted forest sector grew **16.4%** in 2021, compared to the previous year, reaching revenue of **US\$ 27.1 billion**. Much higher than the national average GDP growth of 4.6%. The sector represents **1.6% of Brazilian GDP** and **8.5% of Industrial GDP**.

# Eucalyptus plantation

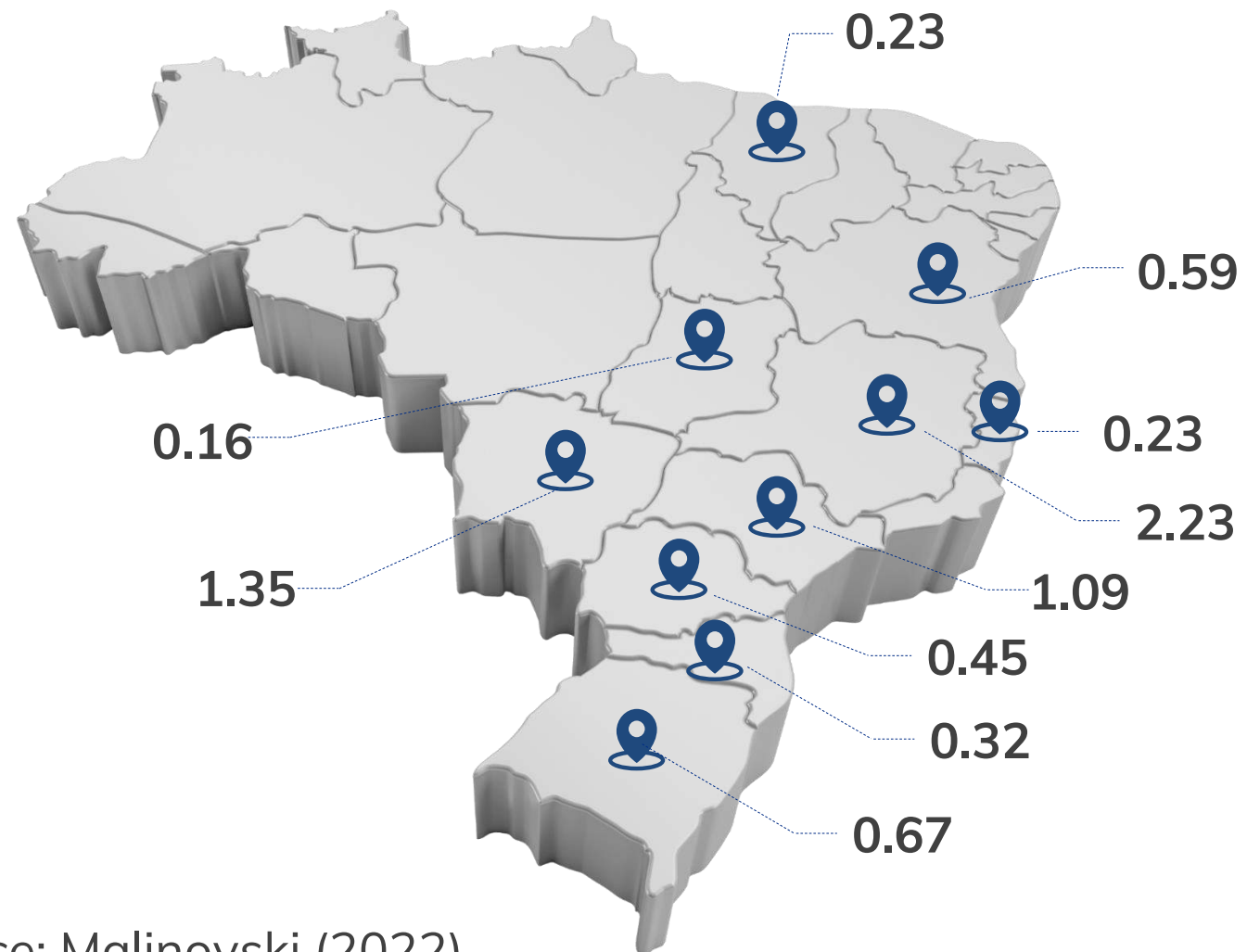


7.5 million ha

Final Felling for:

- Wood Energy: 5 - 7 years.
- Pulp mill: 7 years.
- Wood Panels: 7 years.
- Lumber: up to 12 years.

Top 10 states with largest Eucalyptus planted area (Million ha)



Source: Malinovski (2022)

# Pine plantation

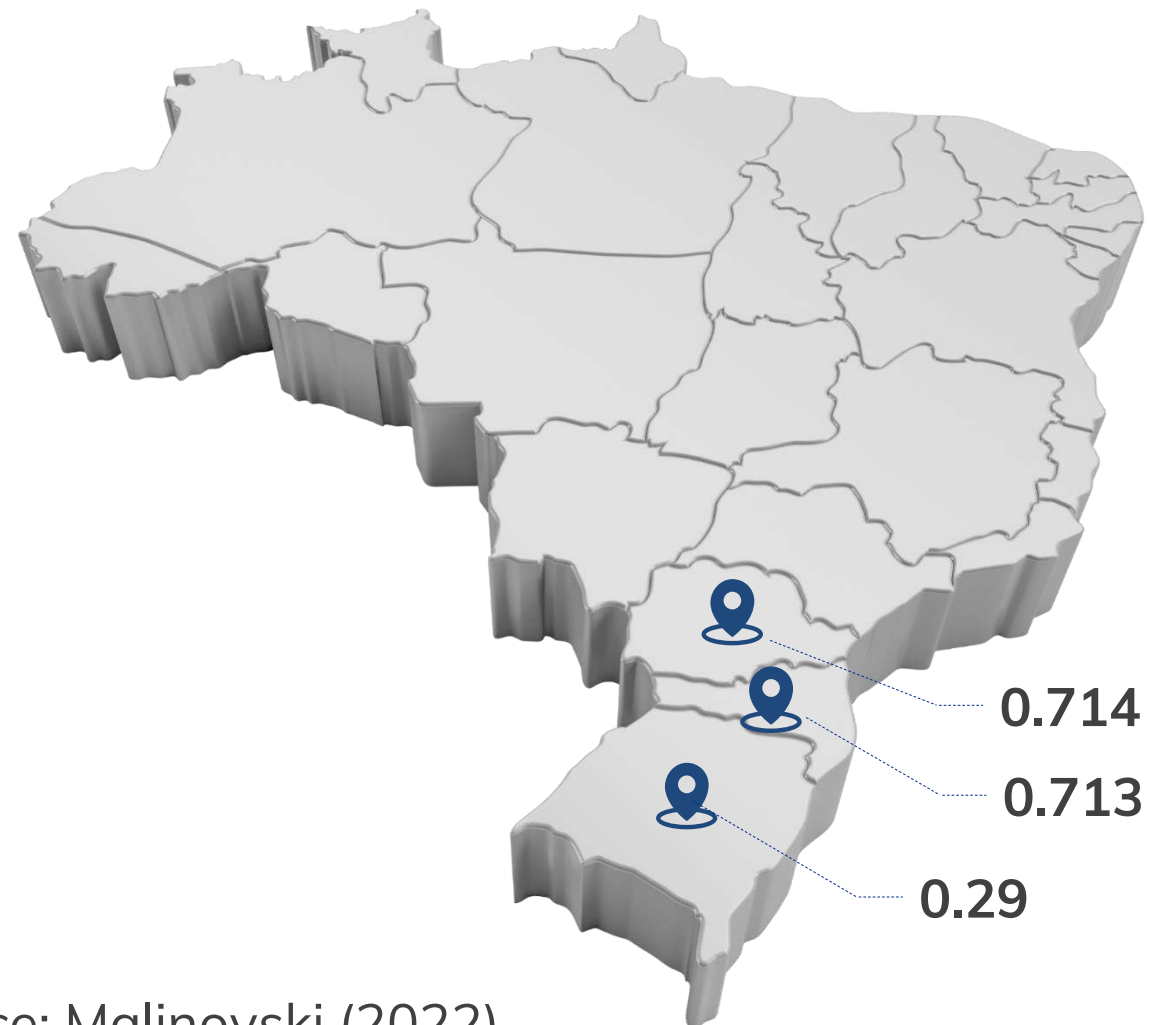


**1.7 million ha**

Final Felling for:

- Pulp mill: 7 to 15 years.
- Wood panel: 15 years.
- Lumber: up to 20 years

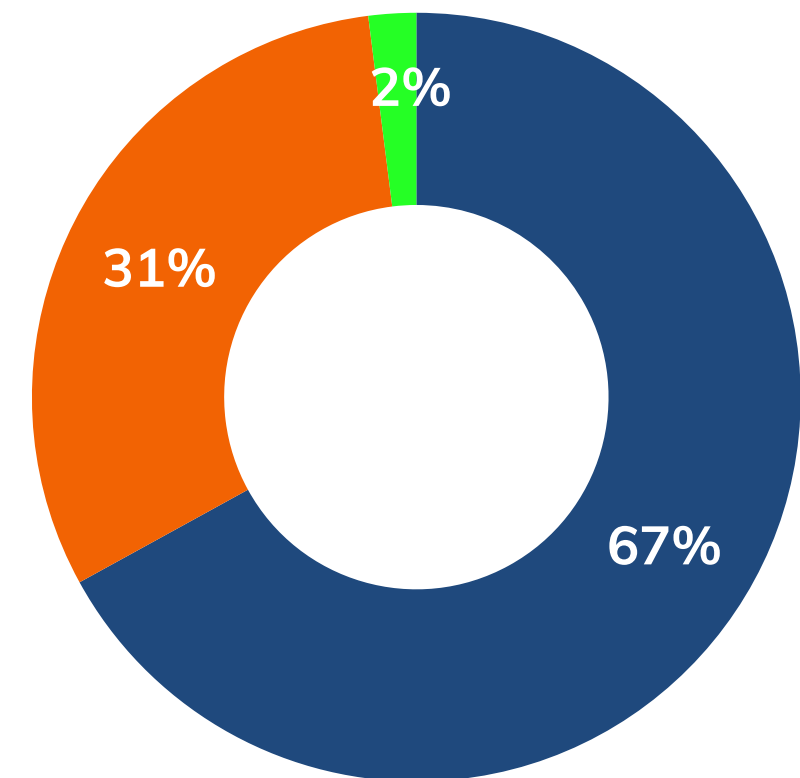
Top 3 states with largest Pine planted area (Million ha)



Source: Malinovski (2022)

# Timber harvesting systems

The main timber harvesting system in Brazil is the **Cut-to-Length**, around **67%** of the wood volume harvested in the last 5 years uses this system. On the other hand, **Full-Tree** system represents **31%**.



■ Cut-to-Length ■ Full-Tree ■ In Field Chipping





# Certification

Certified managed and planted area by certification system, 2020:



Only FSC: 2.4 millions  
Only CERFLOR: 0.75 millions  
FSC and CERFLOR: 3.65 millions

**TOTAL: 6.80 millions of ha.**

# Preservation

Brazilian forest companies preserved 6.11 million hectares



- Legal reserve
- High value conservation areas
- Permanent conservation areas
- Private natural heritage reserves



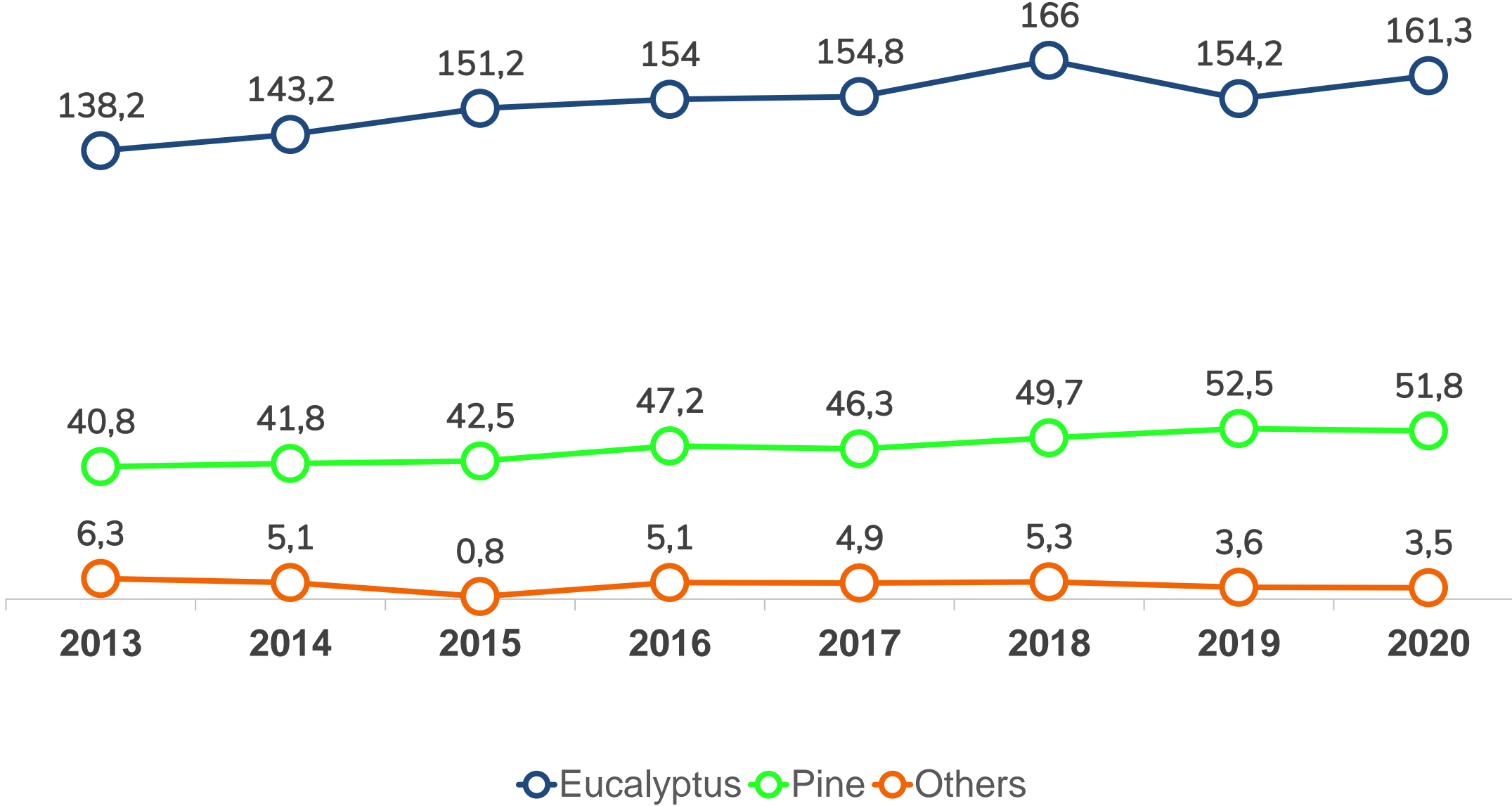


# Consumption

Wood for industrial purposes

## Historical consumption 2013 – 2020

Consumption in million of m<sup>3</sup>



# Production

Brazil x World

## Main Brazilian forest products



Pulp production worldwide

Ranking	Country	Production Millions (t)
1°	USA	50.9
2°	<b>Brazil</b>	<b>21.0</b>
3°	Canada	15.4
4°	China	14.9
5°	Sweden	12.0
6°	Finland	10.5
7°	Russia	8.8
8°	Indonesia	8.4
9°	Japan	7.2
10°	Chile	5.2



Paper production worldwide

Ranking	Country	Production Millions (t)
1°	China	135.2
2°	USA	80.9
3°	Japan	25.4
4°	Germany	24.3
5°	India	17.7
6°	South Korea	13
7°	Indonesia	12.9
8°	Italy	11.6
9°	Russia	10.8
10°	<b>Brazil</b>	<b>10.2</b>



Wood panels production worldwide

Ranking	Country	Production Millions (m³)
1°	China	92.2
2°	USA	24.1
3°	Russia	13.4
4°	Germany	12.7
5°	Poland	10.8
6°	Canada	10.6
7°	Turkey	9.3
8°	<b>Brazil</b>	<b>8.9</b>
9°	Thailand	7.5
10°	France	4.8



Lumber production worldwide

Ranking	Country	Production Millions (m³)
1°	China	84.0
2°	USA	79.1
3°	Russia	41.8
4°	Canada	40.2
5°	Germany	26.2
6°	Sweden	18.6
7°	Finland	10.9
8°	Austria	10.6
9°	<b>Brazil</b>	<b>10.2</b>
10°	Turkey	9.4



Charcoal production worldwide

Ranking	Country	Production Millions (t)
1°	<b>Brazil</b>	<b>6,374</b>
2°	Nigeria	4,751
3°	Ethiopia	4,728
4°	Congo	2,798
5°	Ghana	2,171
6°	Tanzania	2,151
7°	India	1,882
8°	China	1,610
9°	Thailand	1,535
10°	Madagascar	1,505

Source: Malinovski, adapted from IBÁ (2021) and FAO (2020).

# Socioeconomic Indicators of the Forest Sectors

(Base year: 2021)

## GDP



US\$ 27,1 bn

(1.59% of Brazilian GDP)

## Cos



73 thousand

companies

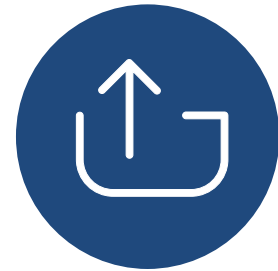
## Jobs



613 thousand

(1.3% of Brazilian jobs)

## Exports



US\$ 13.9 bn

(5% of Brazilian Exports)

## Imports



US\$ 1.2 bn

(0.5% of Brazilian Imports)

## BOT



US\$ 12.7 bn

(21% of Brazilian BOT)

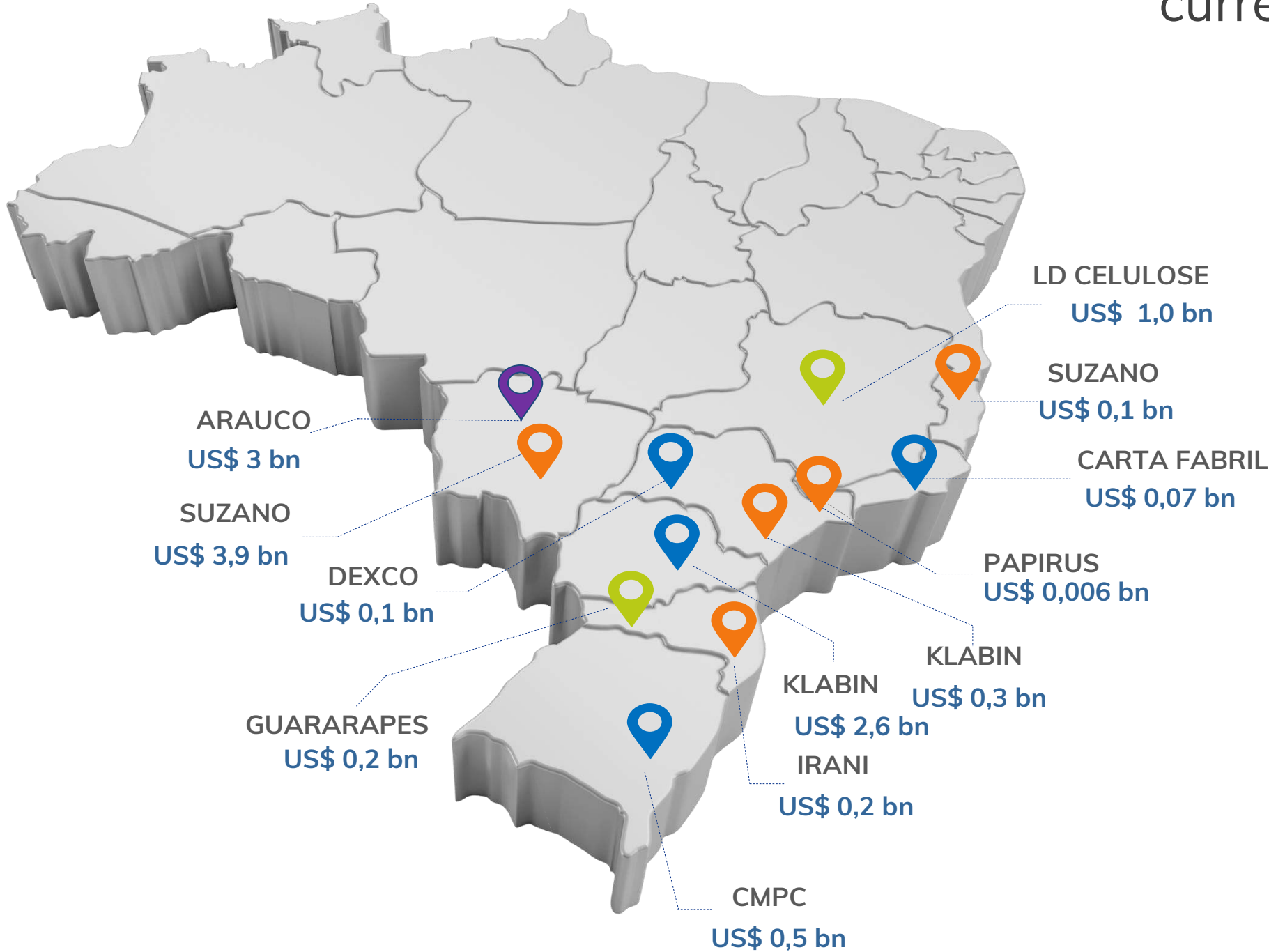
GDP: Gross domestic product | Cos: Companies | BOT: Balance of trade

Source: Abimci (2022)

# Investments

By 2028

Recently **new forestry projects** have been announced, **mainly** in the **pulp and paper** segment. The country currently has **13 projects in progress** by 2028.



**US\$ 12 bn** | 13 projects

- 2022: 1,3 bn
- 2023: 3,3 bn
- 2024: 4,5 bn
- 2028: 3,0 bn

Source: Malinovski, adapted from IBÁ (2022)

5<sup>th</sup> expo 2023  
**FOREST**<sup>®</sup>  
Brazilian Forestry Fair

**EXTREME**



**Biggest forest fair  
in Latin America.**



Participation of the world's largest players in the planted forest segment.







**Highly qualified and business-focused audience.**



**Largest dynamic demonstrations  
of machines at a fair.**

**Demonstrations of different  
timber harvesting systems**



Trucks test-drive with the  
**biggest world players of  
forest segment.**



**Come to know the largest  
Eucalyptus base in the world!**



# HISTORIC

YEAR	EXHIBITORS	VISITORS	COUNTRIES	BUSINESS AGREEMENT
<b>2008</b>	58	4,520	16	<b>BRL 40 millions</b>
<b>2011</b>	128	8,760	26	<b>BRL 100 millions</b>
<b>2014</b>	208	25,107	26	<b>BRL 152 millions</b>
<b>2018</b>	240	30,654	30	<b>BRL 316 millions</b>



# REASONS TO EXPOSURE



- 1** Expoforest brings together the main players in the planted forest segment for the areas such as forest nursery, silviculture, biomass, wood harvesting and transport, and other technologies for production support.
- 2** The first and only dynamic forestry fair in Latin America. Dynamics of silviculture, wood harvesting, transport, and biomass.
- 3** The fair is focused on **business** and **launches** of **machinery, equipment, and products** for the forest-based sector.
- 4** **Highly specialized public** with the presence of the majority of forestry-based companies in Latin America.
- 5** **Expoforest occurs only every 4 years**, except for the 2023 edition due to the COVID-19 pandemic. In this way, the fair becomes stronger and **more representative in the world calendar**.

# MANAGING BOARD

Since its first edition Expoforest has a management board formed by the following companies:



JOHN DEERE

KOMATSU



Tigercat  
Tough • Reliable • Productive



# GLOBAL MAP – 200 hectares

## LEGENDA / SUBTITLE:

### ÁREA DINÂMICA DE COLHEITA, TRANSPORTE E BIOMASSA

DYNAMIC AREA OF HARVESTING, TRANSPORTING AND BIOMASS

E	1.000m <sup>2</sup> (25m x 40m)	B	10.000m <sup>2</sup> (75m x 133m)
D	2.500m <sup>2</sup> (40m x 62,5m)	A	20.000m <sup>2</sup> (100m x 200m)
C	5.000m <sup>2</sup> (50m x 100m)		

### ÁREA DINÂMICA DE SILVICULTURA

DINAMIC AREA OF SILVICULTURE

F	600m <sup>2</sup> (20m x 30m)
D	2.500m <sup>2</sup> (40m x 62,5m)
C	5.000m <sup>2</sup> (50m x 100m)

### ÁREA DINÂMICA ESPAÇO ILPF

DINAMIC AREA OF SILVICULTURE

IL	50m <sup>2</sup> (5m x 10m)
IL	100m <sup>2</sup> (10m x 10m)



BANHEIROS  
RESTROOMS



ESTACIONAMENTO  
PARKING LOT



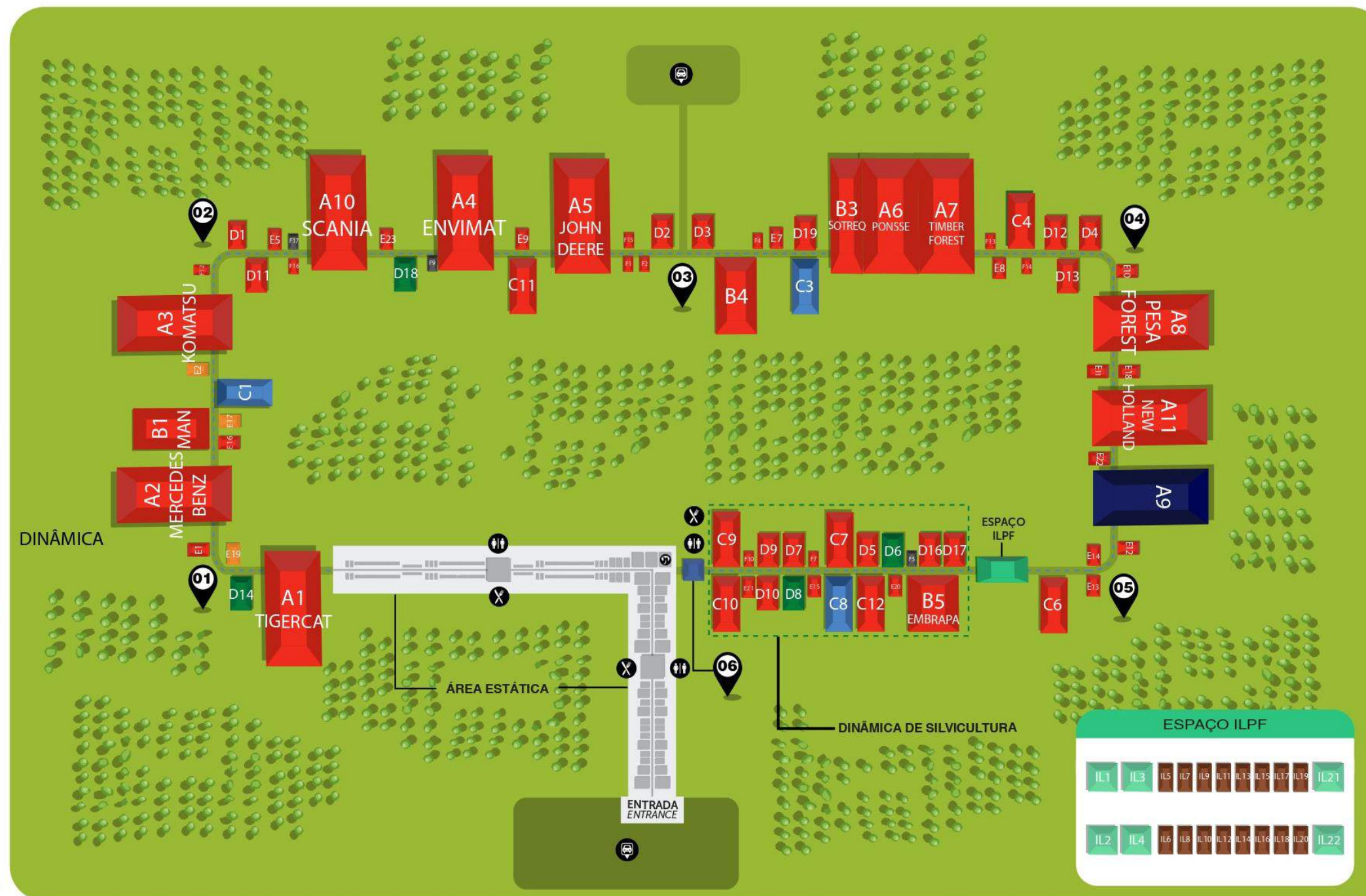
RESTAURANTE  
RESTAURANT



SAV - SERVIÇO DE ATENDIMENTO AO VISITANTE  
VSS - VISITOR SUPPORT SERVICES



MALINOVSKI / ORGANIZAÇÃO



## EXPOSITORES / EXHIBITORS:

<b>A1</b> Tigercat	<b>A11</b> New Holland	<b>C11</b> Planalto	<b>D10</b> Arborgen	<b>E8</b> Potenza	<b>E20</b> Sumitomo Chemical	<b>F13</b> Ferraz Equipamentos
<b>A2</b> Mercedes Benz	<b>B1</b> MAN	<b>C12</b> IN4Y	<b>D11</b> Log Set	<b>E9</b> HFORT	<b>E21</b> Mosaic	<b>F14</b> Nordtech
<b>A3</b> Komatsu	<b>B3</b> Sotreq	<b>D1</b> TMO Forest	<b>D12</b> Fezer	<b>E10</b> Oregon	<b>E22</b> Sergomel	<b>F15</b> Trelleborg
<b>A4</b> Envimat	<b>B5</b> Embrapa Florestas	<b>D2</b> Siebert	<b>D16</b> Stihl	<b>E12</b> Roder	<b>F1</b> Pulsfog	
<b>A5</b> John Deere	<b>C7</b> ICL	<b>D3</b> Vantec	<b>D17</b> Husqvarna	<b>E13</b> Kolecti	<b>F2</b> Máquinas Solo	
<b>A6</b> Ponsse	<b>C9</b> Basf	<b>D4</b> Log Max	<b>D19</b> Vermeer	<b>E14</b> Noma	<b>F7</b> UPL	
<b>A7</b> Timber Forest	<b>C10</b> Syngenta	<b>D5</b> FMC	<b>E1</b> Metalesp	<b>E15</b> Ihara	<b>F10</b> Feldermann	
<b>A8</b> Pesa	<b>C11</b> Minusa	<b>D7</b> Bayer	<b>E5</b> Manos Implementos	<b>E16</b> Let's Rent a Car	<b>F12</b> Rotor	
<b>A10</b> Scania	<b>C11</b> Guerreiro Implementos	<b>D9</b> Corteva	<b>E7</b> Santa Izabel	<b>E18</b> Facchini	<b>F13</b> Hidramave	

# STATIC MAP

## LEGENDA / SUBTITLE:

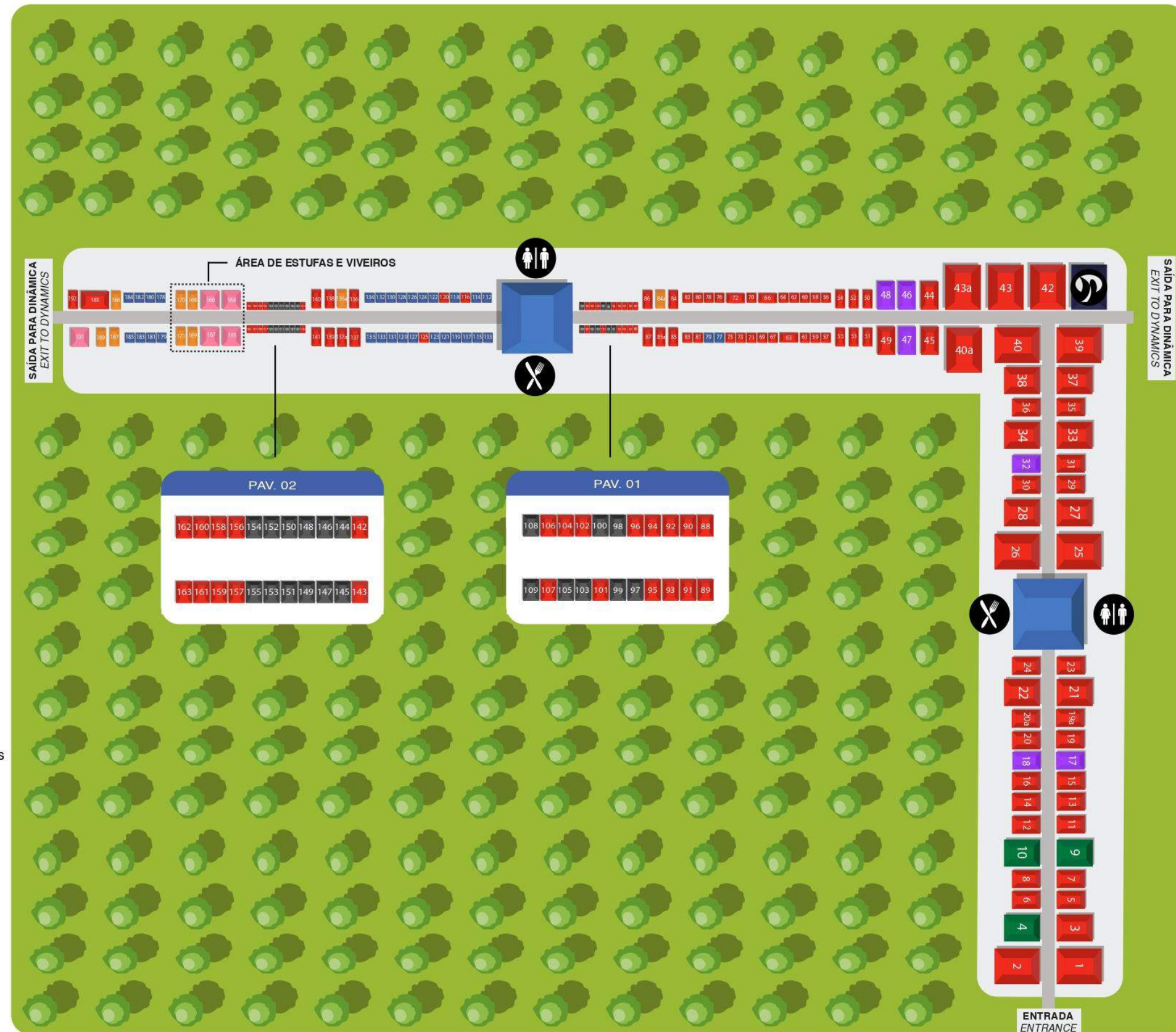
**ÁREA ESTÁTICA**  
STATIC AREA

12m <sup>2</sup> (PAVILHÃO)	150m <sup>2</sup> (10m x 15m)
25m <sup>2</sup> (TENDA)	300m <sup>2</sup> (15m x 20m)
50m <sup>2</sup> (5m x 10m)	500m <sup>2</sup> (20m x 25m)
100m <sup>2</sup> (10m x 10m)	

	<b>BANHEIROS</b> RESTROOMS
	<b>RESTAURANTE</b> RESTAURANT
	<b>MALINOVSKI / ORGANIZAÇÃO</b>

## EXPOSITORES / EXHIBITORS:

- |                               |                            |                            |
|-------------------------------|----------------------------|----------------------------|
| <b>1</b> Sylvamo              | <b>40a</b> Lufer           | <b>72</b> Real Vedações    |
| <b>2</b> J de Souza           | <b>41</b> Malinovski       | <b>73</b> OKUBO            |
| <b>3</b> Inflor               | <b>42</b> Bachiega         | <b>75</b> OKUBO            |
| <b>5</b> Rotobec              | <b>43a</b> Raptor          | <b>76</b> Vista Hydraulics |
| <b>6</b> Mirex-S              | <b>44</b> Futuragro/Lavoro | <b>81</b> Grupo Ferrante   |
| <b>7</b> Engeforest           | <b>45</b> Hyva             | <b>82</b> Sysflor          |
| <b>8</b> Mill Indústrias      | <b>49</b> DRV              | <b>83</b> Creare Sistemas  |
| <b>11</b> Index               | <b>50</b> Hidrau Máquinas  | <b>84</b> Hennings         |
| <b>12</b> Hexagon             | <b>51</b> Marrari          | <b>85</b> Verion           |
| <b>13</b> Dinagro             | <b>52</b> Rotary-Ax        | <b>85a</b> NLMK            |
| <b>15</b> Ani Sistemas        | <b>53</b> WDS              | <b>86</b> Hallco           |
| <b>16</b> Jacto               | <b>54</b> Woodtech         | <b>88</b> STC Simuladores  |
| <b>21</b> Comercial Rodrigues | <b>55</b> HANSA-FLEX       | <b>90</b> Control Union    |
| <b>22</b> EMEX                | <b>56</b> OPT Gis          | <b>91</b> Kero Telecom     |
| <b>23</b> Trestone            | <b>57</b> K2ON             | <b>94</b> Planbelt         |
| <b>24</b> Watabe              | <b>58</b> Mantsinen        | <b>96</b> Canopy           |
| <b>26</b> FEX                 | <b>61</b> Hook do Brasil   | <b>101</b> Lucatec         |
| <b>30</b> Trimble             | <b>62</b> Koppert          | <b>102</b> Signumat        |
| <b>31</b> Guarany             | <b>63</b> Euroforte        | <b>104</b> Tecmater        |
| <b>33</b> XMobots             | <b>64</b> Selva Florestal  | <b>106</b> SR4 Soluções    |
| <b>35</b> Unibrás             | <b>65</b> Euroforte        | <b>107</b> SR4 Soluções    |
| <b>36</b> Liebherr            | <b>66</b> Quality Global   | <b>116</b> Craper          |
| <b>37</b> Rech                | <b>68</b> Quality Global   | <b>120</b> Demuth          |
| <b>38</b> Himev               | <b>69</b> Testato          | <b>125</b> Eloforte        |
| <b>40</b> Maxxi Forest        | <b>71</b> Geplant          | <b>136</b> GF Pneus        |



- |                      |                      |                      |                        |
|----------------------|----------------------|----------------------|------------------------|
| <b>137</b> Timbeter  | <b>140</b> Hidrauvit | <b>143</b> Nord Lock | <b>192</b> Aplic Certo |
| <b>139</b> ADR Eixos | <b>142</b> Simova    | <b>186</b> Abrascort |                        |

Discover the world's  
largest dynamic  
forestry fair

Last edition





Check out the  
**launch video** of  
**Expoforest 2023**

PREPARE-SE

5ª expo 2023  
**FOREST**  
Feira Florestal Brasileira

24 A 26 MAIO 2023 | REGIÃO DE RIBEIRÃO PRETO  
SÃO PAULO - BRASIL

PROMOÇÃO / REALIZAÇÃO: Malnovski | AGÊNCIA: Sylvamo

# DO YOU WANT TO KNOW MORE ABOUT?

AUG 9TH-11TH, 2023



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