

# BEEF

SECTORIAL PRESENTATION



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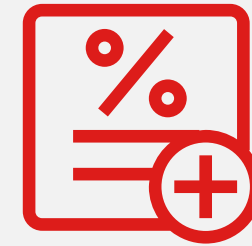
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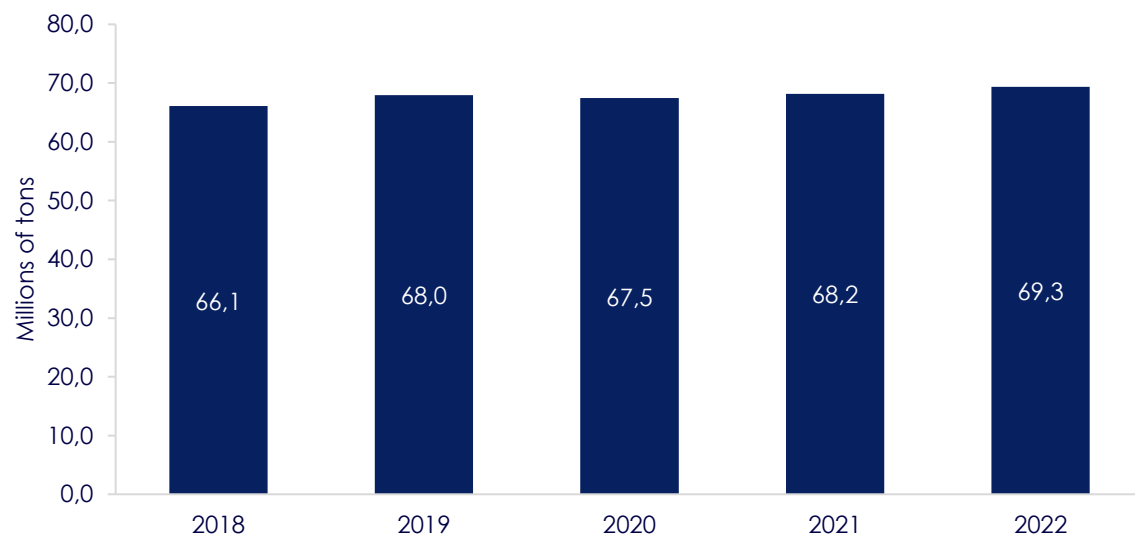


## CONTEXT IN THE WORLD

PRODUCTION, FOREIGN TRADE  
AND WORLDWIDE SALES

# IN 2022, WORLD BEEF PRODUCTION RECORDED ANNUAL GROWTH OF 1.2%, COMPARED TO 2018

## BEEF PRODUCTION, WORLDWIDE (2018 - 2022) (million tons)



In 2022, **Colombia ranked as the 20th largest** supplier in the **world** and the **fourth largest** in **Latin America**.

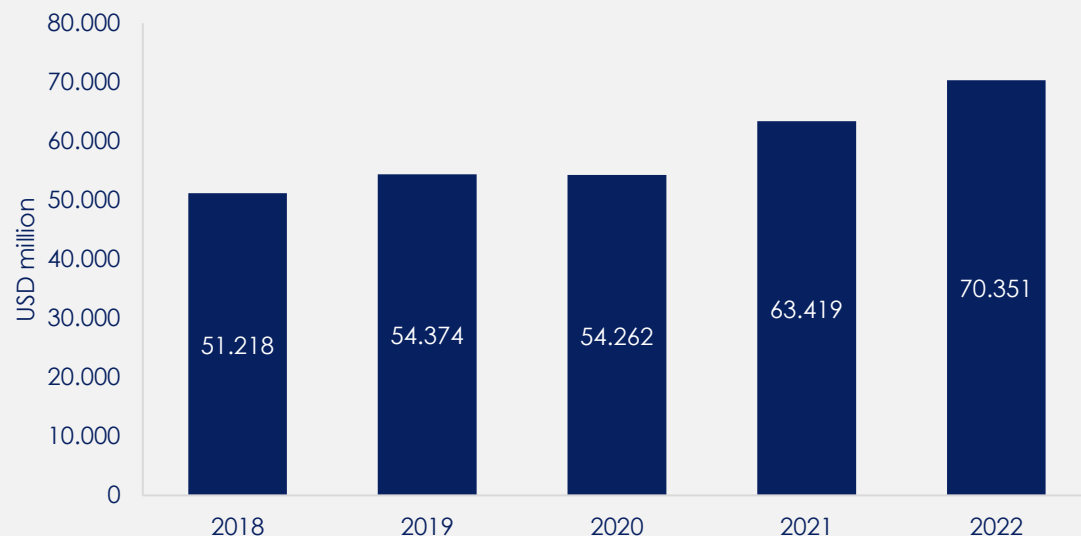
## TOP 10 WORLD BEEF PRODUCERS (2022) (million tons)



# IN 2022, CHINA, JAPAN AND SOUTH KOREA ACCOUNTED FOR 39% OF GLOBAL BEEF IMPORTS

## WORLD BEEF IMPORTS

2018 - 2022 (USD million)



In 2022, **48.7%** of world imports corresponded to **boneless, frozen meat**.

## TOP 5 IMPORTERS

(2022) (USD million)

 **China**  
Value: 18,002  
Part.: 25.6%.

 **United States**  
Value: 8,321  
Share: 11.8%.

 **Japan**  
Value: 4,979  
Part.: 7.1%.

 **South Korea**  
Value: 4,493  
Part.: 6.4%.

 **Italy**  
Value: 2,530  
Part.: 3.6%.

## TOP 5 EXPORTERS

(2022) (USD million)

 **Brazil**  
Value: 12,093  
Part.: 17%.

 **United States**  
Value: 11,187  
Share: 15.8%.

 **Australia**  
Value: 8,177  
Part.: 11.5%.

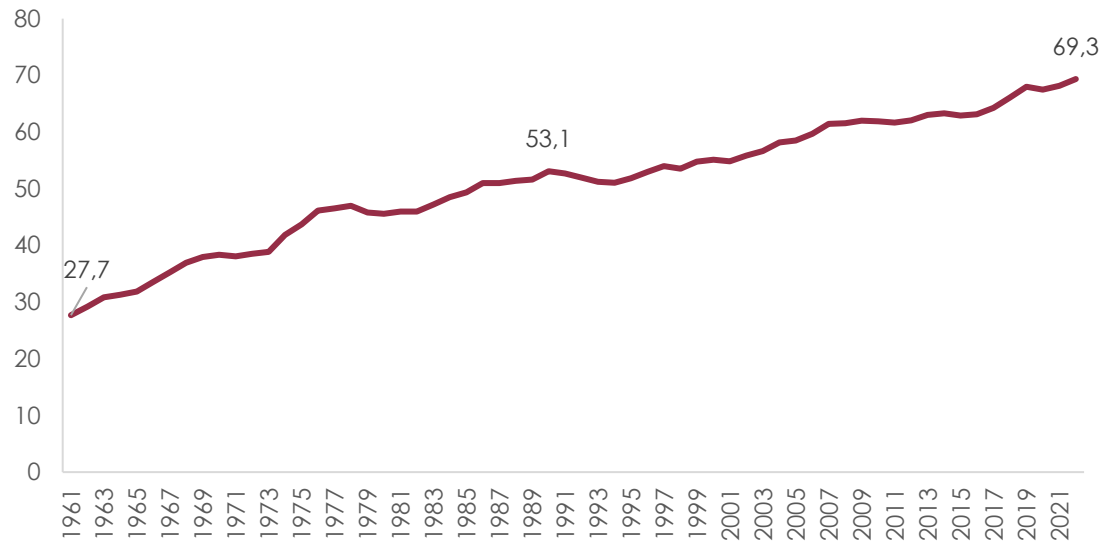
 **Netherlands**  
Value: 3,681  
Part.: 5.2%.

 **Argentina**  
Value: 3,545  
Part.: 5%.

# BETWEEN 1960 AND 2022, WORLD BEEF PRODUCTION TRIPLED, WHILE CONSUMPTION IS EXPECTED TO GROW BY 7.9% BETWEEN 2023 AND 2032

## WORLD BEEF PRODUCTION

1961 - 2022 (million tons)



In 2022, world beef production amounted to **69.3 million tons**, representing an annual growth of 1.5% between 1961 and 2022.

- **Pandemic Resilience:** Despite supply chain difficulties during the pandemic, meat consumption has not declined.
- **Increased Consumption:** Demographic growth and population changes are driving an ever-increasing market demand for meat products.
- **Evolution Towards Sustainability:** The meat sector is moving towards more sustainable and ethical practices, including the adoption of alternative protein production methods.
- **Changes in Consumption Patterns:** Rising incomes and technological innovations, especially notable in the food industry, are changing consumption patterns and market dynamics.

# READY-TO-EAT MEATS: A GROWING TREND

## Global Protein Requirement

According to Straits Research, half of the world's population relies on meat for their daily protein needs.

## Growing Market

The volume of ready-to-eat meat products is expected to reach 98.8 million tons by 2028, with a growth of 5.0% in 2024.

## Factors behind the boom



Fast-paced lifestyles reduce cooking time.



Growing acceptance among millennials.



Innovation in flavors and presentations of ready-to-eat meats.



Increasing urbanization.



Increasing demand for convenient foods.

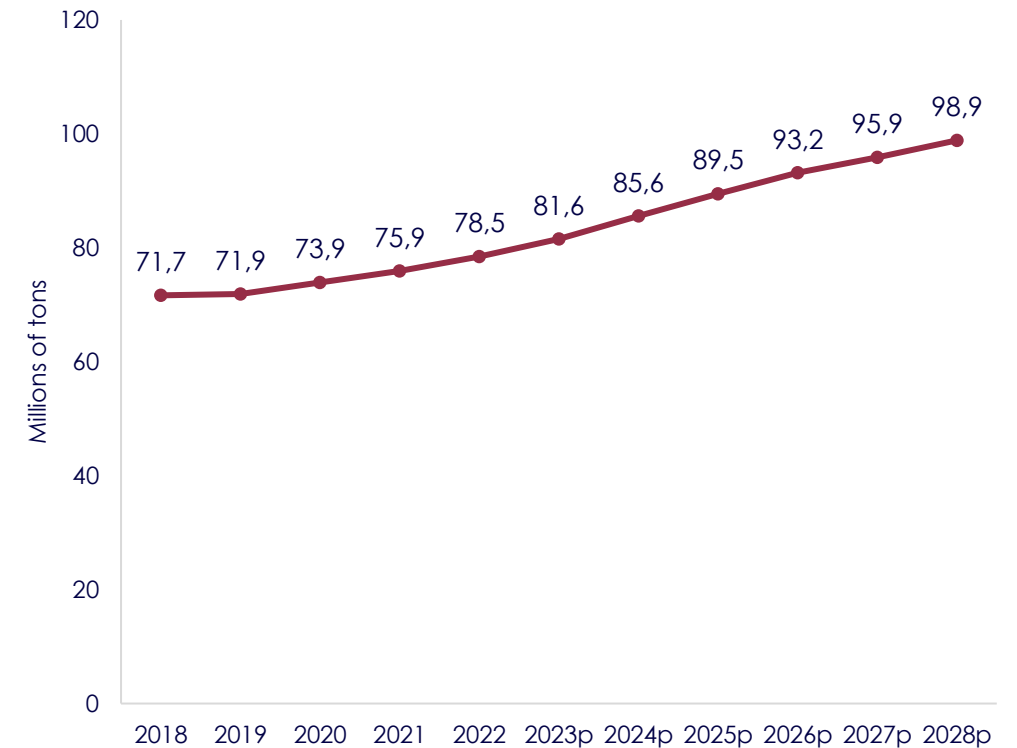
## Conclusions

Today's pace of life and generational preference for convenient foods drive the demand for ready-to-eat meats, making them an essential element in the modern food landscape.

Source: FHA-Food and Beverage, 2024.

Ready-to-eat meats include hamburgers, hams, sausages, among other presentations.

## WORLDWIDE SALES OF READY-TO-EAT MEAT 2018 - 2028 (million tons)



# CONSUMERS ARE LOOKING FOR NUTRITIOUS, SUSTAINABLE AND ETHICAL MEATS, WITH A PREFERENCE FOR HIGH QUALITY FROZEN MEATS

Half of consumers consider **healthy eating as a** top priority, while the other half opt for **convenience foods**.

## CURRENT CONSUMER PRIORITIES



Foods that take up less time for consumers but are nutritious.



Transparency in meat production and ingredients.



Sustainable and environmentally friendly products.



Increased demand for plant-based meat products.



Increased demand for healthier, high quality frozen meat.



Consumption of meat from ethical sources.



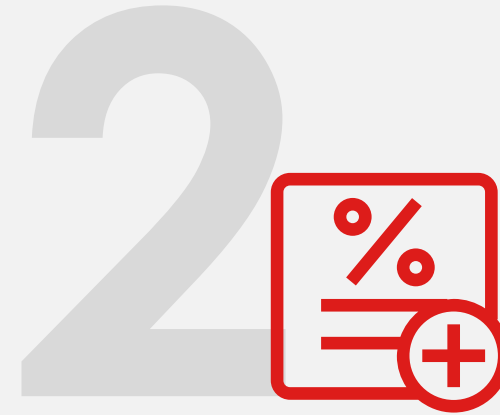
## GLUTEN-FREE ORGANIC MEATBALLS (USA)

- Made from 100% grass-fed beef
- Organic meatballs
- Free of gluten, antibiotics, growth hormones and transgenic products
- High protein content: 14g per serving
- Frozen

## NEUTRAL CARBON SOLOMILLOIN (New Zealand)

- Aged to be exceptionally tender and juicy.
- Raised on **pasture, without** added **hormones**.
- Hand-selected for **superior quality** in taste and texture.
- It has a carbon neutral seal.
- Traceability of origin on Oritain.com





## COLOMBIAN CONTEXT



# THE COLOMBIAN STATE HAS AN ORGANIZED INSTITUTIONAL FRAMEWORK AT THE SERVICE OF THE SECTOR

 **Agricultura** **Ministry of Agriculture and Rural Development:** formulates, coordinates and evaluates policies that promote the competitive, equitable and sustainable development of rural development processes. [www.minagricultura.gov.co](http://www.minagricultura.gov.co)

 **Ambiente** **Ministry of the Environment and Sustainable Development:** defines the national environmental policy and promotes the recovery, conservation, protection, management, use and exploitation of natural resources. <http://www.minambiente.gov.co>

 **Colombian Agricultural Institute:** contributes to the sustained development of the agricultural, fishing and aquaculture sector, through the prevention, surveillance and control of sanitary, biological and chemical risks for animal and plant species. [www.ica.gov.co](http://www.ica.gov.co)

 **upra** **Rural Agricultural Planning Unit:** Plans the efficient use of land, defines the criteria and creates the instruments required for this purpose. [www.upra.gov.co](http://www.upra.gov.co)

 **ADR** **Rural Development Agency:** allies of producers in the structuring, co-financing and execution of Integral Plans for Agricultural and Rural Development. <https://www.adr.gov.co/>

 **AGROSAVIA** **Colombian Agricultural Research Corporation (AGROSAVIA):** Scientific and technical entity whose purpose is to develop and execute research and technology activities and to transfer technological innovation processes to the agricultural sector. <https://www.agrosavia.co/>

 **Agencia Nacional de Tierras** **National Land Agency:** Consolidates and maintains the social order of rural property in order to improve the living conditions of the population. [www.agenciadetierras.gov.co](http://www.agenciadetierras.gov.co)

# IN THE COUNTRY THERE ARE UNIONS IN THE BEEF SECTOR SERVING THE INTERESTS OF BUSINESSMEN

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**National Federation of Cattle Raisers:** its functions include the representation of the association, sectoral analysis, information and cattle policy, collection and administration of the cattle parafiscal tax and the provision of services to cattle raisers.  
[www.fedegan.org.co](http://www.fedegan.org.co)

# COLOMBIA HAS A HIGH QUALITY BEEF SUPPLY WITH THE CAPACITY TO GROW



The country's privileged geographical location allows **cattle** to be **fed on pasture all year round**, without the use of hormones or growth promoters and respecting the animal's natural cycle of development and fattening.



20% of the beef produced in Colombia comes from animals slaughtered before 36 months of age, one of the requirements that foreign markets demand when buying **high quality or Premium cuts**.



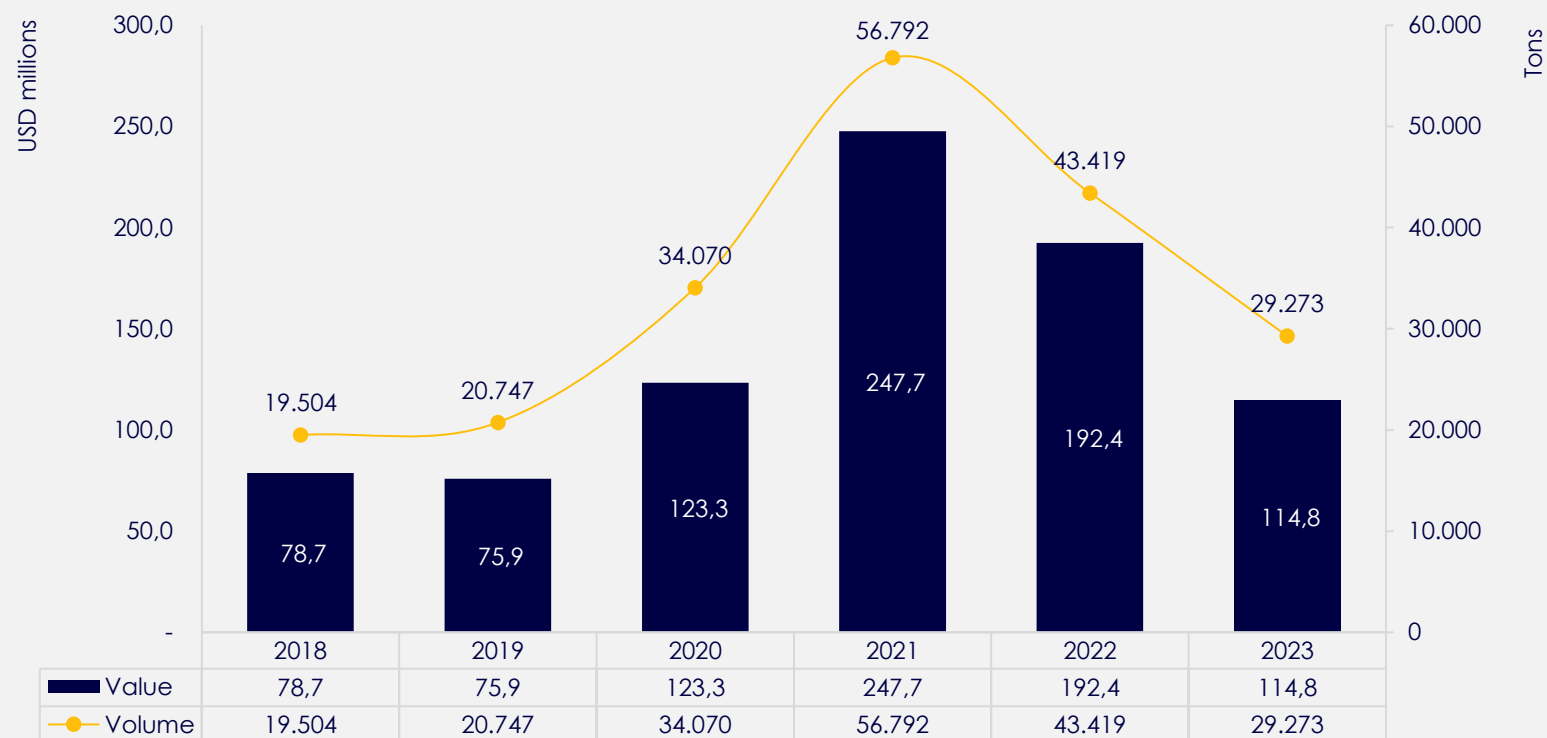
With approximately **28 million cattle**, Colombia has the **fourth largest cattle herd in Latin America**, with breeds of excellence such as the Cebu and Brahman.



# THE COUNTRY SEEKS TO DIVERSIFY ITS EXPORT DESTINATIONS THROUGH SANITARY DIPLOMACY IN INTERNATIONAL MARKETS


## BEEF EXPORTS IN COLOMBIA


2018 - 2023 (USD and tons)




## EXPORTS, BY COUNTRY OF DESTINATION

(2023) (USD millions)

- 

**Russia**  
Value: 49.5  
Part.: 43%.  
Product: forequarters, frozen, boneless
- 

**Chile**  
Value: 21.5  
Part.: 19%.  
Product: forequarters, fresh or refrigerated, boneless
- 

**Egypt**  
Value: 9.6  
Part.: 8%.  
Product: forequarters, frozen, boneless

Source: DANE, DIAN, 2024. Calculations by ProColombia.

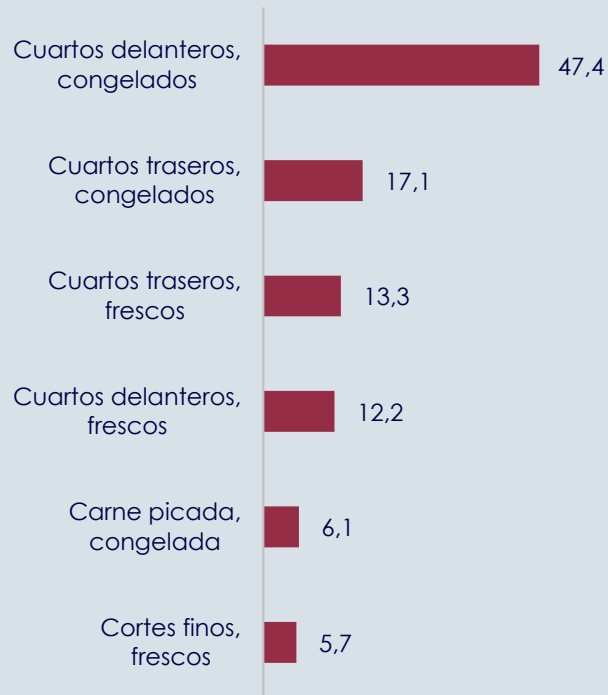
Other destinations with exports exceeding USD1,000,000: Lebanon, Hong Kong, Libya, Vietnam, Curaçao, Saudi Arabia, United Arab Emirates, Jordan and Turkey.

# OF COLOMBIA'S BEEF EXPORTS

## 68% IS FROZEN

### MAIN EXPORTED PRODUCTS

2023 (USD million)



### MAIN EXPORT DESTINATIONS BY PRODUCT

**Russia** (63.7%), **Egypt** (17.0%), **Libya** (7.5%), **Chile** (3.3%),

**Russia** (78.7%), **Chile** (6.7%), **Egypt** (2.5%), **Turkey** (2.4%)

**Chile** (50.7%), **Lebanon** (35.2%), **UAE** (5.1%), **Saudi Arabia** (2.5%), **United States** (5.1%).

**Chile** (75.1%), **Lebanon** (13.5%), **Saudi Arabia** (5.0%), **UAE** (2.4%)

**Russia** (73.3%), **Jordan** (10.6%), **Egypt** (5.5%), **Saudi Arabia** (3.6%)

**Chile** (50.3%), **Lebanon** (35.6%), **UAE** (6.6%), **Curaçao** (2.3%)

### MAIN EXPORTING COMPANIES

2023

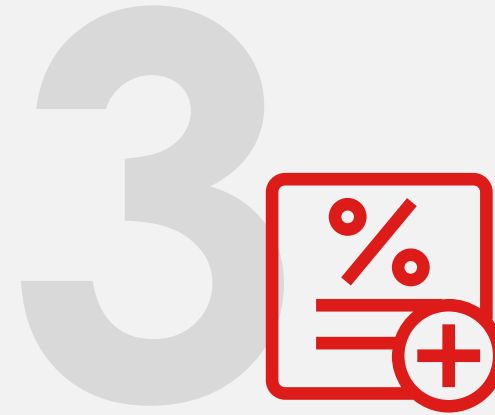
**minerva**  
**foods**



**Alimentos**  
**Cárnicos**



**FRONTERA**  
**VACANA**



## EXPORT PLATFORM

TRADE AGREEMENTS AND  
CONNECTIVITY

# NETWORK OF TRADE AGREEMENTS PROVIDING PREFERENTIAL ACCESS TO 1.5 BILLION CONSUMERS WORLDWIDE

## 18 TRADE AGREEMENTS IN FORCE AND 2 SIGNED

SOUTH AMERICA	NORTH AND CENTRAL AMERICA		EUROPE AND ASIA
 VENEZUELA*	 UNITED STATES	 CUBA*	 KOREA
 CHILE	 CANADA	 PANAMA**	 ISRAEL
CAN	 MEXICO*.	CARICOM	 UNITED KINGDOM
Pacific Alliance	 COSTA RICA	Northern Triangle	 SINGAPORE**
MERCOSUR*.			EFTA (EFTA) European Union



\* Partial scope agreements

\*\* Subscribed

\*\* Panama 1 in force 1 subscribed

# CONNECTIVITY AND INFRASTRUCTURE THAT CONNECTS US TO THE WORLD AND BOOSTS BUSINESS

## CONNECTION TIMES



**Santiago de Chile** 5h 55m  
**Lima** 3h 5m  
**Sao Paulo** 6h 10m  
**Mexico DF** 4h 55m  
**Miami** 3h 55m  
**NY** 5h 35 m  
**Toronto** 6h 10 m



**Callao** 2d  
**Valparaíso** 8d  
**Port Everglades and Miami** 5d  
**Port Manzanillo** 8d  
**NY** 6d  
**Vancouver** 18d  
**Shanghai** 25d



**3,500 maritime** export routes to 750 ports in more than 140 countries.



More than **2,400 export routes** through 30 airlines, with access to more than 500 cities.



**Same time zone** as the main cities of the continent → ideal destination for the export of services.



**El Dorado Airport** in Bogota is the **first** Latin American airport in terms of air cargo volume and the third busiest by passengers.



**Port of Cartagena** ranked as the **best connected** in maritime trade in Latin America and the Caribbean (UNCTAD).



## OPPORTUNITIES AND SUCCESS



# COLOMBIA HAS SANITARY ADMISSIBILITY FOR BEEF EXPORTS IN 17 MARKETS

## MARKETS WITH SANITARY ADMISSIBILITY FOR BEEF EXPORTS FROM COLOMBIA 2024

	Angola		El Salvador
	Saudi Arabia		United Arab Emirates
	Algeria		Jordan
	Chile		Libya
	China		Macao
	Cuba		Peru
	Curaçao		Qatar
	Egypt		Eurasian Economic Union
	Lebanon		



Source: Invima, 2024.

This information is provided as a guide only. It is important to check with the importer or relevant authorities to confirm current access requirements.

Eurasian Economic Union: Russia, Belarus, Kazakhstan, Kyrgyzstan, Armenia



# THANK YOU