

INDUSTRY PERSPECTIVES ON THE EFFICIENT MANAGEMENT AND USE OF FORAGES: THE BEEF SECTOR

Workshop “Tropical pastures in a changing environment: development of an international research collaboration in Latin America and the Caribbean”. Turrialba, April 24-26, 2019.

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- Beef production and land use: some statistics
- Beef processors are key participants on the cattle-beef agribusiness
 - Case study of Costa Rica: the interaction with forage production and use
- What do beef processors expect from cattle ranchers ?
 - Quantity
 - Consistency
 - Quality
- Forage production is basic to produce the type of cattle processors want
 - What is going on in Central America?
 - What we should look for?

CATTLE, BEEF PRODUCTION AND LAND USE

	Cattle herd*, x 10 ⁶	Cattle slaughtered, x 10 ⁶	Beef (cw)*		% of land** on pastures,	Kg cw	
			MT x 10 ⁶	kg/cw		Head	Ha pasture
North America	105.2	36.5	12.8	350	14	122	48
Central America	47.4	10.9	2.5	227	37	53	27
Caribbean	9.0	1.3	0.2	163	21	22	41
South America	354.8	65.4	15.5	237	27	44	33
America	516.5	114.2	31.0	271	21	60	37
World	1491.7	304.4	66.3	218	25	44	20
America, %	35	37	47			3x	
LA and the C, %	28	26	27				

* FAOSTAT 2017

** FAOSTAT 2016

CATTLE AND LAND USE: CENTRAL AMERICA

	CATTLE* NUMBERS, x 10 ⁶	CATTLE* PROCESSED, x 10 ³	BEEF (cw)*		Land on pastures**, %	Kg cw per	
			TM x 10 ³	kg/cw		Head	Ha pasture
Mexico	31.8	8029	1927	240	41	60	23
Guatemala	3.8	941?	174	185	17	46	96
Belize	0.1	7	2	204	2	20	40
Honduras	2.9	351	65	186	16	22	37
El Salvador	1.0	119	20	167	31	20	31
Nicaragua	4.8	819	148	180	28	31	45
Costa Rica	1.4	339	78	230	24	56	65
Panama	1.5	323	70	217	20	47	46
Central America	47.4	10928	2484	227	37	53	27

* FAOSTAT 2017

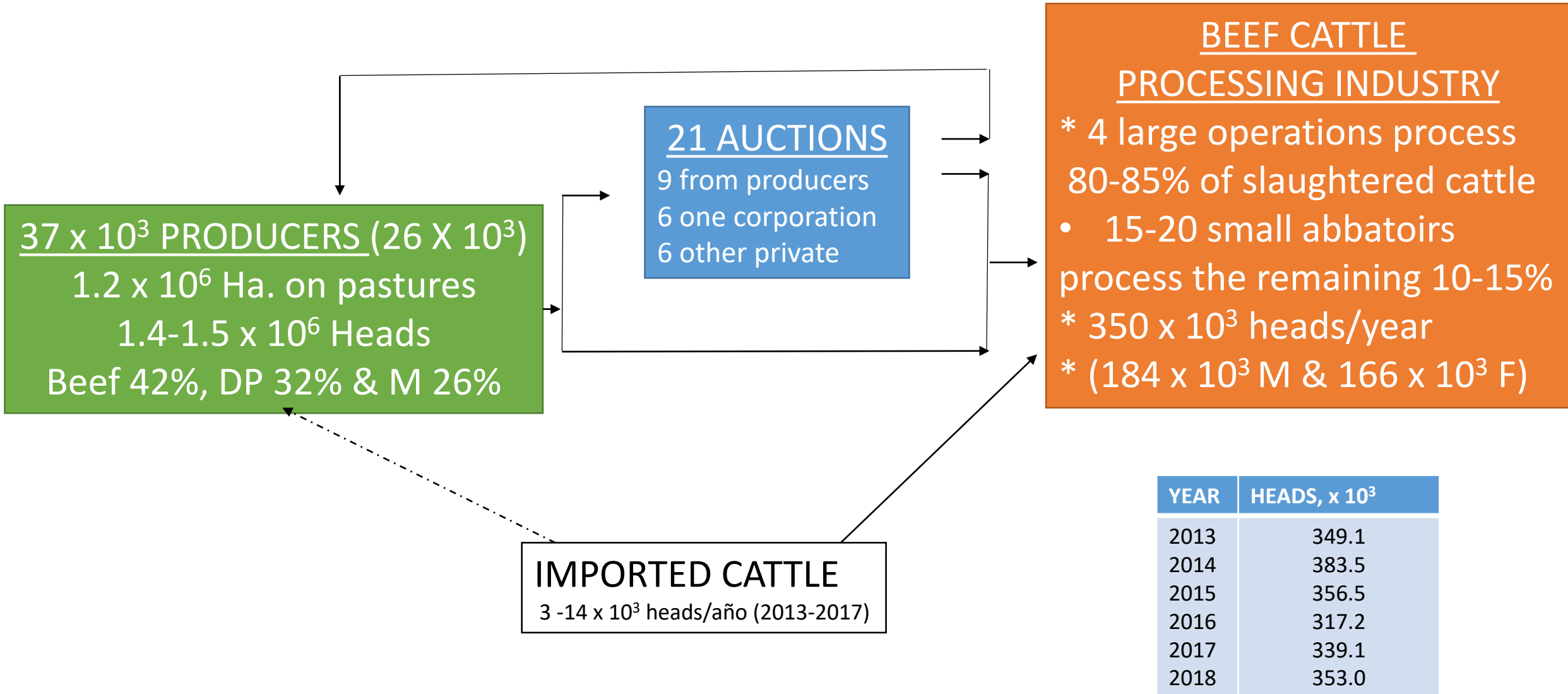
** FAOSTAT 2016

PROCESSORS ARE KEY TO THE CATTLE-BEEF INDUSTRY



PRODUCERS-BEEF INDUSTRY

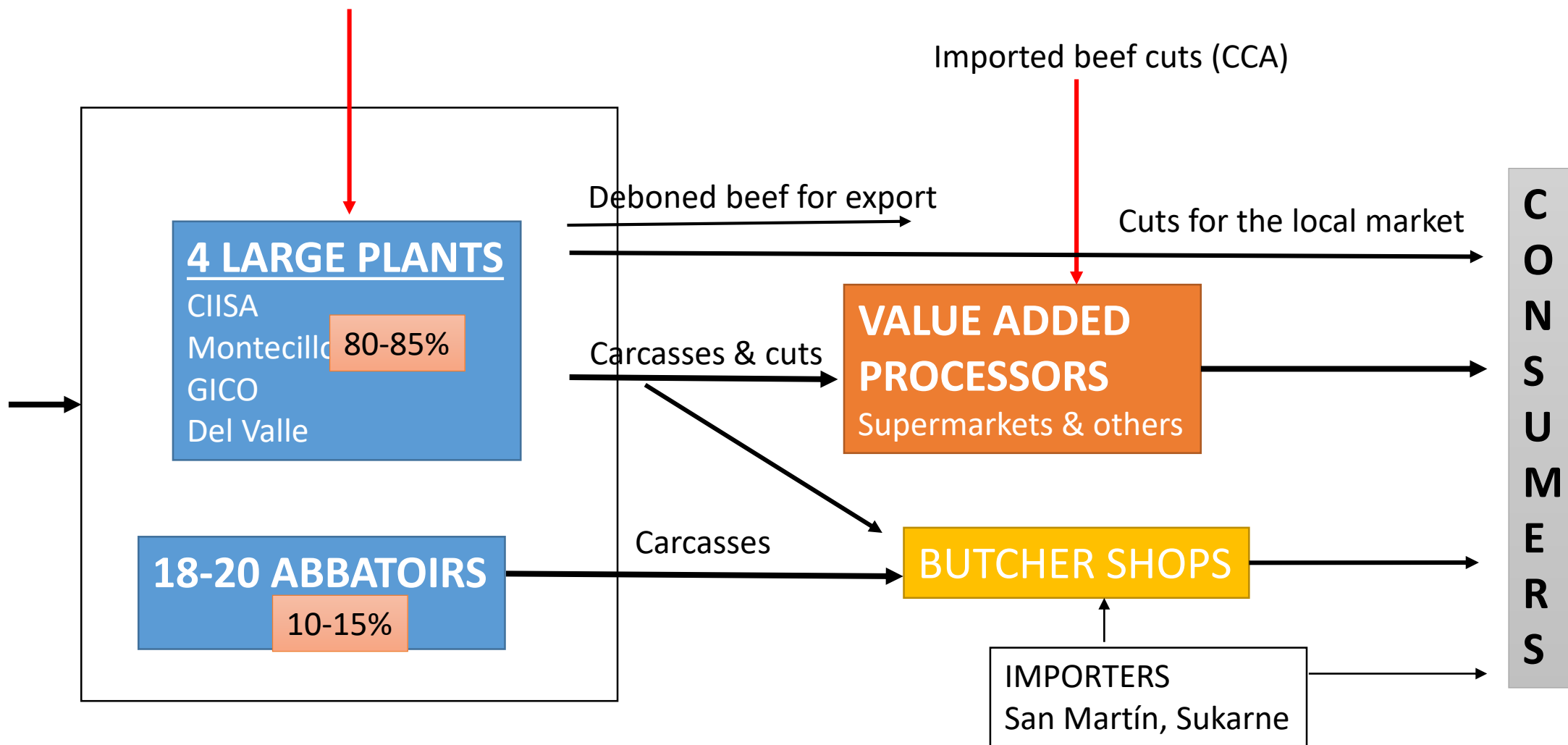
CATTLE PRODUCTION AND MARKETING FOR BEEF IN COSTA RICA



BEEF PROCESSING AND MARKETING IN COSTA RICA: PARTICIPANTS AND PRODUCTS

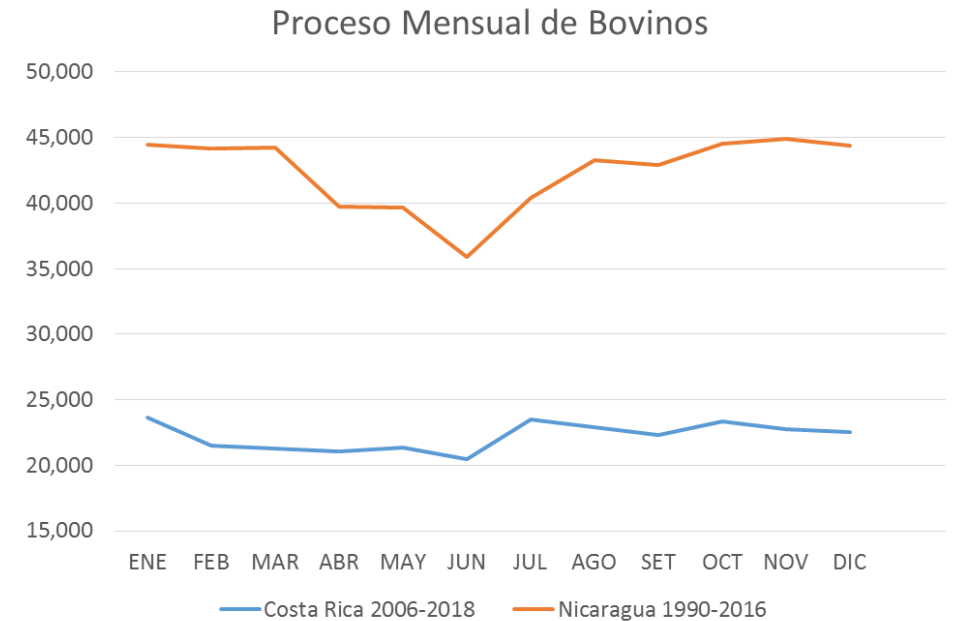
Imported deboned cuts (CIISA)

Imported beef cuts (CCA)



What do Beef Processors expect from Cattle Ranchers?

- Quantity
 - *per capita* intake
 - Processing capacity
 - Exports markets: are there opportunities?
- Consistency
 - Age, sex, cattle type
 - Weights at slaughter and yields (dressing %, deboning %)
- Quality
 - Safety (zoonoses, agricultural and drug residues)
 - Quality *per se* (pre-slaughter management, tenderness, juiciness and flavor)



FORAGE USE FOR BEEF PRODUCTION IN CENTRAL AMERICA: Current status

- 60-80 % of farms use extensive grazing systems (1 head/Ha) with mixed natural and improved grasses.
 - Deficient grazing management produces low stocking rates and degraded pastures.
 - High investment for replanting and weed control.
 - Forage production seasonality causes animal production variability throughout the year, mainly because of lack of rain, but sometimes for floodings.
- 40-20 % of farms have more sustainable (*gramineae* based) grazing systems, with better management practices.
- Forage (cut and carry, usually grasses, fresh/preserved) supplements are used on milk production systems, but not so much on beef cattle operations.
- Mineral supplements have been widely adopted, but quantities are not enough to meet requirements.
- Non fibrous supplements are very seldom found on beef operations. Are there opportunities?
- There are important negative environment-beef production interactions, including deforestation, water management, biodiversity and GG emissions.

What we should look for?

INCREASE PRODUCTION

More cattle
Increase cw

CONSISTENCY

Constant supply throughout the year
Better yields

BEEF QUALITY

Decrease age at slaughter

GRAZING SYSTEMS

Increase adoption of:
Improved grasses.
Legumes

FORAGE MANAGEMENT
IMPROVEMENT

ESTRATEGIAS DE SUPLEMENTACIÓN

Forrajeras de corte (frescos o conservados)
Suplementos no forrajeros
Minerales