



Partnerships for
Forests



**Strengthening
sustainability
commitments in the
Brazilian beef sector:**

a value-chain approach
for eliminating illegal
deforestation in the Amazon

November, 2020



A global call for Brazil to protect the Amazon

Photo Marcio Isensee

Towards the end of 2020, deforestation rates in the Amazon were already the highest in a decade¹, following the continuation of a rising trend over the last eight years. The number of forest fires in the region also surpassed the tragic figures of 2019², a year of historic forest fires that, in combination with an explosion in deforestation rates, put Brazil in the international spotlight. That same year, the environmental crisis in the Amazon dominated the Group of Seven (G7) meeting held in France, where governments and private sector actors, not wanting to be associated with the destruction of one of the most iconic and biodiverse biomes in the world, pressured both the Brazilian government and businesses into action.

The SARS-COV-19 pandemic has aggravated this scenario, intensifying threats to indigenous peoples and their territories. Mounting concerns over the forest's future have led to increasing external pressure, culminating with European leaders voicing concerns over agreeing to a deal between the European Union and Mercosur given the extent of deforestation in the Amazon.

Extensive cattle ranching, a historical means used by land grabbers to seize territory, has been a traditional

way to occupy unclaimed land in Brazil especially in the settlement of the Brazilian North, a process encouraged and accelerated by the government in the 70s³. The result is that today approximately 53 million hectares⁴ of deforested land in the Brazilian Amazon became pasture, which accounts for an astounding 80% of the biome's deforestation in the last forty years.

in 2020, there were over 400 thousand cattle farms in the Brazilian Amazon and 154 operating slaughterhouses⁵. Brazilian meatpackers are among the most pressured businesses in the Brazilian agribusiness sector. Nordea Asset Management, the investment arm of northern Europe's largest financial services, recently excluded the biggest meat processing company in Brazil (and in the world) from its portfolio due to the link between deforestation in the Amazon and the expansion of beef production in Brazil .

In an open letter to the Brazilian Vice President Hamilton Mourão⁶, European countries meeting under the Amsterdam

Declarations Partnerships shared "the increasing number of concerns raised by European consumers, businesses, investors and civil society about the ongoing deforestation in Brazil." Written in September of 2020, the letter asserts that "in Europe, there is legitimate interest that products and food on offer are produced in a fair, environmentally sound and sustainable way." It also notes that "business actors like suppliers, traders and investors are responding by better reflecting this interest in their own corporate strategies" and emphasizes in no uncertain terms that "the current trend of rising deforestation in Brazil is making it increasingly difficult for businesses and investors to meet their environmental, social and governance criteria."

The combination of effective public policies and private sector sustainability

commitments in commodities such as soy and cattle were responsible for effectively reducing deforestation rates in the Amazon in circa 82% between 2004-2014⁷. During that period, agricultural productivity in the region also increased, demonstrating that Brazil can continue to exert its role as a relevant player in the global food market while controlling the deforestation of its forests⁸.

But with the ongoing rise in deforestation trends in the Amazon in the last eight years, it is urgent to revisit existing

Photo Marcio Isensee



arrangements to address the remaining bottlenecks and loopholes for the full implementation of private sector commitments towards a sustainable beef supply chain.

Partnerships for Forests (P4F) is an eight-year programme funded by the UK government via the Foreign, Commonwealth & Development Office (FCDO) and the Department for Business, Energy and Industrial Strategy (BEIS). In Latin America, it operates in Brazil, Colombia, and Peru, incubating businesses and supporting private sector-led initiatives that protect or restore forests while fostering social and economic development. In Brazil, the program works to reconcile agricultural production with forest protection, in addition to investing in the promotion of non-timber forest products and economic models that generate forest restoration.

Partnerships for Forests has been working together with actors in the Brazilian beef value chain in tackling the bottlenecks that still hinder the transition of the sector towards sustainability.

The programme applies an integrated supply chain approach by investing in initiatives that can both strengthen the supply chain of cattle produced under sustainability criteria and increase the demand for cattle raised on farms in compliance with social and environmental legislation.

Between 2018-2020, P4F has financed three initiatives. **Beef on Track** aims to strengthen industry - namely, slaughterhouses - commitments to Brazilian public entities in monitoring their cattle suppliers' socio-environmental compliance. By supporting implementation of private commitments and persuading additional slaughterhouses to adopt them, Beef on Track ultimately increases the demand for cattle raised by producers working in compliance with environmental and labor legislation. **Conecta – Partnerships for Responsible Agriculture** is a monitoring tool that enables the full implementation of private sector commitments by increasing supply-chain transparency. P4F also supports **PECSA**, a flagship company that developed a pioneering business model for sustainable beef production in the Amazon in previously degraded pastures by increasing productivity and returns,

while investing in social and environmental progress in partnerships with local ranchers.

Addressing the bottlenecks that prevent sustainability in the sector has the potential to bring about significant measurable impact at scale. P4F's strategy and the tools developed by our partners have the potential to transform the entire supply chain and make the sourcing process of beef more social and environmentally responsible as well as transparent.

Actors across the value chain are united in support of verifiable streamlined and consistent solutions.

By promoting a positive agenda, P4F aims to further engage stakeholders in the sector such as retailers, slaughterhouses and producers, and to attract investment into sustainable models. Success means that Brazilian beef is a safe commodity internationally, bringing social and economic benefits to Brazil. This strategy is aligned with the UK governmental approach towards more resilient and sustainable supply chains.

Photo Marcio Isensee



Turning commitments into action

In the beginning of the 2000s, deforestation trends in the Brazilian Amazon reached record highs, accelerated by a heated economy after a spike in the international prices of agricultural commodities⁹. The large-scale agricultural sector saw the expansion of the agricultural frontier over forests as the means to increased profits, baked by the fierce demand of fast-growing development economies. After pressure from Brazilian and international civil society, the government committed to agreements implementing a series of environmental criteria to reduce deforestation and restore the image of Brazilian agricultural commodities internationally.

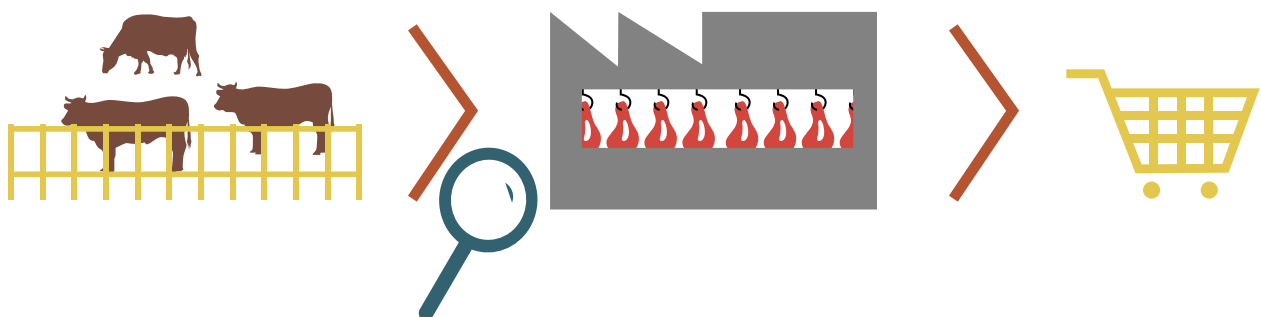
In 2004, the Brazilian government initiated the Action Plan for Prevention and Control of Deforestation in the Brazilian Amazon (*PPCDAm* in Portuguese¹⁰), an unprecedented joint effort by different ministries that enacted this policy with highest priority¹¹. Strategies implemented in the Amazon under PPCDam such as the creation of new conservation units and protected areas in the biome were critical in keeping land speculation and deforestation in check¹². In 2006, the soy sector signed a historical voluntary zero-deforestation agreement, known as The Soy Moratorium, a result of a year-long negotiation between the public and private sectors, with the participation of civil society. While it's hard to disaggregate the impact of the commitment on the overall reduction of deforestation that followed, studies show that it has proven to be an efficient measure in controlling the expansion of soy over forests.

Finally, in 2009, it was the beef industry's turn. A report by the NGO Greenpeace, denouncing the sector's responsibility for the rise in deforestation in the Brazilian Amazon¹³, led to a landmark commitment from what were the three largest slaughterhouses at the time to stop buying beef linked to illegally deforested areas. Later that same year, the Brazilian Federal Prosecution Service forged agreements with

industry representatives in Brazil, known as TAC. TAC is the acronym for Term of Adjustment of Conduct, a legally binding agreement that promotes commitments from private sector actors as a means to solve judiciary conflicts.

These agreements demanded that slaughterhouses monitor cattle purchases for environmental and labour law compliance with supplier farms and initiated the process of setting standards for cattle purchase that include deforestation-free criteria, as well as other social and environmental aspects.

Engaged slaughterhouses initially responded by improving their purchasing processes, with the implementation of monitoring protocols that would block socially and environmentally non-compliant ranchers from their suppliers lists. More stringent requirements led to more suppliers operating outside the legal framework to adhere to norms such as the Environmental Registry. However, neither the private nor the public sector set adequate measures in place to ensure an efficient verification of compliance with commitments. Furthermore, without a pathway to return to legality, blacklisted producers continued to sell¹⁴ their cattle freely to non-committed slaughterhouses, stimulating an alternative market in which illegal deforestation is not controlled, and creating competitive disadvantages for the committed slaughterhouses. A federal prosecutor's report from 2018¹⁵ estimated that 434,000 animals were bought irregularly by 17 slaughterhouses, and that 27% of these animals came from farms directly linked to deforestation.



Remaining Challenges for the Beef Sector

Extensive cattle ranching in the Amazon is typically a low-technology activity, with significant portions of Brazilian cattle raised in unproductive pasture-based systems, and few heads per hectare. Traditional ranchers lack soil management skills, which leads to the low maintenance of pasture quality, degrading the soil, reducing productivity and returns, and encouraging new cycles of deforestation. Obtaining credit is also a challenge, with little to no support for producers to access capital for investments at the property-level.

The beef cattle production chain in Brazil is complex and unstructured. Existing public databases of information related to sanitary control, and social and environmental practices are independent and not in communication with one another. Monitoring only starts once an animal reaches the slaughterhouses, usually after it has passed through a number of cattle production properties, creating a chain full of indirect suppliers consisting of ranchers specialized in calf and rearing. These indirect suppliers become blind spots for the current slaughterhouse monitoring systems hindering full traceability and allowing producers that have deforested to actively participate in the beef market. While current public monitoring mechanisms only focus on the sanitary aspects of cattle production (e.g. vaccination, “mad cow fever” and other diseases), measures to efficiently control the production chain from a socioenvironmental perspective are still lacking.

In addition, different rules from public commitments by slaughterhouses prevent consistent monitoring and disclosure of progress. Independent audits of these commitments are reliant on data and reports from meatpackers’ cattle purchases, however, each slaughterhouse has its own monitoring mechanism delivering different reports on the level of compliance and different levels of environmental scrutiny, resulting in a lack of standards and compliance between industry actors. At the end of this chain are the retailers, who are also under pressure for more stringent commitments but lack the right tools to ensure that the beef on the shelf is deforestation-

free. The lack of standardization is also a barrier to the expansion of those commitments to other meatpackers, which account for 38 percent¹⁶ processing facilities in the Amazon. As a perverse incentive, slaughterhouses that apply less stringent criteria gain a competitive advantage since they will not exclude producers from their suppliers lists, discouraging the market to move to a more robust and transparent system of monitoring and enforcement.

In order to improve the implementation of these commitments among signatories, as well as to expand them to other currently non-signatories meatpackers, standardized monitoring and audit protocols are necessary.

Photo Marcio Isensee





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The Solutions

Beef on Track

- Aims to harmonize the parameters of monitoring slaughterhouse cattle purchases, their audits, and public reports.
- Redirects the industry's demand for cattle towards producers committed to environmental criteria.
- Engage slaughterhouses, retailers and other stakeholders to adopt the unified monitoring and auditing protocols, developed by the initiative

The Beef on Track initiative develops and supports the implementation of standardized environmental criteria for selecting cattle suppliers. To consolidate cattle purchase reports, auditors will generate and present data in the same way, verifying the same indicators.

Standardized rules adopted across the entire industry will help to reduce the competitive advantage gained by slaughterhouses currently applying less rigid purchasing criteria by providing a common ground and reestablishing the pre-competitive arrangement of the existing commitments, creating a level playing field for all relevant actors in the public and private sectors, and encouraging them to comply with the protocol.

The published reports will also be made easily available to the public, increasing transparency and confidence throughout the system.

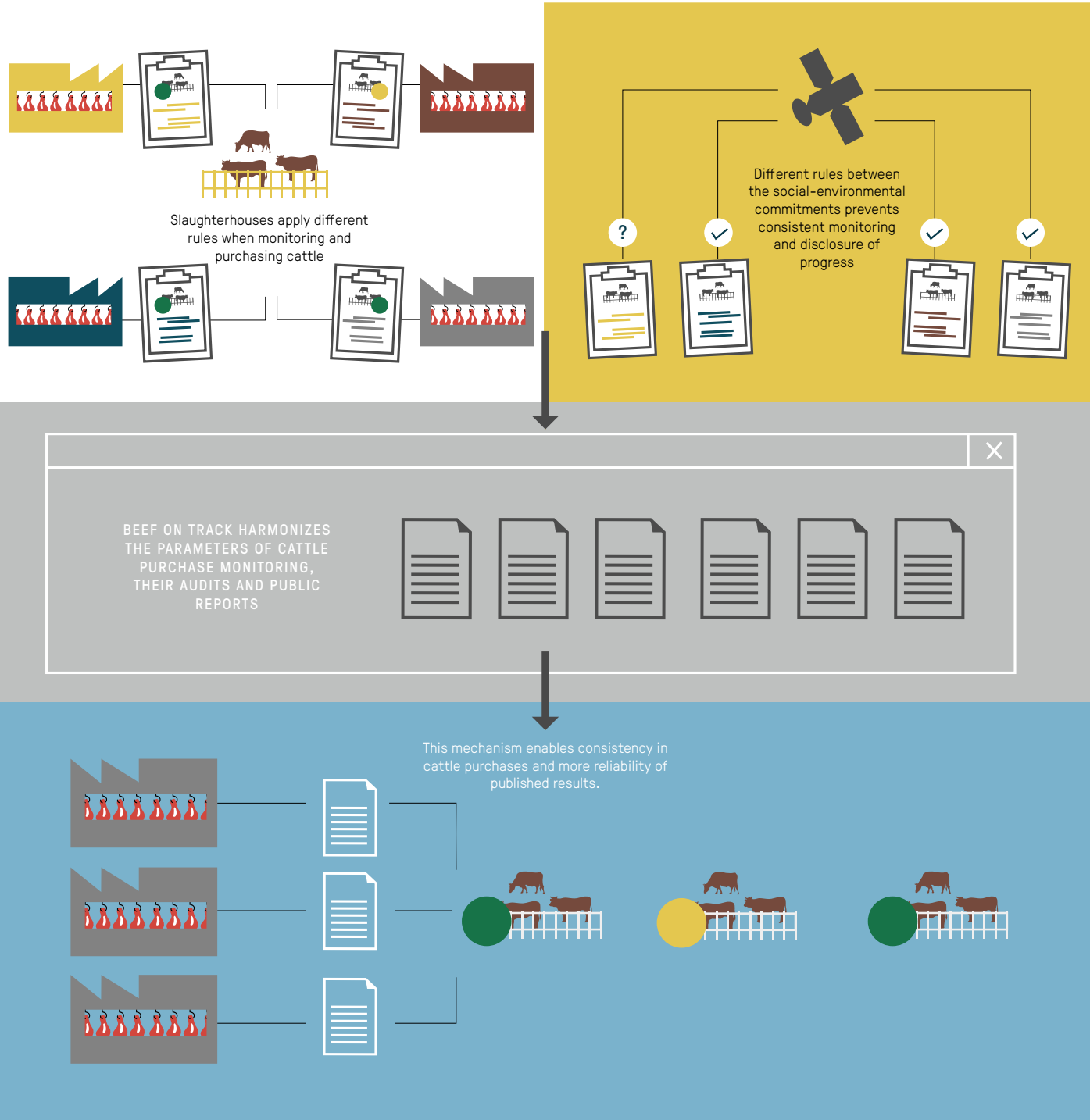
In addition, the initiative helps to implement the protocol by providing training to private monitoring companies, slaughterhouse employees, and auditors.

Imaflora, a Brazilian civil society organization, is the implementer of the Beef on Track Initiative, and has begun its work on the standardization of the TACs' monitoring and auditing in 2018. Imaflora worked with the Federal Prosecutors' Offices of the Amazon Biome's States to finalize a technical cooperation agreement with the largest meatpackers and retailers in the country in order to standardize the approach to supplier screening and monitoring. On May of 2020, after a long public consultation process, the federal prosecutors of all Amazonian States approved the unified monitoring protocol, making it the official tool to be used by all slaughterhouses.

Under a Memorandum of Understanding, this initiative has been also successful in engaging the industry's "G6 group", which is formed by the 3 largest slaughterhouses (JBS, Marfrig and Minerva) and 3 largest retailers (Pão de Açúcar, Carrefour and Big - former Walmart).

Get to know here the companies that have signed socio-environmental commitments in the states of Amazonas, Acre, Mato Grosso, Pará and Rondônia

P4F has supported Imaflora in its effort to ensure that state-level federal prosecutors in the Amazonian regions commit to applying the unified Monitoring, Reporting and Verification (MRV) system and to have slaughterhouses agree to the terms of verification. The support has also been covering the engagement of new slaughterhouses to commit.



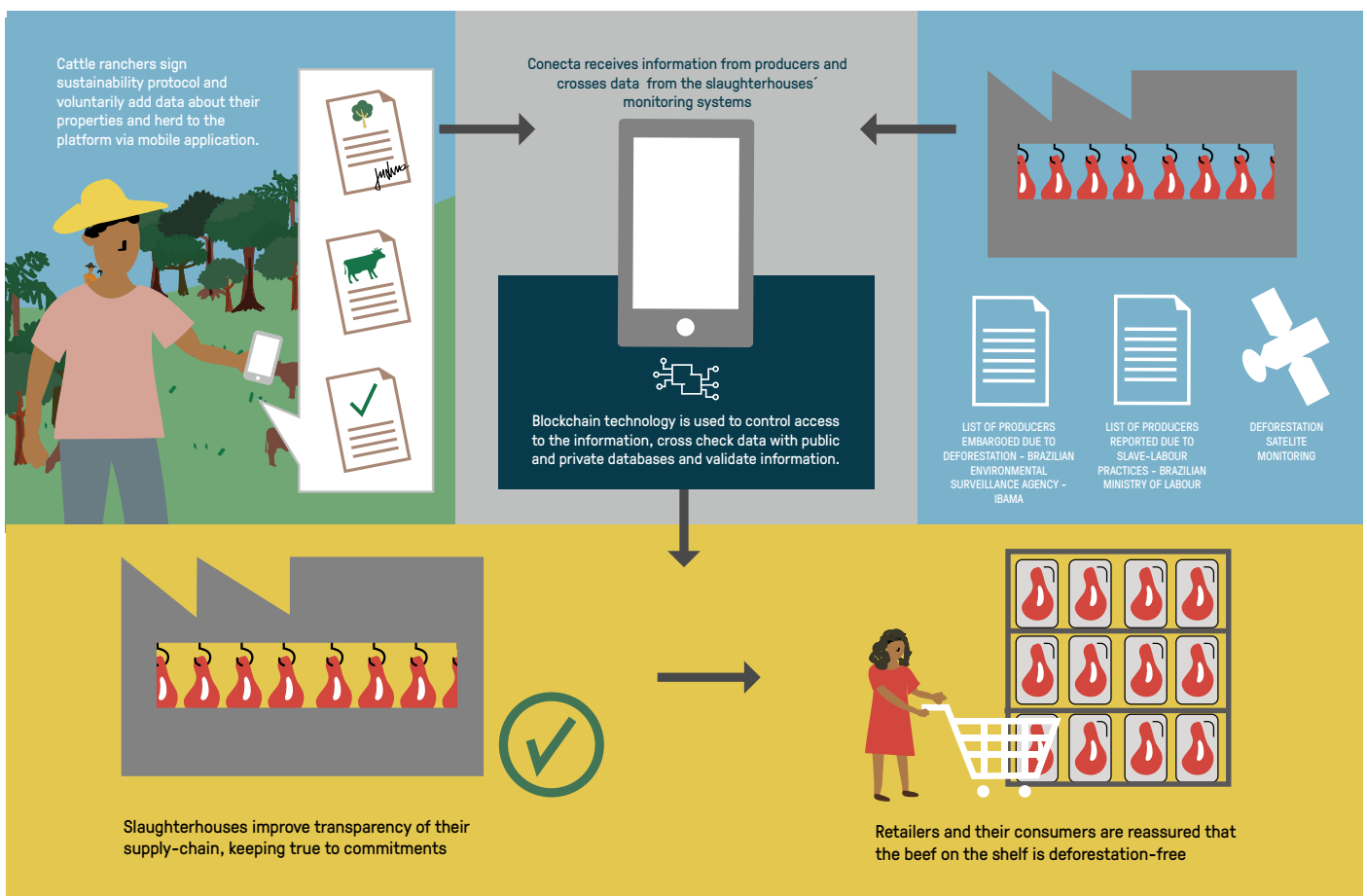
Conecta ■ Partnerships for Responsible Agriculture

- Delivers a proven cattle traceability system reliant of voluntary data from ranchers and capable of flagging deforestation.
- Organizes the supply chain around a sustainable protocol that provides transparency on the level of risk of purchasing from each individual producer.
- Provides a safe market for producers who adopt sustainability criteria by creating a clear pathway to remove them from the blacklist of blocked producers by slaughterhouses.

Conecta – Partnerships for Responsible Agriculture combines a sustainability protocol with a monitoring tool to offer a streamlined, comprehensive solution for achieving transparency across the value chain for the Brazilian beef industry. Developed by a Brazilian traceability company, Safetrace, and implemented with support from The Nature Conservancy and Amigos da Terra - Amazônia Brasileira, two non-governmental organizations, Conecta offers an intelligence tool that combines data from satellite monitoring

and blockchain technology to verify the presence of illegal deforestation and other social and environmental non-conformities in the beef cattle production chain.

Conecta gathers information provided voluntarily by the cattle ranchers currently protected by fiscal secrecy and scattered in several existing public databases and integrates them into a single database. Blockchain technology is used to monitor the risk factors of deforestation in the production chain,



strengthening the ability of slaughterhouses to monitor the entire value chain, thus providing them with a pathway to keep true to their signed commitments to improve traceability. Additionally, the initiative promotes the adoption of a sustainability protocol signed by producers and slaughterhouses which formalizes the commitment to the Brazilian Forest Code to protect forests within the ranches.

“Today we have mature technologies in the country that can assist in the process of tracing the beef chain. Brazil has systems, such as satellite monitoring of deforestation, animal transit control and the Rural Environmental Registry (CAR), but these tools are disconnected from one another. The project's proposal is to be able to unify the database so that, based on this set of information, we will be able to create indicators that bring security to those who are purchasing cattle, whether between farms and with the slaughterhouses, so that everyone can be sure that they are not contributing to illegal deforestation ”; Vasco Picchi, Safetrace

A key aspect of the project is the creation of a pathway for producers currently blacklisted by slaughterhouses to return to the regular market. Environmental state offices can/will facilitate this by offering a fast track process to review land tenure issues and to develop environmental regularization projects at the farm-level .

The initial focus of Conecta's pilot phase is on the Southeast of Pará State where, according to data from TNC, currently blacklisted producers have 1.9 million heads of cattle in private areas. Based on this figure, a conservative estimate points to GBP 149 million/year that could be verified as legally compliant through the platform.

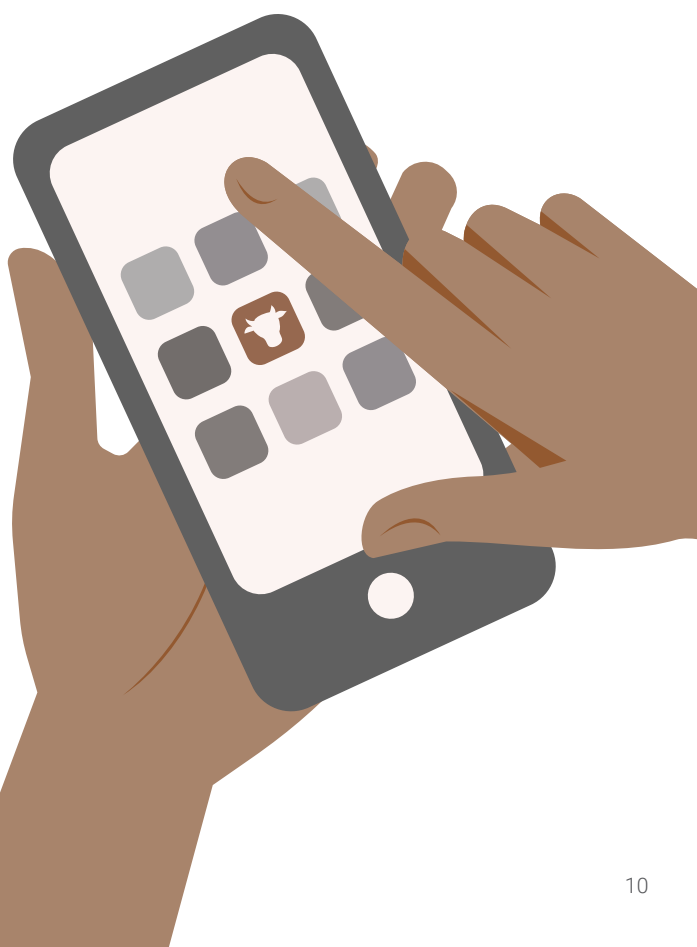
The project has already engaged crucial organisations such as a medium-size slaughterhouse, Frigol, the Xingu Rural Producers Association (APRUX), located in the São Félix do Xingu municipality, one of the higher deforestation regions in the Amazon, and the retailer Carrefour. SEBRAE, a Brazilian public technical assistance service, will provide farm management training to all committed producers who adhere to the platform, helping them achieve greater financial outcomes.

“The great advantage of Conecta is that it is a voluntary membership information system, with reliability mechanisms ensuring that the information is secure in the system. The producers themselves will be able to transact that information, giving

access to the slaughterhouse or any cattle buyer of their choice. This tool will therefore give cattle raisers enormous power over their information”, Mauro Armelin, Amigos da Terra – Amazônia Brasileira.

Conecta – Partnerships for Responsible Agriculture can bring major benefits to the sector by ensuring that beef is sourced from land that has not been illegally deforested. Retailers will be able to confidently tell clients that their product is deforestation-free and concerned consumers will be able to safely purchase beef from retailers committed to environmentally responsible practices. Both slaughterhouses and retailers will have a safer and more efficient tool to guarantee a deforestation-free supply chain. Additionally, the tool aims to empower producers that are fully compliant with the Brazilian Forest Code, allowing them to verify and guarantee to buyers the social and environmental aspects of their production.

Partnerships for Forests has supported this initiative from its inception phase. Conecta – Partnerships for Responsible Agriculture has carried out its pilot phase at regional scale, working with producers from the Pará State, a deforestation hotspot in the Amazon. The following phase involved the initiative's expansion to other Amazonian states and at the national level. Additionally, the platform expects to be a profitable and long-range, sustainable business.



From a producer's perspective: The PECSA model

Since traditional cattle ranching practices in Brazil exhaust the soil, resulting in falling production, ranchers continuously expand by deforesting new areas in order to maintain or increase production. However, there are proven cattle intensification methods that support long-term use of pastureland, significantly improve productivity and reduce Greenhouse Gases Emissions. Sustainable semi-intensified systems, as opposed to extensive cattle ranching, raises economic outcomes for producers and discourages the expansion over forests. This sustainable intensification is dependent on capital and advanced technical assistance, which is acutely needed in many regions of the Amazon.

PECSA is a flagship company that developed a pioneering business model to produce sustainable beef in the Amazon by increasing productivity while investing in forest protection and traceability. PECSA enables medium-large scale producers to implement low carbon and innovative sustainable cattle ranching production systems. PECSA establishes partnerships with farmers who lease their land and part of their herd for seven to ten years in return for a share of the proceeds from the livestock production. The company takes on management of their farms, providing investment required for improvements as pasture reform,

division for rotational grazing, nutritional supplements and drinking trough infrastructure. The company also supports producers in reforestation, provides training for farmworkers and safeguards farms compliance with the Brazilian Forest Code by monitoring its own cattle purchasing supply chain using zero-deforestation criteria.

The company has been operating for four years and has become a model: the "PECSA standard" is now regionally famous serving as a benchmark for other producers who also want to achieve better productivity results.

With the support of P4F, PECSA has successfully achieved operational excellence. Between 2021 and 2025, the company expects to capture a new wave of investment, multiplying the area under improved land-use management fivefold. If successful during the scale-up phase, PECSA could establish the go-to standard in Brazil for sustainable cattle farming at scale.

Photo: Carlini



Next steps

Partnerships for Forests will continue to support the engagement of non-compliant slaughterhouses and retailers in the adoption of the TAC commitments via the **Beef on Track** platform. Next steps include keeping a transparency platform under the [project's website](#), supporting the retailers' by establishing the sectoral environmental and social policy for purchasing beef, and piloting the unified audit protocols with selected slaughterhouses.

Conecta – Partnerships for Responsible Agriculture ran the beta phase of the platform during the first months of 2021, collecting feedback from end-users. The initiative aims to expand to the state of Mato Grosso, the largest cattle producer in Brazil.

Additionally, with the goal of increasing the supply of sustainable beef in the Amazon, P4F is also looking for innovative credit facilities that can cover ranchers' financial and technical assistance necessities in the transition towards a more sustainable production system. Among the crucial aspects of a more sustainable production system are forest restoration, in accordance with the environmental legislation, and the transition from extensive ranching practices to a more intensified system.

Conclusion

By supporting these complementary initiatives, Partnerships for Forests aimed to promote sustainability in the beef sector in the Brazilian Amazon, generating increased value for responsible production and eliminating illegal deforestation associated with suppliers.

Strengthening sectoral commitments that better structure the value chain around more responsible production criteria, as well as increasing transparency across the sector have the potential to generate impact at scale in the protection of forests and to guarantee to consumers - and to the society - that Brazilian beef has a socially and environmentally responsible origin.



Updates Conecta phase 2 - April 2023

In 2022, Conecta began the second phase of the project: the pilot of the business plan. Since 2023, they have been testing the monitoring system with retailers and slaughterhouses, accessing data from their suppliers and conducting socio-environmental analysis of their properties.

They have successfully reached the state of Mato Grosso through a partnership with Marfrig, and they are working towards signing a commercial agreement with the company.

As next steps, the company is working to enable access to the Animal Transit Document (GTA) from the state of Mato Grosso, which is maintained by INDEA, the sanitary agency. This will allow transparency regarding the supply chain and reach the indirect suppliers, the invisible links of the supply chain.

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