

Investing in Argentina Beef & Livestock

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Agencia Argentina
de Inversiones
y Comercio Internacional



Ministerio de Relaciones Exteriores,
Comercio Internacional y Culto
Argentina

Overview



3^{er} largest
agribusiness
sector



Over 53 million
heads of
livestock



5% of world's
beef production



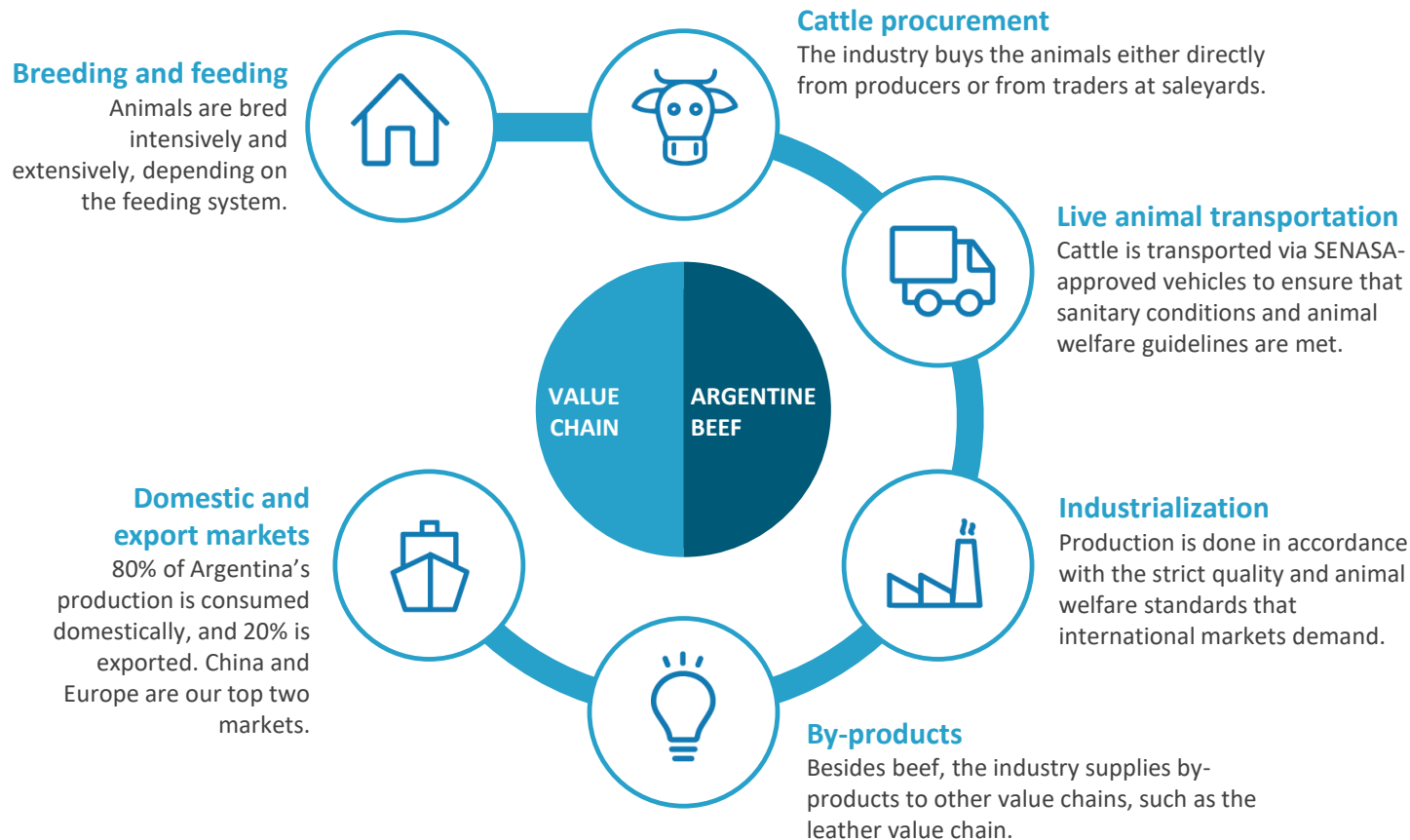
Over USD 3,1 bn
in exports
(2019)



5th global beef
exporter

Domestic market

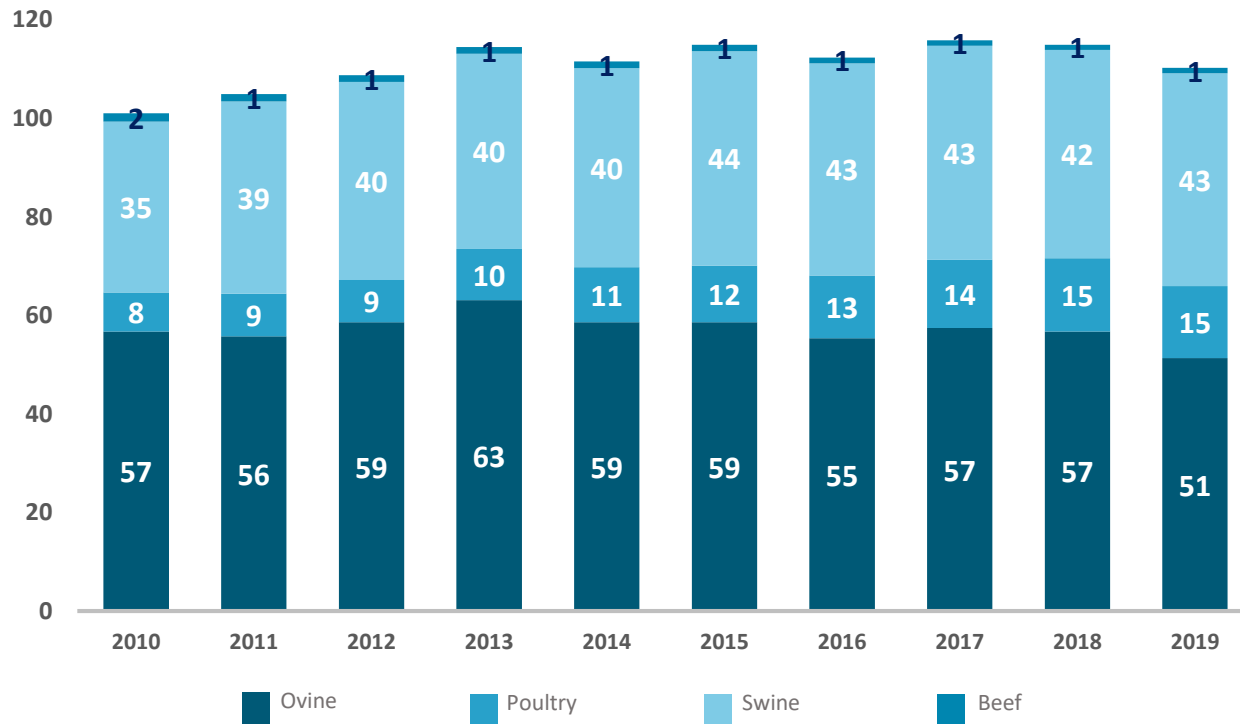
Value chain



- The value chain stands out due to the variety of actors involved as well as their differences in size.
- The activity is audited by SENASA – Argentina's sanitary authority.
- Livestock is raised in all 23 provinces.
- Wide variety of breeds. The most relevant ones (as per number of heads) are Aberdeen Angus, Hereford, Shorthorn, Braford, and Brangus.

Domestic market

MEAT consumption per capita (kg)

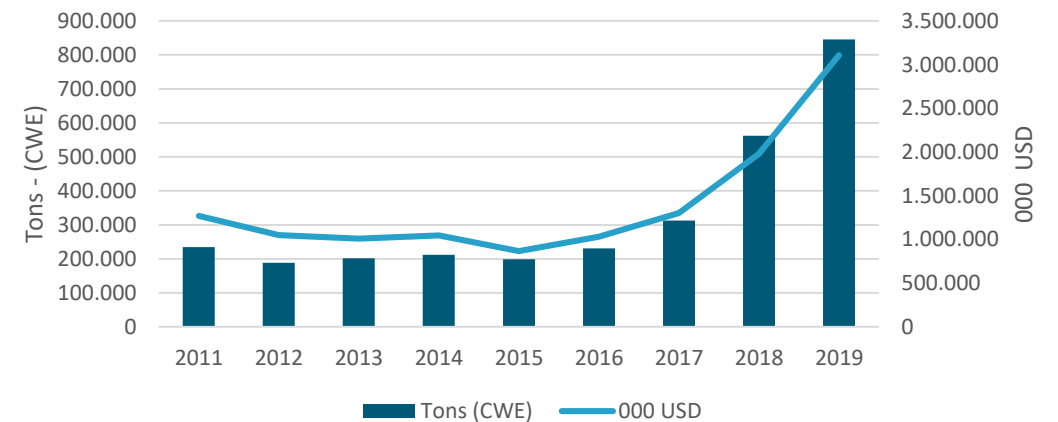


- Argentina is the second country with the highest consumption of beef per capita.
- The domestic market consumes between 75% and 80% of what is produced.
- Long experience in grass-fed and grain-fed production systems.
- More than 350 authorized slaughter establishments for domestic and international markets.

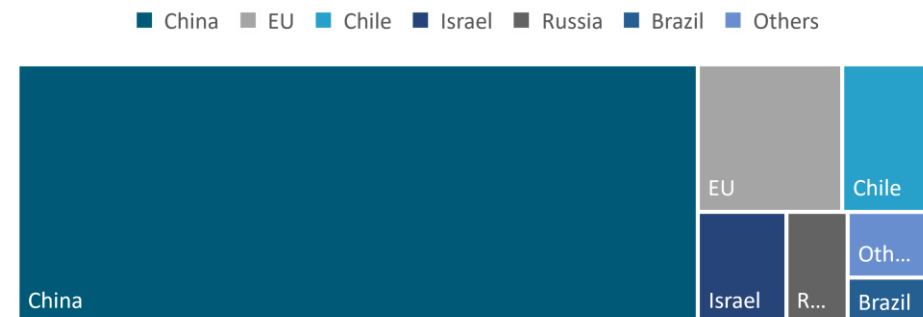
Global market– Present & Future

- Fifth beef exporter in the world.
- Exponential growth: beef exports increased by 370% over the last years.
- Actively operating in over 80 countries.
- Exports projected to increase by 2020.
- The country with the highest percentage of Hilton Quota, as well as access to 481 Quota.
- Exports to the EU will benefit from the potential application of the EU-Mercosur FTA.
- Sanitary regulations grant access to 85% of the international beef market.

Argentine Beef Exports



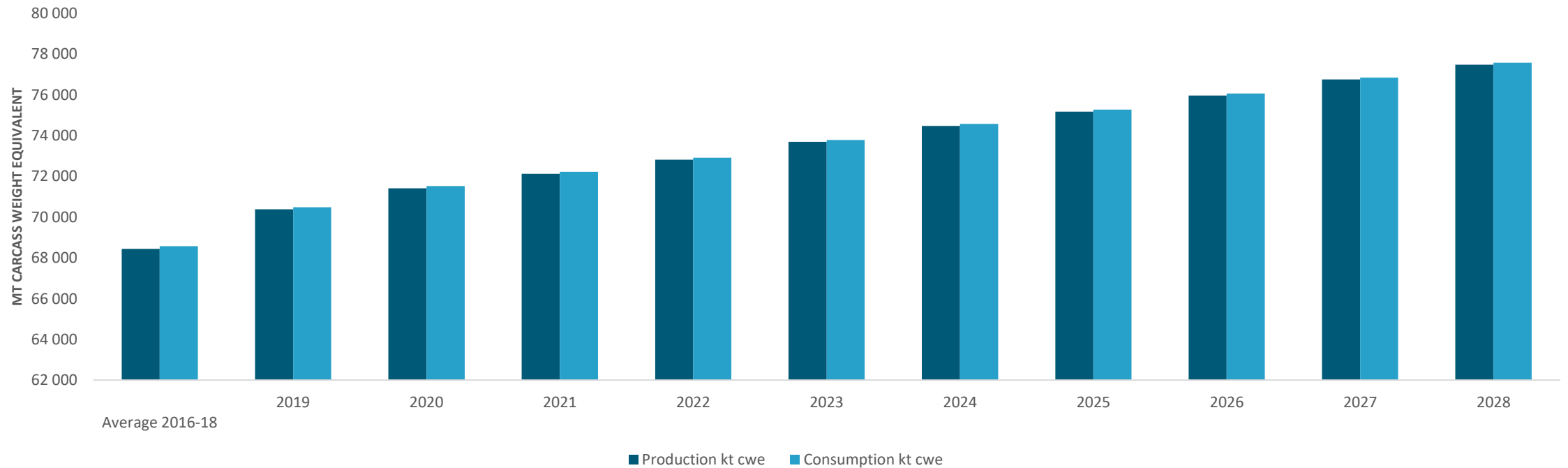
Beef Export Destinations by volume - 2019



Global market– Present & Future

- OECD estimates a global increase in both beef consumption and production over the coming decade.
- Due to its production capacity, and the quality of its meat, Argentina would be one of the main beneficiaries of the aforementioned growth.

Estimated Global Projections for Beef - OECD



Argentina, a privileged origin for MEAT: competitiveness factors



Argentine beef

Genetic Quality

- Breed availability.
- Genetics already adapted to local conditions.
- Argentina is an exporter of bovine genetics.

Advanced Industrial Sector

- International certifications in process standardization, sanitary procedures and animal welfare.
- Approved destinations: EU, USA, Canada, Chile, China, and Japan, among others.

Sanitary Status

- FMD-free with and without vaccination (Patagonia Region) and free from BSE (bovine spongiform encephalopathy).
- Permanent Audit by SENASA.

Demand from local & international markets

- A dynamic demand from both markets, which do not compete, but rather complement each other.

'Extensive' tradition, with 'intensive' development

- Experience and capacity in pasture feeding.
- Top-tier animal nutrition industry.
- Installed capacity of feedlots.

Land Conditions

- Mild climate.
- Water availability.
- Second country with the highest number of certified organic hectares, suitable for livestock production.

Value chain and its investment opportunities

There are investment opportunities throughout the sector, starting from the genetic development of cattle until its trade in both domestic and international markets.

Primary production



- Genetics for domestic and international markets.
- Grass-fed production systems.
- Organic production.
- Feedlot production systems.



Industry



- Joint venture with a local producer/investor.
- Start-up of a new plant, either full or partial cycle.



Trade



- Development of a supply chain built on a differentiated product. The added value can be found in certified genetics or feeding systems.

How we can help

We promote the internationalization of Argentine companies and facilitate private investments in Argentina

OUR SERVICES:



IDENTIFICATION OF OPPORTUNITIES AND LOCATION



NETWORKING



DUE DILIGENCE SUPPORT



FACILITATION



IMPROVEMENT OF BUSINESS CLIMATE



FOLLOW-UP TO THE OPERATION

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