

Tendencias y demandas del mercado en trazabilidad

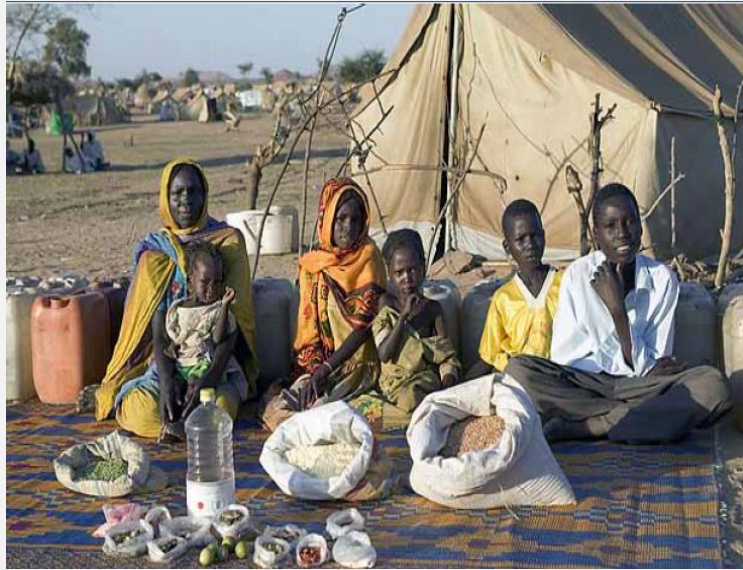
Minerva Foods

Trazabilidad se establece como demanda de mercado?

Se puede generar mejor precio o apertura de mercado?



Demanda: el cambio de hábitos



Urbanización



Aumento renda



Ocidentalización

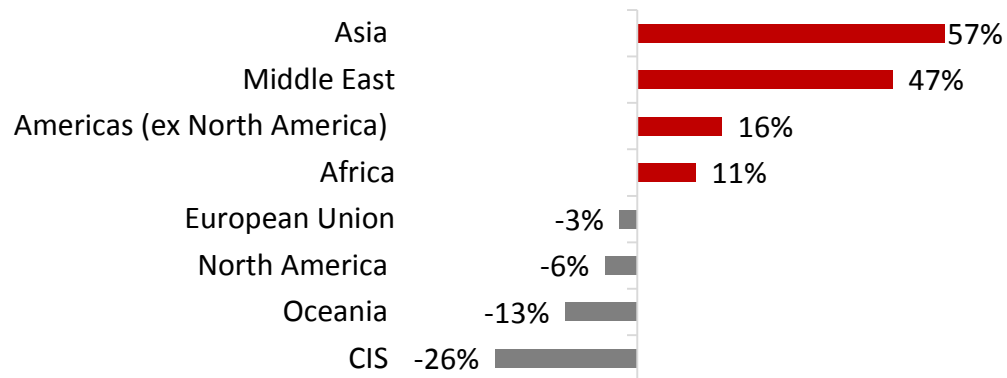


Minerva Foods

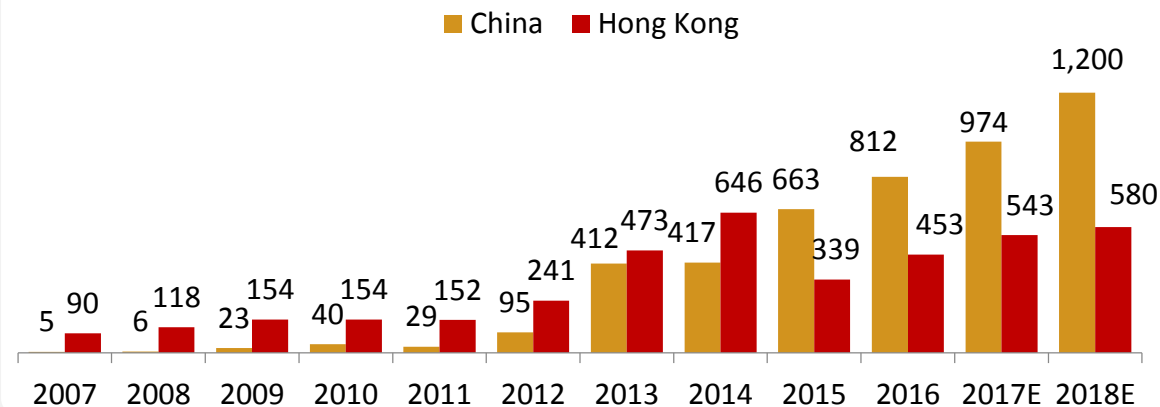
Overview sectorial

Demanda Mundial

AUMENTO DEL CONSUMO DE CARNE (2018E X 2000)

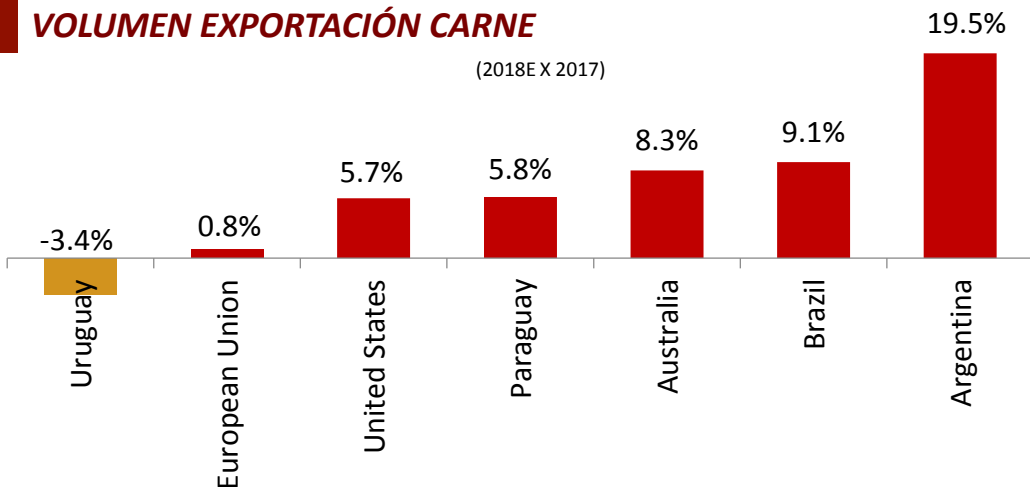


IMPORTACIÓN DE CARNE (000 TONS)



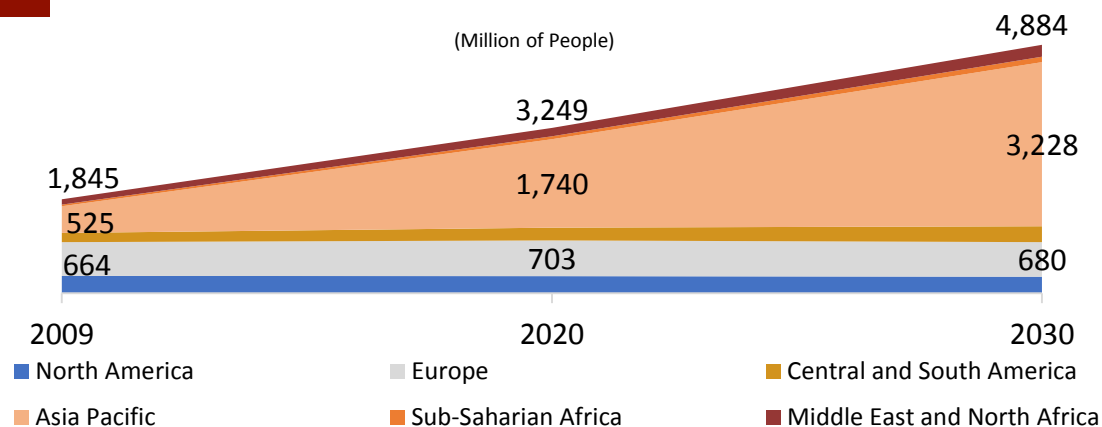
VOLUMEN EXPORTACIÓN CARNE

(2018E X 2017)



EVOLUCIÓN DE LA CLASE MEDIA GLOBAL

(Million of People)



Donde están los proveedores?

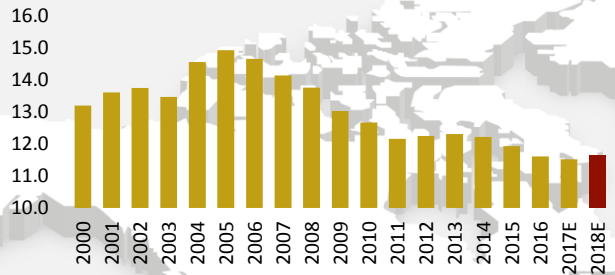
Minerva Foods



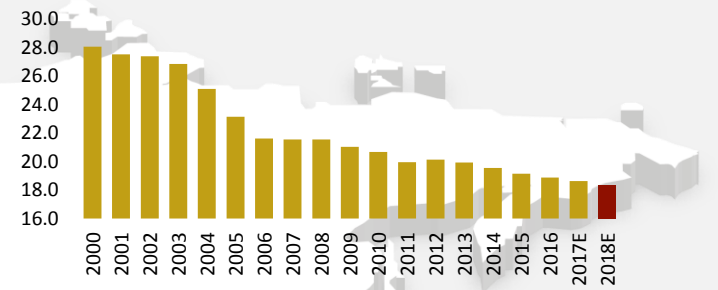
Hato Ganadero: Players en el mundo

Contracción de los mercados a nivel mundial

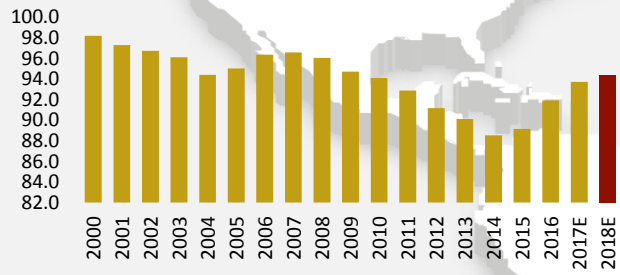
CANADA (2000-2018E: -11.9%)



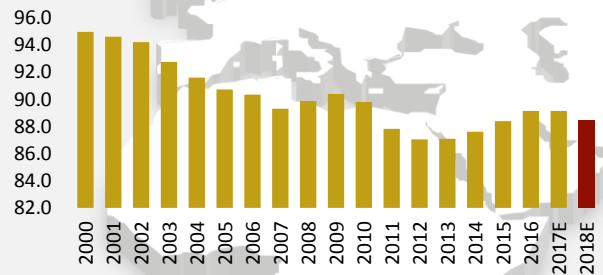
RUSSIA (2000-2018E: -34.5%)



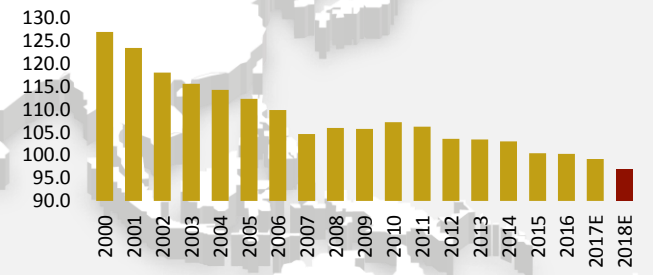
UNITED STATES (2000-2018E: -3.9%)



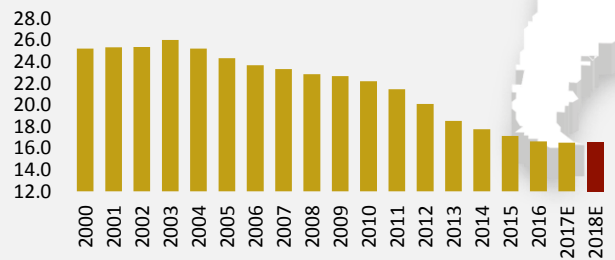
E.U (2000-2018E: -6.9%)



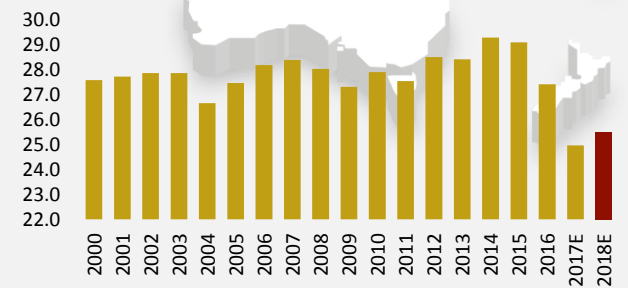
CHINA (2000-2018E: -23.7%)



MEXICO (2000-2018E: -34.2%)

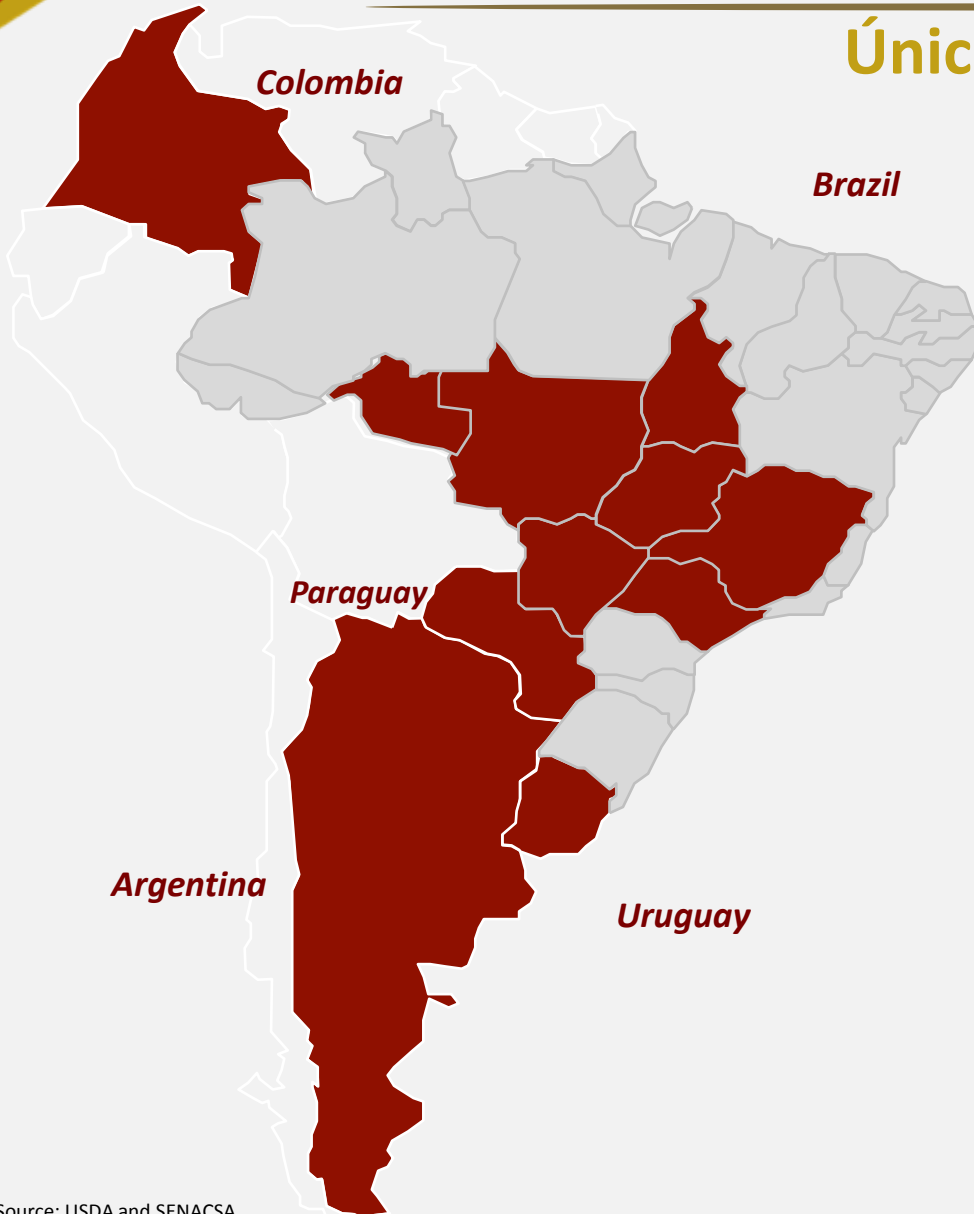


AUSTRALIA (2000-2018E: -7.6%)

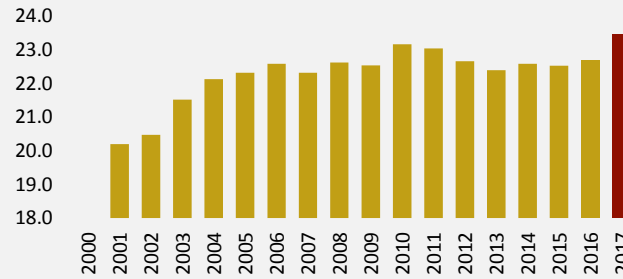


Hato Ganadero: Players en Sudamérica

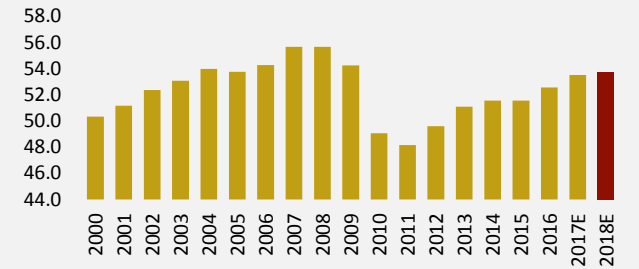
Única Región en Expansión



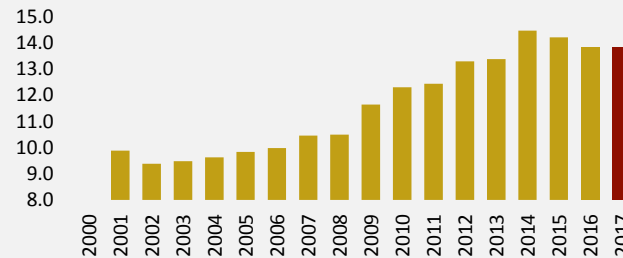
COLOMBIA (2001-2017: 16.2%)



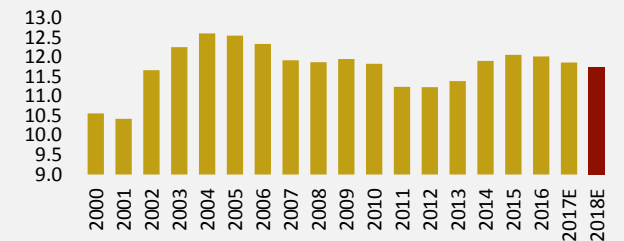
ARGENTINA (2000-2018E: 6.8%)



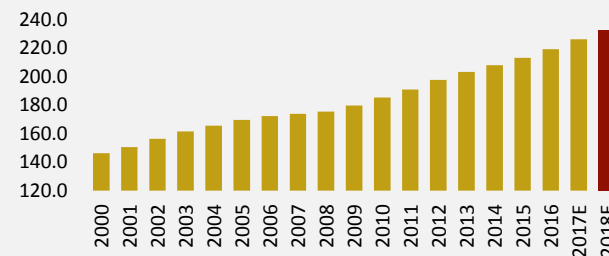
PARAGUAY (2001-2016: 39.8%)



URUGUAY (2000-2018E: 11.3%)



BRAZIL (2000-2018E: 58.8%)



Source: USDA and SENACSA
Cattle Herd: Numbers in mm heads | E: Estimates

Apertura de mercados - un camino al reconocimiento

Países importadores de carne vacuna									
Rank	Países	2018f	Var. YoY	Share importacion	BRA	PRY	URY	ARG	COL
1	EUA	1.374	2%	17,2%			✓		
2	China	1025	11%	12,8%	✓		✓	✓	
3	Japão	815	4%	10,2%					
4	Coreia do Sul	560	2%	7,0%			✓		
5	Rússia	480	-8%	6,0%	✓	✓	✓	✓	✓
6	Hong Kong	410	-4%	5,1%	✓		✓	✓	
7	União Europeia	360	6%	4,5%	✓	✓	✓	✓	
8	Chile	300	3%	3,8%	✓	✓	✓	✓	
9	Egito	280	12%	3,5%	✓	✓	✓	✓	✓
10	Canadá	235	4%	2,9%			✓		
11	Malásia	210	2%	2,6%	✓				
12	México	210	2%	2,6%			✓		
13	Filipinas	185	6%	2,3%	✓			✓	
14	Irã	165	3%	2,1%	✓	✓	✓		
15	Arábia Saudita	160	0%	2,0%	✓		✓	✓	
	Outros	1.223	2%	15,3%	✓	✓	✓	✓	✓
	TOTAL	7.992	3%	100%	60%	35%	85%	55%	25%