



Soft Commodities Forum Progress Report, June 2019:

Building transparent and traceable soy supply chains in Brazil's Cerrado region



About the Soft Commodities Forum

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The Soft Commodities Forum (SCF) is a global platform for leading soft commodities companies, convened by the World Business Council for Sustainable Development (WBCSD) for the purpose of advancing collective action around common sustainability challenges.

The SCF is made up of WBCSD member companies who share a vision of ensuring sustainable agriculture supply chains and working in partnership with government, producers, consumers and civil society to create a safer, more sustainable food system.

The SCF is fully compliant with laws, including antitrust, which prevent any kind of arrangement or sharing of information that would reduce competition on price or on any other parameter of competition.

The SCF consists of Archer Daniels Midland (ADM), Bunge, Cargill, COFCO International, Glencore Agriculture and Louis Dreyfus Company (LDC). It is expected that other WBCSD members will join the SCF as its work expands.















About the June 2019 Report

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The SCF members have committed to a common framework for reporting and monitoring progress on transparent and traceable supply chains for soy in Brazil's Cerrado region. The SCF members will report progress every six months. This is the first time leading global commodity traders are working together in the soy sector on a pre-competitive project to address sustainability risks they all share, but which no single company can resolve alone.

In the June 2019 reports, the SCF member companies report individually on the percentage of soy they source from the Cerrado relative to the total Brazilian volume based on 2018 data (total Brazilian volume is defined as 100 percent per company). They each report the percentage of soy within the Cerrado that is sourced from 25 priority municipalities. Finally, they report the combined percentage of soy coming from the 25 priority municipalities, which is then divided into the percentage that is sourced directly from farmers and the percentage that is sourced indirectly from aggregators, cooperatives and other third parties.

Six reports have been produced, one by each SCF member company. The reports are identical apart from the percentages that are specific to each company as well as each company's soy sustainability journey, which is shared at the end of each report.

Why does this report matter?

By prioritizing 25 municipalities, SCF members are actively identifying where targeted interventions are needed to address native vegetation conversion to soy in the Cerrado. Identifying and reporting on percentages of soy sourced directly or indirectly is important to inform the type of strategy that will be developed. When soy is sourced directly from farmers, supply chains are more transparent, and engagement and monitoring can reach production level. In the case of indirect sourcing, additional actors need to be engaged to improve traceability and implementation at the farm level. By focusing on the priority municipalities, SCF members will work together to protect native vegetation, supporting the adoption of more sustainable production practices and engaging directly with cooperatives, aggregators, and other third parties.

The report was produced with the assistance of Proforest, the SCF technical partner, and with information provided by the Grupo de Trabalho do Cerrado (GTC), also known as the Cerrado Working Group.



Background and Context



1.1 Background and context

Brazil's Soy Sector

Brazil is the second largest soybean producer in the world, behind only the United States, with the soybean crop occupying an area of 35 million hectares. In 2017-2018, total production amounted to 119 million tons and the average yield of Brazilian soybeans was 3,394 kg per hectare.¹

Soy production is of significant economic importance in Brazil. Soy has become the country's most valuable export commodity, overtaking oil and mineral exports, with China (67 percent) and the EU (11 percent) as the major export markets.²

Why focus on the Cerrado?

The Cerrado region of Brazil plays a significant role globally for both people and nature, including climate change mitigation, biodiversity, and freshwater systems. It is also an economic engine for local communities and a production region for exported agricultural commodities. However, the extent and pace of native vegetation loss resulting from agricultural expansion in the Cerrado poses a significant threat to these social, environmental and economic values.

The Cerrado is located in the highlands of Central Brazil and covers about 2 million km² or 21 percent of the Brazilian territory. It represents the second largest biome in South America after the Amazon.³ The total area is equivalent to the size of Germany, France, England, Italy, and Spain combined.

While the Cerrado is less well-known than the Amazon as a biodiversity hotspot, it is equally important; Brazil has created official terrestrial protected areas in 8.3 percent of the Cerrado.⁴ The Cerrado is home to over 4,800 species of plants and vertebrates found nowhere else on the planet. The rainfall during the wet season is vital for the region's rivers, which provide habitat for a total of 800 species of fish, nearly 200 of which are found only in the Cerrado.⁵

Since the 1970s, agribusiness has been steadily expanding across the Cerrado biome, contributing to Brazil's emergence as a global leader in agricultural commodity production.



1.2 Background and context

The Cerrado has the largest area of farm and ranch land in Brazil, accounting for 88 Mha, or 44 percent, of the total agricultural area. It produces about 40 percent of Brazil's beef, 84 percent of its cotton, more than 50 percent of its soybeans, and 44 percent of its corn.⁶ Soy in the Cerrado covers 17.8 million hectares, representing 8 percent of the 204 million hectares of the Cerrado.⁷

As a result of robust economic activity, nearly half of the biome's native vegetation has been lost. Under the Brazilian Forest Code, in addition to the permanent preservation of areas such as riparian buffers and other sensitive ecosystems, landowners in the Cerrado are required to maintain 20 to 35 percent of their properties as legal reserve. The conversion of native vegetation has declined significantly in recent years – 2017 had the lowest conversion rate in the region since 2000 while productivity grew over the same period.

There are at least 25.4 million hectares of already converted land in the Cerrado that is suitable for agriculture, and improvements to agricultural productivity are compatible with the protection of forests and native vegetation, providing the opportunity for more sustainable production in the future.¹¹

How SCF Members are Protecting Native Vegetation in the Cerrado

By gathering supply chain data and reporting at regular intervals, SCF members are taking an important joint step toward better transparency and traceability of soy produced in the Cerrado. This applies, in particular, to soy purchased from cooperatives, aggregators and other third parties, which tends to be less traceable than soy purchased directly from producers

where sustainability practices can be verified. By reporting every six months, SCF members are committed to improving the transparency and traceability of their supply chains in the Cerrado, promoting better sustainability practices across the region, and achieving measurable reductions in native vegetation conversion over time.

The SCF member companies are also participating in the GTC to develop common definitions, to design appropriate financial incentives, and to outline actions which should be taken. The GTC was established by a multistakeholder coalition to develop terms of agreement between producers, industry, consumer organizations and civil society, as well as an action plan for eradicating deforestation and conversion of native vegetation in Brazil's Cerrado biome.



Priority Municipalities



2.1 Methodology for selecting the municipalities

The SCF members and Proforest worked to determine a methodology that would utilize the latest available data to determine municipalities in the Cerrado with high native vegetation conversion to soy and where SCF members could have the greatest positive impact. As part of December 2019 report, SCF members and Proforest will develop a process and set of criteria to update the list of priority municipalities.

For the June 2019 reports, the approach called for SCF members to account for the municipalities within the Cerrado from which they source soy (either directly or indirectly) and to collate this data to determine those municipalities where at least two members are sourcing soy and it is evident that soy expansion has been driving recent native vegetation conversion.

The following methodological approach was used to determine the 25 priority municipalities that are the focus of SCF members' June 2019 reporting:

- Focus on Cerrado biome: From the 5,570 municipalities in Brazil, those with their territory completely included within Cerrado biome¹² were selected.
- Where planting soy is a relevant land use type: From those municipalities, those with planted soy area in 2017¹³ larger than 5,000 hectares were selected.
- Where soy is driving conversion of native vegetation: From those municipalities, the top 30 for soy planted in 2017¹⁴ on areas of native vegetation converted after 2014¹⁵ (in absolute number of hectares) were selected and ranked.

4. Where potential for collective action is higher: From those municipalities, the 25 with largest area of soy planted in 2017 on areas of native vegetation converted after 2014 (in hectares) ¹⁶ and with higher overlap of SCF members¹⁷ were selected.





The prioritization criteria

5,570 municipalities in Brazil

Area planted with soy in 2017 was larger than 5,000 ha (IPAM-IBGE)

Territory is 100% in Cerrado biome

A schematic to demonstrate how the prioritization methodology was applied to determine the 25 priority municipalities. Full details of the municipalities are listed in the Appendix.

Top 30 for soy planted in 2017 (Agrosatelite) in areas of natural vegetation converted after 2014 (PRODES) in hectares

Higher conversion to soy AND higher overlap of SCF companies

25 Priority municipalities



2.2 About the priority municipalities

Based on the methodology presented, the SCF selected 25 municipalities in the Cerrado biome as priorities for engaging, monitoring and reporting. The map shows municipalities' location and the table presents general information on soy and native vegetation conversion for each municipality.

23 of the 25 municipalities are in the region known as MATOPIBA, which comprises the portion of the Cerrado biome in the Maranhão, Tocantins, Piauí and Bahia states. It is considered the greatest national agricultural frontier of the present time (currently, Matopiba corresponds to 12 percent of Brazil's soy production). The other 2 municipalities are in Mato Grosso state, the largest soy producing state in Brazil (Mato Grosso state corresponds to more than 25 percent of Brazil's soy production). 19

State	Number of SCF priority municipalities
Maranhão	4
Tocantins	10
Piauí	4
Bahia	5
Mato Grosso	2

The total area of the 25 municipalities is 17,789,098 ha, which is approximately the size of England or Florida, and accounts for 8.74 percent of Cerrado total area. Together, the 25 municipalities planted 2,447,911 ha of soy in 2017, which is

7 percent of total soy planted in Brazil that year and represents almost 10 percent of soy expansion from 2013 to 2017.





The 25 priority municipalities

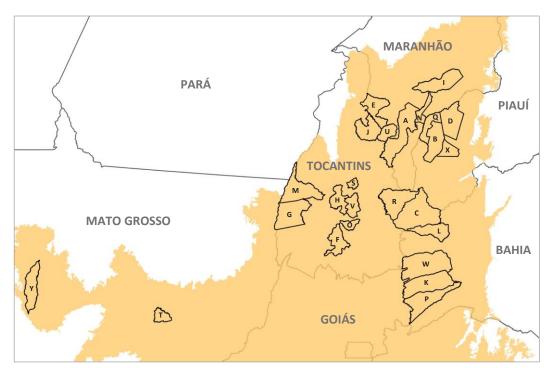
Municipality	State	Map location
Balsas	Maranhão	А
Baixa Grande do Ribeiro	Piauí	В
Formosa do Rio Preto	Bahia	С
Uruçuí	Piauí	D
Carolina	Maranhão	E
Peixe	Tocantins	F
Lagoa da Confusão	Tocantins	G
Porto Nacional	Tocantins	Н
Mirador	Maranhão	1
Goiatins	Tocantins	J
Correntina	Bahia	К
Riachão das Neves	Bahia	L
Pium	Tocantins	М

Municipality	State	Map location
Sambaíba	Maranhão	N
Santa Rosa do Tocantins	Tocantins	0
Jaborandi	Bahia	Р
Ribeiro Gonçalves	Piauí	Q
Mateiros	Tocantins	R
Aparecida do Rio Negro	Tocantins	S
Planalto da Serra	Mato Grosso	Т
Campos Lindos	Tocantins	U
Monte do Carmo	Tocantins	V
São Desidério	Bahia	W
Currais	Piauí	Χ
Campos de Júlio	Mato Grosso	Υ



2.3 Map of priority municipalities





Priority municipalities

- A Balsas
- B Baixa Grande do Ribeiro
- C Formosa do Rio Preto
- D Uruçuí
- E Carolina
- Peixe
- Lagoa da Confusão
- Porto Nacional
- I Mirador
- J Goiatins
- K Correntina
- L Riachão das Neves
- M Pium
- N Sambaíba
- O Santa Rosa do Tocantins
- P Jaborandi
- Q Ribeiro Gonçalves
- R Mateiros
- S Aparecida do Rio Negro
- T Planalto da Serra
- U Campos Lindos
- / Monte do Carmo
- W São Desidério
- X Currais
- Y Campos de Júlio

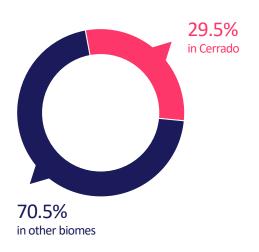


Company Data

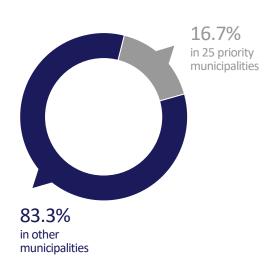


Soy Sourcing Data

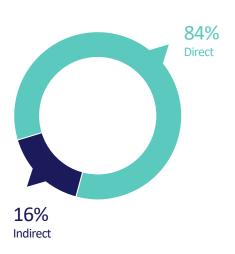
Soy volume sourced in Brazil



Soy volume sourced in Cerrado



Soy volume sourced in 25 priority municipalities in Cerrado



Next Steps



Next Steps

The SCF members have committed to reporting every six months on the first 25 municipalities as well as additional municipalities identified as priorities for each reporting cycle. Over time, the SCF expects that the rate of native vegetation conversion will diminish in the targeted municipalities as a result of concerted action and the adoption of improved sustainable land management practices.

The SCF members will work together to develop targeted interventions to support sustainable intensification and tackle native vegetation conversion in the priority municipalities, alongside and in collaboration with relevant local stakeholders.

Several complementary channels have already been identified and, in the coming months, SCF members will determine where best to focus time and resources to achieve the greatest impact in improving sustainable soy production in the Cerrado.

These channels may include:

- Mapping initiatives for potential partnerships in addressing soydriven native vegetation conversion, including continued collaboration with the GTC, as well as initiatives already under implementation by SCF members such as landscape and jurisdictional approaches.
- Referring to the Accountability Framework for guidance on consistent definitions, industry norms and good practices.
- Supporting financial incentives for landholders through partnerships in the soy value chain and with financial institutions, donors and funds.
- Building on SCF members' individual commitments and current
 activities to set goals and define strategies for collective action.
 Commitments can cover the avoidance of native vegetation
 conversion, protection of human rights, and performance against
 the targets of the Sustainable Development Goals.



COFCO International's Soy Sustainability Journey



COFCO International's soy operation in Brazil

For COFCO International, established in 2014, soybean is a key commodity and Brazil a key origination country. We believe soy production in Brazil should and can go hand in hand with conservation of forests and native vegetation. Since completing the acquisition of our Brazil operations in 2017, we have been working to manage our soy supply chain risks, as well as collaborating with key stakeholders on a wider transformation towards sustainable soy production, with special focus on the Cerrado biome.

In Brazil, COFCO International operates one soy crushing plant, 19 grains and oilseeds silos, as well as export facilities at Santos. The majority of our facilities are located outside of the Cerrado boundaries and less than a third of our soy volumes are originated from Cerrado.





Current soy sourcing policy and implementation

Current Soy Policies

Our <u>Supplier Code of Conduct</u> spells out supplier expectations on responsible and sustainable production - including no deforestation and natural habitats conversion. In order to ensure this Code is respected in Brazil soy sourcing, we have defined several fundamental criteria for all Brazilian soy suppliers, including:

- Free from Ministry of Labour's forced labour list
- Free from IBAMA's embargoed areas list
- Compliant with the Amazon Soy Moratorium
- Compliant with the Green Grains Protocol of Para
- Free from Conservation Units and Indigenous land

Furthermore, to guide implementation of the Supplier Code for the pre-financed soy suppliers in Brazil, we developed the <u>Sustainable Soy Sourcing Policy</u> with additional environmental and social criteria.

Policy implementation

We have fully incorporated the Sustainable Soy Sourcing Policy criteria in the pre-financed supplier credit review process. Each farm applying for credit from COFCO International gets satellite mapped and screened against these criteria by an independent service provider. Farms that do not comply can not proceed with the credit application process.

For the fundamental sourcing criteria that have credible database, they have been inserted in our trading system to ensure that all non-compliant suppliers, including spot suppliers, are automatically blocked.

Table: risk screening of pre-financed farms in Brazil

	Number of satellite mapped and screened farms	Total satellite mapped and screened area (Hectares)
2017	691	962,506
2018	1,028	1,131,382

Example: Satellite mapping analysis of pre-financed farms





Expanding our soy sourcing policy

With our current soy sourcing policy fully implemented, we are ready to expand its scope and formalise concrete sustainability principles for all soy sourcing in Latin America. To do this, we have been taking the following steps, starting with Brazil:

Map our soy supply base

In late 2018, we took the soy origination data of the 17/18 crop season and developed a visual map of our soy supply base in Brazil.

Map environmental and social issues

With advice from NGO partners, we defined the below key environmental and social issues in Cerrado:

- Deforestation and native vegetation conversion
- Conservation units; indigenous land;
 Quilombolas land; Assentamentos land
- Land conflicts and violation of land rights
- Forced labour
- Embargoed areas

We further developed 11 geo-rating maps covering the above issues. We then aggregated them into one overall environmental and social issues map of the Cerrado biome.

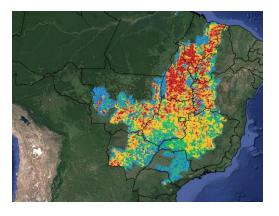


Illustration: one of 11 geo-rating maps for Cerrado: deforestation in 2016/2017 (PRODES)

Identify "hot spots" in our supply base

By overlaying our supply base map and the Cerrado environmental and social issues map, we now have a good understanding of where potential challenges might exist in our supply base, thus directing our further efforts to address such challenges. We are conducting similar exercises for the rest of Brazil, as well as Argentina, Paraguay and Uruguay.

Develop a revised soy sourcing policy

The above internal analysis, combined with wider stakeholder input from a consultation workshop in February this year, allows us to take an informed approach to develop the revised soy sourcing policy. We aim to launch the new policy soon and will provide regular updates on implementation progress.



Supporting responsible production

We believe that opportunity to reconcile soy expansion and land conservation in Cerrado lies with the vast open land suitable for soy. In fact, in recent years, more soy expansion has already been taking place on cleared land. We are doing our part to further encourage responsible soy expansion by:

Responsible business planning

While evaluating investment projects and origination expansion opportunities, we analyse environmental and social impact and consider availability of suitable degraded land for soy as a key factor. We also use <u>Agroideal</u>, a territorial intelligence tool to help identify geographies with low environmental and social risks and high growth potential for soy production.

Exploring financing responsible expansion

We are exploring opportunities to facilitate long-term financing for soy expansion on degraded land, in collaboration with our partners and selected farmers. We are confident it could provide strong incentive for farmers to produce more without further deforestation or native vegetation conversion.

Engagement and collaboration

We actively participate and support multistakeholder initiatives towards sustainable soy production. Below are some examples:

- Amazon Soy Moratorium
- Cerrado Working Group (GTC)
- Green Grains Protocol Pará
- <u>Produce, Conserve, Include (PCI) Corporate</u> <u>Action Group</u>
- PCI Sorriso Compact
- Soft Commodities Forum
- Soy Working Group (GTS)
- Tropical Forest Alliance

David Dong, CEO of COFCO International states: "We see the critical importance of conserving Cerrado's forests and native vegetation. Addressing land use challenges in Cerrado requires collaboration among actors across the whole soy value chain and beyond. COFCO International remains committed to working with producers, government, civil society groups, financial institutions and businesses towards this goal, while we continue to enhance our supply chain management."

About COFCO International

With 11,000 people in 35 countries, COFCO International is the overseas agriculture business platform for COFCO Corporation, China's largest food and agriculture company. The company trades with over 50 nations, while providing farmers unique direct access to the growing Chinese market. In 2018, COFCO International handled over 106 million tonnes of agricommodities. For more, please visit: www.cofcointernational.com/sustainability



Acknowledgements



Acknowledgements

The SCF would like to thank Proforest and Grupo de Trabalho do Cerrado for their support.

About Proforest

Proforest is a leading non-profit group that supports companies, governments and other organizations to implement their commitments to the responsible production and sourcing of agricultural commodities and forest products, such as palm oil, soy, sugar, beef, timber, and others. Five offices in four continents form the group (UK, Malaysia, Brazil, Ghana, and Colombia). Through a combination of programs and consultancy services, Proforest provides technical support, capacity building, solution development and process facilitation.

As technical partners of the Soft Commodities Forum, Proforest is providing advisory support and technical inputs for the development of a common monitoring and reporting framework, also ensuring there are links to wider sustainability and deforestations discussions. As part of this process, Proforest is part of a confidentiality agreement to maintain compliance with antitrust laws.

About the Grupo de Trabalho do Cerrado (GTC)

The shared objective of the GTC is to 'Eradicate, in the shortest timeframe possible, deforestation in the Cerrado Biome, reconciling the production of soy with environmental, economic and social interests', where deforestation ('desmatamento') is defined by the GTC as the conversion of native vegetation.

The organizations who are members of the GTC are:

- Industry Members: Abiove, ADM, Amaggi, ANEC, Bunge, Cargill, Cofco, Glencore, Louis Dreyfus Company
- Civil Society Members: Earth Innovation Institute, Imaflora, IPAM, TNC, WWF
- Producer Organizations: Sociedade Rural Brasileira
- Governmental and Financial Institutions: Banco do Brasil, INPE, MAPA, MMA, Serviço Florestal
- Consumer Goods: Carrefour, Walmart





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- 12.Municipalities boundaries, official data (shapefile), IBGE, 2015 Brazilian Institute of Geography and Statistics ftp://geoftp.ibge.gov.br/organizacao do territorio/malhas territoriais/malhas municipais/municipio 2015/Brasil/BR/
- 13. Cerrado biome boundaries, shapefile: Mapbiomas, adapted from IBGE, 2016 http://mapbiomas.org/pages/database/reference maps
- 14. Soy planted area (ha) per municipality in 2017 table: Agricultural Municipal Production (IPAM-IBGE) https://sidra.ibge.gov.br/pesquisa/pam/tabelas

- 15. Soy planted area in Cerrado biome in 2017, shapefile, developed by Agrosatelite, obtained through GTC (Cerrado Working Group) via SCF members that have access to the database. The dataset used was dated April 2019.
- Area of native vegetation converted (ha) per municipality 2014-2017, shapefile, PRODES Cerrado, INPE National Institute for Space Research, https://www.obt.inpe.br/cerrado/downloads.html
- 17. To identify overlap of SCF members in the municipalities, each SCF member indicated confidentially to Proforest and WBCSD if they sourced soy from direct or indirect suppliers registered in each of the 30 municipalities in 2018. Proforest compiled the information and used the results to identify municipalities with highest overlap of SCF members (i.e. where there were 5 or 6 SCF companies present), which were prioritized. Then the five municipalities with lowest conversion of native vegetation to soy from the remaining list were removed, resulting in a total of 25 municipalities.
- https://www.inputbrasil.org/wp-content/uploads/2018/06/CERRADO-CAMINHOS-PARA-OCUPACAO-TERRITORIAL-SUSTENTAVEL-EXPANS%C3%83O-DA-SOJA-FINAL.pdf
- https://sidra.ibge.gov.br/home/lspa/brasil



Appendix

Additional information on the 25 priority municipalities

Municipality Name	State Name	Geocode	Total Soy Area Planted in 2017 (Hectares)	Soy Area Planted on Converted Native Vegetation in 2017 (Hectares)	Number of SCF Members Sourcing Soy (Directly or Indirectly)
Balsas	Maranhão	2101400	187,144.00	8,743.19	4
Baixa Grande do Ribeiro	Piauí	2201150	179,358.00	8,495.01	4
Formosa do Rio Preto	Bahia	2911105	405,583.00	7,908.73	4
Uruçuí	Piauí	2211209	134,869.00	7,488.29	4
Carolina	Maranhão	2102804	25,00.00	4,692.89	3
Peixe	Tocantins	1716604	50,000.0	3,878.19	4
Lagoa da Confusão	Tocantins	1711902	40,128.00	3,547.40	4
Porto Nacional	Tocantins	1718204	41,000.00	3,337.56	4
Mirador	Maranhão	2106706	11,100.00	3,310.03	3
Goiatins	Tocantins	1709005	15,700.00	3,180.76	3
Correntina	Bahia	2909307	172,200.00	3,120.94	4
Riachão das Neves	Bahia	2926202	120,200.00	3,004.22	4

Municipality Name	State Name	Geocode	Total Soy Area Planted in 2017 (Hectares)	Soy Area Planted on Converted Native Vegetation in 2017 (Hectares)	Number of SCF Members Sourcing Soy (Directly or Indirectly)
Pium	Tocantins	1717503	10,378.00	2,824.45	4
Sambaíba	Maranhão	2109700	57,445.00	2,785.77	4
Santa Rosa do Tocantins	Tocantins	1718907	36,000.00	2,699.53	4
Jaborandi	Bahia	2917359	94,350.00	2,558.73	4
Ribeiro Gonçalves	Piauí	2208908	77,365.00	2,354.11	3
Mateiros	Tocantins	1712702	43,000.00	2,303.56	4
Aparecida do Rio Negro	Tocantins	1701101	21,000.00	2,208.12	4
Planalto da Serra	Mato Grosso	5106455	20,000.00	2,061.69	5
Campos Lindos	Tocantins	1703842	40,500.00	2,033.47	4
Monte do Carmo	Tocantins	1713601	31,500.00	2,032.39	4
São Desidério	Bahia	2928901	394,016.00	1,977.57	4
Currais	Piauí	2203230	43,295.00	1,966.26	3
Campos de Júlio	Mato Grosso	5102686	196,780.00	1,734.17	6





WBCSD

Maison de la Paix l Chemin Eugène-Rigot 2B CP 2075 1211 Geneva 1 Switzerland



