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BEEF SUPPLY CHAIN MAPPING

From South American countries to Swiss
supermarkets



Commissioned by: Greenpeace Switzerland

AidEnvironment is registered at the
Chamber of Commerce of Amsterdam in
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Cover Picture: Victor Moriyama

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Swiss companies' commitments to eliminating deforestation from their bovine meat supply chains are unclear regarding their targets or progress.

The research found links between the bovine meat products collected in Swiss supermarkets with three importing (*Bell Schweiz, Gustav Spiess, and Micarna*) and five processing companies (*Coop, Maestral, Bolton Food, and Fleischhandel Chur*). Most companies have publicly available sustainability reports, in which some specify targets or measures to address deforestation within their bovine meat products supply chains. *Coop*, for instance, states that their target is to get, by 2026, 100% of raw materials linked to high risk of deforestation (including bovine meat products) used in their own-label brands from sources free of deforestation and conversion in the retail sector and 85% in the production and wholesale sectors.

In South America, Uruguay is one of the largest suppliers of fresh or chilled bovine meat to Switzerland, and Brazil dominates the supply of prepared or preserved bovine meat products.

According to the Swiss-impex Database, in 2023, 22% of fresh or chilled meat imports originated in South American countries: half of it came from Uruguay, one-third from Paraguay, and the rest distributed between Argentina, Brazil, and Chile. Among the imports of prepared or preserved bovine meat products, in 2023, 25% of the imported volume by Switzerland came from South American countries. Most of these products originated in Brazil (95%), and the rest in Paraguay and Uruguay.

All the bovine meat products found in Swiss supermarkets indicate the country of origin of the meat on their labels. However, in most cases, the provided information does not allow traceability to the processing unit or slaughterhouse of origin.

Although the country of origin was visible on all the fresh or chilled bovine meat products found in Swiss supermarkets, those found in *Coop* shops did not indicate the registration code of the processing unit in the country of origin. For the prepared or preserved products, although the labels of all collected products also informed the country of origin of the bovine meat used, only those packed in these countries (*Bonfine* and *Jack Link's* products) had the registration code of the processing unit in the country of origin. Information on all *Jack Link's* products indicated a processing unit in Brazil but stated the meat is from Uruguay. In the case of the *Bonfine* product, the study found links between the processing unit in Brazil (JBS, in Lins, São Paulo) and at least one indirect cattle supplier with 533 hectares between July 2020 and August 2023.

Brazilian companies dominate the bovine meatpacker sector in South American countries.

Frigorífico Las Piedras (Uruguay) is the lead exporter of fresh or chilled bovine meat from Uruguay; however, *Minerva* and *Marfrig*, both Brazilian companies, operate more than half of the meatpacker sector in Uruguay. Companies under *Minerva's* corporate structure in Paraguay, such as *Beef Paraguay* and *Frigomerc* (Paraguay), exported 45% of the volume of fresh or chilled bovine meat from Paraguay. Argentina is the only exception, where the three largest exporters of bovine meat are family-owned companies.

1. INTRODUCTION

This report is meant to inform Greenpeace Switzerland about meat products originating in South American countries that can be found in supermarkets in Switzerland to support advocacy campaigns and strategies with companies operating in the protein sector in the country. The research established links between products sold in supermarkets in Switzerland and beef-producing countries in South America, more specifically Brazil and Uruguay. The aims of this investigation are:

- Identify what information is available for Swiss consumers on the origin of beef products being sold in supermarkets.
- Connect meatpackers and the cattle sector in South America to Swiss supermarkets and expose specific cases of deforestation and environmental and social impacts within the supply chain.

To map the links between the beef supply chain in South America and the Swiss supermarkets, AidEnvironment conducted a “trade data and ownership analysis” (desk study) guided by a sample of beef products (fieldwork) collected by Greenpeace Switzerland. The **mapping study** of beef supply chains in South America and their connection to Swiss supermarkets includes:

- Summary of Swiss imports of beef products globally and, more specifically, from South American countries.
- Summary of findings of the ‘fieldwork’, considering a sample of 35 products collected in Swiss supermarkets coordinated by Greenpeace Switzerland.
- One case study linking beef products of the sample collected in Switzerland to a Brazilian beef meatpacker and cattle ranches, including visuals on recent deforestation and other socioenvironmental impacts.

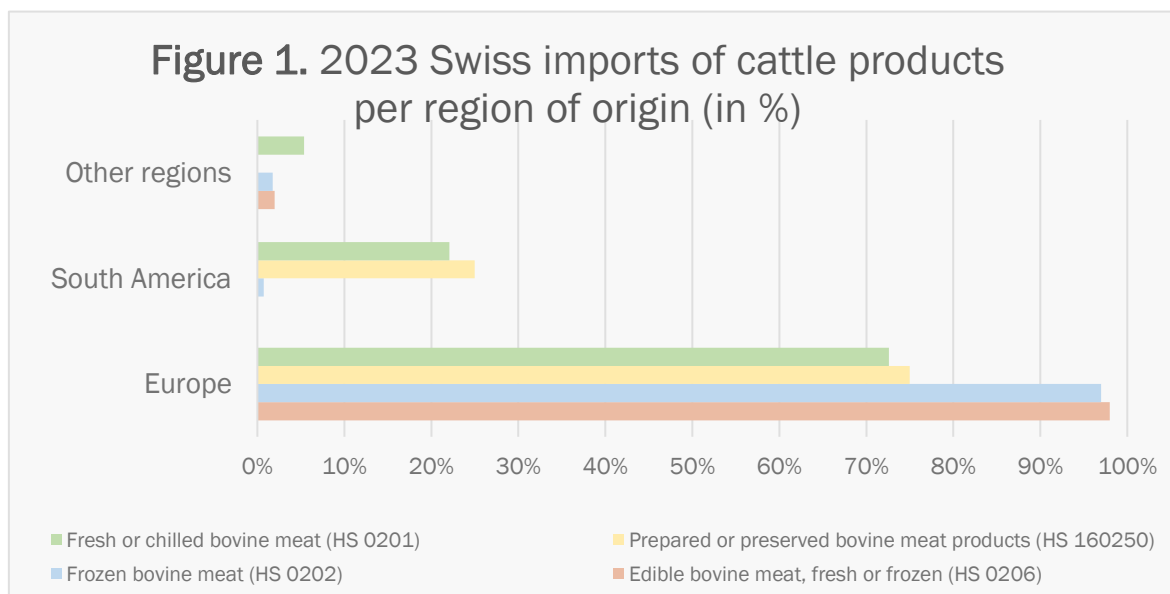
2. BEEF PRODUCTS – SWISS IMPORTS AND THE ROLE OF SOUTH AMERICA

For the analysis of the trade data of beef products, AidEnvironment used both the overall 2023 Swiss trade data (Swiss-impex Database) as well as the most recent available shipping data (from the provider Seair) for all relevant trading codes (**HS codes**) linked to beef products. We included the HS codes for the following products:

- HS 0201 – fresh or chilled bovine meat
- HS 0202 – frozen bovine meat
- HS 020610 – edible offal of bovine meat, fresh or frozen
- HS 020622 – edible bovine livers, frozen
- HS 020629 – edible offal of bovine meat (excluding tongues and livers), frozen
- HS 160250 – other prepared or preserved meat, offal meat, or blood of bovine animal

Key findings of Swiss imports of beef products (see Figure 1):

- In 2023, 73% of the imported fresh or chilled bovine meat (HS code 0201) originated from European countries, 22% from South American countries and 5% from countries in other regions.
- In 2023, 98% of the imported frozen bovine meat (HS code 0202) came from European countries and only 1% from South American countries, while other regions also supplied 1% of this product to the Swiss market.
- In 2023, 98% of the imports of other edible bovine meat products (all HS codes starting with 0206) also came from European countries, while 2% from other regions (excluding South American countries).
- In 2023, 75% of the beef prepared products (HS code 160250) came from European countries and 25% from South American countries.
- Relevant imported volumes of beef products from South American countries are fresh or chilled bovine meat (HS Code 0201) and other bovine meat prepared products (HS Code 160250).



Elaborated by AidEnvironment (2024). Source: Swiss-impex Database.

2.1. FRESH OR CHILLED BOVINE MEAT (HS CODE 0201)

In 2023, 22% of Swiss imports of fresh or chilled bovine meat came from South American countries, including (in crescent order by volume) Uruguay, Paraguay, Argentina, Brazil, and Chile (with a non-relevant volume) (see Table 1 below).

Origin	Quantity (kg)	%
Uruguay	1,725,094	45.2%
Paraguay	1,190,385	31.2%
Argentina	722,960	19.0%
Brazil	168,580	4.4%
Chile	5,705	0.1%
Total	3,812,724	100%

Source: Swiss-impex Database.

Although the available shipment data does not inform the destination country, below is a list of the top 3 exporters of fresh or chilled bovine meat products from South American countries relevant to the Swiss market (see Table 2 below).

Exporters	Quantity (kg)	%
URUGUAY Jan - May 2024*		
Frigorifico Las Piedras	3,229,909	15%
Ontilcor (Frigorifico Pando)	2,579,544	12%
Frigorifico Tacuarembó	1,983,177	9%
Other 19 different exporters	14,212,169	65%
Total	22,004,799	100%
PARAGUAY Dec 2023 - Apr 2024		
Beef Paraguay	13,604,407	33%
Frigomerc	5,214,116	12%
Frigorifico Concepcion	5,150,323	12%
Other 4 different exporters	17,797,785	43%
Total	41,766,631	100%
ARGENTINA Jan - May 2024		
Azul Natural Beef	12,798,495	20%
Frigorifico Gorina	8,550,052	13%
Arre Beef	7,560,527	12%
Other 21 different exporters	35,522,414	55%
Total	64,431,488	100%
BRAZIL Jul - Nov 2023		
JBS	10,469,009	40%
Satel Despachos**	4,932,955	19%
Marfrig Global Foods	2,207,015	8%
Other 15 different exporters	8,389,836	32%
Total	25,998,815	100%

(*) covered period is always 5 months and varies among countries depending on data availability.

(**) Satel Despachos is a logistics company. Source: Seair.

Uruguay

The Uruguayan bovine meat industry is an investment target of Brazilian companies. In 2023, [Minerva](#) and Marfrig, both Brazilian companies, controlled the operations of [more than half](#) of the meat processing unities in Uruguay. According to shipment data from the platform Seair (see Table 2), the two largest exporters of fresh and chilled bovine meat from Uruguay between January and May 2024 were Frigorifico Las Piedras and Ontilcor, the last operating under the brand Frigorifico (Matadero) Pando, both family-owned companies. The third in exported volume is Frigorifico Tacuarembó, a Marfrig-owned company. According to the [Uruguayan National Meat Institute](#), all three meatpackers listed above have licenses to export bovine meat to Europe, Russia, China and other markets.

Paraguay

Minerva, a Brazilian meatpacker company, is the [ultimate owner](#) of Beef Paraguay and Frigomerc, which together exported 45% of fresh and chilled bovine meat volume from Paraguay between December 2023 and April 2024. Jair Antonio de Lima, the owner of Frigorifico Concepción (FriCon), the third in fresh and chilled bovine meat exports in the same period, has several [ongoing criminal prosecutions](#) for financial crimes in Brazil and illegal imports of meat from Brazil [in Paraguay](#). FriCon and Minerva had recently gained authorisation to export meat to the US market.

Argentina

Azul Natural Beef (Devesa) is part of Grupo Duhau, one of the [largest agribusiness groups](#) in Argentina, which operates around 120,000 hectares of land for agriculture and cattle production. Alejandro Carlos Duhau, the current director of Azul Natural Beef, is part of [Greenpeace's list](#) of people linked to deforestation in Argentina between 1990 and 2020. In 2021, Azul Natural Beef and Arre Beef [were fined for not declaring](#) or under-declaring cattle trading operations. Arre Beef (Borrell family) and Frigorifico Gorina are family-owned companies.

Brazil

Although Brazil does not play a central role in the Swiss imports of fresh or chilled bovine meat, being the origin of just 4.4% of all imports from South American countries (see Table 1), it is still the country with the largest exports of bovine meat worldwide. The world's largest animal protein industry is JBS, a Brazilian company linked to several [financial crimes](#), including [money laundering](#), [human rights violations](#), and [environmental crimes](#), including [deforestation](#).

Minerva has operations in Brazil, Uruguay, Paraguay, and Argentina. In 2023, Minerva launched a growth plan that included the acquisition of part of Marfrig's operations in South America and Australia. If national Laws and regulations approve the selling operations, Minerva will increase its [slaughtering capacity by more than 40%](#) (from 30 to 42 thousand animals per day).

Marfrig, now the third-largest meat processor in Brazil, also has operations in Chile, Argentina, and Uruguay. Marfrig is also the target of investigations into [financial and](#)

[environmental crimes](#) and recently had a credit from the Interamerican Development Bank denied for [environmental risks](#) in Amazon.

2.2. PREPARED OR PRESERVED BOVINE MEAT PRODUCTS (HS CODE 160250)

In 2023, 25% of Swiss imports of prepared or preserved beef products originated in South American countries, including (in crescent order by volume) Brazil, Paraguay, and Uruguay (with a non-relevant volume) (see Table 3 below).

Table 3. Exports of prepared or preserved bovine meat products from South American countries to Switzerland in 2023

Origin	Quantity (kg)	%
Brazil	420,555	95.6%
Paraguay	19,067	4.3%
Uruguay	228	0.1%
Total	439,850	100%

Source: Swiss-impex Database.

Although the available shipment data does not inform the destination country, below is a list of exporters of prepared or preserved bovine meat products from Brazil and Paraguay (see Table 4 below). In the case of Brazil, the available data also show the main importers of prepared or preserved beef products that originated in the country, even if the destination country is unknown (see Table 5).

Table 4. Main global exporters of prepared or preserved beef products from Brazil and Paraguay

Exporters	Quantity (kg)	%
BRAZIL		Jul - Nov 2023*
JBS	30,619,889	49.4%
Pampeano Alimentos	14,959,455	24.2%
Meat Snack Partners do Brasil	7,746,399	12.5%
Conservas Oderich	2,930,494	4.7%
Minerva	2,139,338	3.5%
Marfrig Global Foods	1,730,902	2.8%
Ferreira International	1,542,863	2.5%
DN Logistica Internacional**	274,164	0.4%
Total	61,943,504	100%
PARAGUAY		Dec 2023 - Apr 2024
Frigorifico Guarani	416,880	97.1%
Frigorifico Concepcion	12,256	2.9%
Total	429,136	100%

(*) covered period is always 5 months and varies among countries depending on data availability.

(**) DN Logistica Internacional is a logistics company. Source: Seair.

Paraguay

Frigorifico Guarani is a family-owned company in the Pettengill family's business conglomerate. Another important company Pettengill's family owns is Ocho A, responsible

for the construction work in Paraguay of the [Via Corridor Bioceánica](#), linking Brazil, Paraguay, Argentina and Chile to the Atlantic and Pacific exporting ports. The route, also known as the “new Panama Chanel,” will cross the Gran Chaco biome region in Paraguay, which is expected to [accelerate the environmental impact](#) in the area.

Jair Antonio de Lima, the owner of Frigorífico Concepción (FriCon), is also an important player in exports of fresh and chilled bovine meat (see item 2.1). As already said, Jair has several [ongoing criminal prosecutions](#) for financial crimes in Brazil and illegal meat imports from Brazil to [Paraguay](#).

Brazil

In Brazil, the lead companies in the meat sector, JBS, Marfrig, and Minerva, are the main exporters of prepared or preserved bovine meat products (HS code 160250) directly or through a series of subsidiaries. Marfrig, for instance, owns Pampeano Alimentos, the second-largest Brazilian exporter of prepared or preserved bovine meat products between July and November 2023. JBS and Ferreira International own Meat Snack Partners do Brasil (MSP), Jack Link’s products producer in Brazil. JBS operates MSP production units in Lins and Santo Antonio de Posse in São Paulo. According to shipment data, between July and November 2023, Conservas Ocederich, a company from São Sebastião do Caí, in Rio Grande do Sul state, is the only family-owned company among the top exporters of prepared and preserved bovine meat products from Brazil.

Table 5. Main global importers of prepared or preserved beef products from Brazil

BRAZIL		
		Jul – Nov 2023*
Importers	Quantity (kg)	%
Sampco	12,105,744	19.5%
Marfrig	9,335,671	15.1%
Link Snacks	8,259,705	13.3%
JBS	8,126,090	13.1%
MF Foods USA	3,241,956	5.2%
Bolton Food SPA	2,443,059	3.9%
Other 29 different importers	18,431,279	29.8%
Total	61,943,504	100%

Source: Seair.

Most of the exporters of prepared and preserved bovine meat products are also seen in the list of importers (see Tables 4 and 5 above). This means that this specific industry is highly verticalized: the same company that processes the products in the producing country is responsible for imports in the consuming countries. This is the case of JBS (also through Link Snacks) and Marfrig, both from Brazil and also present in consuming countries.

3. FIELDWORK – BOVINE MEAT PRODUCTS FOUND IN SWISS SUPERMARKETS

In July 2024, Greenpeace Switzerland collected pictures of beef products found in Swiss supermarkets. The sample of 35 beef products was collected in fourteen shops of six supermarkets in five cities. The data collection covered shops in Bern, Colombier, La Tour de Peilz, Neuchatel, and Zürich from the following supermarkets:

- Coop (4 shops, 3 cities)
- Migros (4 shops, 3 cities)
- Lidl (1 shop, 1 city)
- Selecta (1 shop, 1 city)
- Aldi (1 shop, 1 city)
- Denner(1 shop, 1 city)

The product information collected in the sample included the product type (fresh bovine meat or prepared/preserved bovine meat), brand, and, when available, the country of origin, importer, and processor, among other relevant information. Usually, a prepared or preserved product is processed and labelled in the country of origin. If available, a domestic code allows the identification of the meat processor and its location in the country of origin. This is the case with the SIF code in Brazil, a unique federal inspection code given to every meat processing unit within the national territory. In the case of European meat processors, the codes are usually shown as CE and/or the code of the European country. Tables 6 and 7 below summarise the sample of bovine meat products collected in Swiss supermarkets.

Cities / Supermarkets	Coop	Migros	Lidl	Selecta	Aldi	Denner	Total	
Zürich	6	10	1	1	-	1	19	54%
Neuchatel	5	3	-	-	1	-	9	26%
La Tour de Peilz	1	2	-	-	-	-	3	9%
Bern	2	-	-	-	-	-	2	6%
Colombier	2	-	-	-	-	-	2	6%
Total	16	15	1	1	1	1	35	100%
	46%	43%	3%	3%	3%	3%	100%	-

Source: Greenpeace, prepared by AidEnvironment.

Type / Origin	Uruguay	Brazil	Brazil or Argentina	Total	
Fresh or chilled	11	-	-	11	31%
Prepared or preserved	-	18	6	24	69%
Total	11	18	6	35	100%
	31%	51%	17%	100%	

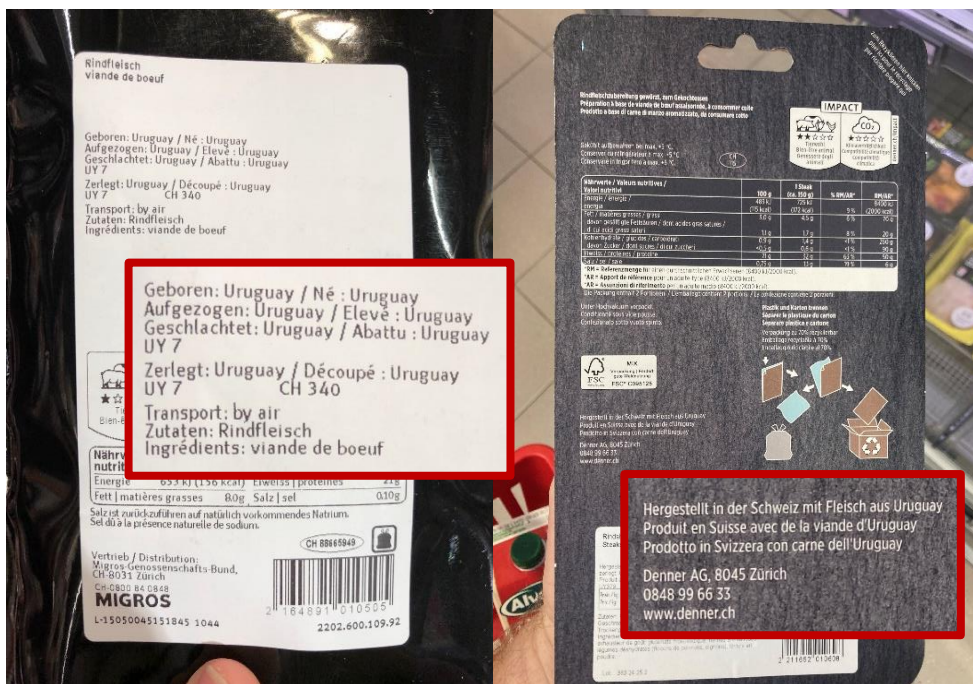
Source: Greenpeace, prepared by AidEnvironment.

From the products collected in the Swiss supermarkets, all the **fresh or chilled bovine meat** products indicated **Uruguay as the country of origin**. Among the **prepared or preserved bovine meat products**, including processed and canned products, we identified two different origins, **Brazil and Brazil “or” Argentina**.

3.1. FRESH OR CHILLED BOVINE MEAT FROM URUGUAY

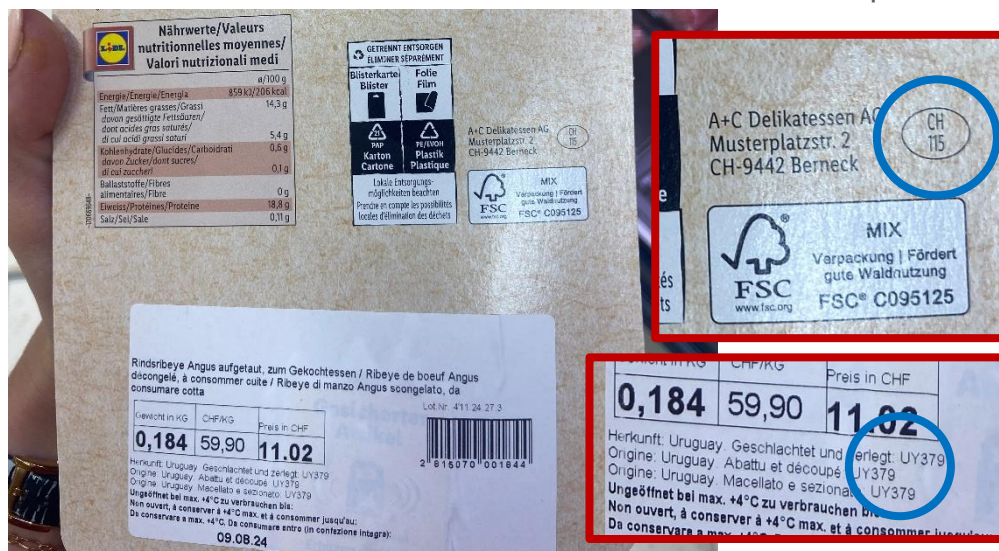
The sample of bovine meat products collected in Swiss supermarkets included 11 examples of fresh or chilled meat from Uruguay. All of the fresh or chilled meat products had information about the origin of the product visible on their label (see Figure 2). On the labels of 6 of these products, there was also a Uruguayan code (starting with UY) allowing the identification of the exporter and the location of the processing unit in Uruguay (see Figures 2 and 3). In all the fresh or chilled bovine meat products, a visible Swiss code on the labels allowed the identification of the importing company in Switzerland (starting with CH) (see Figure 3).

Figure 2. Label information of fresh or chilled bovine meat products



Pictures: Greenpeace Switzerland

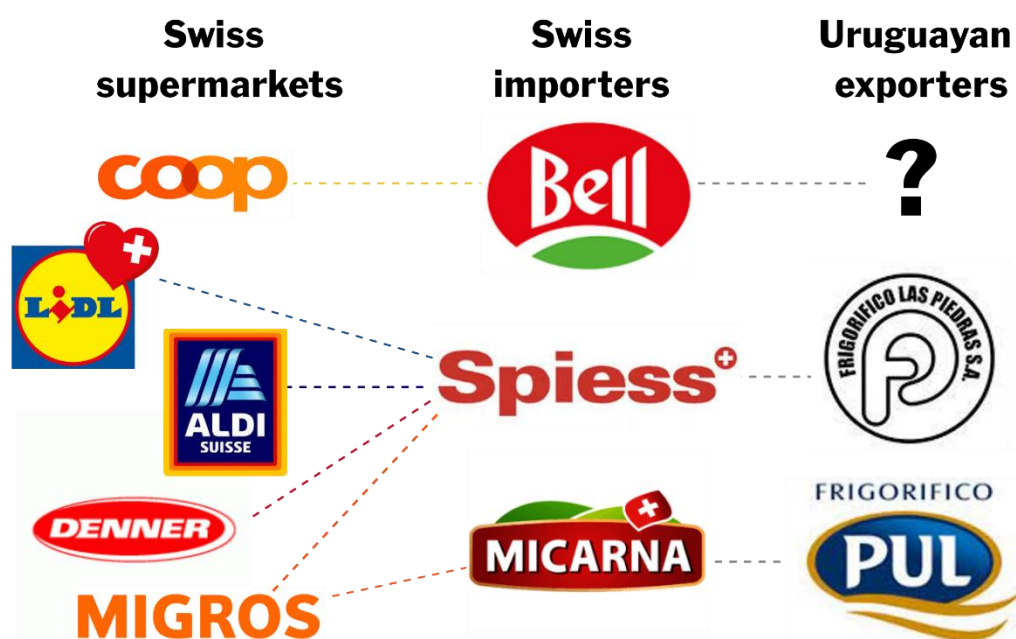
Figure 3. Label information of fresh or chilled bovine meat products



Pictures: Greenpeace Switzerland

Following the identification code of the Swiss bovine meat importer or meatpacker, we could identify all the linked companies to the 11 fresh or chilled bovine meat products of the sample: **Bell Schweiz AG** (CH 145), **Gustav Spiess AG** (CH 115), and **Micarna SA** (CH 88665949). However, only 6 products had the information about the Uruguayan exporters and the slaughterhouse of origin in Uruguay: **Frigorífico Las Piedras** (UY 370, 5 products linked to Gustav Spiess) and **Frigorífico Pul** (UY 7, 1 product linked to Micarna). All the products linked to Bell Schweiz, although informing that the origin of the bovine meat is Uruguay, do not have visible or available information about the Uruguayan exporter or processing unit (see Figure 4).

Figure 4. Supply chain mapping of fresh or chilled bovine meat, links between Swiss supermarkets and Uruguayan meatpackers



Elaborated by AidEnvironment.

Bell Schweiz (Switzerland) is part of the Bell Food Group, a meat processing company linked to Coop-Gruppe, which has 2,5 million people listed as cooperates or shareholders. Coop-Gruppe, with 2.5 million people listed as cooperators or shareholders. The [Coop-Gruppe's multi-year targets \(2022-2026\)](#) state that their target for the production sector is to have 85% of the raw material of their label brand products, including bovine meat, from sources free of deforestation and conversion.

Spigus Verwaltungs (a capital managing company) is the ultimate owner of **Gustav Spiess** (Switzerland). The corporate group has two other subsidiary companies: Spiber and Fleischrocknerei Churwalden (both in Switzerland). The last one has five other subsidiaries in other countries: Spiess (Áustria), Surselva (Germany), Grischuna (Germany), Societe DES Grisons (France), and A+C Delicatessen (Switzerland). On their website, Gustav Spiess affirms that they work “[almost exclusively](#)” with meat suppliers from East Switzerland and that all their meat products are certified by the “[Swiss Meat](#)” label to guarantee environmentally and animal-friendly production. It is unclear, though, what criteria they apply for imported products, such as fresh or chilled meat from Uruguay.

Migros is the ultimate owner of **Micarna** (Switzerland). Migros is a cooperative with over 2.3 million members and 40 subsidiaries, including retail, health, banking, and foundations. Migros' [retail sector](#) covers over 50% of its operations and is active in Switzerland, France and Germany. Migros is also the ultimate owner of Denner. [Micarna group](#) also includes three other companies: Favorite Poultry, Luchinger + Schmid, and Mérat. Micarna's [2023 Sustainability Report](#) does not cite any commitment or target to eliminating deforestation linked to bovine meat from outside Switzerland.

Frigorifico Las Piedras (Uruguay) is a family-owned company. According to a sample of shipment data covering January and May 2024 (see item 2.1 above), Frigorifico Las Piedras was the largest exporter of fresh or chilled meat from Paraguay, with 15% of the exported volume between January and May 2024. Minerva, a Brazilian meatpacker, is the ultimate owner of **Frigorifico Pul** (Uruguay). [Minerva and Marfrig](#), the second and third largest Brazilian meatpackers, operate more than half of the meatpacker sector in Uruguay.

3.2. PREPARED OR PRESERVED BOVINE MEAT FROM BRAZIL AND ARGENTINA

The sample of bovine meat products collected in Swiss supermarkets includes 24 examples of prepared or preserved products. We could find information about the origin of the meat on the labels of all these products. However, only the 8 products processed and packed in Brazil, under Jack Link's and Bonfine brands, show the domestic code allowing the location of the processing unit, which in the case of Brazil is the SIF Code (see Figure 5 and 6 below). Regarding Jack Link's products, the label informs that although it was produced in Brazil, it is made of bovine meat from Uruguay (see Figure 6 below).

Figure 5. Label information of processed or prepared bovine meat products



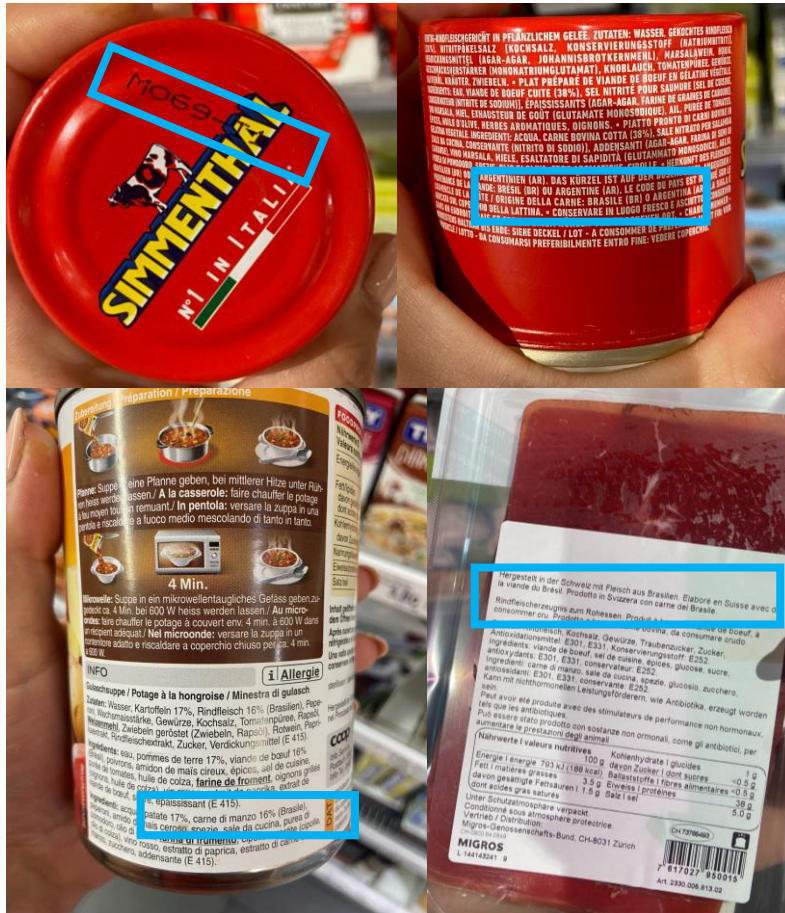
Pictures: Greenpeace Switzerland

Figure 6. Label information of processed or prepared bovine meat products



Pictures: Greenpeace Switzerland

Figure 7. Label information of processed or prepared bovine meat products

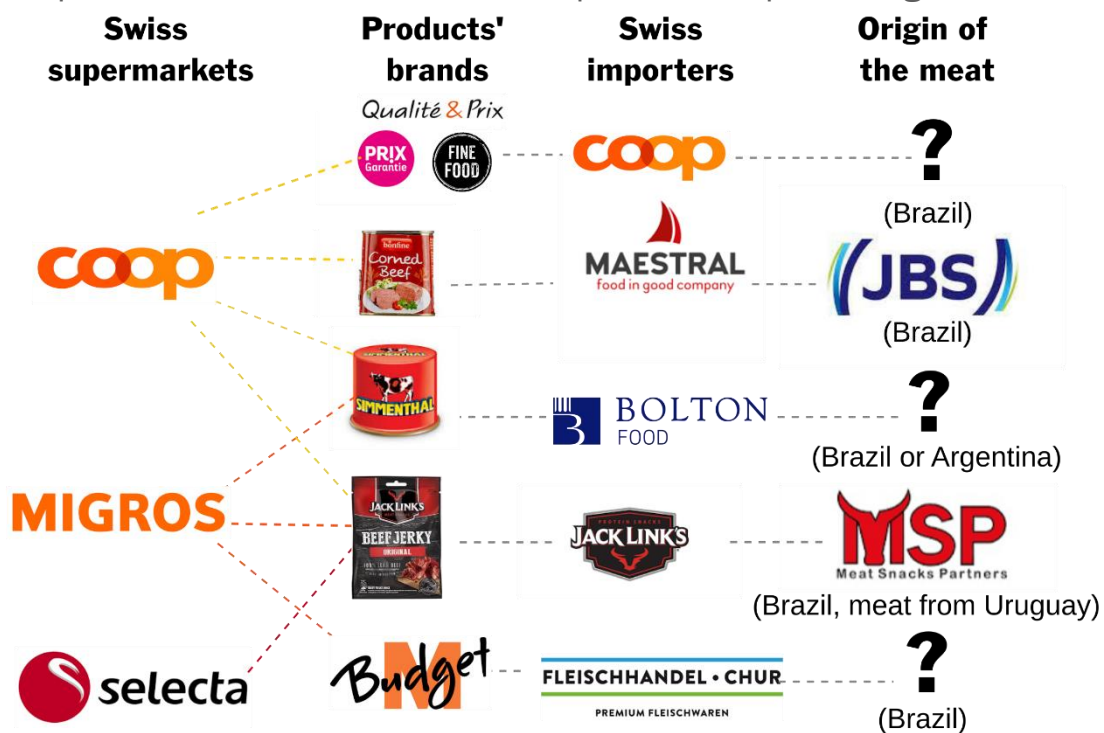


Pictures: Greenpeace Switzerland

In general, for the products being processed in Europe or Switzerland, the information about the origin of the meat is even less transparent. On the label of Simmenthal products processed in Italy by Bolton Food, for instance, it is possible to find the information that the meat comes from Brazil OR Argentina. Still, the indicated code is not part of any publicly available registration databases allowing the location of processing units in both countries. The same happens with products of the MBudget and Coop brands; the information available links it to Fleischhandel Chur or Coop, respectively, Swiss meat processing companies, and informs that the meat originates in Brazil but does not give information about the exporter or the processing unit in the country of origin (see Figure 7 above).

For all the 24 processed or prepared bovine meat products found in Swiss supermarkets, the information on the label allowed the identification of the importer or processing company in Europe or Switzerland and the country of origin of the meat. All the collected products were linked to Brazil, among which 6 could be linked to Brazil or Argentina, but Jack Link's products, although processed in Brazil, use meat from Uruguay (see Figure 8 below).

Figure 8. Supply chain mapping of prepared or preserved bovine meat products, links between Swiss supermarkets producing countries



Elaborated by AidEnvironment.

Coop is part of the Coop-Gruppe, with 2.5 million people listed as cooperators or shareholders. The [Coop-Gruppe's multi-year targets \(2022-2026\)](#) state that their target is to get 100% of raw materials linked to high risk of deforestation (soya, palm oil, coffee, cocoa, meat, wood, and paper) used in their own-label brands from sources free of deforestation and conversion in the retail sector, and 85% in the production and wholesale sectors.

Maestral (Switzerland) is a family-owned company that is part of the Adriatic Group and indirectly related to the Agrocor Group through its founder and manager, Jozo Luburic. There is no public information about Maestral's sustainability policies linked to the source of bovine meat products.

Bolton Food (Italy) is part of the corporate structure of Bolton Group. Factor Holding SRL owns [Bolton Group](#) and is registered in Italy. [Simmenthal](#) is the only brand of the Bolton Group linked to bovine meat products. According to the Bolton Group's [2022 Sustainability Report](#), they follow the [Global Roundtable for Sustainable Beef](#) principles in sourcing bovine meat products. The report states that, in 2009, these suppliers agreed not to source bovine meat from producers linked to deforestation in the Amazon biome, probably an agreement related to the Public Cattle Sector Commitment (CPP) initiated after the publication of Greenpeace's report "[Slaughtering the Amazon](#)" in 2009. According to available shipment data, between July and November 2023, the Bolton Group appears as the seventh-largest global importer of prepared or preserved bovine meat products from Brazil (see Table 5 above).

Fleischhandel Chur is part of Gustav Spiess's corporate group, which is ultimately owned by Spigus Verwaltungs, a capital management company. Fleischhandel Chur has five subsidiaries in other countries: Spiess (Áustria), Surselva (Germany), Grischuna (Germany), Societe DES Grisons (France), and A+C Delicatessen (Switzerland). Its [sustainability approach](#) mentions that it supports products that follow animal welfare standards and that it is committed to continuously reducing its CO2 emissions, but it does not mention any actions or commitments toward eliminating deforestation within its supply chains.

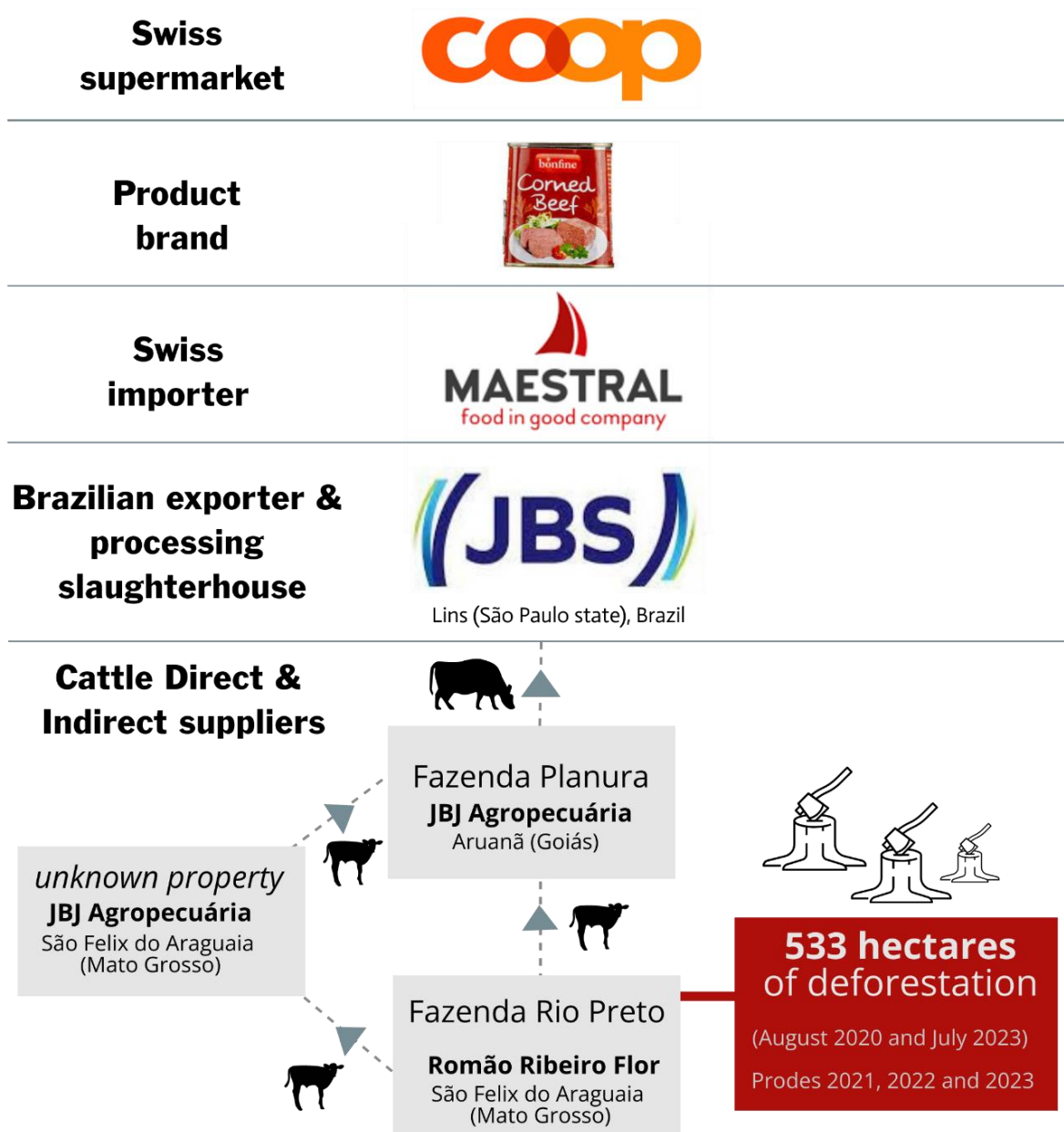
Jack Link's is a company registered in the United States of America with [12 processing units worldwide, including three in Brazil](#). It operates through a joint venture with **Meat Snacks Partners do Brasil (MSP)** and Flavio de Aquino Ferreira, owner of a group of companies representing Life Spice and Ingredients (LSI) in Brazil. **JBS** is the ultimate owner of Meat Snacks Partners do Brasil.

The Brazilian company **JBS** is the largest meat processing enterprise in the world. It operates in the bovine, poultry, pork and sheep meat sectors and the leather industry. In the second quarter of 2024, it reported a net income of more than [BRL 100 billion](#), equivalent to USD 18 billion. According to an internal database of Animal Transportation Guides (GTA) covering part of its supply chain, JBS has trading links with at least 2,900 cattle suppliers with environmental fines, 1,100 with embargoes, and 120 linked to slavery labour practices. JBS is one of the signatories of the binding commitment [TAC](#) with the Brazilian Prosecutor Office and of the [Public Cattle Commitment](#) (CPP). JBS renewed its commitment to [eliminate deforestation](#) from its supply chain by 2030, with several different deadlines covering direct and indirect suppliers in different biomes in Brazil. However, as its operations are still one of the drivers of deforestation linked to cattle production in Brazil, it has been the focus of several news articles and reports linking its operations in Brazil with a relevant amount of recent deforestation. Some examples are pieces recently published by [Unearthed](#) (Greenpeace), [The New York Times](#), [Global Witness](#), and [Mighty Earth](#).

4. CASE STUDY

The case study aims to map the entire supply chain of bovine meat products from the cattle-producing ranch to the shelves of Swiss supermarkets. Due to the lack of transparency and information within the supply chains, the links between different stakeholders are based on desk research or evidence when data is available. The case below links a Corned Beef (Bonfine) found in Coop supermarket shops in La Tour de Peilz, Neuchatel, and Zurich. The product is imported by Maestral (Switzerland) and produced in a JBS processing unit in Lins (São Paulo state), Brazil. The case exposes recent deforestation in a property indirectly supplying this specific JBS unit in Lins through another cattle producer, JBJ Agropecuária.

SUPPLY CHAIN LINKAGES:



Elaborated by AidEnvironment.

SLAUGHTERHOUSE

Name: JBS (Lins, São Paulo)

S.I.F. code: 337

Issues linked to the slaughterhouse: In 2012, JBS Lins received a BRL 10,000 fine for “failing to present environmental information within the deadlines determined by the environmental authority”, proving actions taken to cease environmental damage from the companies’ operations. The JBS unit in Lins received another BRL 21,000 environmental fine for not presenting the requested documents to IBAMA within a defined timeline in November 2023.

LINKED FARMS AND SOCIOENVIRONMENTAL ISSUES

a) Direct supplier

Property: Fazenda Planura

Owner: JBJ Agropecuária

Location: Aripuanã (Goiás)

Direct Supplier to: JBS (Lins, São Paulo)

Environmental issues: No recent deforestation was found, and no fines or embargoes were imposed on this specific property of JBJ Agropecuária (Fazenda Planura, Aripuanã, Goiás). However, the company has 73 suppliers with fines, 25 with embargoes, and 3 on the list of companies linked to slavery labour.

Description: JBJ Agropecuária is registered under the ownership of José Batista Júnior. His father, known as “Zé Mineiro”, is the founder of JBS, now managed by two of José’s brothers, Joesley and Wesley Batista. The ultimate owner of JBS is the J&F group, which is also active in the [mining and energy](#) sectors. José Batista Júnior has not been formally linked to JBS since 2013 but maintains a business relationship with it through its cattle-producing company JBJ: in 2022, [the trading value of the cattle sold to JBS](#) was BRL 1,4 billion between the two companies.

b) Indirect suppliers

Property: Fazenda Rio Preto (cluster of different farms)

Owner: Romão Ribeiro Flor

Location: São Félix do Araguaia (Mato Grosso) / Canabrava do Norte (Mato Grosso)

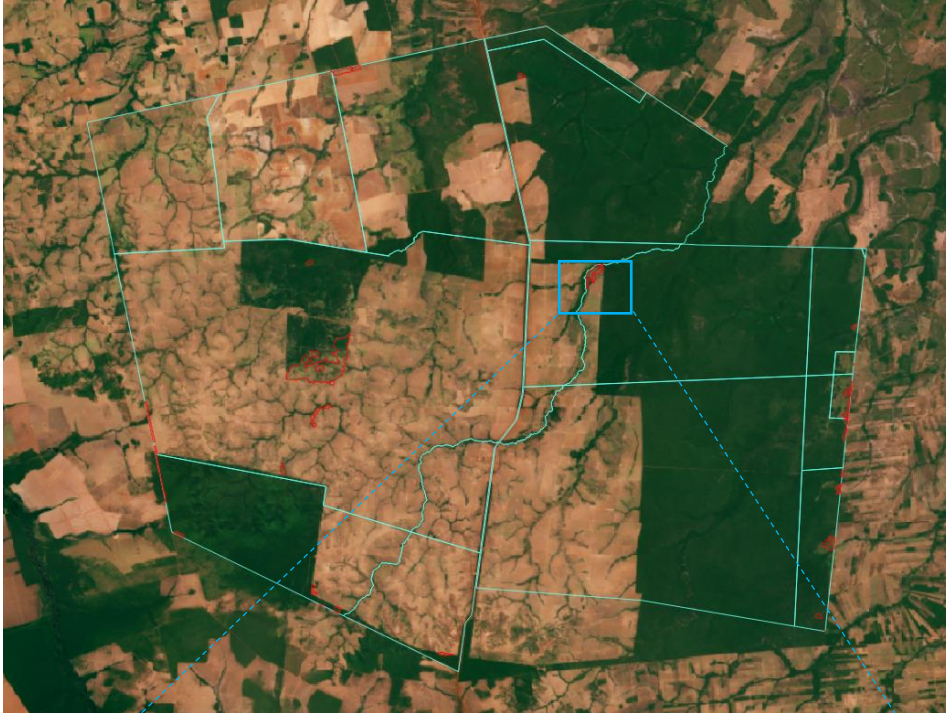
Direct Supplier to: JBJ Agropecuária (Fazenda Planura, Aripuanã, Goiás)

Environmental and social issues: The cluster of properties named as Fazenda Rio Preto, in the bordering areas between Canabrava do Norte (Mato Grosso) and São Félix do Araguaia (Mato Grosso), received 13 environmental fines between 1998 and 2021 totalling more than BRL 22,860,000. Most of these fines are linked to the illegal use of fire in native vegetation areas or deforestation without proper authorization. The cluster Fazenda Rio Preto also received two embargoes in 2009 for illegal deforestation and installing

structures without proper authorization. The embargo of 2,746 hectares for illegal deforestation in Fazenda Rio Preto is still valid.

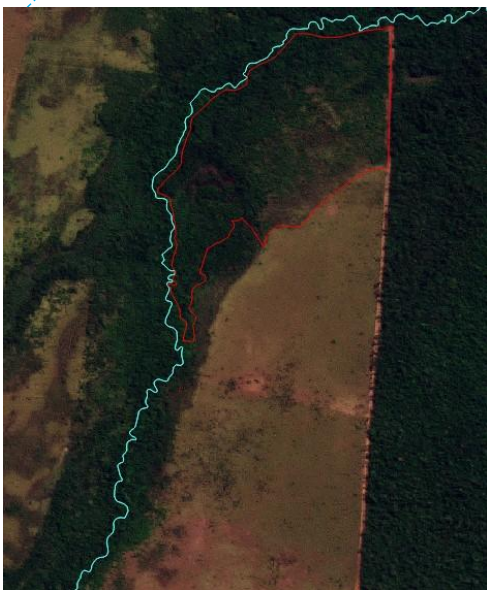
Deforestation: Prodes¹ deforestation data shows 826 hectares of native vegetation (Amazon and Cerrado biomes) have been cleared in Fazenda Rio Preto in the last 15 years. Over half of this area (534 hectares) was cleared in the last four years (between August 2020 and July 2023).

Satellite imagery showing deforestation in Fazenda Rio Preto

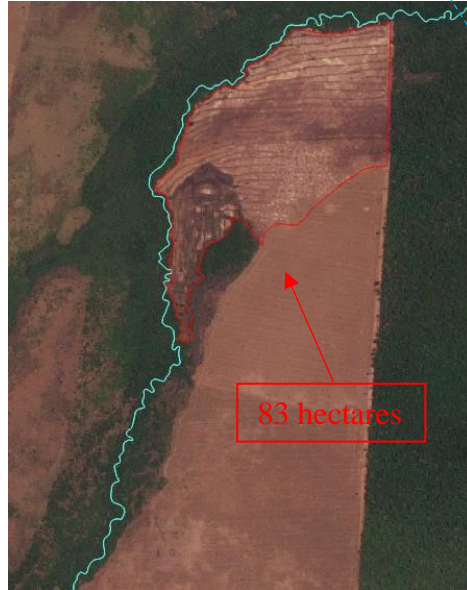


In Red: all deforested areas in the cluster of Fazenda Rio Preto between August 2007 and July 2023. Source: AidEnvironment, based Prodes, Mapbiomas, SIGEF, SNCI. Imagery © 2024 Planet Labs.

June 2021



September 2021

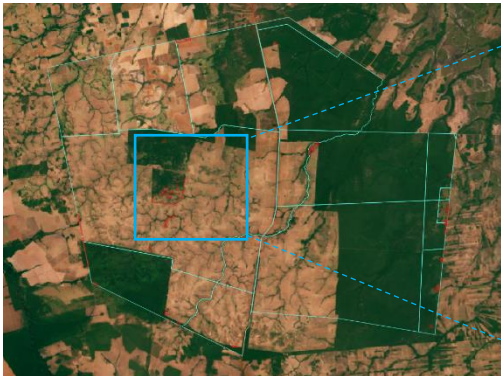


Source: AidEnvironment, based Prodes, Mapbiomas, SIGEF, and SNCI. Imagery © 2021 Planet Labs.

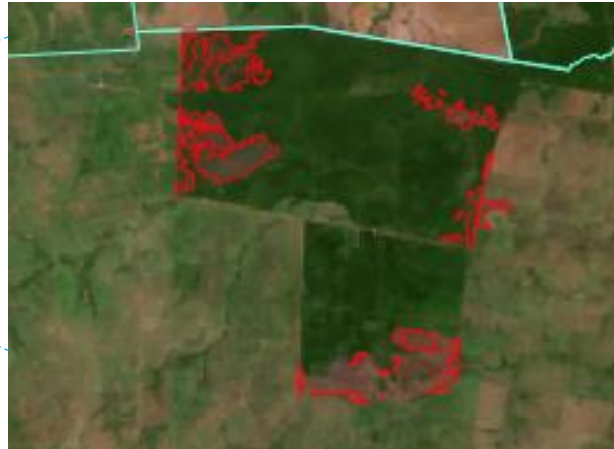
¹ PRODES is the program for monitoring deforestation in the Amazon through satellite data. It releases official deforestation data annually. The National Institute for Spatial Research (INPE) coordinates the program.

Deforestation alerts: in addition to Prodes deforestation reported until July 2023, we found around 490 hectares of deforestation alerts in Fazenda Rio Preto, a cleared area confirmed by satellite imagery but not yet part of Prodes, the official deforestation monitoring system.

January 2024



Source: AidEnvironment, based on Prodes, Mapbiomas, SIGEF, and SNCI. Imagery © 2024 Planet Labs



Description: Fazenda Rio Preto, a cluster of properties totalling 33,845 hectares, is registered in the Federal land tenure system SIGEF (Código do Imóvel 9010830134717) under the ownership of Romão Ribeiro Flor. The area has a CAR declaration (environmental register MT-5102694-FA53FB78D6D24CB2863AD464A48982D7) validated by the Mato Grosso State Environmental Agency, also in the name of Romão Ribeiro Flor. According to the Federal land tenure system (SIGEF), five other properties are linked to Romão Ribeiro Flor in Goiás, totalling at least 10,568 ha.

The owner of the Rio Preto farms, Romão Ribeiro Flor, is allegedly linked to numerous environmental and social crimes. In 2004, 18 workers were rescued from [slave labour](#) conditions in Fazenda Rio Preto, and he received a fine of BRL 414,000. In 2009, the Federal Police accused Romão Ribeiro Flor of being involved in land grabbing in the Araguaia region in Mato Grosso, including areas inside the [Indigenous Territory Marãiwatsédé](#). In addition, federal prosecutors in the "Operação Pluma" accused Romão Ribeiro Flor of contracting lawyers for another series of [land-grabbing activities](#) in Mato Grosso state.

6. METHODS

For the **trade data analysis**, we have used both the overall 2023 Swiss Imports statistics ([Swiss Impex](#) database, publicly available) and the most recent available shipping data (from the paid provider Seair) covering all relevant supplying countries in South America and the Harmonised System (HS) codes of the following products: fresh or chilled bovine meat (HS 0201), frozen bovine meat (HS 0202), and prepared or preserved bovine meat (HS 020610, HS 020622, HS 020629, and HS 160250).

For the corporate structure analysis of the importers, processing companies, and meatpackers in Switzerland and supplying countries, we have examined company type, ownership, and supply chain linkages. For the ownership analysis of the beef importing companies in Switzerland, we have used, among other sources, the [Orbis database](#), a paid platform that aggregates multiple sources of companies' structures and shareholders worldwide.

AidEnvironment relies on its existing sample of direct and indirect suppliers to Brazilian slaughterhouses to examine the upstream part of the bovine meat supply chain. AidEnvironment developed a database linking cattle-producing properties to slaughterhouses over the past years based on Federal Land Tenure Systems ([SIGEF](#) and [SNCI](#)), Rural Environmental Cadastre ([SICAR](#)), data on slaughterhouses registered in the SIF system ([SIF - Ministry of Agriculture](#)), and animal transportation permits (GTA data). For JBS specifically, we have a sample of 6,556 direct and 12,402 indirect suppliers to its slaughterhouses. This enables monitoring of past and current deforestation on farms linked to identified slaughterhouses.

There are a few essential methodological notions and limitations to the GTA data. First, it only covers a small proportion of all direct and indirect suppliers linked to the meatpackers. For instance, AidEnvironment's sample, which includes 6,556 direct suppliers to JBS's slaughterhouses, covers only 13% of the company's total estimated supply base of 50,000 direct suppliers. None of the Brazilian meatpackers publishes clear information on the total amounts of their direct and indirect suppliers. Generally, AidEnvironment sees that many cattle farms have a relatively stable supplier-buyer relationship and supply the same meatpackers for multiple years. However, AidEnvironment believes the burden of proof on supply chain linkages and whether they are still valid is on the meatpacker companies.

For the other data presented in the case study, we used multiple sources, including [IBAMA](#) (Federal Environmental Agency), for checking environmental embargoes and fines; [PRODES](#) - INPE (National Institute for Spatial Research) on official deforestation data; [Planet Labs Inc.](#) for satellite imagery accessed through the [NICFI Satellite Data Program](#); and Ministry of the Environment ([MMA](#)) and National Foundation for Indigenous Populations ([FUNAI](#)) for checking protected areas and Indigenous Territories.

Finally, the case study analysis does not necessarily imply that the cattle from that farm ended up in the product found in the Swiss supermarkets. We can only express "risk" since suppliers supply multiple slaughterhouses, slaughterhouses source from numerous farms, and an individual bovine animal traceability system is not in place. We can, however, confirm supplier-buyer relationships between a particular farm and meatpacker's slaughterhouse and verify if that slaughterhouse has supplied the Swiss market.