




Global animal protein

Striking the balance

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Animal Protein



Beverages



Consumer Foods



Dairy



F&A Supply Chains



Farm Inputs



Grains and Oilseeds



Sugar



Wool

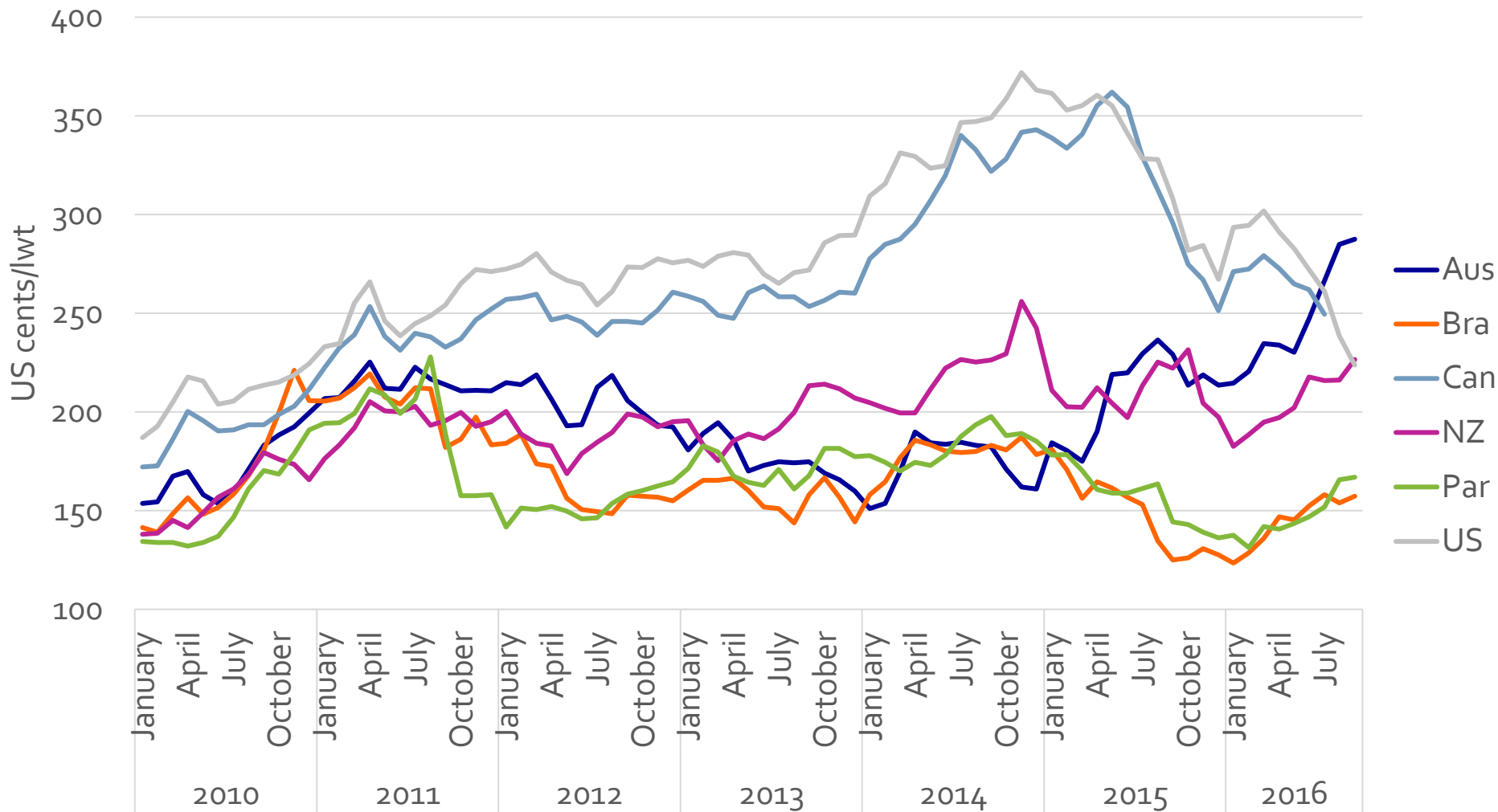
The balance of world meat trade



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High cattle prices sent a clear signal to the world.....



Sources: IPCVA, MLA; Esalq/Cepea, NZX Agrifax, INAC, USDA, Rabobank 2016

World meat trade in the balance



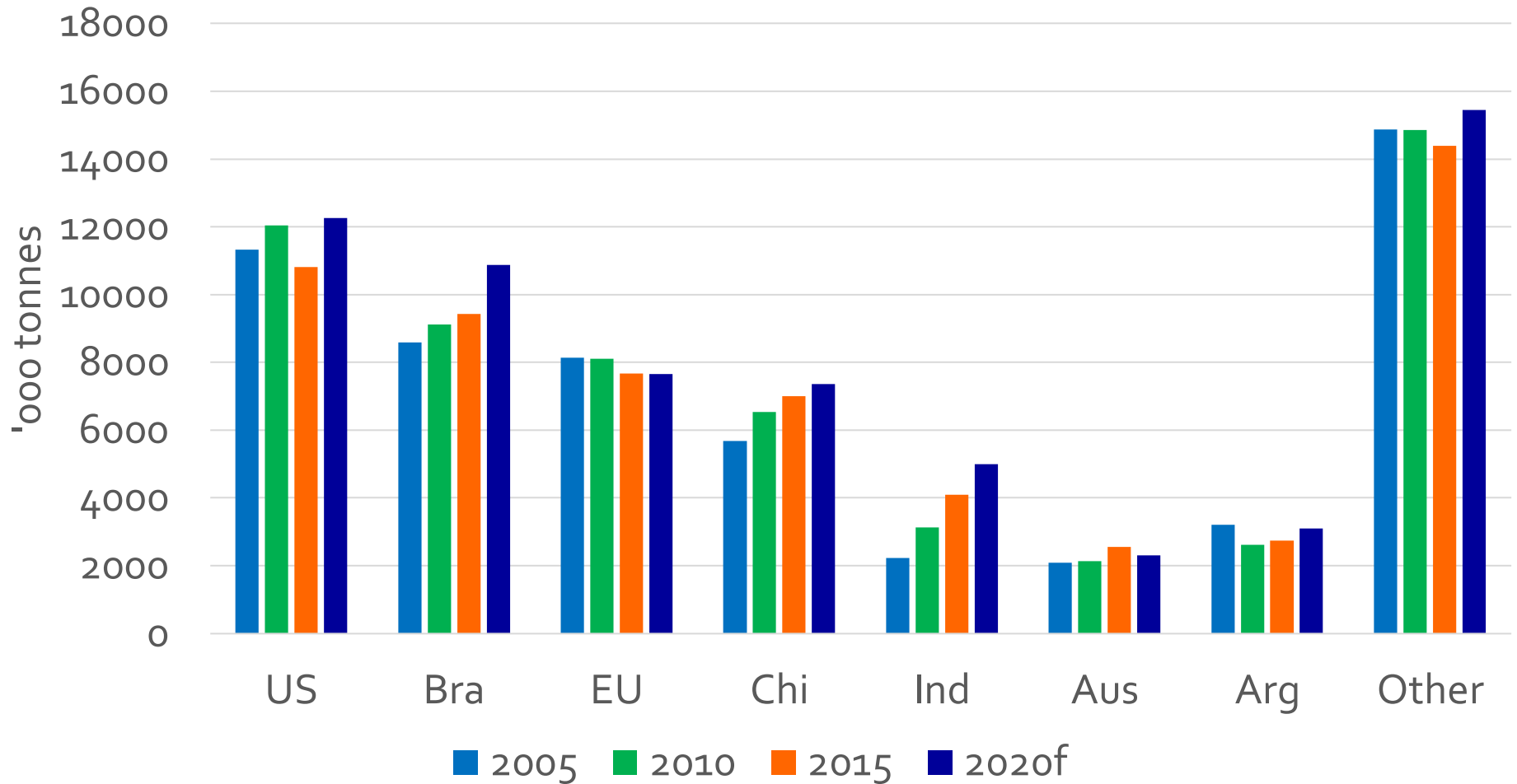
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Production of beef
and other animal
proteins

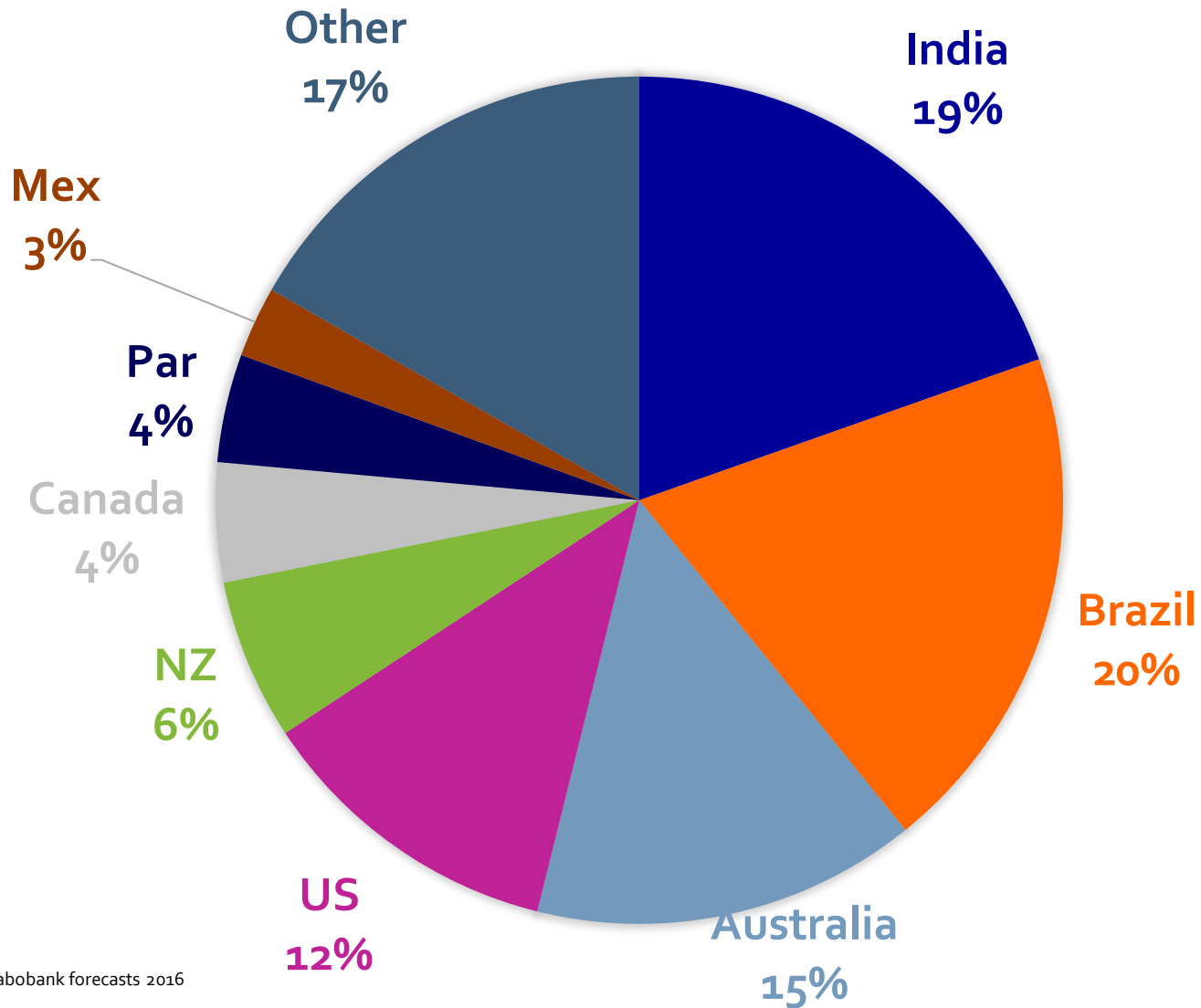
Consumption of
beef and other
animal proteins

Live exports
managing balance
via the supply chain

Global beef production 2020



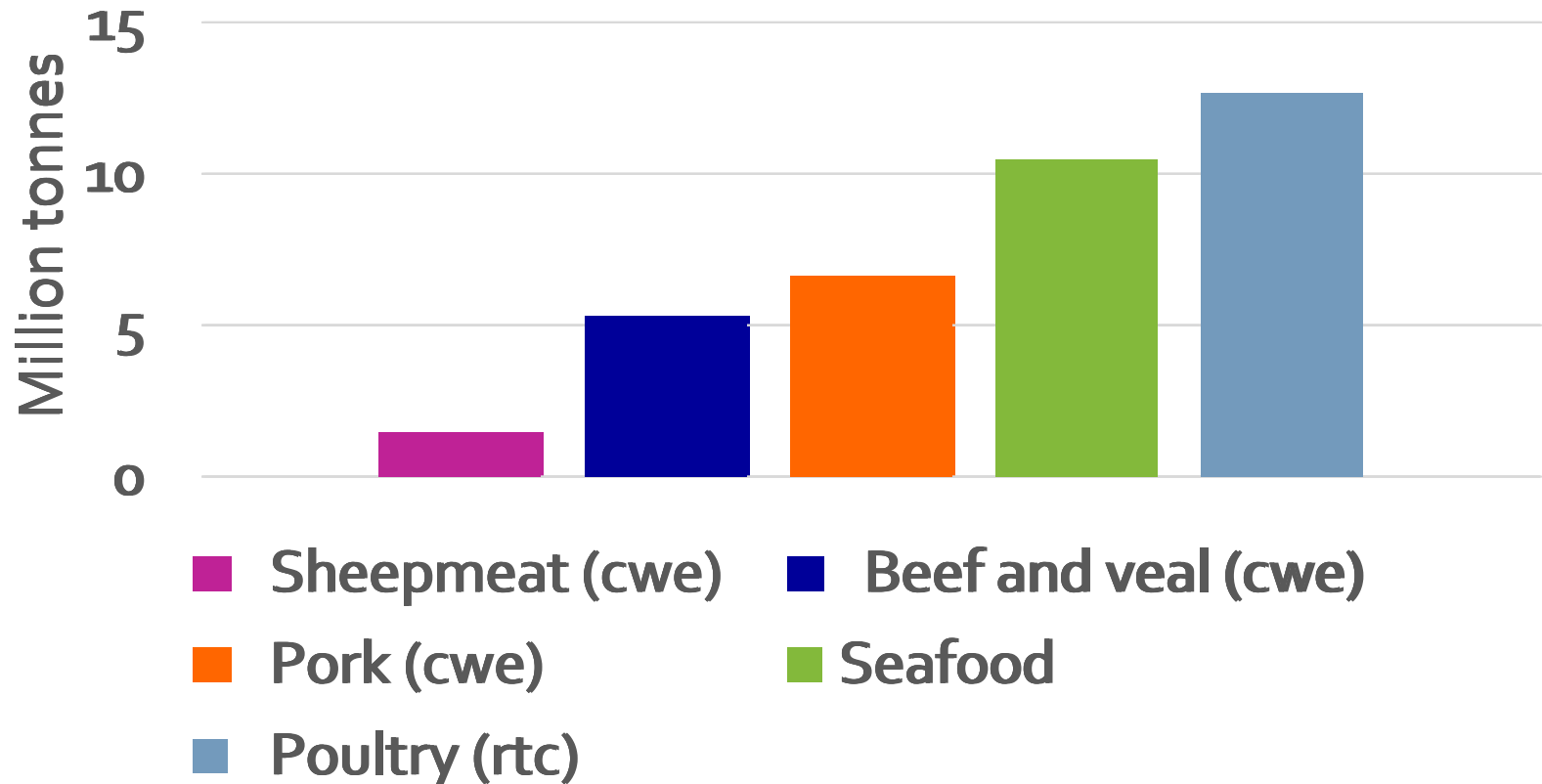
The big exporters



All proteins growing – some more than others



Increase in production from 2015 to 2020f



World meat trade in the balance



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Production of beef
and other animal
proteins

Consumers winning – global
animal protein production and
competition increasing.

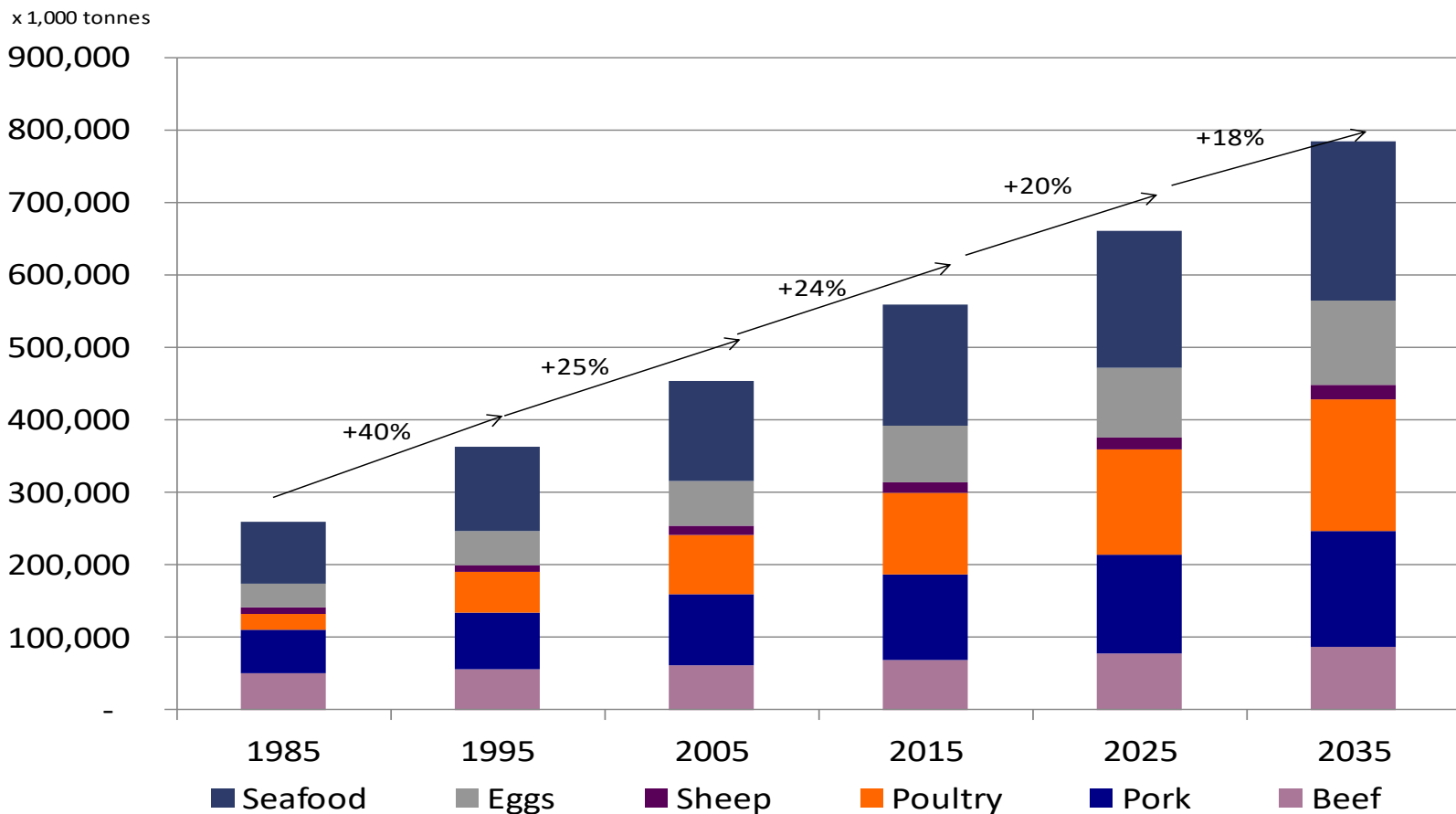
Consumption of
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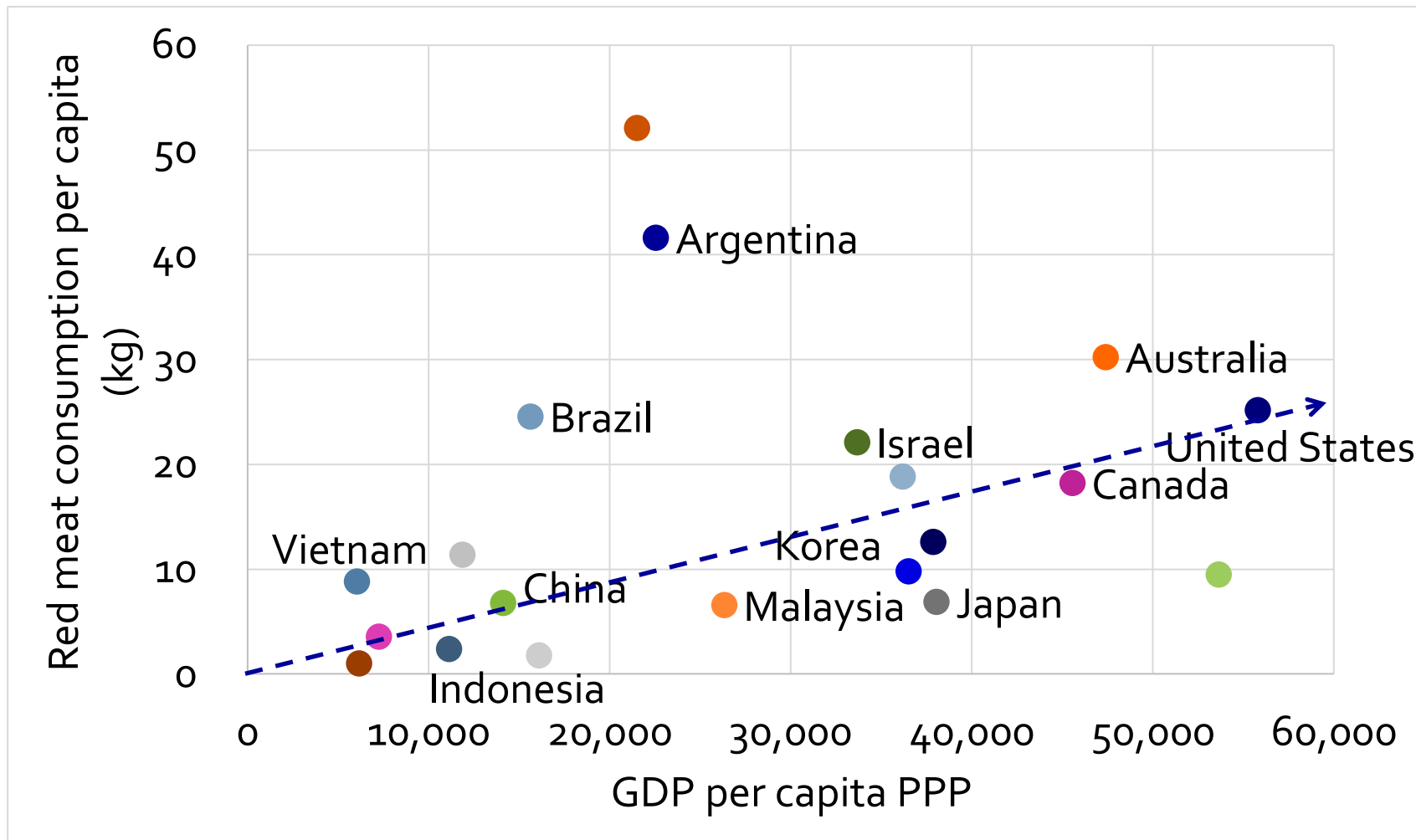
40% more demand for animal protein in 2030



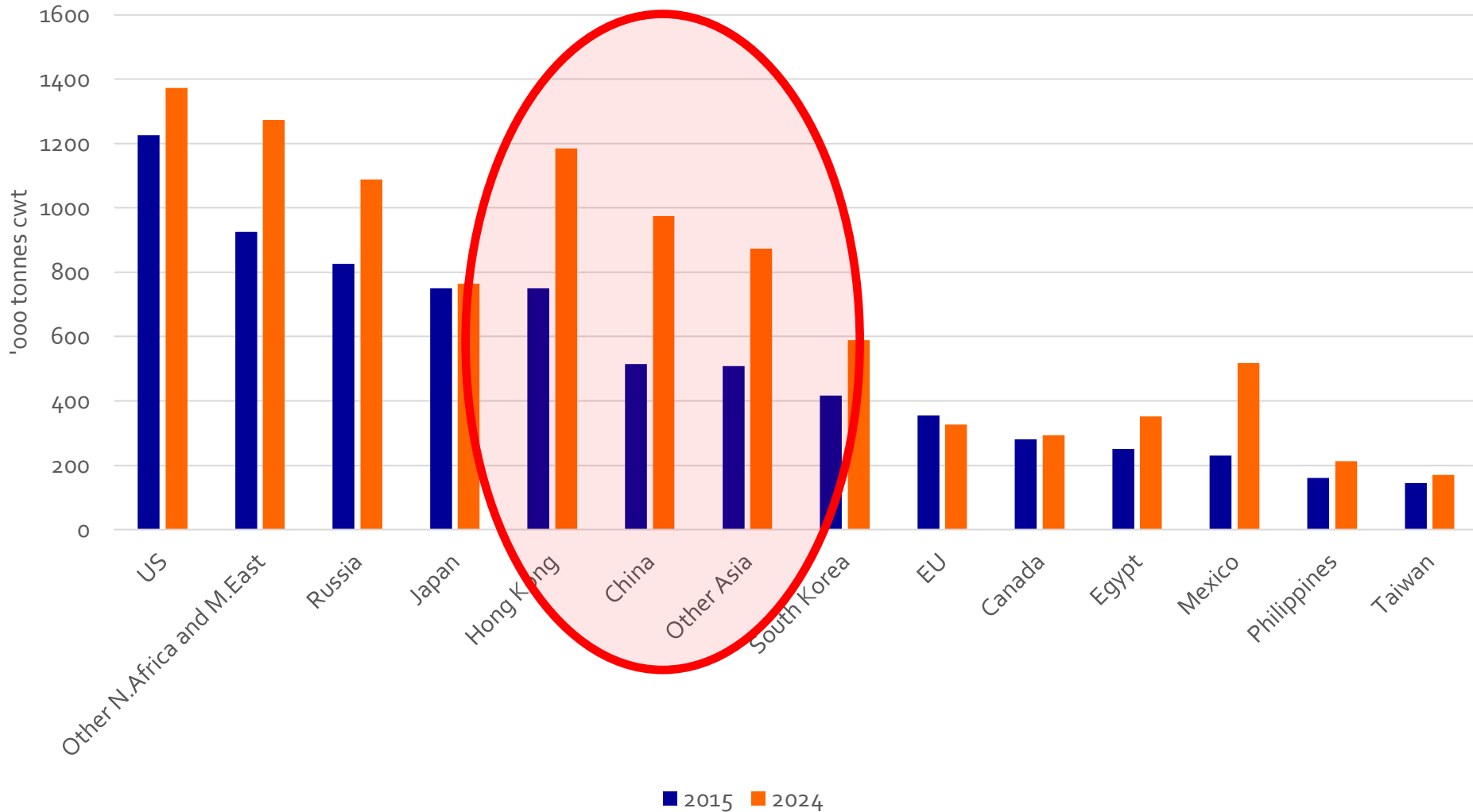
Global demand for animal protein 2015-2035



Increasing wealth, increasing red meat consumption



Asia region to become dominant beef importer



World meat trade in the balance



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Production of beef
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Consumers winning – global
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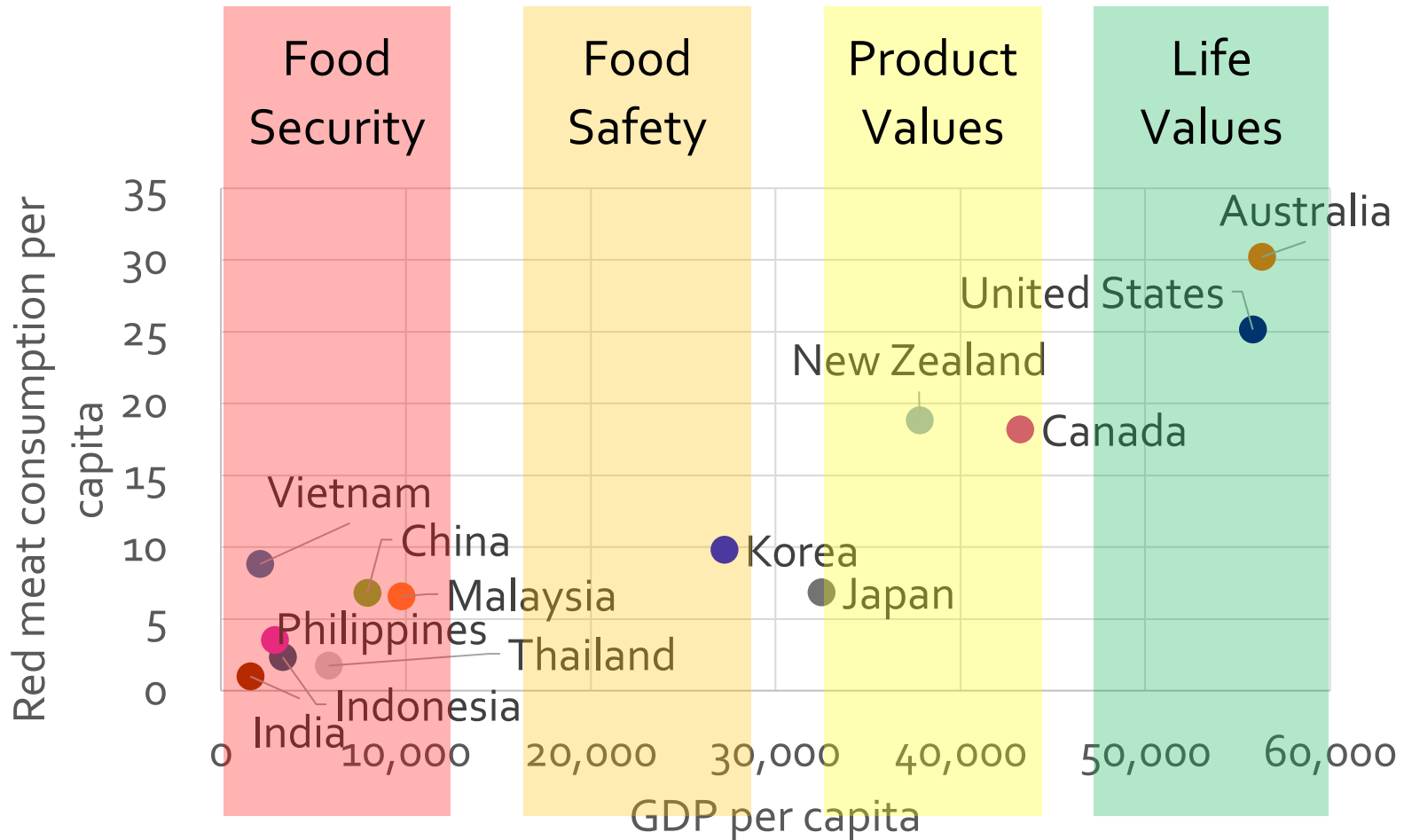
Consumption of
beef and other
animal proteins

Asia the centre of consumption
growth

Live exports
managing balance
via the supply chain



Knowing your consumer



When the supply chain breaks
trust is lost and value destroyed....



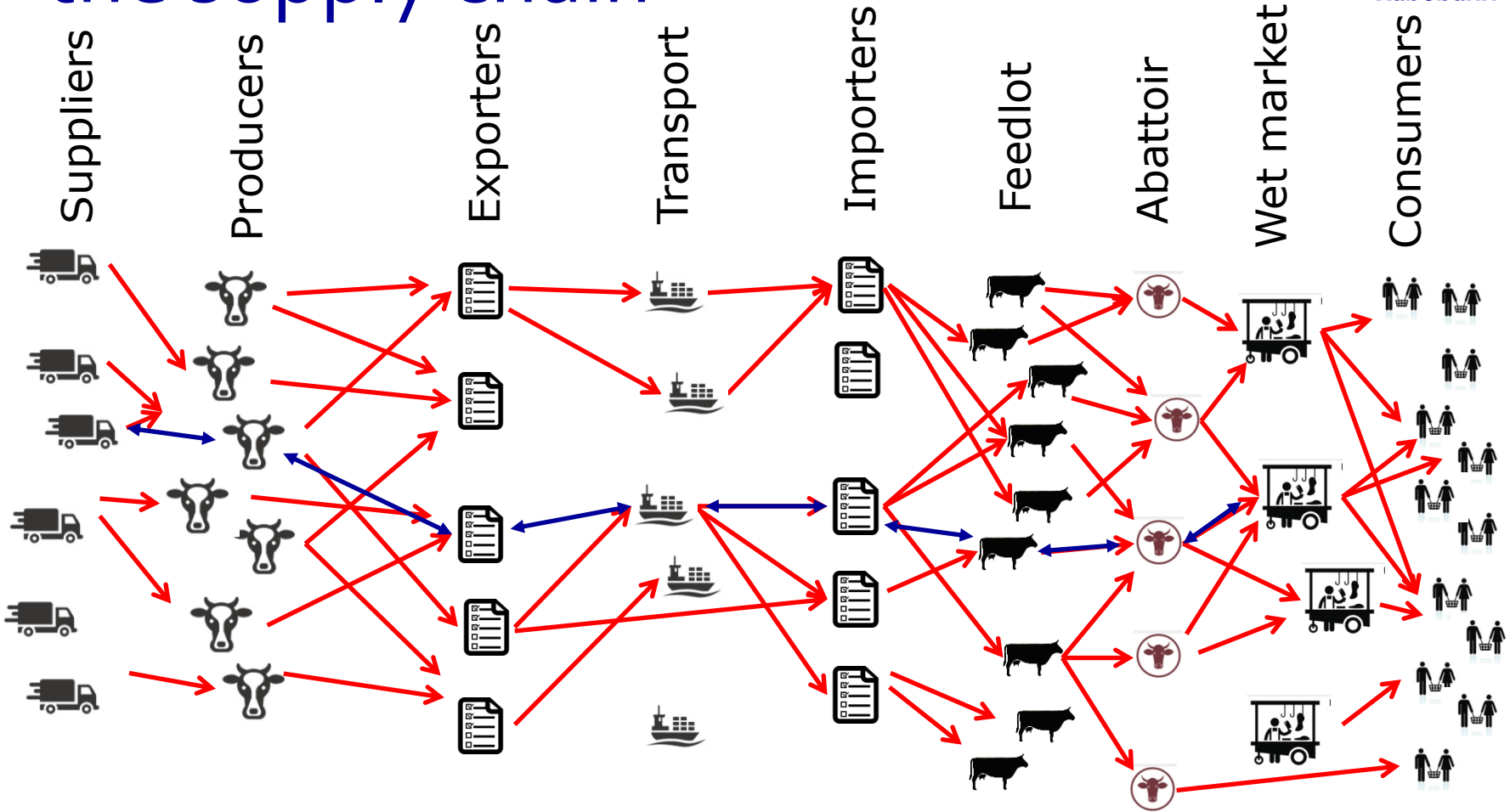
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The importance of cooperation in the supply chain



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World meat trade in the balance



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Production of beef and other animal proteins

Consumers winning – global animal protein production and competition increasing.

Consumption of beef and other animal proteins

Asia the centre of consumption growth

Live exports managing balance via the supply chain

Coordinated and collaborative supply chain needed to manage disruptors



Thank you

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