

Del sur al mundo en 2030

Seguridad alimentaria global y bioenergía

Presentación del Ing. Agr. Héctor Huergo

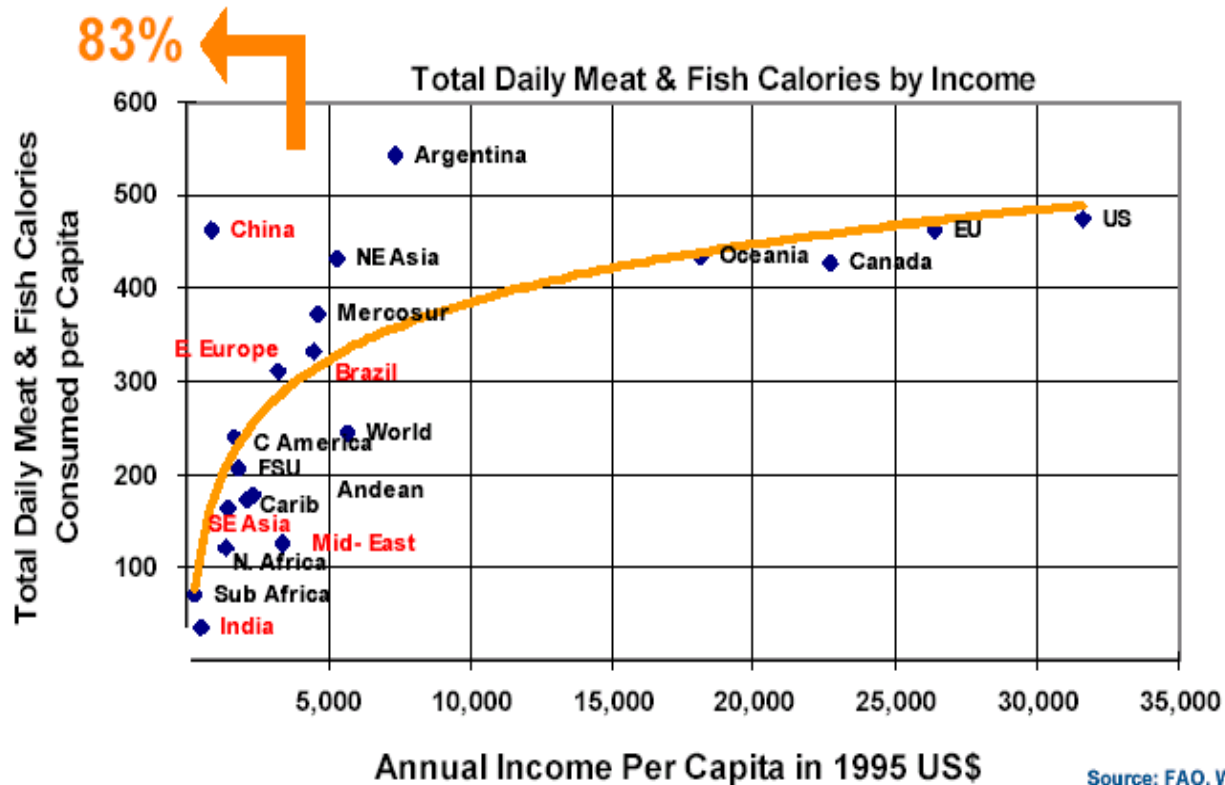
Matriz simplificada de oportunidades

		PRODUCTOS	
		Actuales	Nuevos
MERCADOS	Actuales	PENETRACION DEL MERCADO	LANZAMIENTO DE NUEVOS PRODUCTOS
	Nuevos	DESARROLLO DEL MERCADO	DIVERSIFICACION



Dos nuevos drivers

Income is Less Than \$5000 Per Year



Source: FAO, World Bank

«Who will feed China?»

- In this book, published in 1995, Brown highlights the pressure on world resources as more countries, especially China, become developed. He writes, "To feed its 1.2 billion people, China may soon have to import so much grain that this action could trigger unprecedented rises in world food prices."

Reloj biológico...

- <http://countrysmeters.info/en/China>

Pollo es el más eficiente convertidor de granos en carne y seguirá siendo

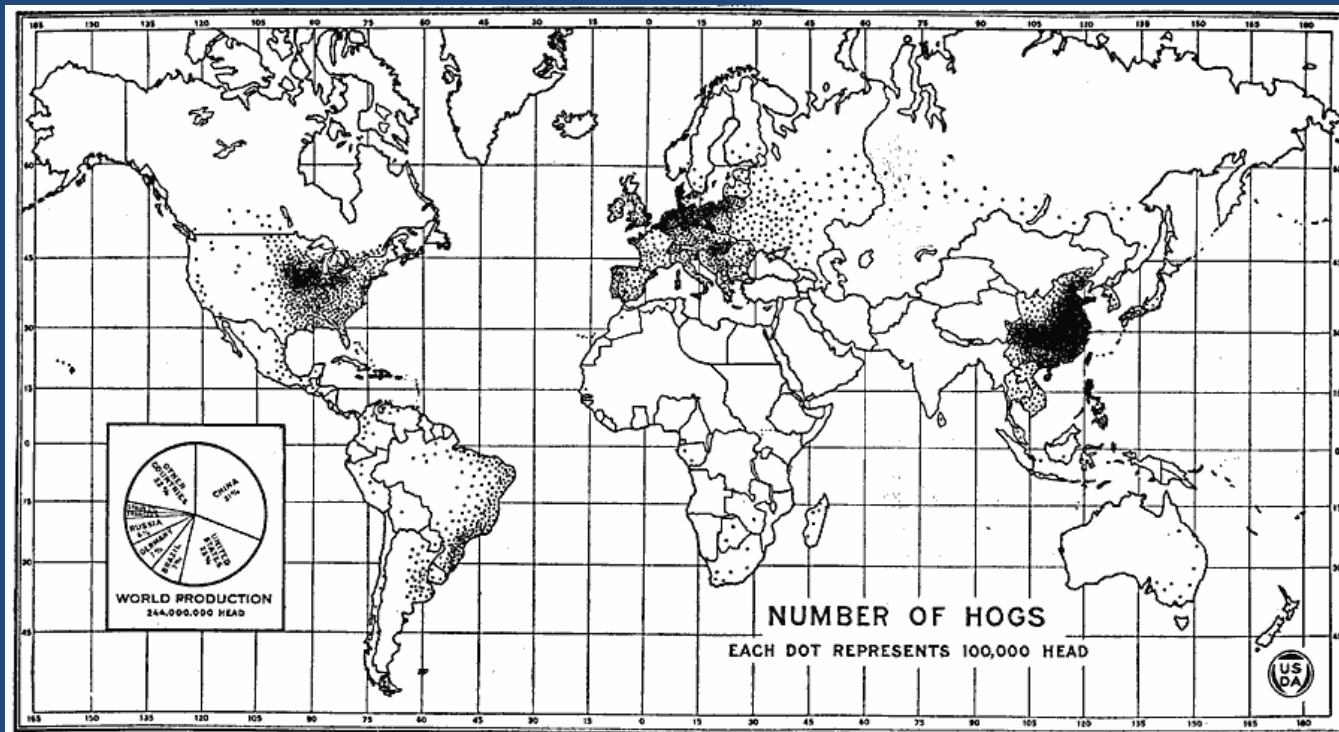
Años	Conversión por kg vivo	Maíz por kg eviscerado	Producción anual (en ton)	Volumen de Maíz (en ton)	Incremento de peso por día (en gramos)	Días de Crianza
'70	3,000	2,370	280.000	654,5	27	85
'80	2,750	2,250	380.000	855,4	34	75
'90	2,450	2,050	720.000	1.476,0	39	65
2000	2,100	1,810	1.300.000	2.343,0	55	50
2012	1,750	1,680	1.800.000	3.034,0	69	40





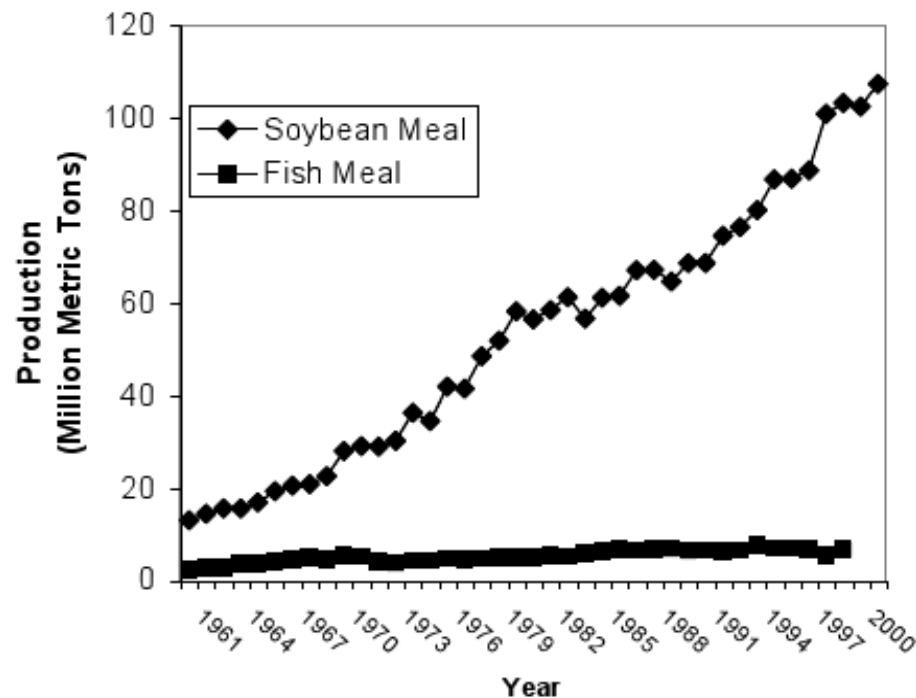


El mundo de los cerdos



Harina de soja y harina de pescado

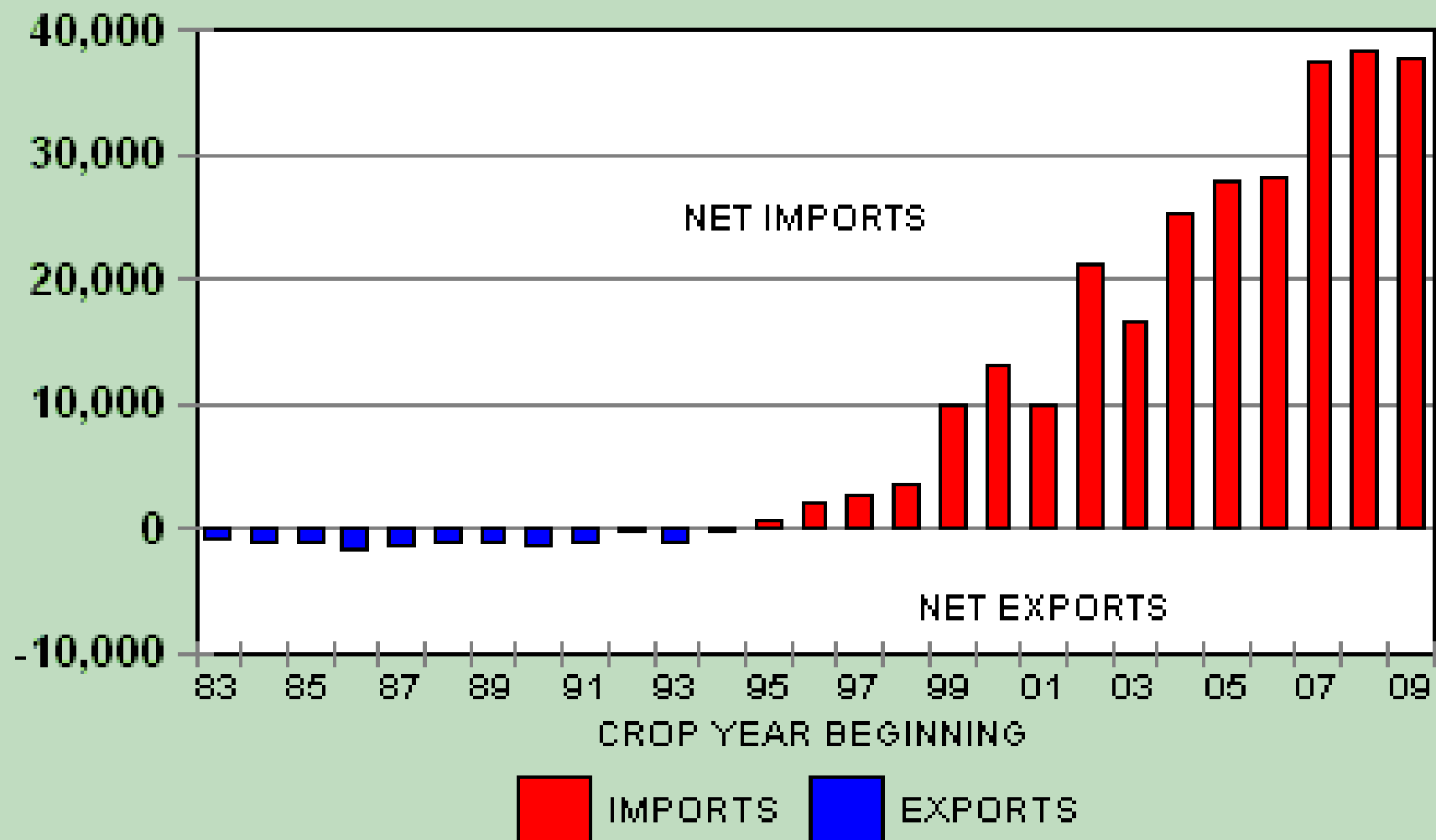
Figure 1: Global Production of Soybean Meal and Fish Meal



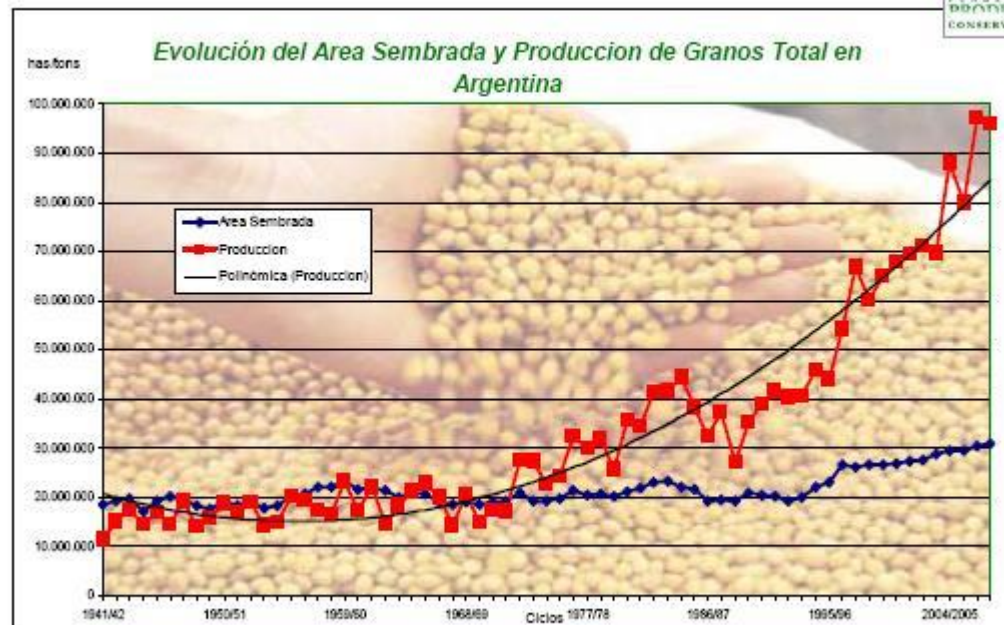
Source: Food and Agriculture Organization of the United Nations, 2001

CHINA SOYBEAN NET IMPORTS/EXPORTS

1,000 METRIC TONS

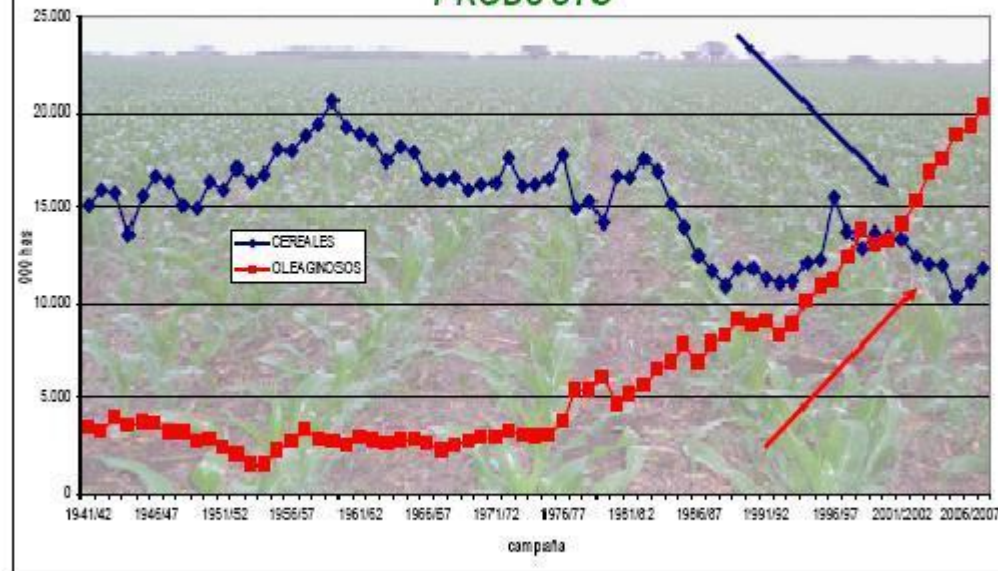


Updated June 10, 2009



Fuente: Agritrend SA

EVOLUCION DEL AREA SEMBRADA POR TIPO DE PRODUCTO



Fuente: Agttrend SA

Malthus tenía razón, pero a medias...

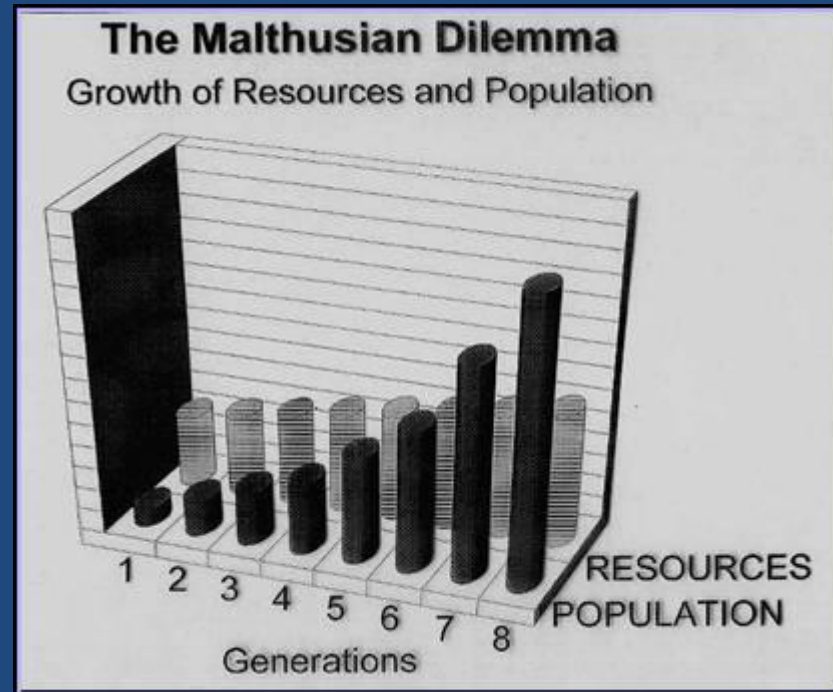


Table 1. Changes in Acre Harvested by Crop from 1990-1994 to 2005-2009.

Crop	Acres Harvested During Period		Change	
	1990 - 1994	2005 - 2009	Acres	Percent
Gains in acres	Thousand acres		,000	
Soybeans	58,174	72,210	14,036	24%
Corn for grain	68,660	78,093	9,433	14%
	126,834	150,303	23,469	19%
Stable acres				
Hay	60,054	60,636	582	1%
Rice	2,977	3,002	25	1%
	63,031	63,639	608	1%
Declines in acres				
Wheat	62,830	50,694	(12,136)	-19%
Barley	7,329	3,323	(4,007)	-55%
Grain sorghum	9,761	6,051	(3,710)	-38%
Corn for silage	9,761	6,051	(3,710)	-38%
Cotton	12,384	10,456	(1,928)	-16%
Peanuts	1,762	1,324	(437)	-25%
Dry edible beans	1,795	1,489	(306)	-17%
Potatoes	1,353	1,084	(269)	-20%
Sugarbeets	1,406	1,189	(217)	-15%
	108,382	81,662	(26,720)	-20%

Expansión de capacidad de crushing

- 1999 76.000
- 2004 95.000
- 2009 157.000
- 2012 200.000
- 2015 230.000

Crecimiento más del 100% en diez años



肯德基
KFC

麦当劳

Tendencia del fast food

Strength in Numbers?

Number of outlets in China, 2012



KFC

4,260



1,730



Real Kung Fu

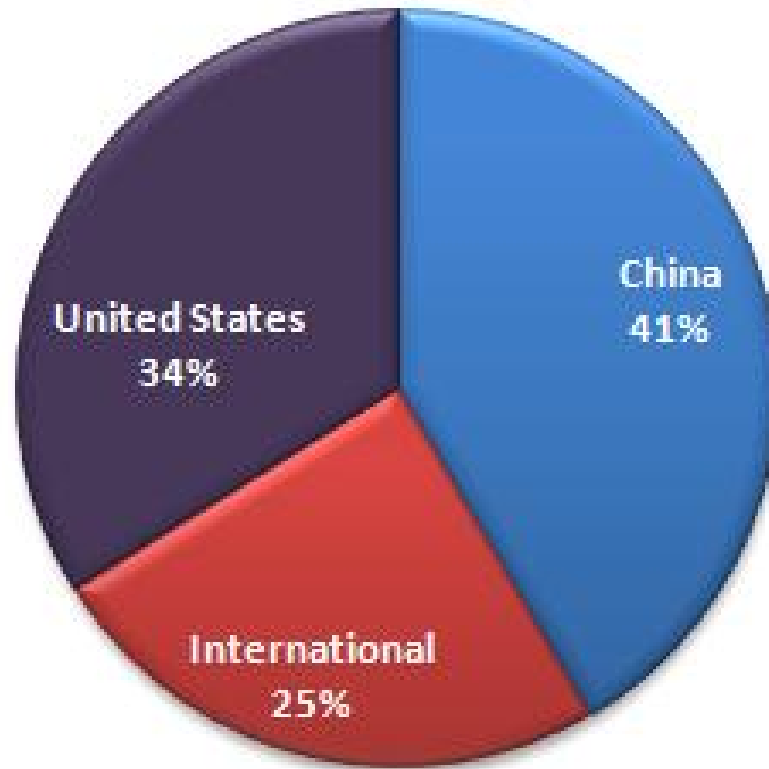
596

Real Kung Fu is a local Chinese chain that is slowly grabbing marketshare from global fast food chains

Source: Company records

China, el mayor mercado

Yum! Sales By Region

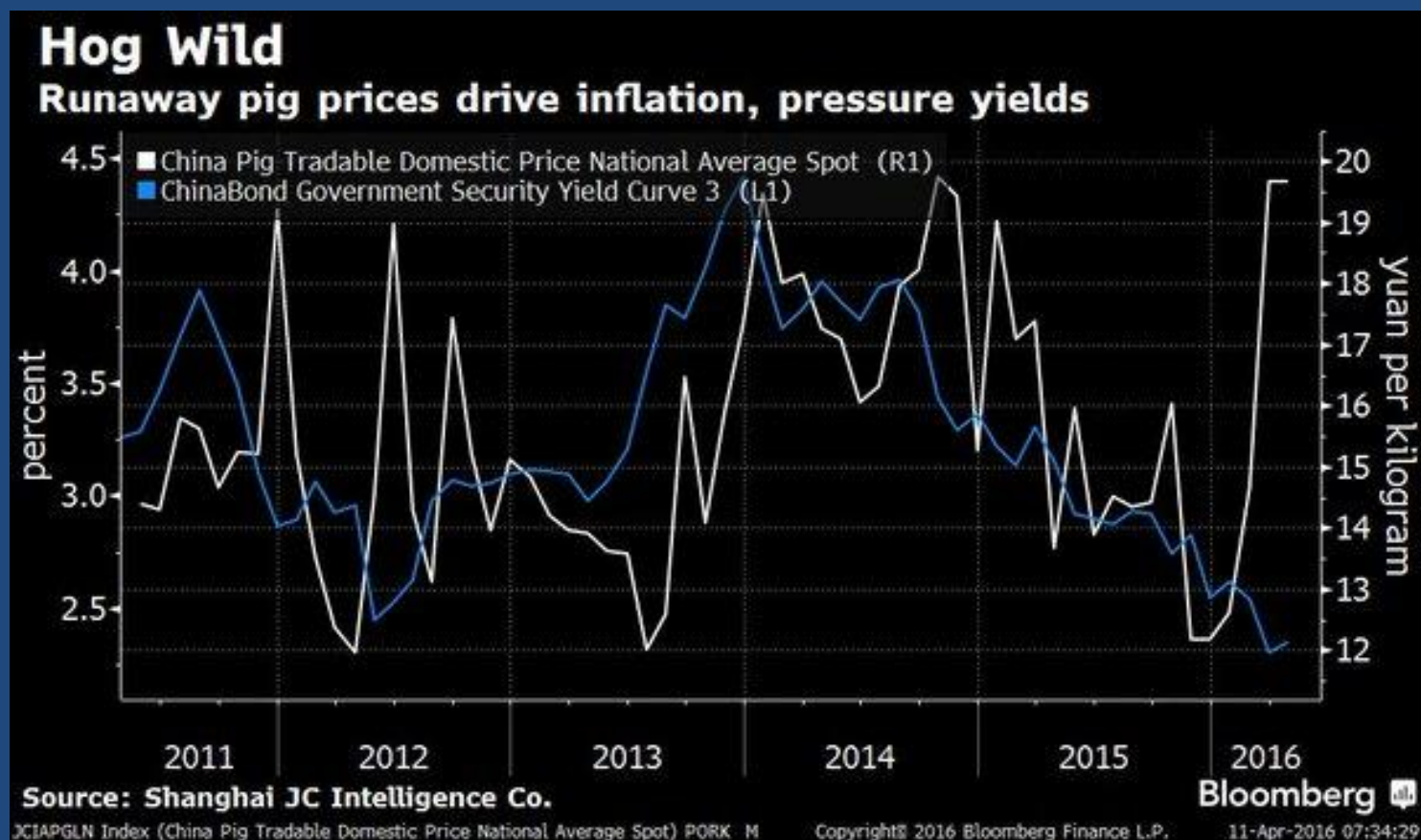


Tuesday, August 05, 2008

Goldman Sachs Invests in Chinese Pig Farming

CHINA - Goldman Sachs has invested US\$200 to 300 million in purchasing a dozen pig farms in China's Hunan and Fujian provinces.

Impacto en la inflación



Y ahora...

- **Smithfield Foods, Inc.** is a meat processing company.
- Headquartered in Luohe, Henan, People's Republic of China, it runs facilities in 26 U.S. states, including the largest [slaughterhouse](#) and [meat-processing](#) plant in the world, located in [Tar Heel, North Carolina](#).^[3] It also has operations in Mexico and in 10 European countries, with a global total of over 46,000 employees and an annual revenue of \$13 billion.
- Smithfield was purchased in 2013 by Chinese-based and state-owned holding company Shanghai International Holdings Ltd.

Shanghai International Holdings Ltd.

- Hoy WH Group Ltd
- “The renaming of our corporate brand to WH Group reflects the increasingly global reach of our operations, which combine the largest pork production companies in China and the United States and cater to consumers globally,” said WH Group Chairman and CEO Wan Long.

Marfrig - Foresun

- Operación comunicada el jueves pasado en San Pablo y Buenos Aires
- Tres frigoríficos y un feedlot
- Foresun ya había adquirido un frigorífico en Rosario, Uruguay.
- «ahora vienen por la carne»...