SOY AS POULTRY FEED

A case study linking Swiss poultry imports to deforestation risk in Brazil

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KEY FINDINGS

- **Brazil is the world's top poultry exporter**, and its poultry feed relies heavily on soy and corn crops, closely linked to deforestation. Despite the industry's vertical integration, traceability, especially for soy, remains insufficient.
- **In 2024, 42% of Swiss poultry imports came from Brazil**, with 92% of exports concentrated in five municipalities. These are tied to exporters like Seara (JBS), C. Vale, and Vibra, which operate near soy-producing areas and often lack strong traceability and deforestation-free commitments.
- **The top 10 Swiss poultry importers handle nearly 80% of imports**, with Coop (Bell Food Group) and Migros as key actors. However, their deforestation-free policies do not cover soy used for poultry production that is subsequently imported from Brazil.
- **Swiss consumers generally lack access to origin details**, as product labels rarely identify the Brazilian slaughterhouse or soy source. Only some frozen products sold by wholesalers include SIF codes that allow such identification.
- **Brazil lost 43.5 million hectares of forest between 2002 and 2023**, with soy cultivation directly responsible for 7% of deforestation in the Amazon and 20% in the Cerrado, making it a major driver of forest loss.
- **Case studies show recent illegal deforestation for soy production** near poultry feed facilities, potentially linked to slaughterhouses exporting poultry to Switzerland. While direct sourcing links are unclear, the proximity of deforested farms to exporter infrastructure indicates a risk of deforestation in the poultry supply chain.

1. INTRODUCTION

How is the poultry industry linked to deforestation?

According to the Food and Agriculture Organisation of the United Nations (FAO), in 2023, poultry represented 37% of global livestock meat production, followed by pigs (34%) and beef and buffalo meat (21%) (see Figure 1). Among the producing countries, the top three, which represented 40% of the global poultry production in 2023, were the United States, Brazil, and China (see Table 1).

Figure 1. Global livestock meat production by type in 2023*

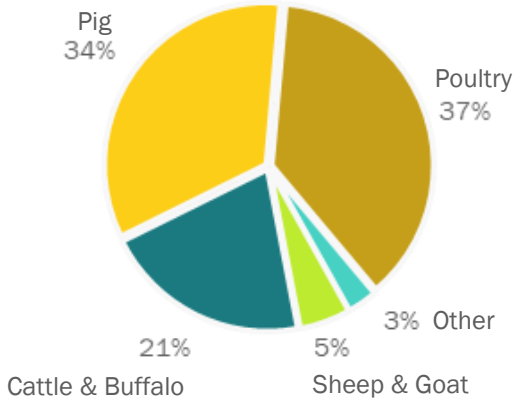


Table 1. Poultry production in 2023 by country*

Producing country	Quantity (tons)	%
USA	19,901,890	16%
Brazil	14,833,000	12%
China	14,800,000	12%
Russia	5,339,500	4%
India	5,019,410	4%
Other 188 countries	66,583,125	53%
Total	**126,476,925**	**100%**

*Source: FAO Stat, accessed in May 2025 at https://www.fao.org/faostat/

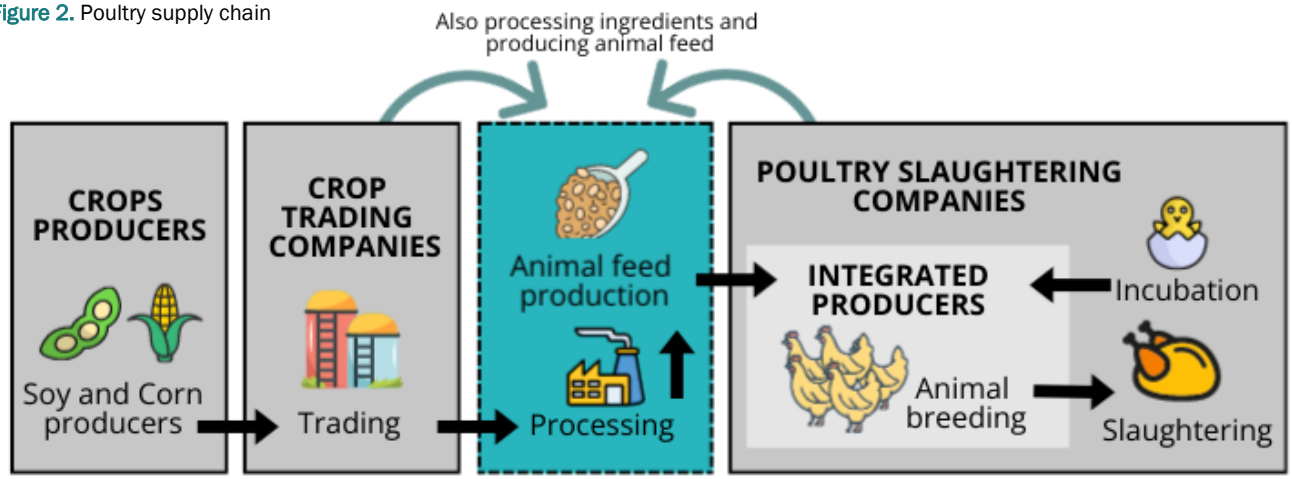
However, Brazil, the second-largest global poultry producer, was the largest poultry meat exporter in 2023, followed by the United States and Poland. According to FAO Statistics, Brazil exported 4.9 million tons of poultry meat in 2023, accounting for 13% of global exports.

Seara, a brand of the Brazilian JBS group, is the world's largest poultry slaughtering company, slaughtering 5.1 million chickens per day. The second-largest poultry producer in Brazil is BRF, a brand of Marfrig, which is also the third-largest poultry producer globally. According to Embrapa, approximately 98% of poultry production is conducted through the "integration" system, where producers receive all inputs from the slaughtering company, including animals, food, technical assistance, transport, slaughter, and all the products necessary for animal rearing. The "integration" system, besides being adopted in almost the entire production within the poultry supply chain in Brazil, also potentially allows a better traceability of the poultry suppliers.

Brazil is the third-largest producer of animal feed, after China (1st) and the USA (2nd), primarily to supply the poultry and pig production in the country. Globally, poultry feed accounts for approximately 43% of the animal feed industry's production, encompassing both broiler and layer animal feed. In the case of poultry, animal feed is mainly composed of soybean meal and corn (maise). Brazil is also one of the largest soy and corn-producing countries, accounting for 41% of global soy production and 11% of the worldwide corn (maise) production.

The animal feeding industry is vertically integrated, with both crop traders on one side and poultry slaughtering companies on the other. In other words, both crop traders and poultry slaughtering companies process ingredients and produce animal feed (see Figure 2 below). In Brazil, the largest soy and corn traders, such as ADM, Bunge, and Cargill, as well as slaughtering companies like Seara (JBS) and BRF (Marfrig), among others, operate facilities that process ingredients and/or produce animal feed (Sipeagro).

Figure 2. Poultry supply chain



Elaborated by AidEnvironment

Deforestation risks in the poultry supply chain are primarily linked to the production of feed crops, particularly soy and corn. Between 2018 and 2023, Brazil lost **14 million hectares** of forests, according to MapBiomas. Of this deforested area, 57% was in the Amazon biome and 33% in the Cerrado biome. To illustrate the scale: the deforested area in Brazil between 2018 and 2023 is more than three times the size of Switzerland. During the same period, soy cultivation expanded by **3.6 million hectares**, primarily through the direct conversion of pasture areas rather than forest. However, since forests are often initially cleared for pasture, which is later used for agriculture, **soy cultivation is still a key indirect driver of deforestation** in Brazil.

2. SWISS POULTRY IMPORTS AND BRAZILIAN EXPORTS

What is the share of Brazilian poultry exports in Swiss poultry imports?

According to Swiss import data (Swiss-Impex database), Switzerland imported 46,159 tons of poultry in 2024, of which around 42% (19,384 tons) came from Brazil (see Table 2 below and the highlighted number in green). **Brazil is by far the largest supplier of poultry to Switzerland**, followed by Hungary (15%), Germany (11%), and France (11%). The other 14 EU countries, together, account for 17% of the Swiss poultry imports in 2024, and the remaining six non-EU countries account for the remaining 3% of the imported volume.

Table 2. Swiss imports of poultry (HS 0207) globally and from Brazil (2020 – 2024)*

Swiss-Impex	2020		2021		2022		2023		2024	
Total imports (tons)	**35,920**	**100%**	**37,528**	**100%**	**40,528**	**100%**	**39,400**	**100%**	**46,159**	**100%**
Imports from EU countries	20,301	57%	21,178	56%	20,926	52%	20,754	53%	25,454	55%
Imports from Brazil	13,865	39%	14,960	40%	18,247	45%	17,560	45%	19,384	42%
Imports from other countries	1,753	5%	1,390	4%	1,356	3%	1,086	3%	1,320	3%

The Swiss-Impex platform states that these numbers are still "provisional data" and were consulted in May 2025.
Source: https://www.gate.ezv.admin.ch/swissimpex

Compared to the Swiss import data, the Brazilian export data presents a slightly lower number (see highlighted numbers in green in Tables 2 and 3). This discrepancy may be explained by the continuous inclusion of new data in both databases after 2024 or by the use of different sources of information by

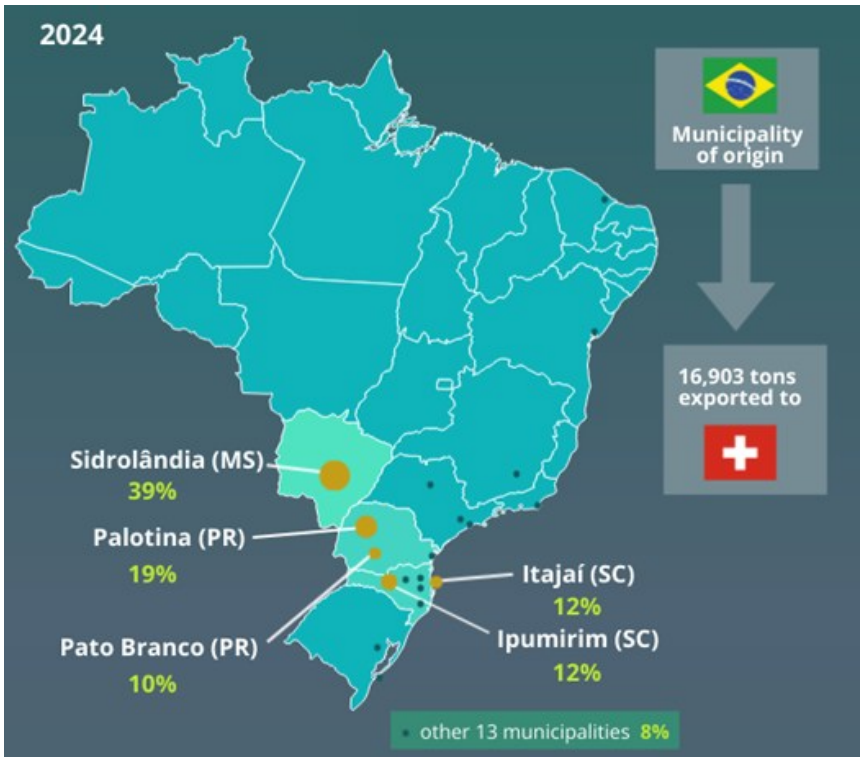
both countries. However, the Brazilian export data identifies the municipality of origin of poultry exports to Switzerland (see Table 3). In 2024, **only five municipalities accounted for 92% of the exports**: Sidrolândia (MS), Palotina (PR), Ipumirim (SC), Pato Branco (PR), and Itajaí (SC) (see also Figure 3).

Table 3. Brazilian poultry exports to Switzerland and the originating municipality and state

Place of origin / Years		2020		2021		2022		2023		2024	
Total exports (tons)		**11,557**		**13,109**		**18,158**		**13,582**		**16,903**	
Sidrolândia	MS	2,763	24%	3,793	29%	5,730	32%	3,920	29%	6,616	39%
Palotina	PR	2,349	20%	2,431	19%	3,176	17%	2,993	22%	3,170	19%
Ipumirim	SC	2,034	18%	2,125	16%	3,301	18%	2,180	16%	1,985	12%
Pato Branco	PR	1,700	15%	1,499	11%	2,378	13%	2,138	16%	1,750	10%
Itajaí	SC	599	5%	952	7%	492	3%	2,347	17%	2,028	12%
Other origins (26 municipalities)		2,112	18%	2,309	18%	3,081	17%	2,394	18%	1,354	8%

Source: https://comexstat.mdic.gov.br/

Figure 3. Brazilian poultry exports to Switzerland in 2024 (% of volume and total volume in tons)



Source: https://comexstat.mdic.gov.br/

The Brazilian SIF ("Selo de Inspeção Federal") is a sanitary control registration system for slaughterhouses that sell meat and its sub-products beyond the boundaries of the states in which they are located, including exports. According to the SIF database, the following poultry slaughterhouses are registered in the five municipalities, which are the origin of 92% of Swiss poultry imports from Brazil in 2024:

- Sidrolândia (MS): **Seara** Alimentos Ltda
- Palotina (PR): **C. Vale** Cooperativa Agroindustrial
- Ipumirim (SC): **Seara** Alimentos Ltda
- Pato Branco (PR): **Vibra** Agroindustrial S/A
- Itajaí (SC): only after-slaughtering meat processing units registered, including one operated by Seara

3. SWISS POULTRY IMPORTERS (OPERATORS) AND BRAZILIAN POULTRY EXPORTERS

Which Swiss companies are buying poultry from which Brazilian companies?

According to the Swiss Federal Office for Agriculture (FOAG), the **top 10 Swiss poultry importers accounted for 79.8% of total imports in 2024**, with the top three (GVFI, Bell Schweiz, and Swiss Poulet Trade) accounting for 45% (see Table 4).

Table 4. Swiss importers of poultry in 2024

Importer, location	Tons	%
GVFI AG, Basel	12,088	21.4%
Bell Schweiz AG, Zell	7,824	13.8%
Swiss Poulet Trade AG, Lupfig	5,789	10.2%
Lidl Schweiz DL AG, Weinfelden	3,697	6.5%
Prime Meat Swiss AG, Hünenberg	3,629	6.4%
Micarna SA, Courtepin	3,629	6.4%
VB Food International AG, Basel	3,518	6.2%
ALDI SUISSE AG, Schwarzenbach	2,448	4.3%
CASIC Einkaufsgenossenschaft des, Pratteln	1,368	2.4%
FS Trading SA, Villars-Ste-Croix	1,209	2.1%
Other 133 importers	11,413	20.2%
Total	**56,613**	**100.0%**

Source: Federal Office for Agriculture (FOAG), Import and Export Division. Accessed on July 2025: https://backend.blw.admin.ch/fileservice/sdweb-docs-prod-blwch-files/files/2025/01/20/2ecd9e79-f017-46c7-9dc1-a21718e1eeea.pdf

However, when considering corporate structures among the listed companies, **Swiss Poulet Trade** and **Prime Meat Swiss** are, for instance, operated by the same company, the **Kyburz Group**. This positions the Kyburz Group as the second-largest importer, accounting for 16.6% of the reported volume (considering both the volumes linked to the companies Swiss Poulet Trade and Prime Meat Swiss). The top three importers are GVFI, Kyburz Group (Swiss Poulet Trade and Prime Meat Swiss), and Bell Schweiz, accounting for 51.8% of Switzerland's poultry imports in 2024.

FOAG reported a higher total import volume (56,613 tons) than Swiss-Impex (46,159 tons) for the same year, 2024 (see numbers highlighted in yellow in Tables 2 and 4). We have sent a request for clarification to both institutions, and Swiss-impex replied that the data is continuously checked to clear any inconsistencies. However, the amount of approximately 46 tons is correct for 2024. Due to a holiday period during the elaboration of this report, FOAG has not yet replied to our requests for clarification. Additionally, to challenge transparency, Swiss-impex informed that data on quotas by company names is not recorded or disclosed by customs due to data protection reasons. It is not impossible to understand, for instance, where the top importers, such as GVFI, Kyburz Group, or Bell Food Group, import poultry from.

GVFI is an importer, marketing, and distributor company with over 100 clients in Switzerland. Poultry ranks second in the company's imported volume by meat type, with 14,200 tons in 2024, 50% higher than the number reported by FOAG (see Table 4). They state that they import "a large" percentage of their poultry from Brazil, Italy, Poland, and Hungary. There is no publicly available information on GVFI's deforestation-free supply chain policies, commitments or targets.

Swiss Poulet Trade and **Prime Meat Swiss** are both part of the Kyburz Group. While Swiss Poulet states that they work with European suppliers, Prime Meat states that they import poultry meat from both Europe and South America. For both companies, specifically the Kyburz Group, there is no publicly available information regarding any sustainability policies or commitments related to deforestation-free supply chain targets.

Bell Food Group is part of the **Coop Group** (a cooperative with over 2.5 million members). While Coop Group's Deforestation and Conversion Policy identifies soy as a deforestation-risk raw material, it does not include soy used in feed for imported animals in its target of only sourcing certified soy by 2026. More specifically, the Bell Food Group 2024 annual report states a **target of 50% of deforestation-free soy used in poultry feed** within their supply chain. In 2024, they reported achieving 35.3%, lower than the 2023 number of 38.2%. It is unclear, however, whether this commitment and target apply only to the soy consumed in their poultry production in Switzerland or also to the soy used to feed their imported poultry products from other countries.

Lidl Schweiz, or Lidl Switzerland, is a subsidiary of the German Schwarz Group. Lidl Switzerland states that it is a member of the Lidl soy initiative, which states that 80% of global soy production is used in the animal feed industry. The Lidl soy initiative claims to conduct an annual mapping of soy suppliers (indirectly through animal feed) to assess the quantity and certification status of producers, stating that most soy sourcing is linked to Brazilian production. Results show that only 20% of Lidl's soy sourcing is deforestation- or land conversion-free, despite the company's target to have a deforestation-free supply chain for risk commodities by the end of 2024.

Micarna also includes three other brands and subsidiaries linked to poultry: Optigal, Optisol, and Favorit Geflügel. Micarna is part of the **Migros Group**, a cooperative with over 2.3 million members and 40 subsidiaries. Migros' Procurement Policy lists soy as a deforestation-risk product and states that by the end of 2025, all edible and animal feed soy within its supply chain must be certified or in compliance with the EU Deforestation Regulation (EUDR). However, it's not clear if this also covers soy used to feed the imported poultry products. Micarna's 2024 report does not mention any commitment or target to eliminate deforestation linked to the animal feed used in imported poultry products.

Which Swiss companies are buying poultry from which Brazilian companies?

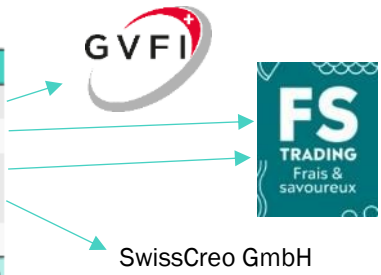
On the Brazilian side of trading operations, there is no official data available listing Brazilian poultry exports by company (exporter) and country of destination. In other words, it is not possible to know which companies are exporting poultry to Switzerland. However, "Watt Poultry International" ranks two Brazilian companies, BRF and Seara, as the largest poultry producers and among the top three poultry exporters globally.

To link Brazilian poultry exporters to Swiss imports, we analysed a sample of shipment data covering the period between 2021 and 2023. Despite data limitations, a connection was found between Seara (JBS) and GVFI. The data also identified C. Vale Agroindustrial and Vibra Agroindustrial as exporters to Switzerland. Together with Seara, these companies are the sole owners of the registered slaughterhouses in the SIF database for the five key municipalities, which account for 92% of Brazil's poultry exports to Switzerland in 2024 (see Figure 3 on page 6).

Considering the sample of shipment data, **GVFI** imports the entire volume of exports from **Seara**; **FS Trading** imports the entire volume of exports from **Bello Alimentos** and **C. Vale**; and **Swiss Creo GmbH** imports the entire volume of exports from **Vibra Agroindustrial.** (see Table 5).

Table 5. Sample of shipment data showing Brazilian poultry exporters to Switzerland

Sample of Shipment data - Brazilian exporters	2021	2022	2023	%
Seara Alimentos Ltda	3,321	4,113	6,786	96,0%
Bello Alimentos Ltda (Frango Bello)	-	51	204	1.7%
C Vale Cooperativa Agroindustrial	-	52	103	1.0%
Vibra Agroindustrial (Vibra Foods)	51	-	-	0.3%
Other 5 exporters	79	-	50	1.0%
Total	**3,451**	**4,216**	**7,144**	**100.0%**



Source: SeAir

Seara, part of Brazil's JBS group and the second-largest poultry slaughterer, operates the only registered poultry slaughterhouse in Sidrolândia, Mato Grosso do Sul, which accounts for 39% of poultry exports to Switzerland in 2024. In addition to slaughterhouses operating in five other municipalities exporting poultry to Switzerland in 2024, Seara also runs 26 facilities for processing animal feed ingredients. Seara is committed to eliminating deforestation in its grain and oil supply chains in the Amazon by 2023, as well as illegal deforestation in other biomes by 2025, but there is no publicly available information on whether the company reached the targets of 2023 and is performing to reach the 2025 targets.

Bello Alimentos is part of Grupo Pluma, a conglomerate of five companies, three poultry producers and one involved in crop trading. Bello Alimentos is the only slaughterhouse registered in Itaquiraí (Mato Grosso do Sul), where it also has registration active for animal feed production. Its Code of Conduct indicates that the supplier's assessment considers environmental practices. Still, there is no indication or any other publicly available information about the company's policies or commitments to deforestation-free supply chains.

C. Vale is a cooperative with over 28,000 members in Brazil and Paraguay that processes poultry, pigs, fish, and produces animal feed. It has a soy processing unit and sources crops from several Brazilian states. However, it lacks clear deforestation-free targets. The company operates the only poultry slaughterhouse in Palotina, Paraná, registered in the SIF database, accounting for 19% of Brazil's poultry exports to Switzerland in 2024.

Vibra Foods is a joint venture of Tyson Foods, the world's third-largest poultry producer. In Brazil, Vibra operates in Paraná, Rio Grande do Sul, and Minas Gerais, processing poultry and producing animal feed and does not have a clear deforestation-free target or commitment. Vibra operates the only registered poultry slaughterhouse in Pato Branco, Paraná, which in 2024 was the source of 10% of Brazil's poultry exports to Switzerland.

4. SWISS RETAILERS AND WHOLESALERS SELLING BRAZILIAN POULTRY

Do Swiss retailers and wholesalers properly inform consumers about the origin of poultry products?

At the other end of the supply chain, we visited various retail and wholesale shops in Switzerland to determine whether the information on product labels enables clients to properly trace poultry products back to their origins. We analysed data from the labels of poultry products with origin indications from Brazil found in shops between January and April 2025. We visited 10 shops of four retailers (Coop, Denner, Lidl, and Migros) and three wholesalers (Transgourmet, Aligro, and TopCC) in **five cities in Switzerland** (Dübendorf, Geneva, Winterthur Töss, Neuchâtel, and Zürich), collecting data from **61 different products**.

The most common information found on chicken products in retailers' and wholesalers' shops in Switzerland is about the **country of origin of the meat** and the **Swiss company processing it**. On the label of 55 products of the collected sample of poultry products, it is possible to visualise both Brazil as the country of origin and the Swiss meat processors by the "**CH code**" (see Box 1). Some Swiss meat processing companies are also listed as importers of poultry by FOAG (see Table 4), including Bell Schweiz and Micarna. Therefore, for most of the chicken products processed in Switzerland, although it is possible to determine the country of origin of the meat, there is no information available about the Brazilian slaughterhouses or the exporting meatpackers, except for products that are packed in Brazil and present a national registration code that allows the location of the facility of origin in Brazil (SIF code, see Box 2).

Box 1. Label of poultry products found in Swiss retailers' and wholesalers' shops between January and April 2025.

Source: Mystery shopping performed by Greenpeace Switzerland

Only six products of the collected samples were frozen chicken pieces, and were found only in wholesalers' shops. In this case, the information visible on the products' labels includes the name of the meatpacker and the Brazilian Ministry of Agriculture registration code, specifically the "SIF code". A Brazilian code that allows the exact location of the slaughterhouse or processing unit where the product was packed.

The frozen chicken products found in wholesalers' shops in Switzerland, which were packed in Brazil, were linked to two meatpackers: Seara (in Itapiranga, Santa Catarina) and C. Vale (in Palotina, Paraná) (see Box 2). Palotina (Paraná) accounts for 19%, while Itapiranga (Santa Catarina) accounts for only 1% of the Swiss poultry imports from Brazil in 2024 (see Figure 3 on page 5; Itapiranga is included in the "other municipalities" category). Both companies, Seara and C. Vale, are also listed as Brazilian poultry exporters to Switzerland in the sample of shipment data analysed (see Table 5).

Box 2. Label of poultry products found in Swiss wholesalers' shops between January and April 2025.

Source: Mystery shopping performed by Greenpeace Switzerland

The information found on the labels of products in Swiss retailers' and wholesalers' shops only allows for the identification of the poultry meat processor in Switzerland and the country of origin (see Figure 4). The only case where information about the origin of the meat in Brazil was found was in wholesalers' products that were packed in Brazil using the SIF code (see Figure 5). The links between retailers and meat processors are varied, but products processed by Micarna, which is part of the Migros Group, and by Bell Schweiz, which is part of the Coop Group, are more often sold in these retailers' shops. However, both retailers, Migros and Coop, also sell products processed by other companies such as Ospelt, Fredag and the Austrian Fleischerei Wild. According to the information collected on the product's label, the retailer Denner sources the product from Micarna (both part of the Migros Group), Fredag, and Mofag. And Lidl sources only from Mofag.

Fredag, part of the Orior Group, is a supplier of the three wholesalers from which we collected data: TopCC, Aligro, and TransGourmet. On their website, it's possible to find a statement that they source only "sustainable raw materials"; however, there is no information about any specific commitment to deforestation-free sourcing linked to their poultry supply chain. In 2023, the **Orior Group** sourced 55.7% of its poultry products from outside the EU. Even if in the Orior Group's 2024 sustainability report they

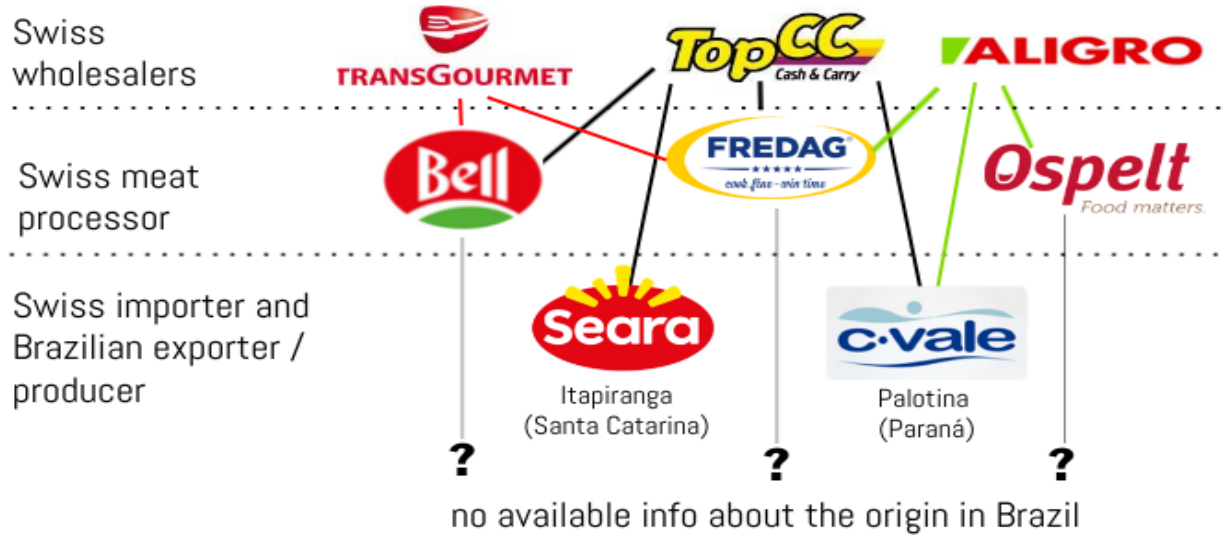
mention a plan to issue a "No Deforestation Commitment" by the end of 2025, the report does not cite the indirect link to deforestation that these products might have in their origin countries, especially from animal feeding crops, such as soy and maise. There is no publicly available information about **Mofag's** commitment to deforestation-free poultry sourcing from Brazil, but on their website, they state that they are a partner of Fredag.

The **Ospelt** 2024 Sustainability report does not mention any target of deforestation-free sourcing linked to poultry imported from Brazil. Ospelt states that "*animal husbandry and agriculture* [in their supply chains] *do not involve deforestation*", without providing any evidence for such a claim.

Figure 4. Connections between retailers and poultry product producers in Switzerland based on the product's label information.

Source: Elaborated by AidEnvironment using data from the Mystery shopping performed by Greenpeace Switzerland

Figure 5. Connections between wholesalers and poultry product producers in Switzerland based on the product's label information.



Source: Elaborated by AidEnvironment using data from the Mystery shopping performed by Greenpeace Switzerland

Although **GVFI** is listed as one of the largest poultry importers in Switzerland in 2024 (FOAG) (see Table 5), it was not possible to find any publicly available information about its Swiss clients. In other words, we did not identify GVFI as a meat importer or processor for any of the products found in the visited shops. Information about **GVFI, Bell (Coop), Lidl, Micarna (Migros), Seara** and **C. Vale's** commitments to deforestation-free supply chains can be found on pages 7, 8 and 9.

5. DEFORESTATION RISKS IN SOY PRODUCTION IN BRAZIL

Drivers of deforestation in Brazil and differences between the Amazon and Cerrado biomes

The Mapbiomas platform publishes land use data in Brazil yearly, which is currently accessible from 1985 to 2023. In the most recently available data, considering a 20-year period, from 2002 to 2023, in Brazil, there was a net 'forest'[1] loss of 43.47 million hectares, considering deforestation and forest gains (see Table 6). Of the total of net forest loss in Brazil in this period, 58% occurred in the Amazon biome (25.40 million hectares) and 36% in the Cerrado biome (15.46 million hectares).

Table 6. Net forest loss in Brazil (2018 to 2023)

Net forest cover loss (2002 to 2023)	million hectares	%
Brazil	43.47	100%
Amazon biome	25.40	58%
Cerrado biome	15.46	36%
Other biomes	2.61	6%

Source: MapBiomas

In the long term, soy cultivation is one of the most relevant drivers of deforestation in both the Amazon and Cerrado biomes. Between 2002 and 2023, for instance, 7% of the net forest loss in the Amazon biome was directly converted into soy, and 20% in the Cerrado biome (see Table 7). These areas represent 33% of the soy area gain in the Amazon biome and 30% in the Cerrado biome in the same period.

Table 7. Net forest loss and direct conversion to soy area, and soy area gain in the Brazilian Amazon and Cerrado biomes (2002 to 2023)

Forest loss and soy area gain	Amazon biome		Cerrado biome	
Total forest loss between 2002 and 2023	25.40	100%	15.46	100%
Soy in 2023 in areas occupied by forests in 2002	1.77	7%	3.11	20%
Total soy area gain between 2002 and 2023	5.39	100%	10.37	100%
Soy in 2023 in areas occupied by forests in 2002	1.77	33%	3.11	30%

Source: MapBiomas

Figures 6 and 7 below exemplify areas deforested between 2015 and 2024, with soy cultivation in 2023 in Feliz Natal (Mato Grosso), in the Amazon biome, and Uruçuí (Piauí), in the Cerrado biome.

Figure 6. Soy area (2023) on deforested land between 2015 and 2024 in Feliz Natal (Mato Grosso), Amazon biome

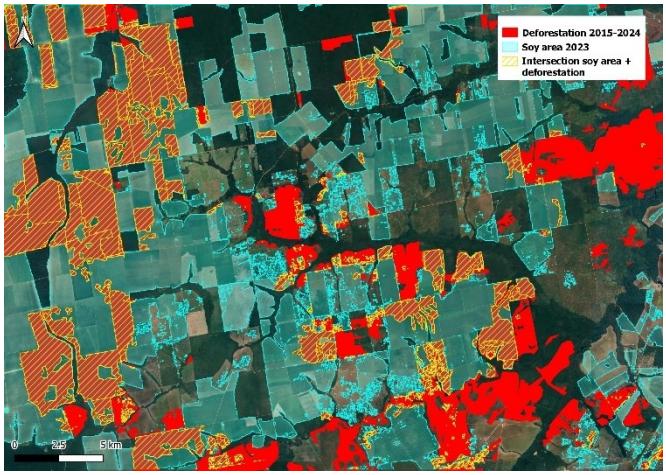
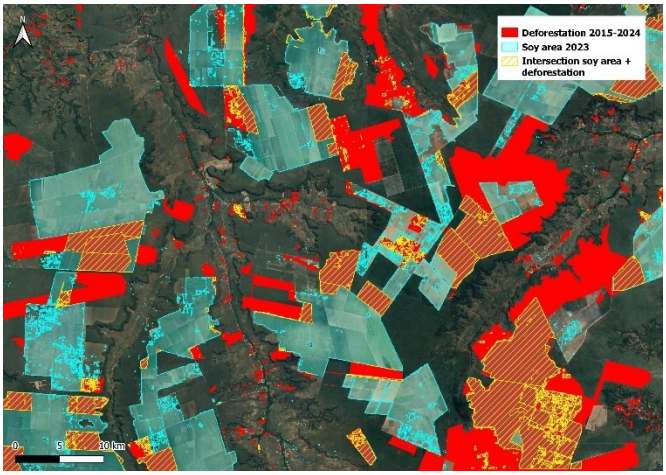


Figure 7. Soy area (2023) on deforested land between 2015 and 2024 in Uruçuí (Piauí), Cerrado biome



Source: Prodes data (INPE) and Soy layer (GLAD Lab, University of Maryland).

[1] 'Forest' here follows the class "*Floresta*" from the Mapbiomas platform, which **excludes** other types of native vegetation (i.e., Shrub and Herbaceous Vegetation).

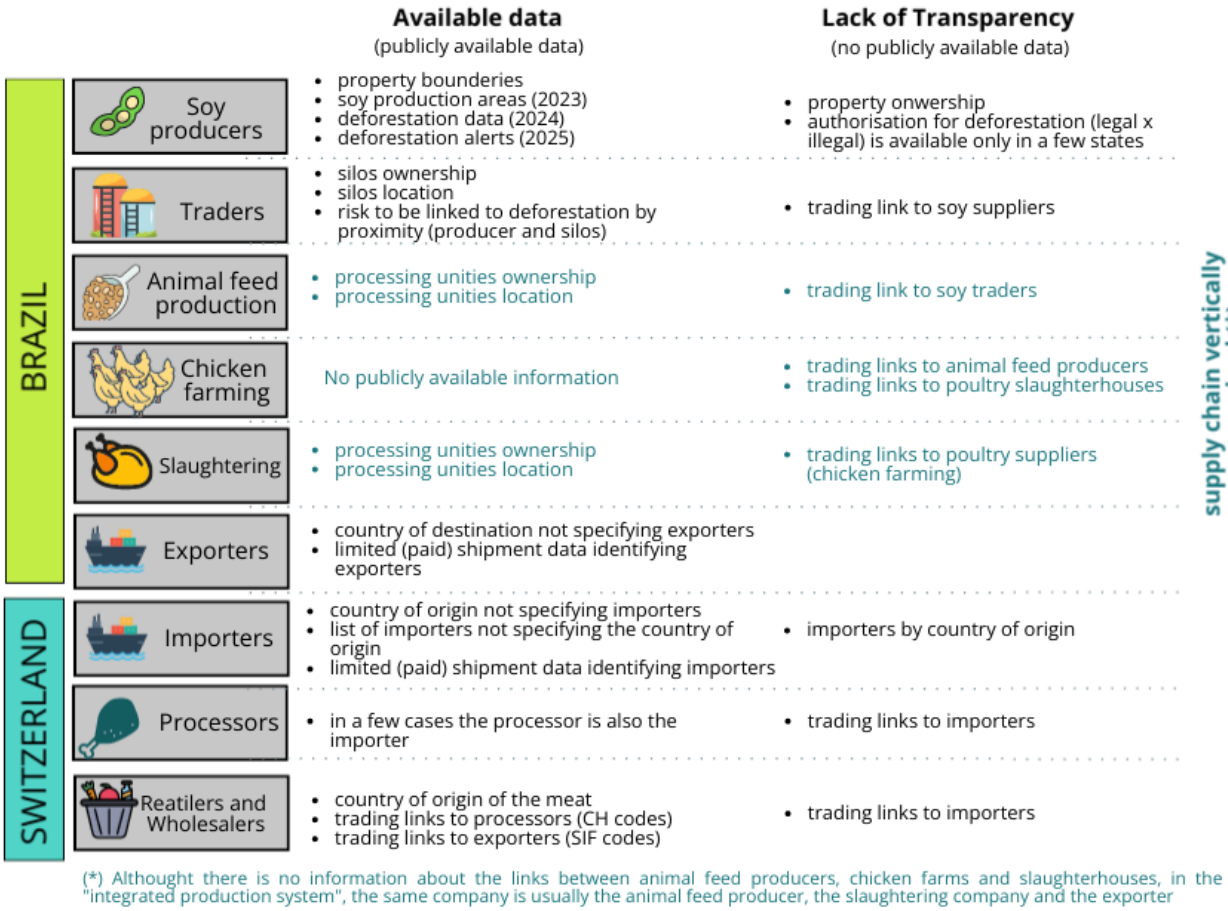
6. CASE STUDIES (*)

What is the evidence of links between poultry production in Brazil and deforestation, and what are the main challenges for a deforestation-free supply chain?

The case studies aim to map the entire supply chain of poultry products, from the soy-producing properties supplying the animal feed industry and poultry production in Brazil to the shelves of Swiss supermarkets. However, due to the **lack of transparency and information** within the supply chain, it is not always possible to establish a link between different stakeholders. Between the soy producer and the poultry producer, for instance, there are at least three key actors: the soy trader, the animal feed producer, and the slaughterhouses, considering the integrated production system where slaughterhouses supply poultry producers with animal feed (see Figure 2 on page 4). In some cases, the link between the soy trader and the animal feed producer is easily established due to a vertically integrated organisation of the supply chain. This is the case of the company C. Vale, which owns soy warehouses and silos and is one of the largest animal feed producers, as well as a relevant poultry exporter.

The following case studies aim to highlight the **risk that poultry exporters have of being linked to recent deforestation** through their indirect sourcing of soy used in animal feed. In this sense, the cases are not an indication of a direct link to deforestation found in soy-producing areas, but rather the illustration of a potential link or a **deforestation risk within the Brazilian poultry supply chain**.

Figure 8. Brazilian poultry exports to Switzerland: supply chain available data and lack of transparency



Source: elaborated by AidEnvironment

CASES 1 & 2 - Supply chain links from Swiss retailers to Brazilian poultry exporters

Shop in Winterthur Töss (Switzerland)

22/04/2025

SEARA (JBS) Slaugherhouse in **Itapiranga** (Santa Catarina – Brazil)

SEARA (JBS) Slaugherhouse in **Sidrolândia** (Mato Grosso do Sul – Brazil)

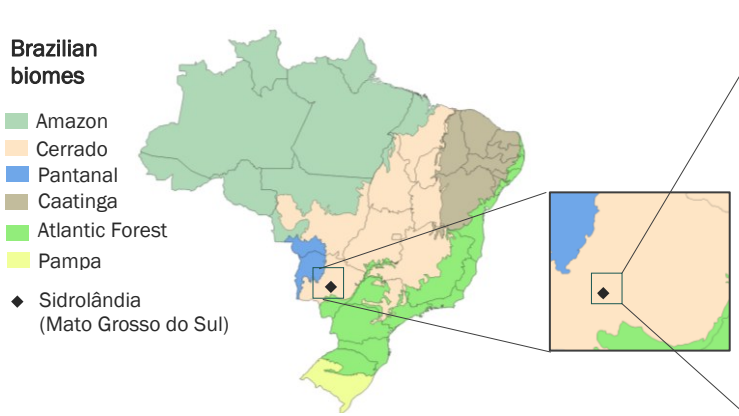
A sample of **shipment data** shows **Seara** exporting poultry from Sidrolândia exclusively to **GVFI** in Switzerland between January 2021 and November 2023

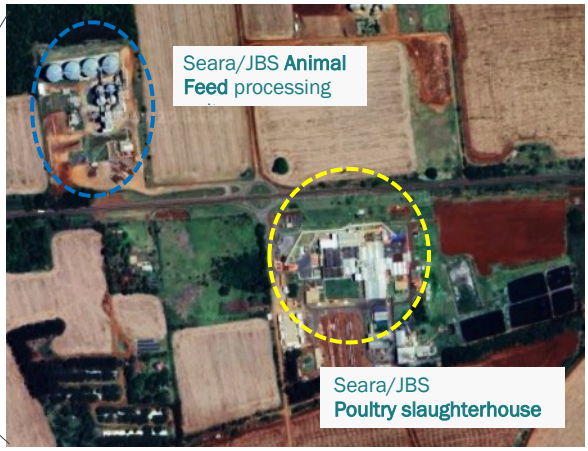
Unknown retailer or wholesaler in Switzerland

39% of the Brazilian poultry exports to Switzerland in 2024 originated in Sidrolândia (Mato Grosso do Sul)

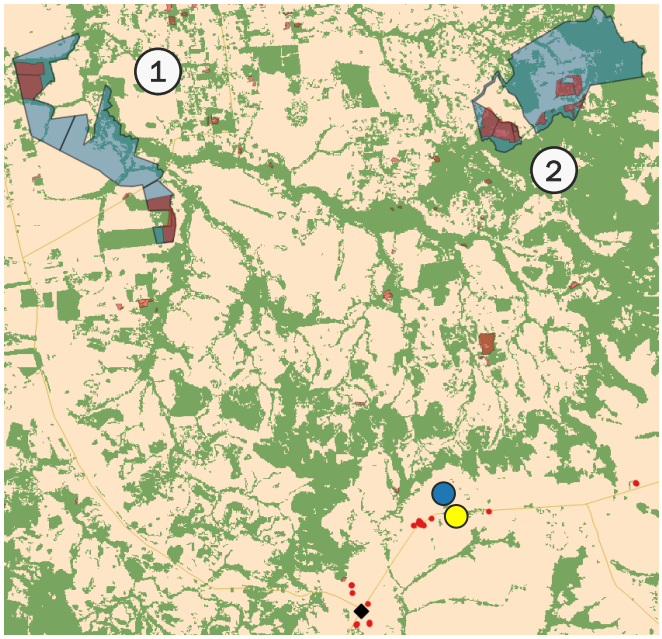
In Sidrolândia (Mato Grosso do Sul), Seara is the only poultry slaughterhouse registered in the SIF database (Ministry of Agriculture), which is a mandatory registration to sell poultry beyond the Mato Grosso do Sul state borders

CASES 1 & 2 - Seara/JBS facilities in Sidrolândia (Mato Grosso do Sul)



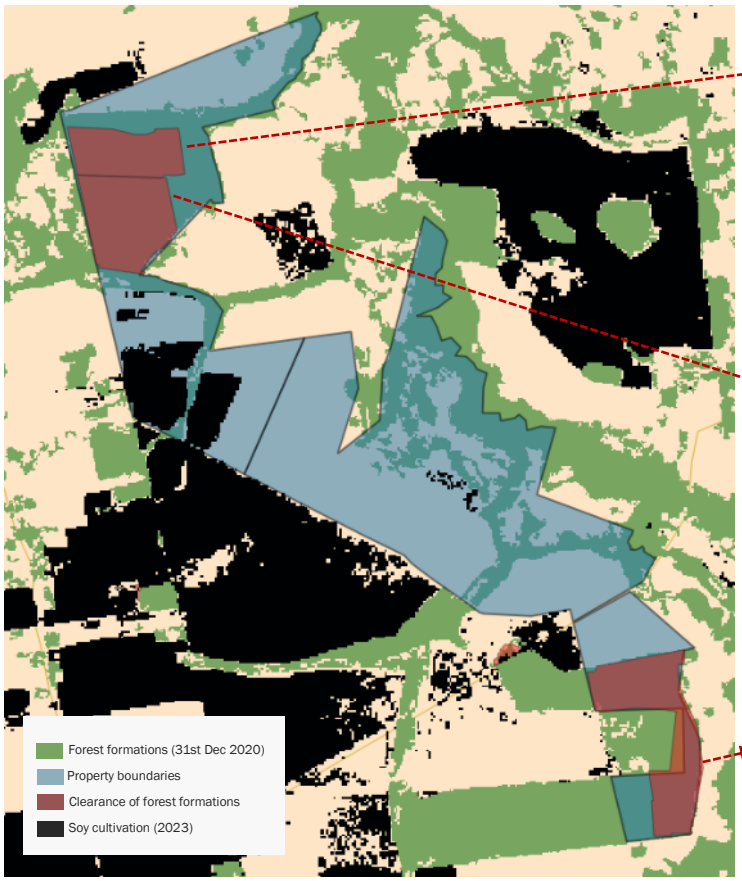


CASES 1 & 2 - Location of deforestation linked to soy production potentially linked to poultry supply chain

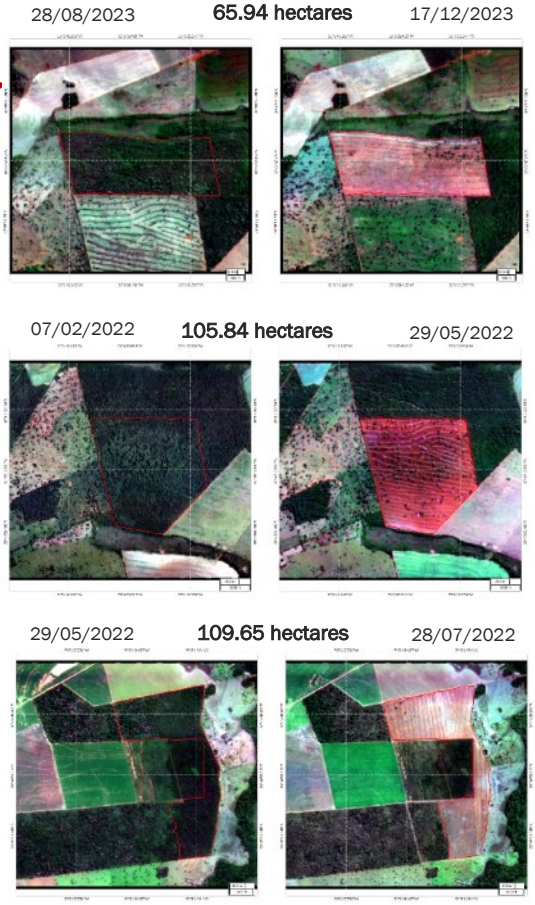


- Seara/JBS animal feed processing unit
- Seara/JBS poultry slaughterhouse
- Grains warehouses
- Sidrolândia (city)
- Other land uses (31st Dec 2020)
- Forest formations (31st Dec 2020)
- Clearance of forest formations (after 31st Dec 2020)
- Properties (cases 1 & 2)
- Main roads
- 1 Case study 1 – Fazenda Boa Vista
- 2 Case study 2 – Fazenda Boa Esperança

CASE STUDY 1 – FAZENDA BOA VISTA (SIDROLÂNDIA, MATO GROSSO DO SUL)



Source: AidEnvironment

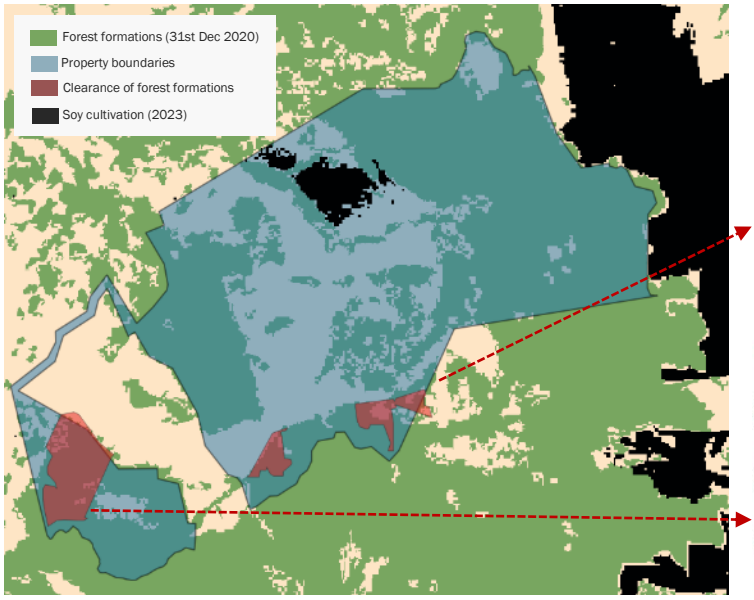


Source: MapBiomas Alerta (2025)

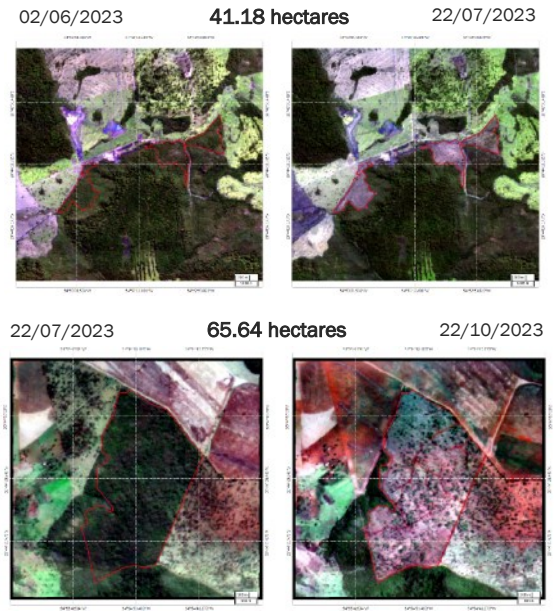
Property (name, area):	Fazenda Boa Vista (recently registered as Fazenda Aprisco) (1,778 hectares)
Land use in 2024 (Mapbiomas):	Pasture (56%), soy/corn (11%), other crops (9%), native vegetation (23%), other (1%)
Registration Code ("código do imóvel"):	9111000042861
Total deforestation:	281.43 hectares (forest formation in the Cerrado biome), between February 2022 and December 2023
Environmental licenses or authorisation for clearing:	NO (illegal clearance)
Environmental embargoes and fines:	NO embargoes, NO fines
Distance (by road) to Seara:	43 km (from Seara's animal feeding processing unit in Sidrolândia, Mato Grosso do Sul)
Soy area in 2022:	≈ 100 hectares
Ownership & linked companies:	Roberto Benedito Silva (recent ownership under Celso, unknown surname)

Although the ownership and name of the property are unclear in the land tenure records, the area is surrounded by soy cultivation, and the property had approximately 100 hectares of soy fields as of 2023. However, it is not yet possible to link the reported deforestation to more recent soy cultivation.

CASE STUDY 2 – FAZENDA BOA ESPERANÇA (TERENOS, MATO GROSSO DO SUL)



Source: AidEnvironment



Source: MapBiomas Alerta (2025)

Property (name, area):	Fazenda Nova Esperança (2,195 hectares)
Land use in 2024 (Mapbiomas):	Soy (3%), other crops (31%), pasture (5%), native vegetation (61%)
Registration Code (“código do imóvel”):	0000433265009
Total deforestation:	**106.82 hectares** (forest formation in the Cerrado biome), between June and October 2023
Environmental licenses or authorisation for clearing:	NO (illegal clearance)
Environmental embargoes and fines:	NO embargoes, NO fines
Distance (by road) to Seara’s animal feeding processing unit:	41 km
Soy area in 2022:	**≈ 50 hectares**
Ownership & linked companies:	Sociedade Agropastoril Barcellos Ltda

The property is surrounded by soy fields and had approximately 50 hectares of soy area in 2023. However, it is not yet possible to directly link the reported deforestation to more recent soy cultivation. There is no clear evidence of a direct link between the company Sociedade Agropastoril Barcellos, the owner of the property, and the Seara animal feeding processing unit in Sidrolândia; however, the property is 41 km distant from Seara's facilities.

CASES 3 & 4 - Supply chain links from Swiss retailers to Brazilian poultry exporters

Shop in Winterthur Töss (Switzerland)

22/04/2025

Shop in Geneva (Switzerland)

03/04/2025

C. Vale Slaughterhouse in **Palotina (Paraná – Brazil)**

Unknown retailer or wholesaler in Switzerland

A sample of **shipment data** shows **C. Vale** exporting poultry from Sidrolândia exclusively to **FS Trading Frozen Seafood SA** in Switzerland between November 2022 and July 2023

19% of the Brazilian poultry exports to Switzerland in 2024 originated in Palotina (Paraná)

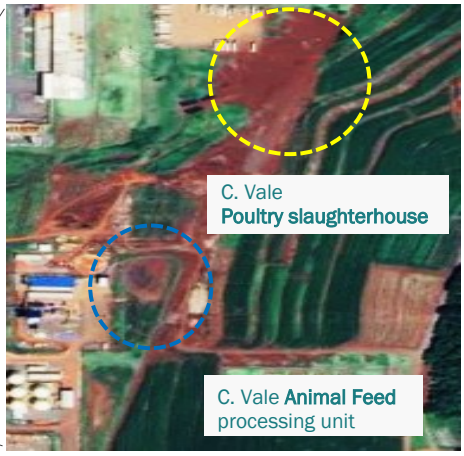
In Palotina (PR), **C Vale** is the only poultry slaughterhouse registered in the SIF database (Ministry of Agriculture), which is a mandatory registration to sell poultry beyond the Paraná state borders

CASES 3 & 4 – C. Vale facilities in Palotina (Paraná) and C. Vale silos in Mato Grosso

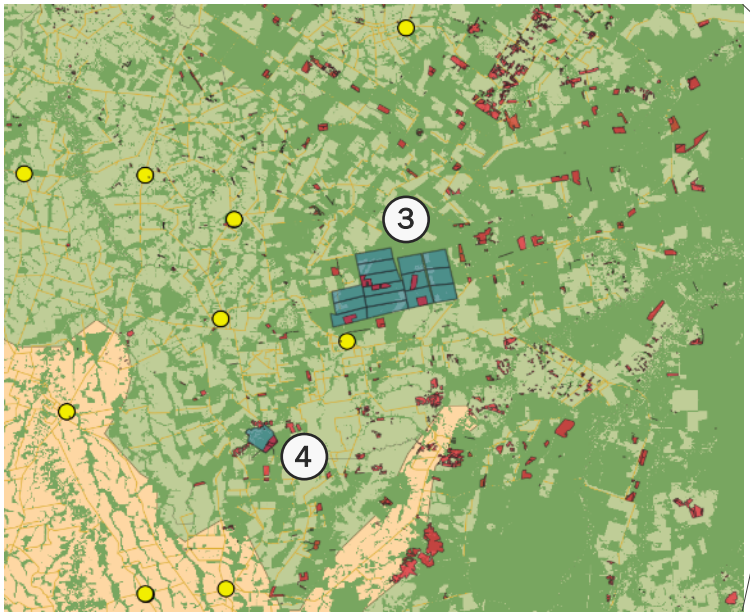
Brazilian biomes

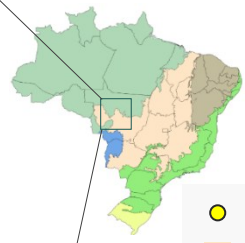
- Amazon
- Cerrado
- Pantanal
- Caatinga
- Atlantic Forest
- Pampa
- Palotina (Paraná)
- C. Vale silos in Mato Grosso
- C. Vale poultry slaughterhouse
- C. Vale animal feed processing unit

C. Vale has **121 silos** registered in five states, among which **22** are in **Mato Grosso**.



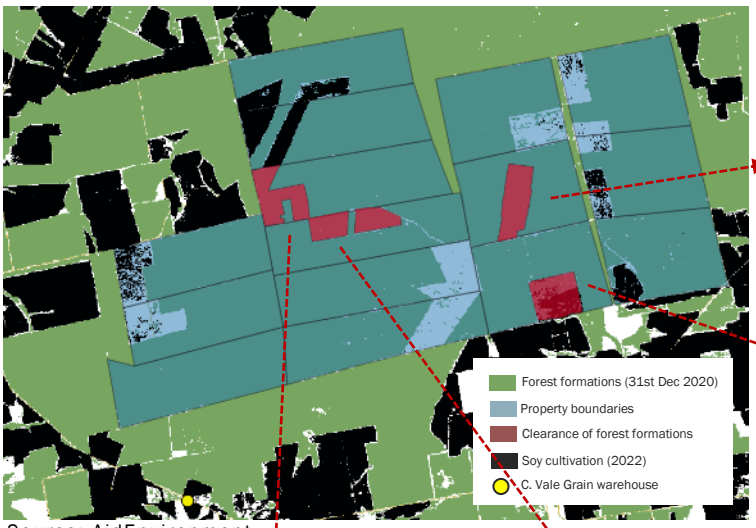
CASES 3 & 4 - Location of deforestation linked to soy production potentially linked to poultry supply chain



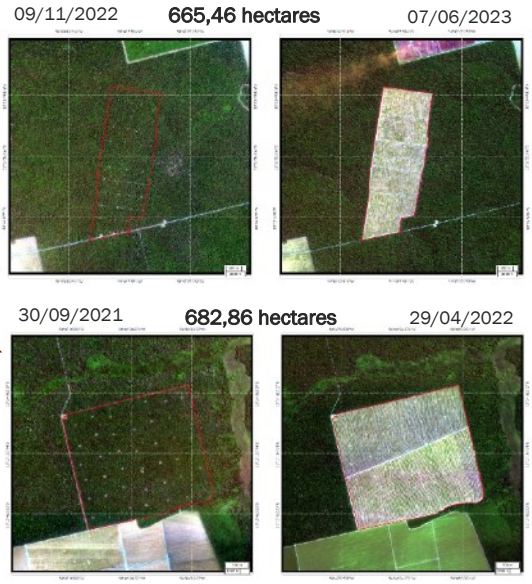


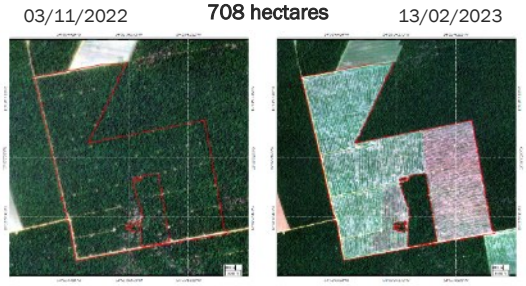
- C. Vale silos
- Other land uses (31st Dec 2020)
- Forest formations (31st Dec 2020)
- Clearance of forest formations (after 31st Dec 2020)
- Properties (cases 3 & 4)
- Main roads
- 3 Case study 3 – Fazenda 2 de Maio, 23 de Setembro, Roseira, Amparo, Maçaranduba
- 4 Case study 4 – Fazenda J Crestani

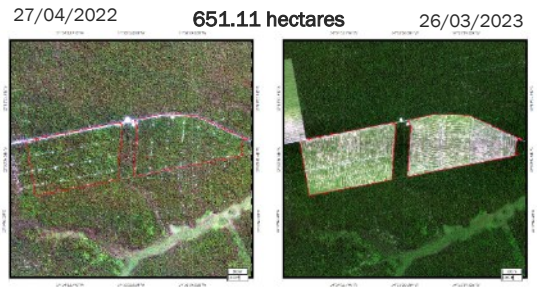
CASE STUDY 3 – FAZENDA 2 DE MAIO, 23 DE SETEMBRO, ROSEIRA, AMPARO, MAÇARANDUBA (FELIZ NATAL, MATO GROSSO)



Source: AidEnvironment





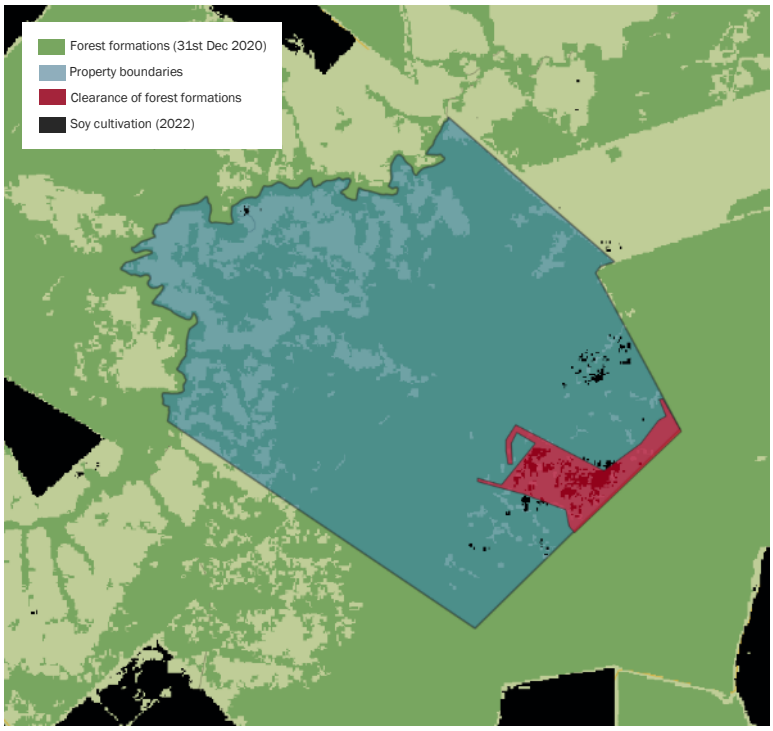


Source: MapBiomas Alerta (2025)

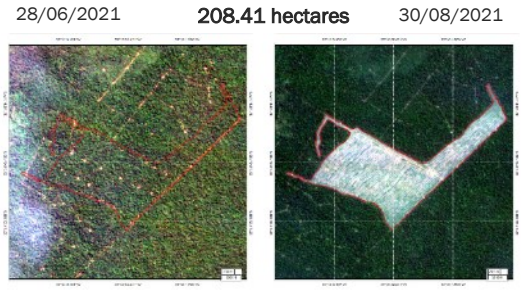
Property (name, area):	A conglomerate of 5 properties: 2 de Maio, 23 de Setembro, Roseira, Amparo, and Maçaranduba (total area 45,300 hectares)
Registration Code ("código do imóvel"):	9010320074981, 9010320064838, 9010320064919, 9010322726803
Land use in 2024 (Mapbiomas):	Soy (2%), other crops (3%), pasture (12%), native vegetation (83%)
Total deforestation:	**2,707.43 hectares** (forest formations of the Amazon biome), between 30 September 2021 and 07 June 2023
Environmental licenses or authorisation for clearing:	NO (illegal clearance of native vegetation). The area has several plans for sustainable forest management, which theoretically do not include clear-cutting of native vegetation.
Environmental embargoes and fines:	Several embargoes and fines in the conglomerate of properties, most for illegal clearance of native vegetation and logging
Distance (by road) to C Vale warehouse:	15 km
Soy area in 2022:	**≈ 2,700 hectares**
Ownership & linked companies:	Linked to Ricardo Publio de Oliveira through the companies Agropecuária Sol Nascente, Jaú Agronegócios, Agropecuária São Francisco, Aripuanã Agropecuária, Arati Agronegócios, and Agropecuária 30 de Dezembro

Ricardo Publio de Oliveira's companies are active in logging, as well as soy, corn, rice farming, and cattle breeding. Although it is not possible to verify the direct sourcing of soy from this area by C. Vale, it does have a warehouse located 15 km away, and the property already had approximately 2,700 hectares of soy in 2023. Still, it is not yet possible to directly link the reported deforestation to soy cultivation.

CASE STUDY 4 – FAZENDA J CRESTANI (FELIZ NATAL, MATO GROSSO)



Source: AidEnvironment



Source: Mapbiomas Alerta (2025)

Property (name, area):	Fazenda J Crestani (4,678 hectares)
Registration Code ("código do imóvel"):	7221620154158
Land use in 2024 (Mapbiomas):	Pasture (19%), agriculture (1%), native vegetation (80%)
Total deforestation:	**203.41 hectares** (forest formation in the Amazon biome), between June and August 2021
Environmental licenses or authorisation for clearing:	There is an authorisation for deforestation in the area active between May 2021 and May 2023. There is an active authorisation for a "controlled" fire, valid only between April 2022 and April 2022, following the detection of deforestation.
Environmental embargoes and fines:	NO active embargoes, YES one fine without an apparent reason in 2021
Distance (by road) to C Vale warehouse:	35 km (Vera, Mato Grosso), and 45 km (Feliz Natal, Mato Grosso)
Soy area in 2022:	**≈ 150 hectares**
Ownership & linked companies:	Augusta Agropecuária Ltda

Although there is no evidence of a direct sourcing of soy by C. Vale from Fazenda J Crestani, the property is located close to at least two C. Vale warehouses in the region. Even if it is not yet possible to verify the direct link between the reported deforestation and soy cultivation, the property had approximately 150 hectares of soy fields in 2023 and had deforested an area in 2021 that, by 2022, was already being cultivated with soybeans.

7. METHODS

For the **trade data analysis at the country level**, we have used both the overall 2024 Swiss Imports statistics (Swiss Impex database, publicly available) and the 2024 Brazilian export data (Comexstat, database, publicly available). For the **trade analysis at the company level** we used the most recent available shipping data (from the paid provider Seair) covering the Harmonised System (HS) codes of poultry (HS 0207). In addition to the shipping data, we used the 2024 Federal Office for Agriculture (FOAG) data listing acquisition quotas by company (Utilisation des contingents tarifaires 2024, publicly available)

For the **location of slaughterhouses and animal feed industry units** in Brazil, we relied on the Federal System SIF, from the Ministry of Agriculture, which identifies the companies operating poultry slaughterhouses and animal feed industries (SIF, publicly available). For the **corporate structure analysis** of importers, exporters, processing companies, slaughterhouses, the animal feed industry, and retailers in Switzerland and Brazil, we examined company type, ownership, and supply chain linkages through desktop research using available data on the World Wide Web, which was cited through hyperlinks throughout the text. The **soy production** data was collected at the Mapbiomas platform (Mabpiomas, publicly available).

For the **case studies' analyses**, we used an internal database that links Federal Land Tenure Systems (SIGEF and SNCI, publicly available) and Rural Environmental Cadastre (SICAR, publicly available) to map rural properties. In the case of Mato Grosso state, the analysis was also checked in the Geoportal of the Mato Grosso Environmental Agency (Geoportal SEMA, publicly available). The properties were overlapped with a 2023 soy cultivation layer (Glad Lab, publicly available). For the deforestation analysis, we utilised deforestation data from the National Institute for Spatial Research (PRODES, publicly available), confirmed with deforestation alerts by the Mapbiomas Alerta platform, from where we also collected the 'before & after' satellite images of the deforestation events in each case study (Mapbiomas Alerta, publicly available). For the other data presented in the case studies, we used multiple sources, including IBAMA (Federal Environmental Agency), for checking environmental embargoes and fines, the Ministry of the Environment (MMA) and National Foundation for Indigenous Populations (FUNAI) for checking protected areas and Indigenous Territories as well as desktop research using available data on the World Wide Web, which was cited through hyperlinks throughout the text.

Finally, **the case study analysis does not necessarily imply that the soy produced on the reported property is supplying the animal feed industry linked to poultry production and the slaughter of chicken products found in Swiss supermarkets.** We can only express the "risk" of connection, as there is no publicly available data to establish secure trading links between soy suppliers, grain traders, and the latter's integrated production systems in the animal feed industry and poultry, which exports poultry to Switzerland.

Disclaimer: This report was commissioned by Greenpeace Switzerland and includes data provided by them. However, AidEnvironment retains sole responsibility for the content, data, analyses, interpretations, and conclusions contained herein.