



COLOMBIAN CHICKEN MEAT INDUSTRY REPORT

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**IPC CONFERENCE
CARTAGENA
APRIL 27, 2017**

COLOMBIA: KEY DATA



AREA (KMS²):
1.142.000

POPULATION (2017):
49.190.810

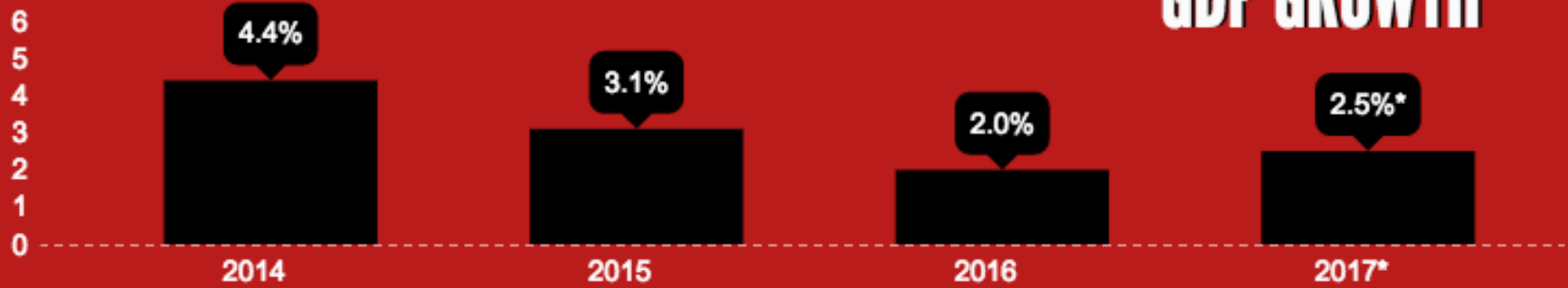
GDP (2015) CURRENT USD:
292.1 BILLION

GNI (2015) PER CAPITA:
\$7.140

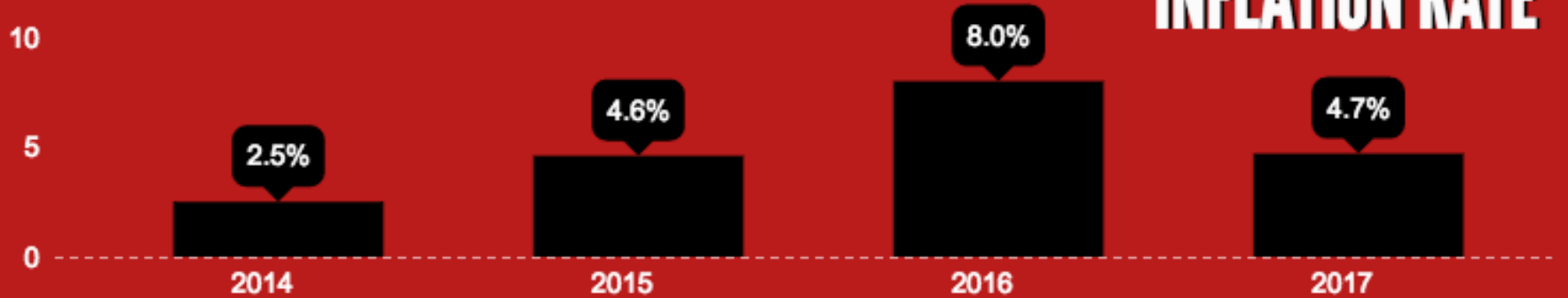
GDP (2016) GROWTH:
2.0%

ECONOMIC PERFORMANCE

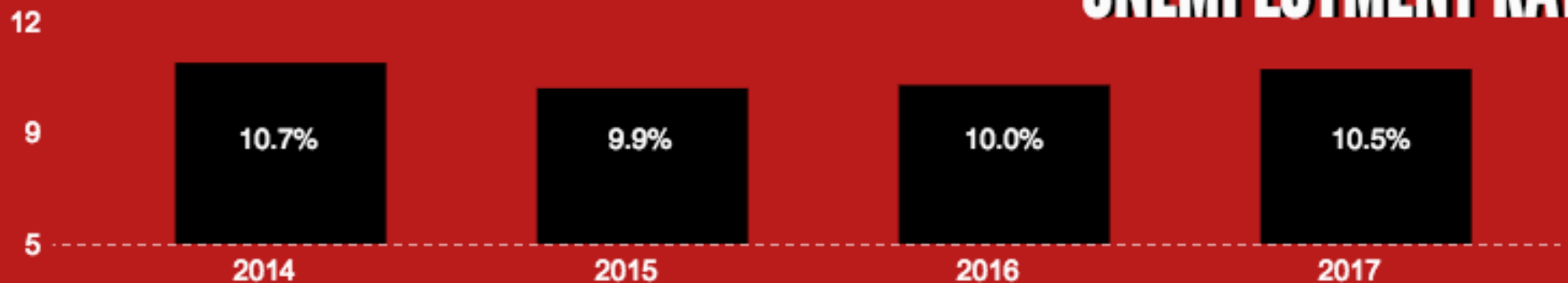
GDP GROWTH



INFLATION RATE



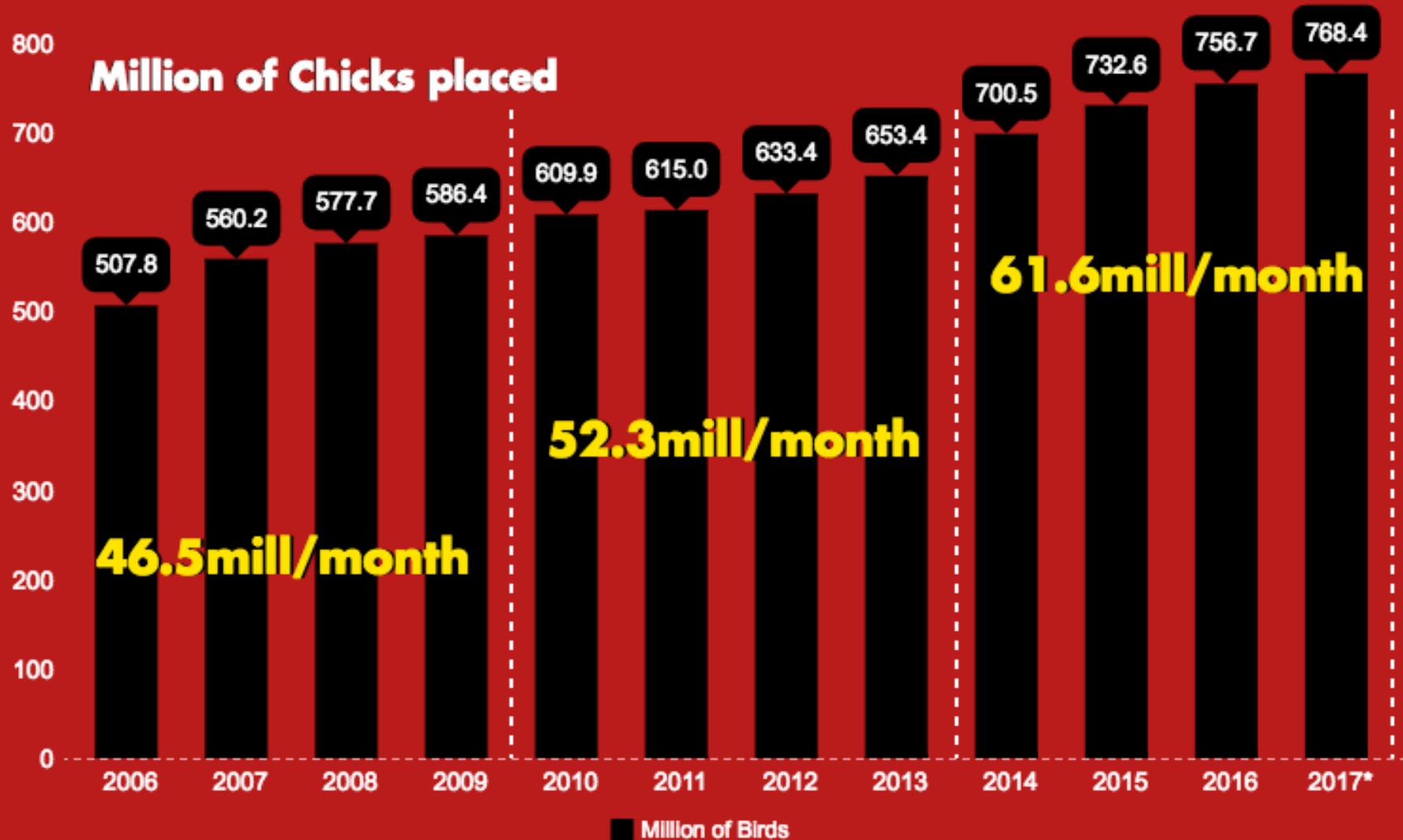
UNEMPLOYMENT RATE



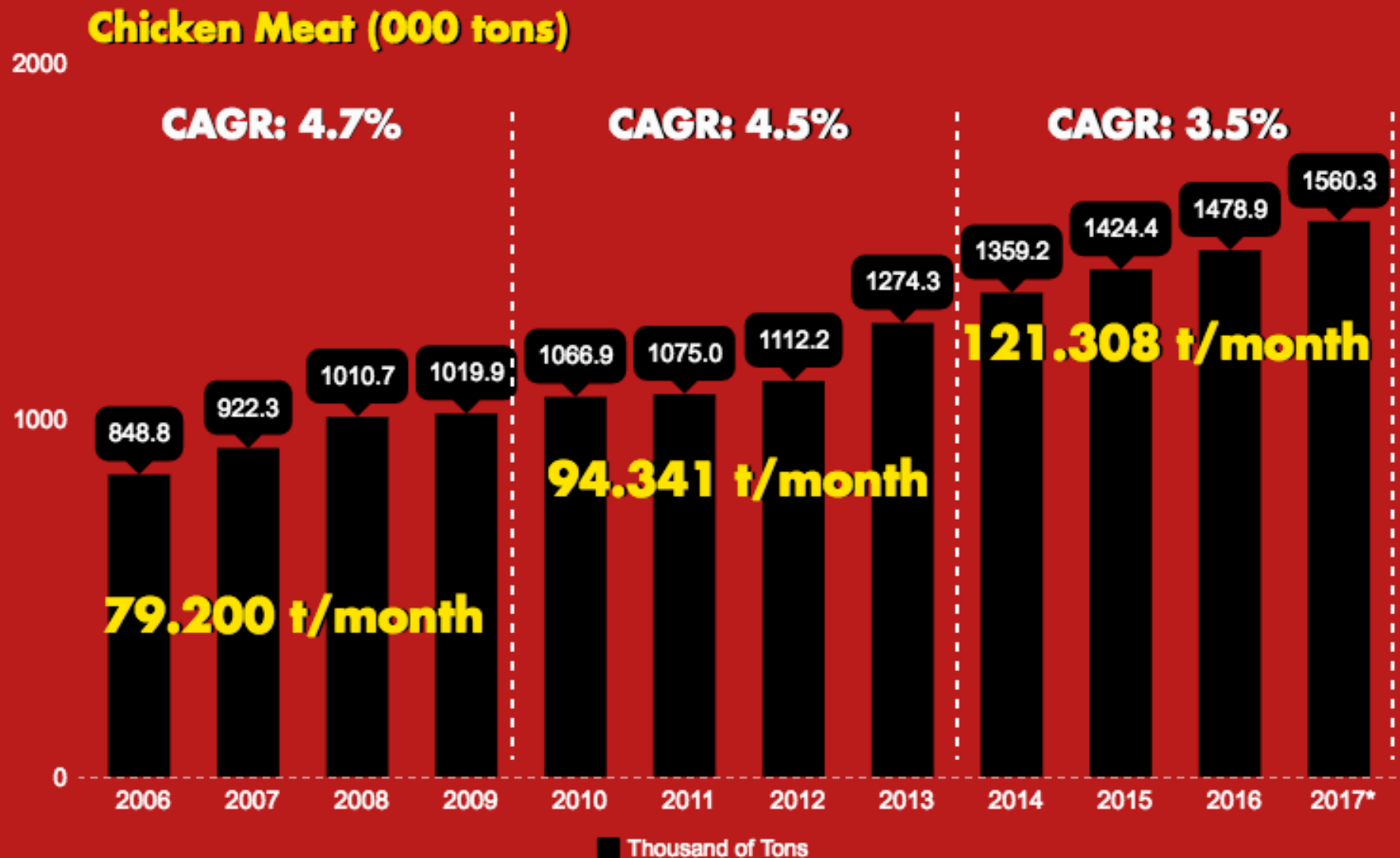


2. Facts and figures of the Colombian poultry industry

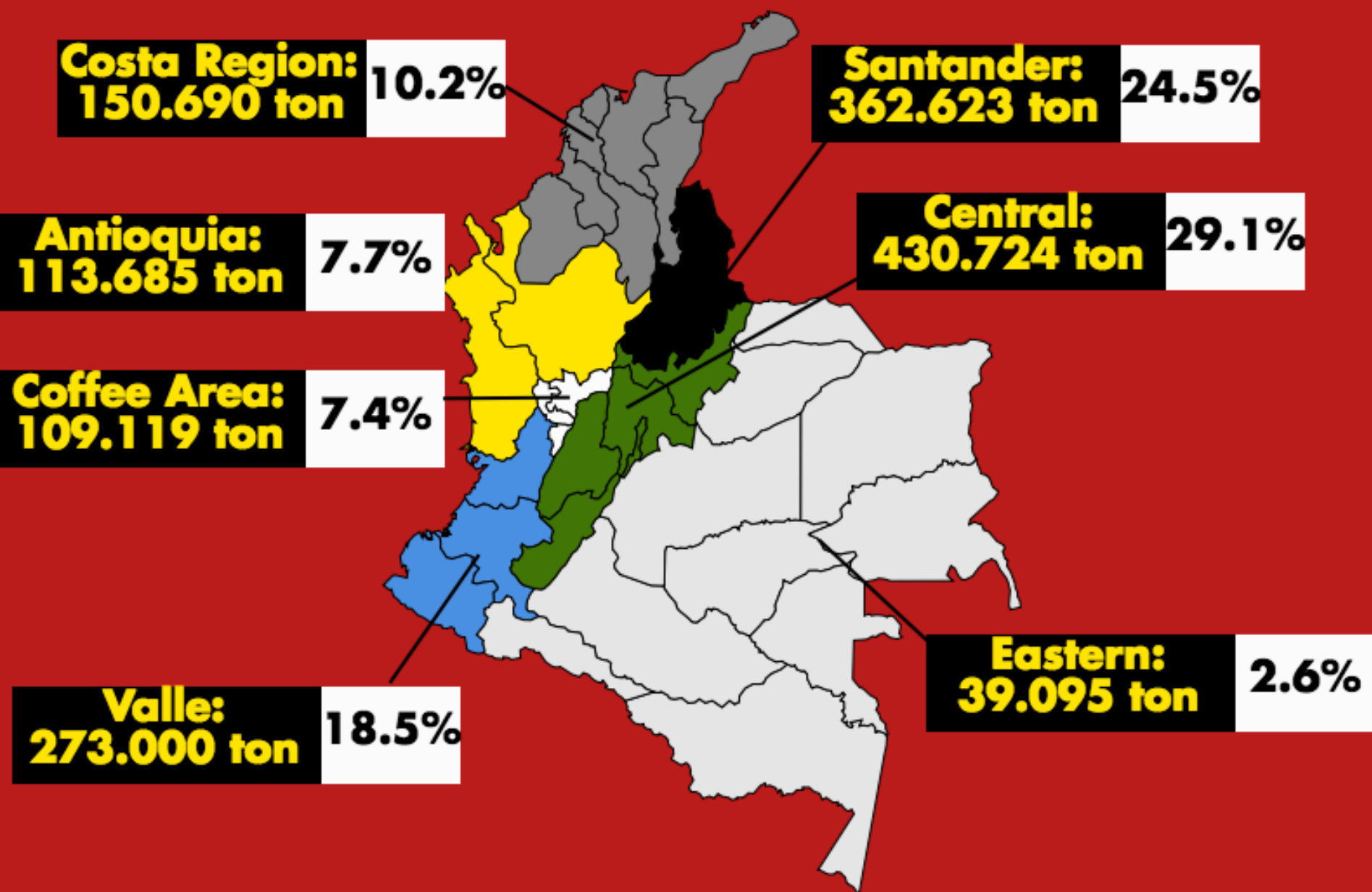
OUR INDUSTRY IS A STORY OF SUCCESS



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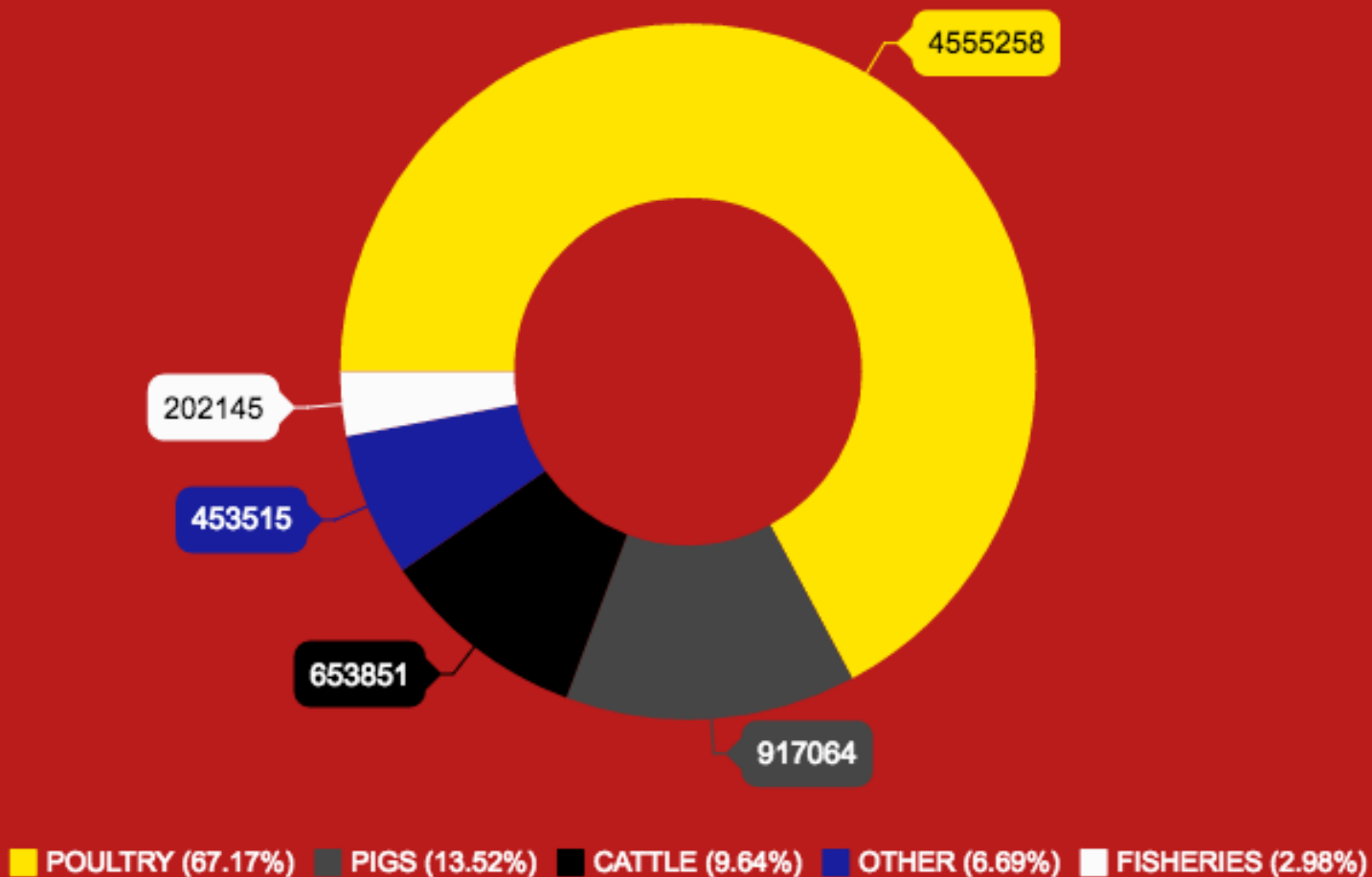


MAIN PRODUCING REGIONS 2016



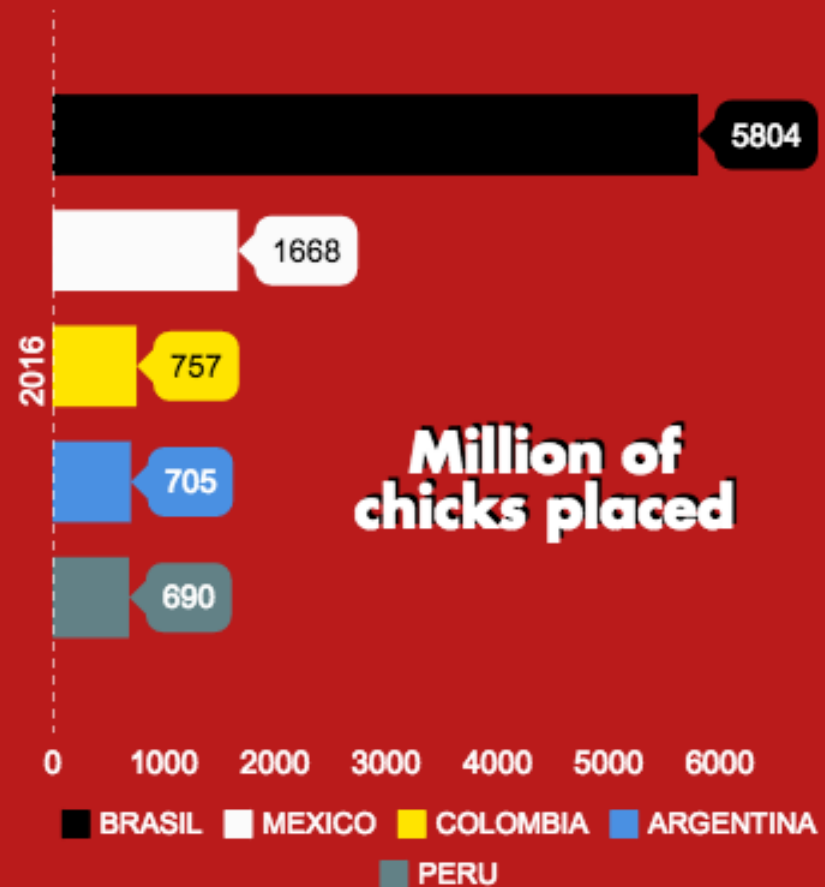
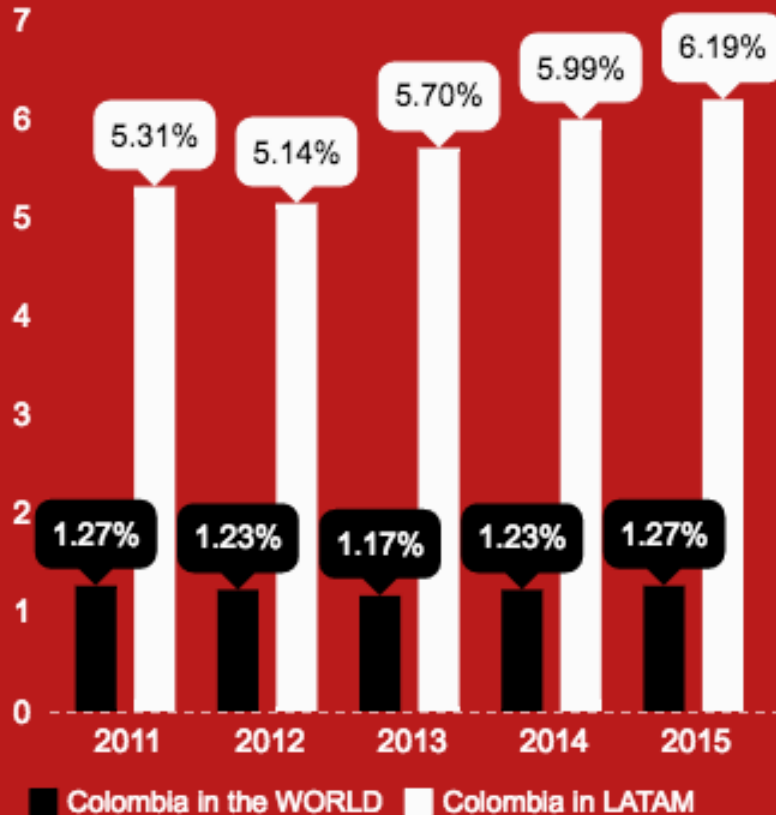
POULTRY IS THE BIGGEST CONSUMER OF ANIMAL FEED

**ANIMAL FEED PIE:
7.000.000 TONS**

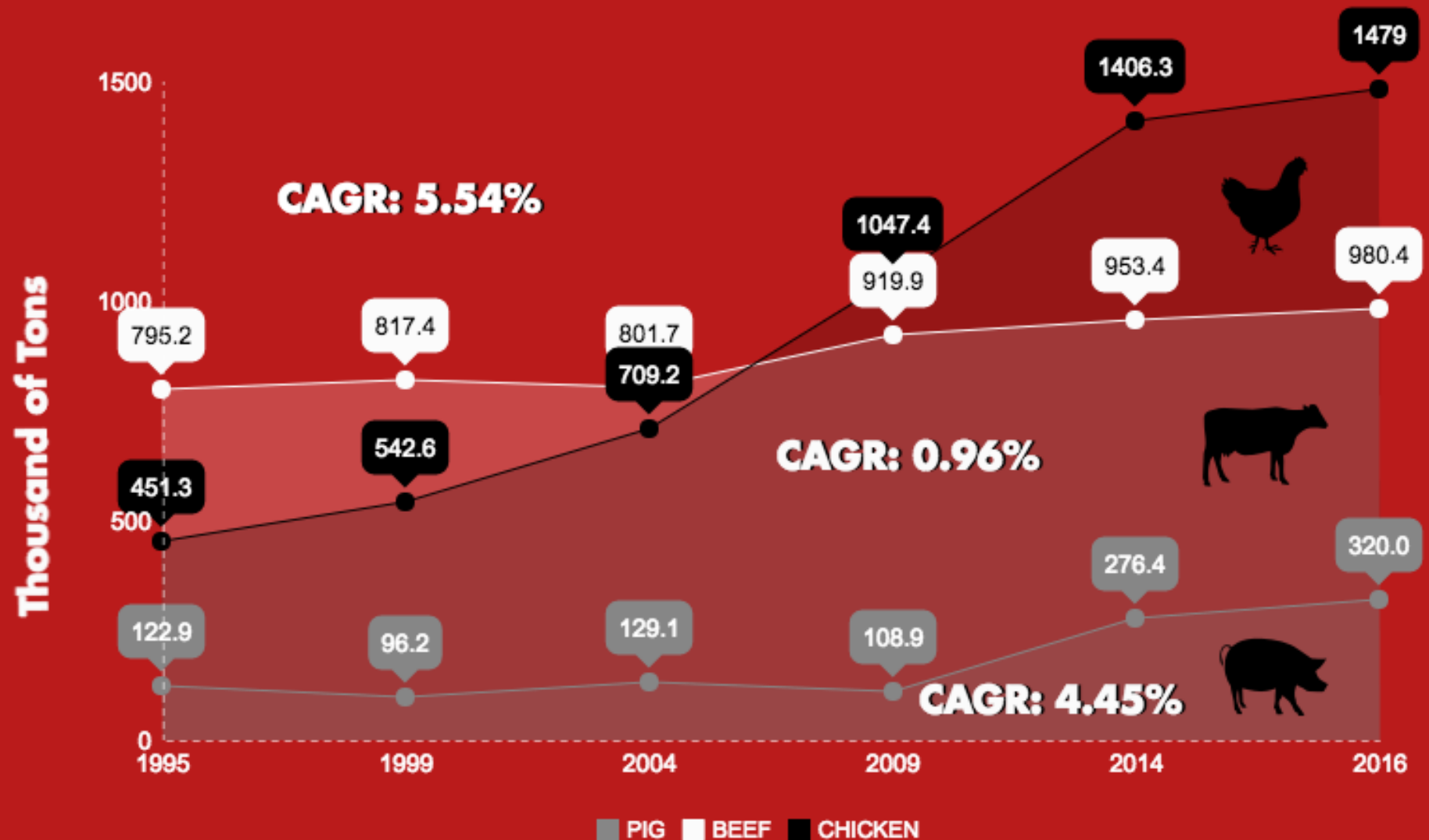


COLOMBIA IN THE WORLD

Colombia represents little as % of the global and regional production, but still is the 3rd largest in LATAM



CHICKEN IS THE MOST PRODUCED MEAT BY FAR



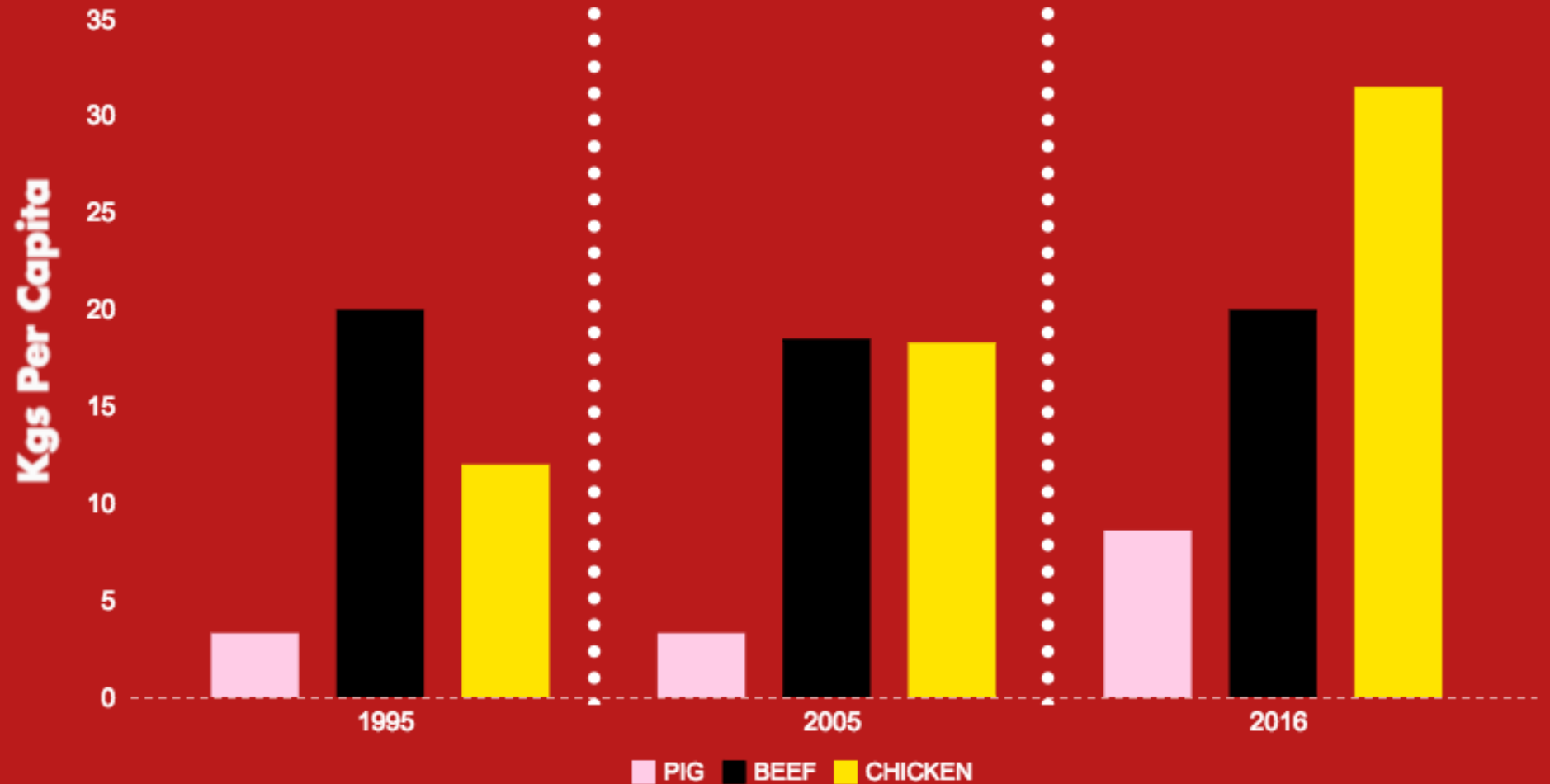
...AND OF COURSE IS THE MOST CONSUMED

Total Protein Consumption:

35.3 kgs

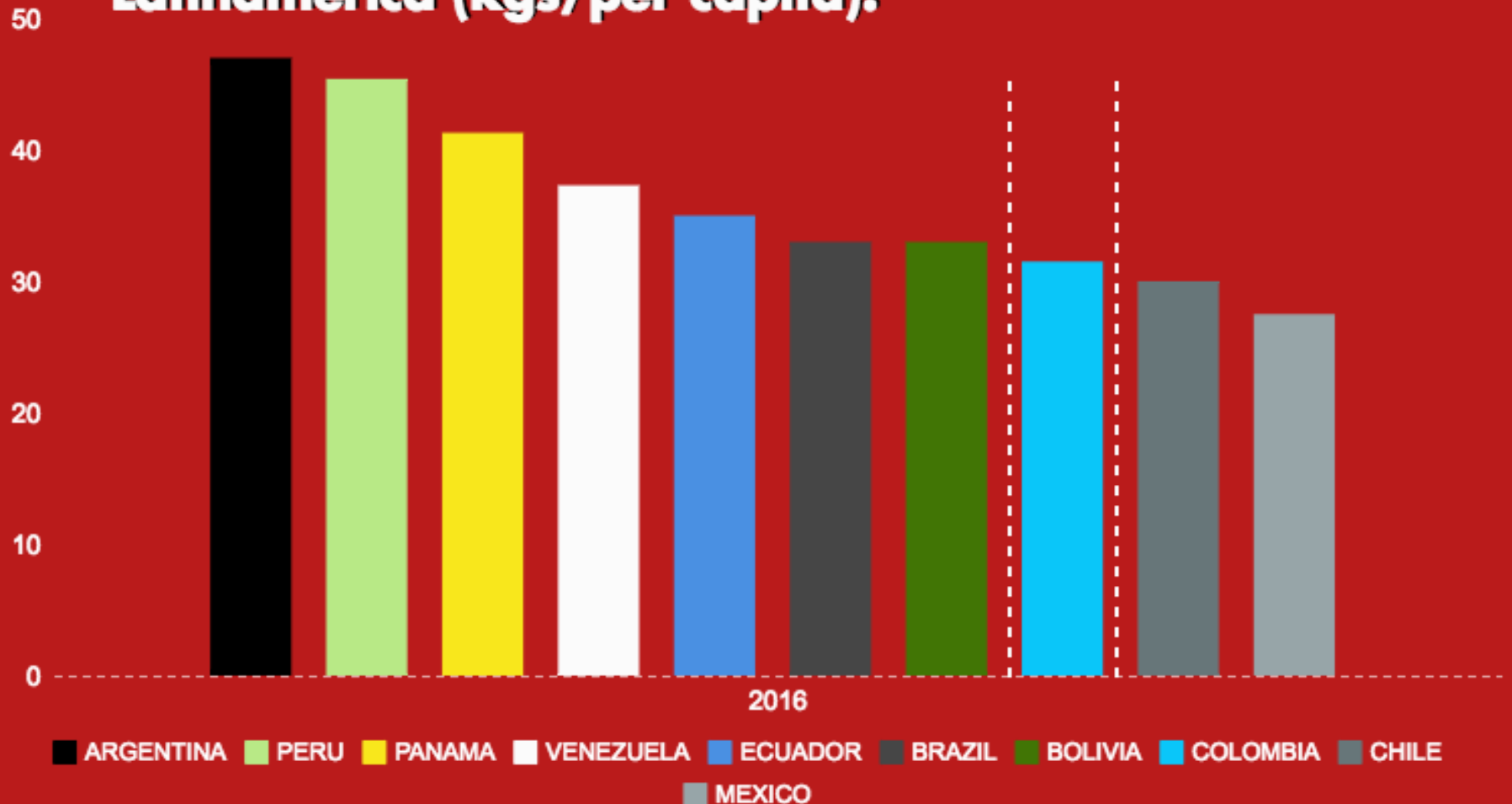
40.1 kgs

60.1 kgs



...BUT IT'S LAGGING BEHIND COUNTRIES WITH SIMILAR INCOME

Top 10 chicken consumers in Latinamerica (kgs/per capita):



THE VALUE OF POULTRY PRODUCTION IS ONE OF THE HIGHEST IN COLOMBIA



POULTRY
\$5.5 Billion



**SUGAR
CANE**
\$0.5 Billion



RICE
\$0.6 Billion



CORN
\$0.3 Billion



BANANAS
\$0.4 Billion



PALM OIL
\$0.8 Billion



COFFEE
\$1.8 Billion



FLOWERS
\$1.0 Billion



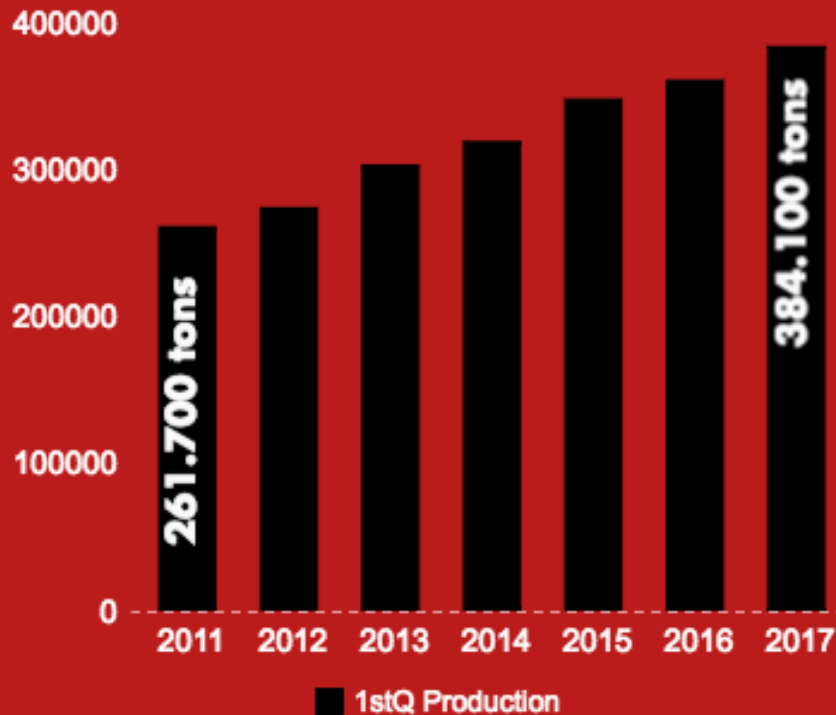
PIG MEAT
\$0.9 Billion



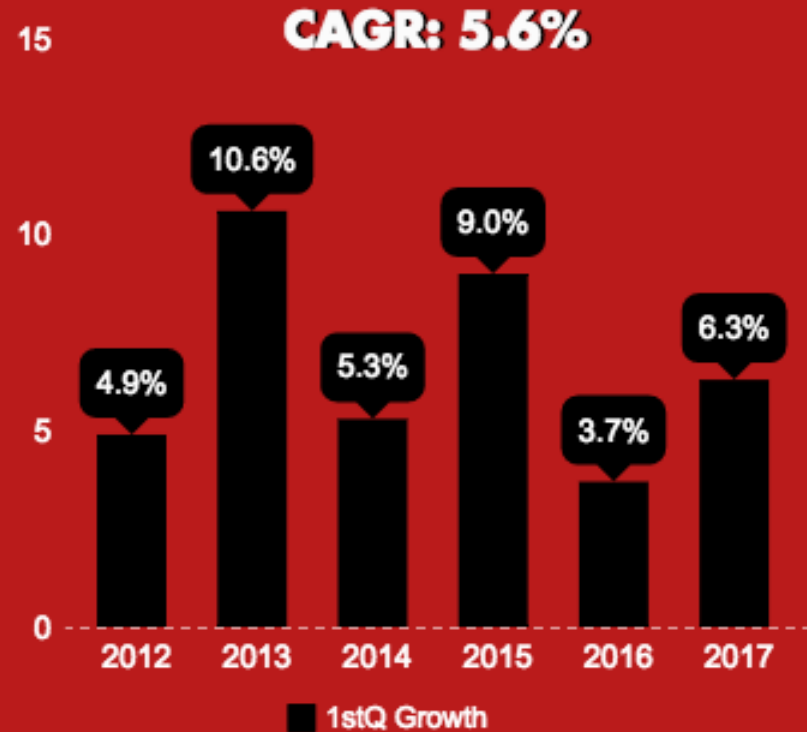
3. Challenges and opportunities

GROWTH IN THE 1ST QUARTER CONFIRMS OUR EXPECTATIONS

Meat production reaches 384.100 tons in the 1stQ
The highest in history

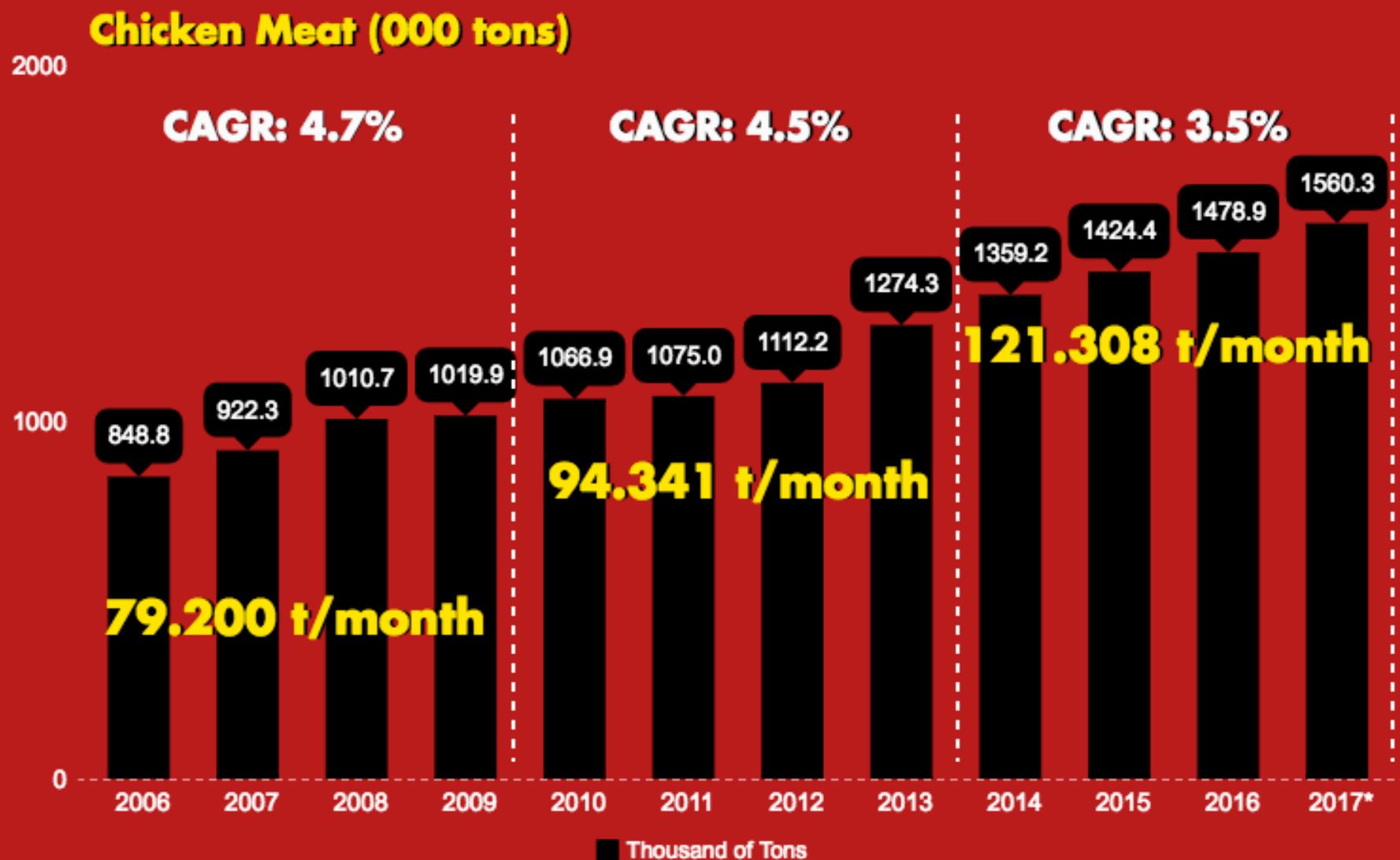


Production grew by 6.3% in the 1st Q. A solid pace YoY basis



OUR INDUSTRY REMAIN BULLISH

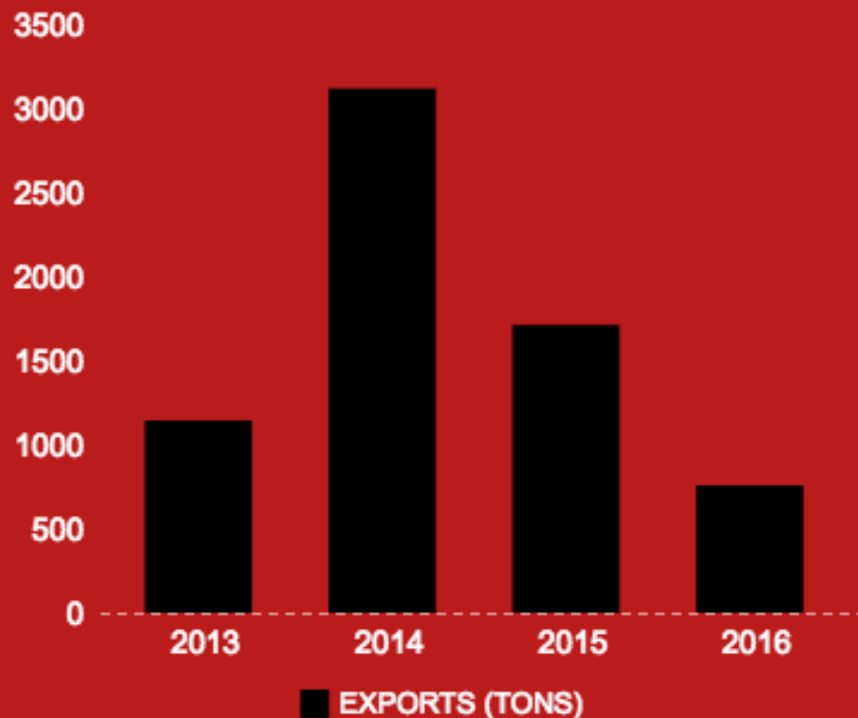
Installed capacity is reaching its limits. New investments are required to match future demand



COLOMBIAN CHICKEN TRADE IS NOT SIGNIFICANT, SO FAR...

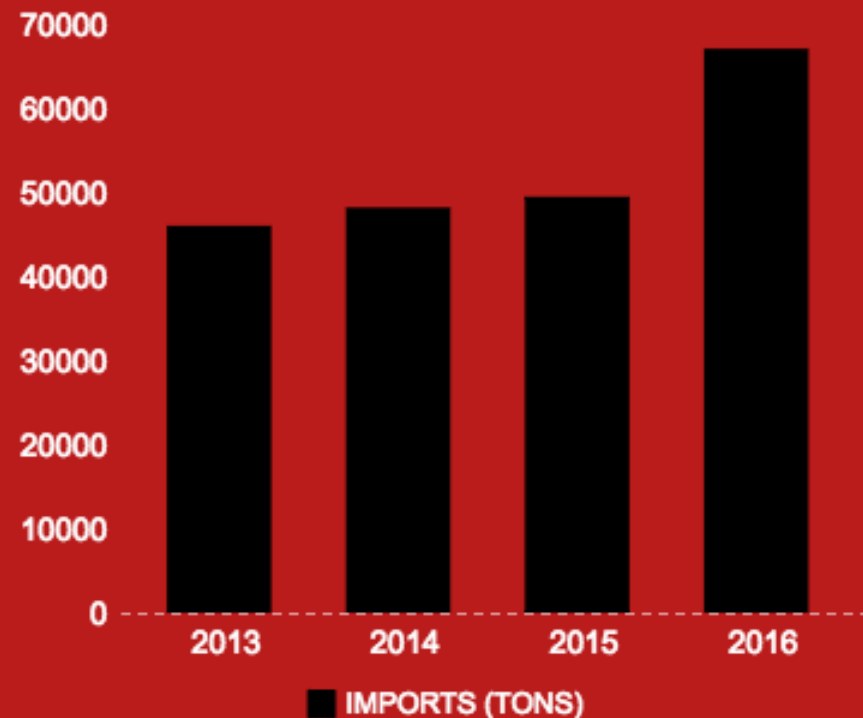
EXPORTS

**MOSTLY TO ASIAN MARKETS
PARTICULARLY CHICKEN PAWS
OCASSIONAL BUSINESS**



IMPORTS

**MOSTLY FROM THE USA
TRQ FOR CHICKEN LEG QUARTERS
AUCTION SYSTEM (4 PER YEAR)**



THANK YOU!



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