



Pork production in a global perspective

Challenges and Opportunities

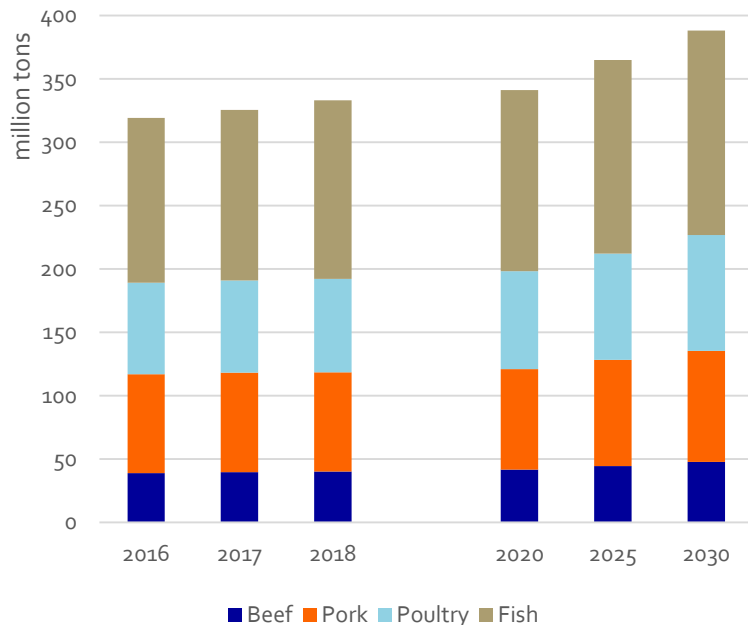
Matz Beuchel, january 2020



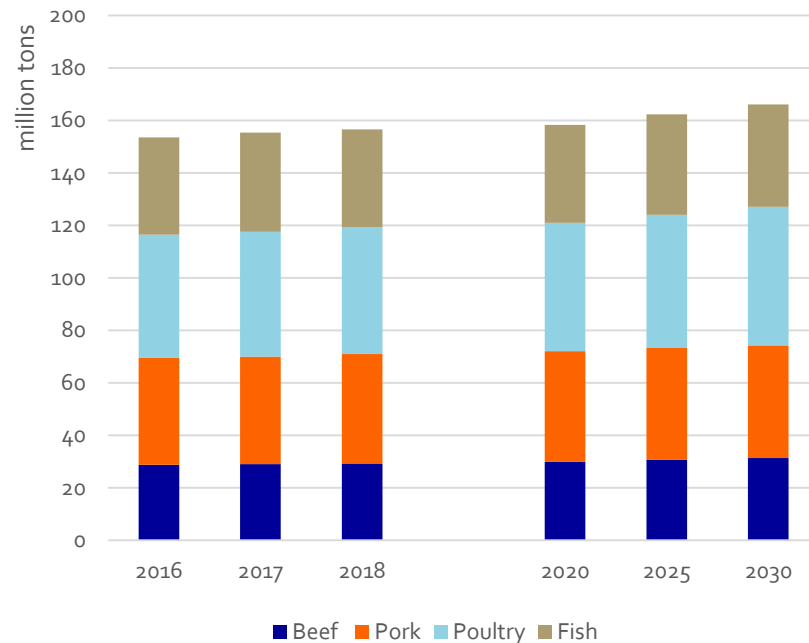
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Consumption outlook 2030

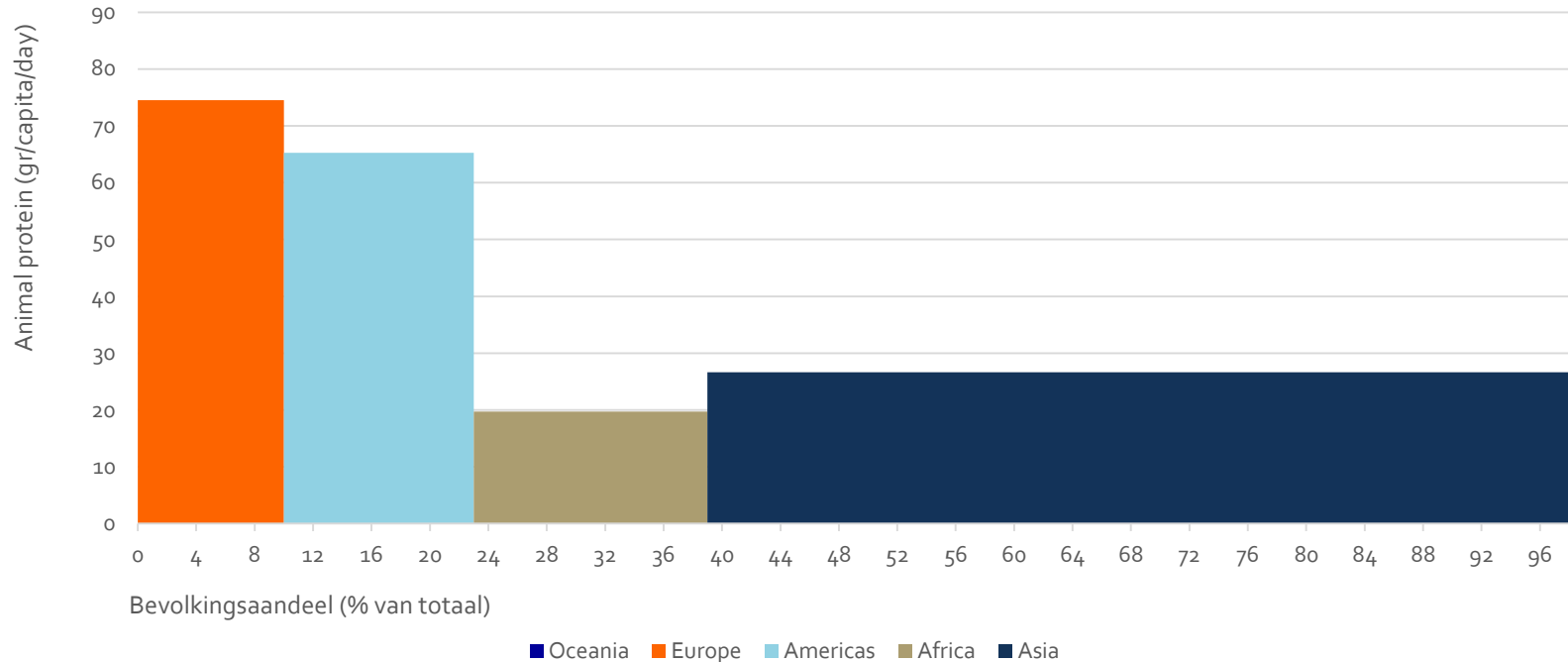
Rising demand in developing countries



But also matured markets show growth



Protein consumption development in Asia has global significance



Geopolitics &
biosecurity shaping
trade

Critical consumers
challenging value

Innovation &
Technology offering
potential

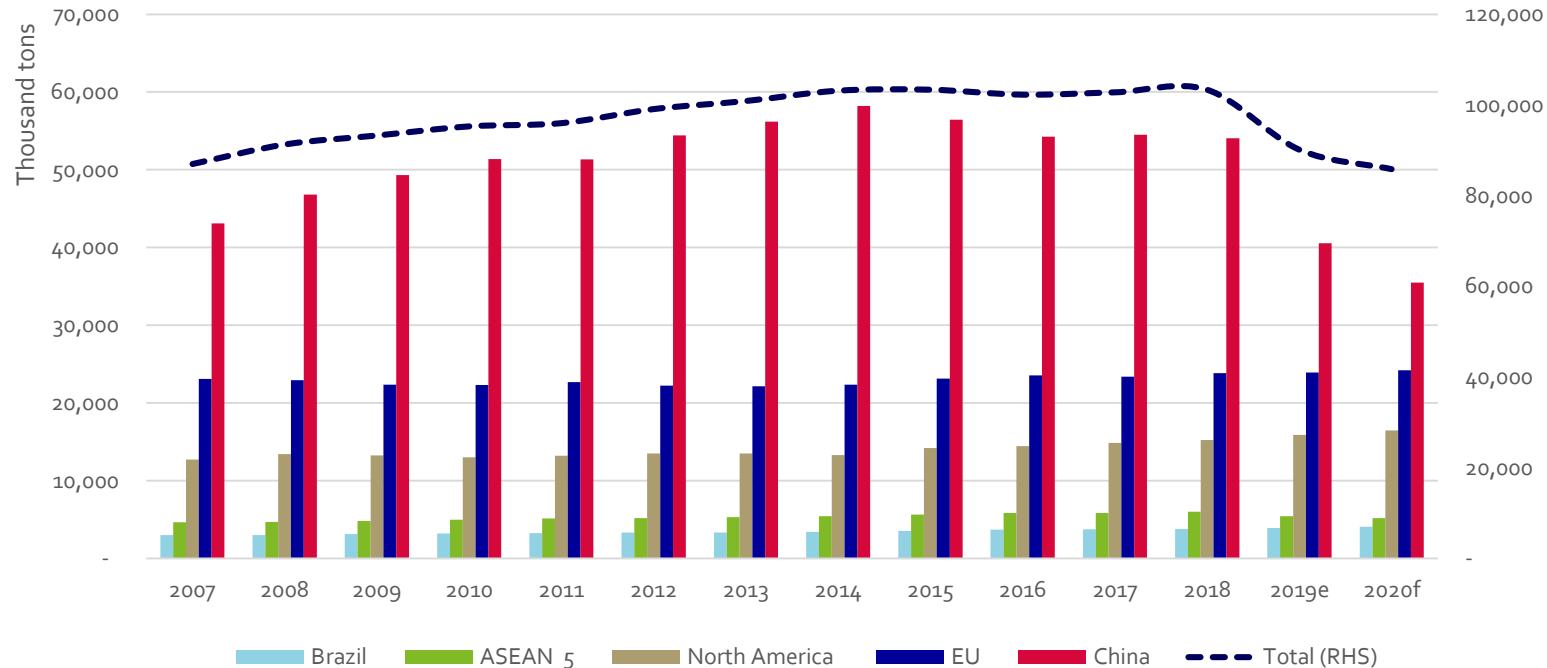


Pork will remain on the menu

Production outlook dominated by ASF

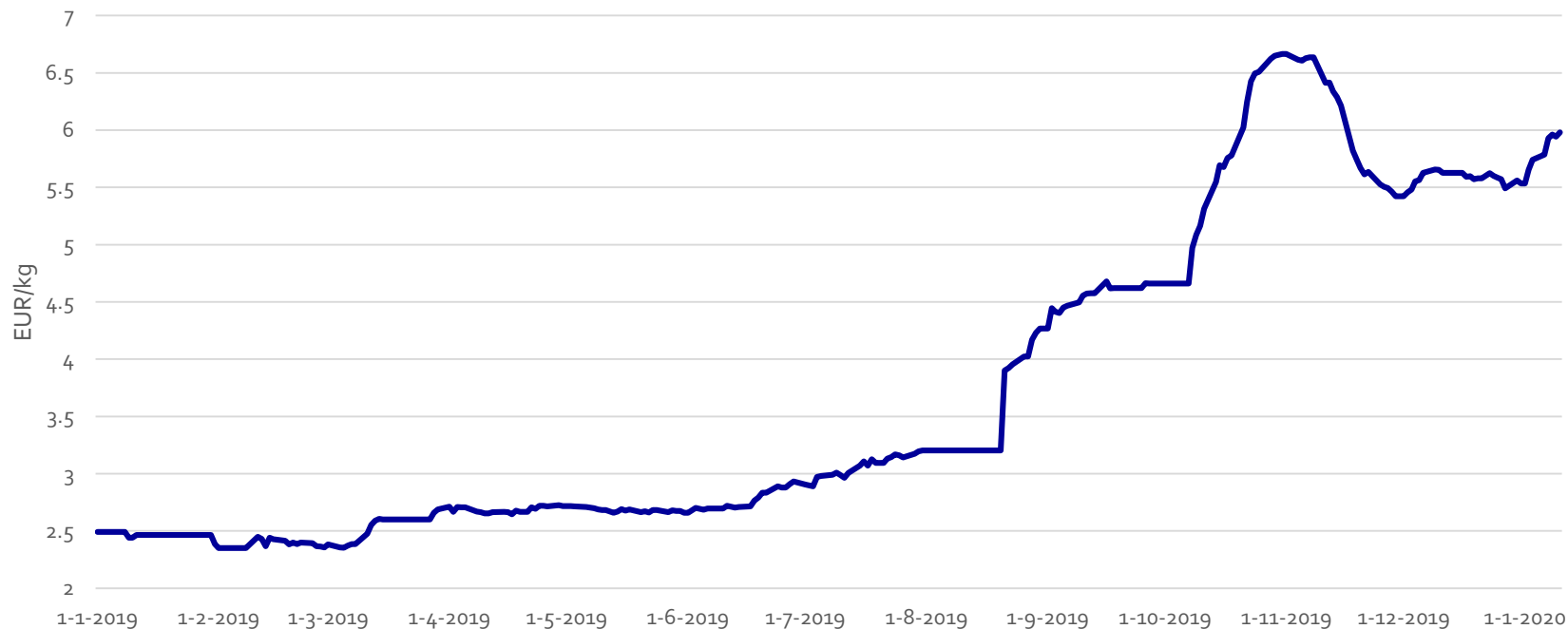


Recovery of Chinese production will take years



Unprecedented disease outbreak in Asia

Steep increase of pork price in China

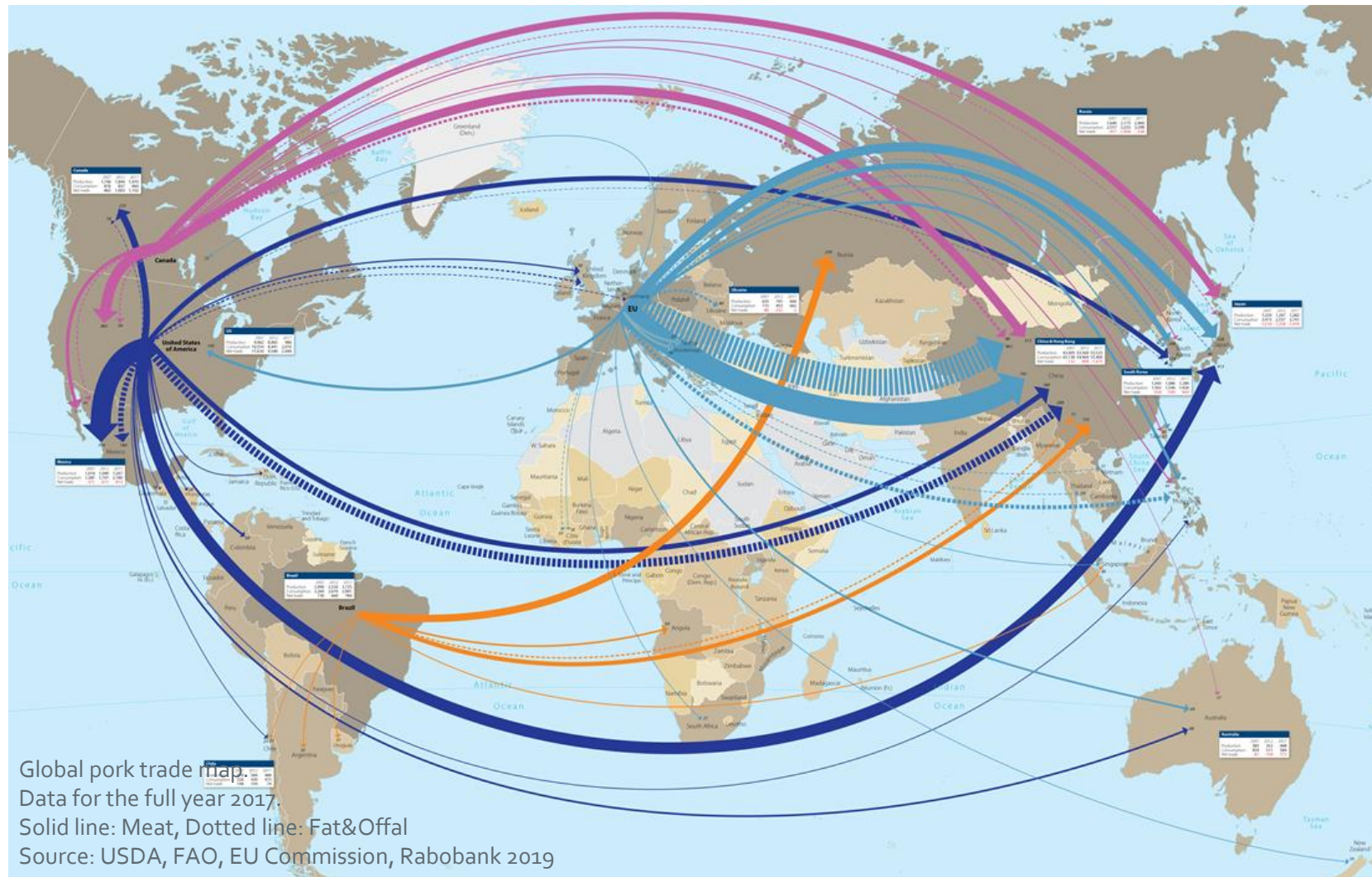




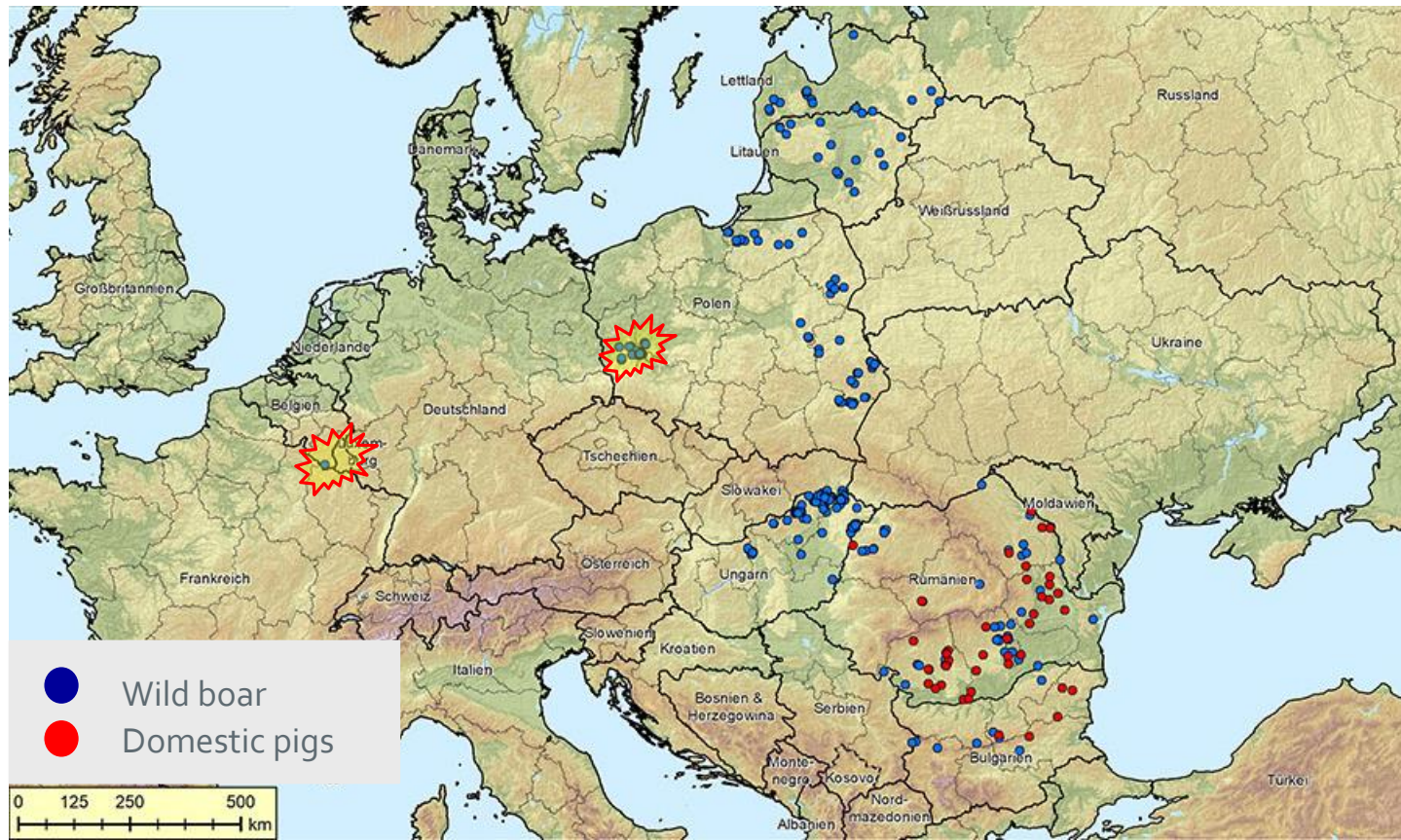
...with global trade effects



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ASF outbreaks continue in Europe

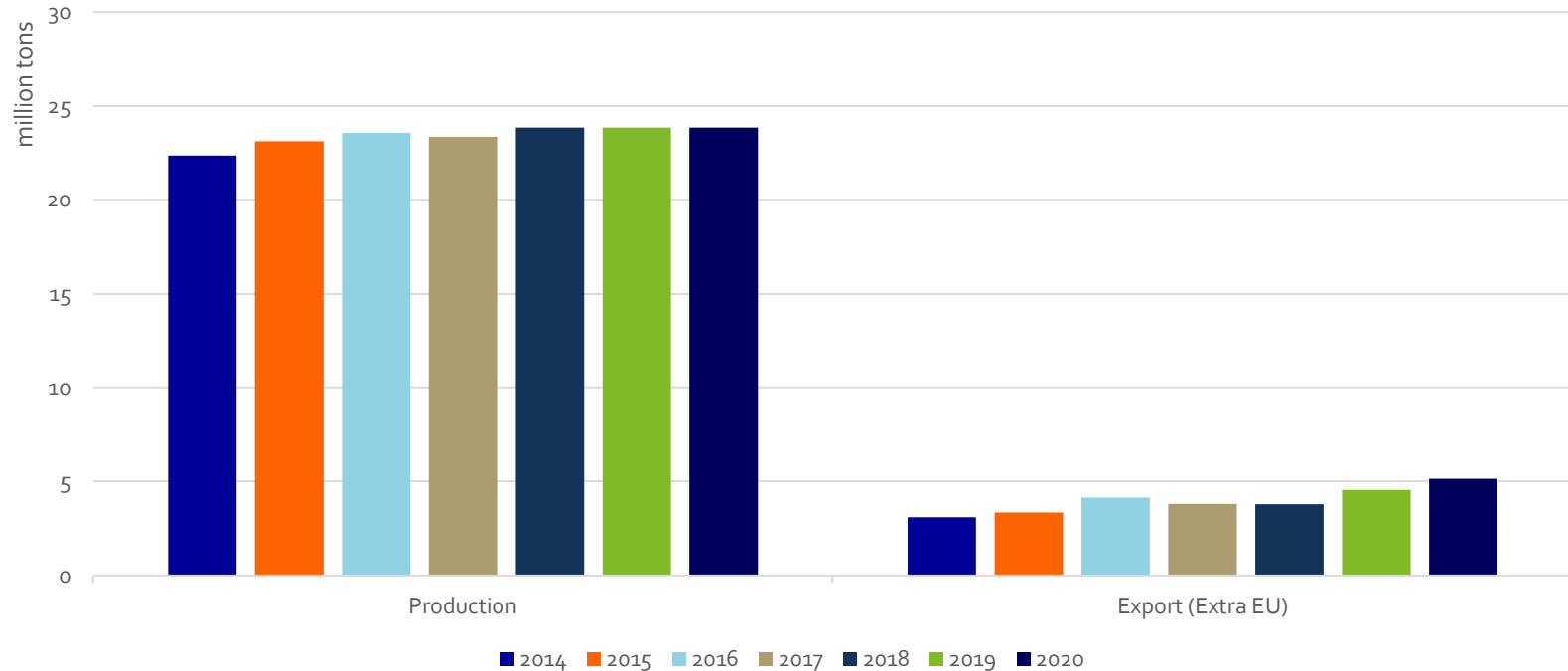


Source: FLI; Rabobank 2020

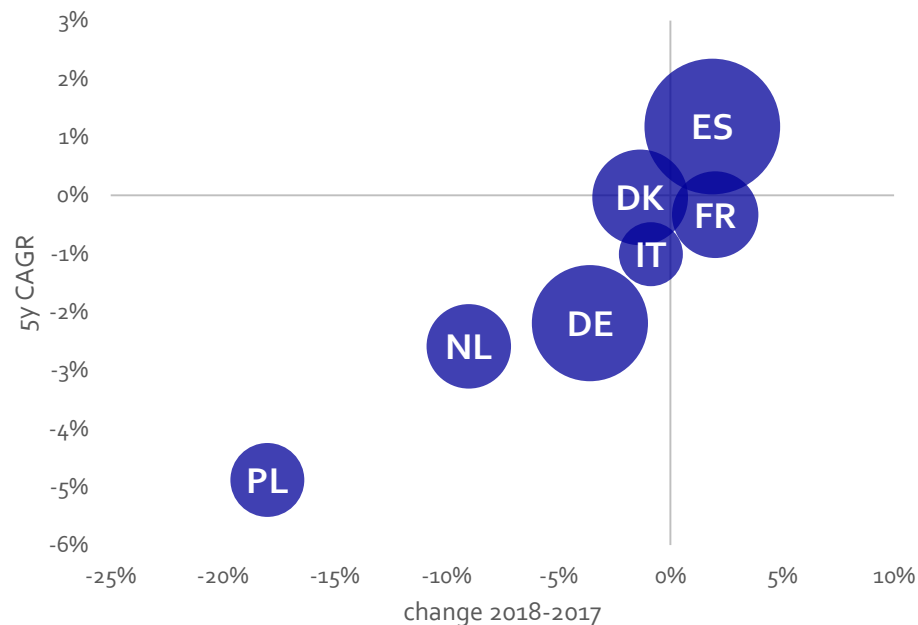
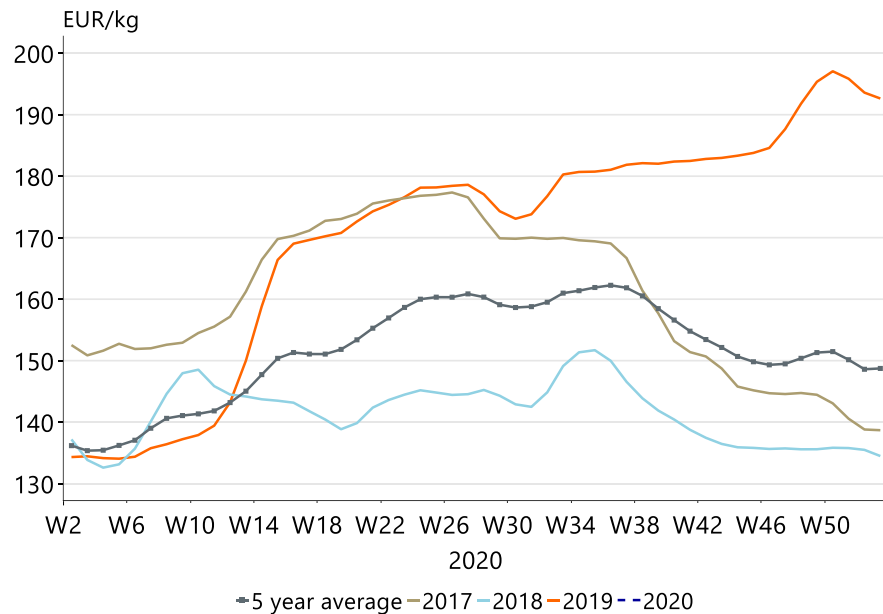
EU: Small growth and increasing exports



Regulatory pressure and ASF main drivers



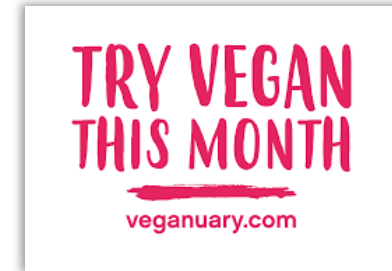
Strong prices and regional differences in Europe



What's cooking?



Re-thinking meat consumption has become a global trend



The growth of alternative protein space is sustained by strong drivers at the consumer level



Drivers for the growth of alternative proteins are well understood



Sustainability



Animal welfare



Health and wellness



Uniqueness & novelty



Adaptability

But barriers also exist for their further growth



Questionable nutrition



Taste



Supply chain issues



Price



Other healthy proteins

Innovation gaining broad attention globally

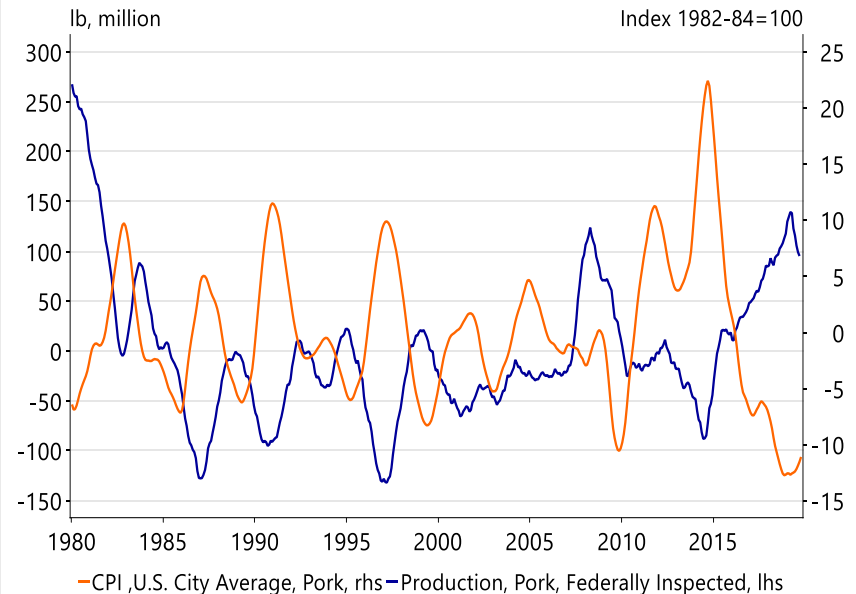


Boehringer Ingelheim investeert in hoestmonitor

Blockchain voor Frievar varkensvlees is een feit

Alibaba Brings AI To Pig Farming And Retail Tech On The Rise

Stay ahead using on farm data



Conclusions



ASF will remain
dominant topic

Politics like US-China
Trade War
& Brexit drive risks

European consumption
perspective driven by
authenticity, trust and
convenience

Technology offers
untapped potential

Concerns on sustainability
and health are mounting



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