



AGRIBUSINESS

Uruguay produces
food for

30 million
people

but could feed

50 million
people





AGRIBUSINESS

Why Uruguay?

Reliable food



Natural production with open-air breeding, free of hormones and antibiotics and with a **traceability system** by law applied for more than a decade to 100% of livestock.

Expanded market access



Its strategic location and logistical development allow access to a **market of more than 400 million people**.

Research and development



Space for the development of R&D activities and capacity for the development of new products in a **country of reference in quality production**.

Adaptability and response



Ability to adapt and respond to changes and the needs of the most demanding markets.



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Dynamic and significant sector in the economy

- 11% of GDP comes from agricultural sector.
- Average annual growth of 2% over the last decade.
- 20% of total projects with tax incentives.
- Represents 80% of exports of goods.



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Agribusiness innovative evolution

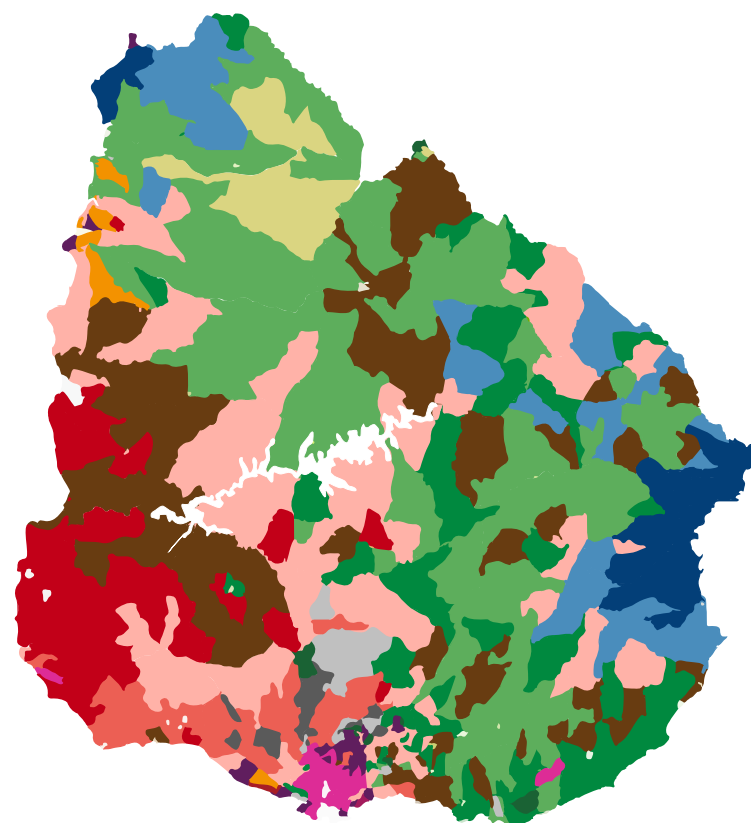
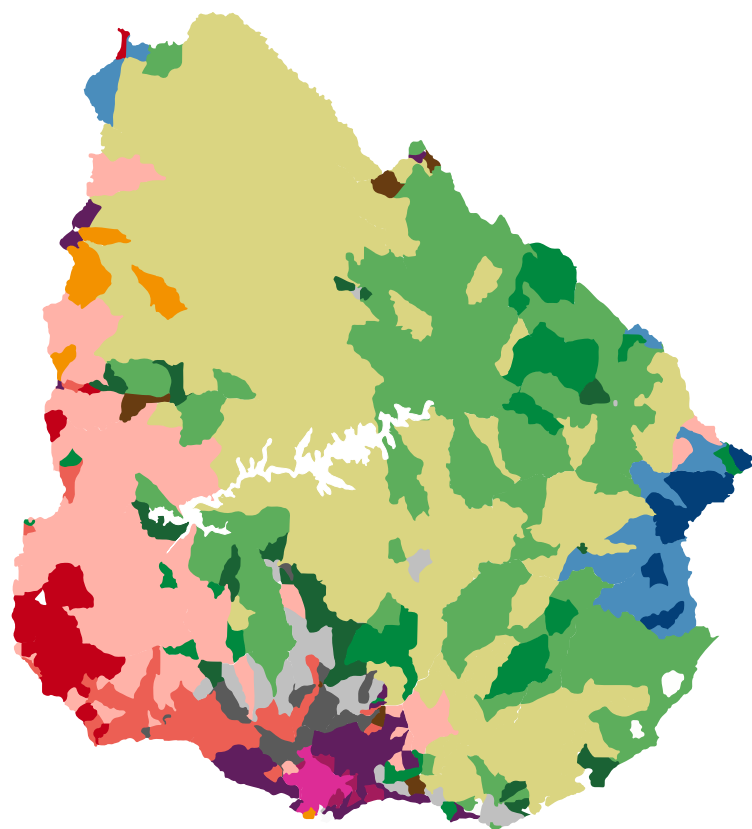
Livestock farming country

1990

Diversified country

2.3 million of improved hectares

2011



Livestock 40%

- Sheep: **3%**
- Livestock with 10% or less of improvements: **27%**
- Livestock with more than 10% of improvements: **9%**
- Dairy: **0%**

Agriculture 30%

- Agriculture: **8%**
- Agriculture-Livestock: **19%**
- Agriculture-Dairy: **3%**

Forestry 15%

- Forestry: **15%**

Rice production 11%

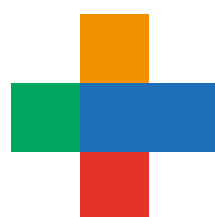
- Rice production: **4%**
- Rice production - Livestock: **7%**

Dairy 2%

- Dairy production: **1%**
- Dairy production - Livestock: **1%**

With intensive agriculture 2%

- Citrus fruit production: **1%**
- Vineyards: **1%**
- Vegetable production: **0%**
- Vegetable and fruit production: **0%**



diversified
productive
sustainable

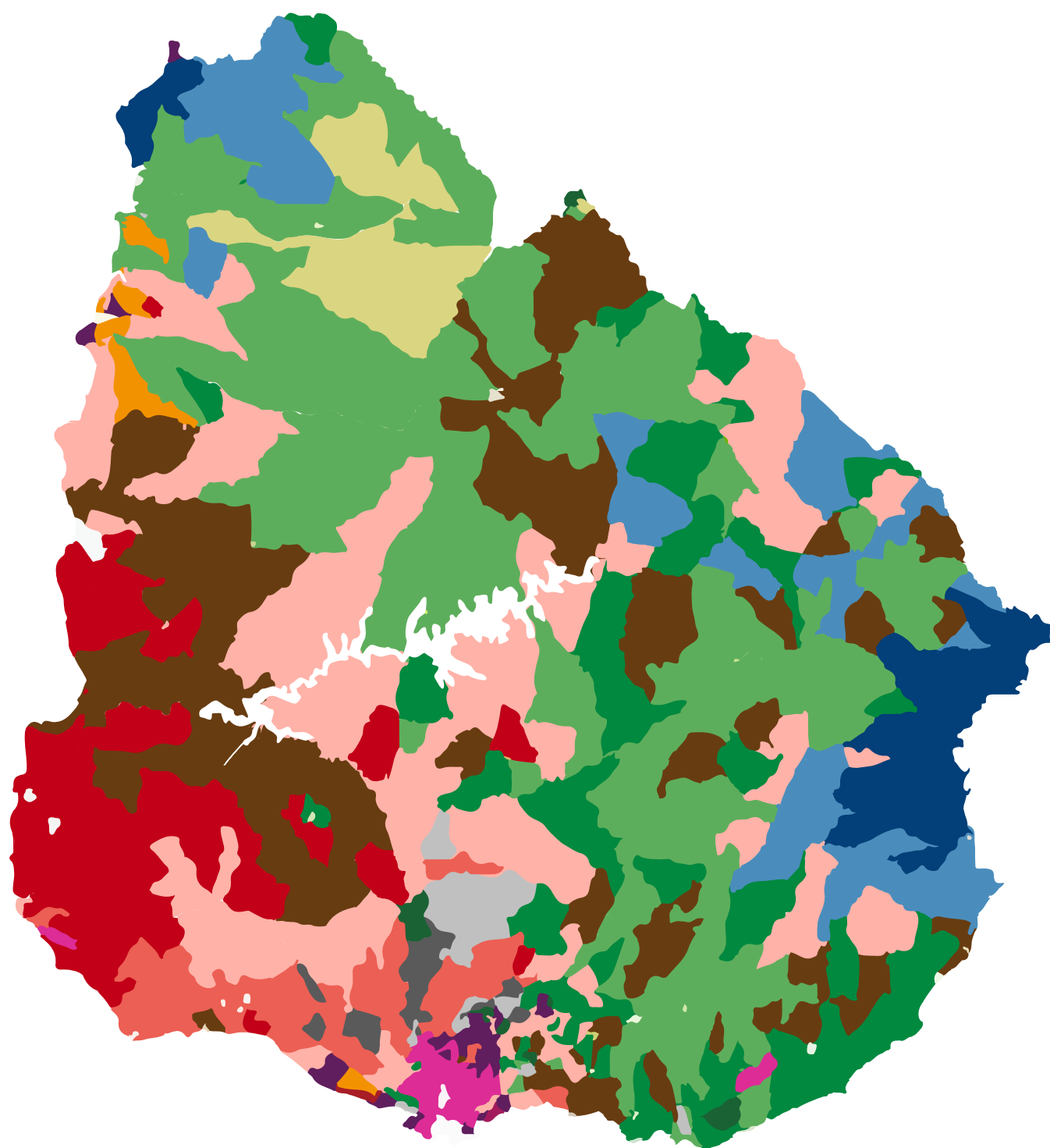


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Agribusiness innovative evolution

Diversified country

2011 - 2.3 million of improved hectares



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diversified
productive
sustainable



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Industrial companies that have chosen Uruguay

North America



Europe



Asia



South America



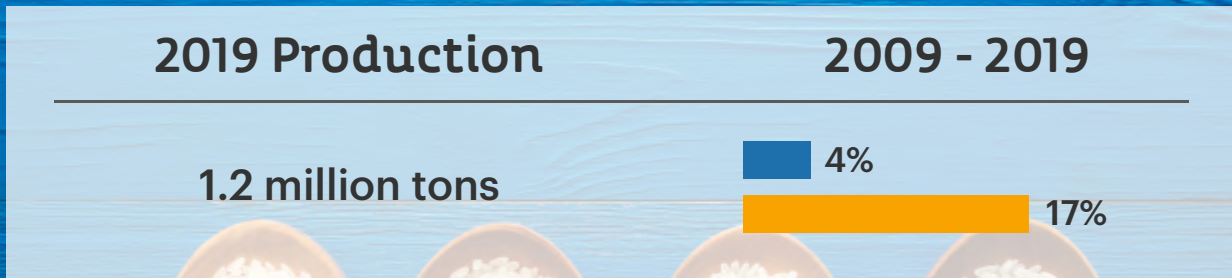
Oceania



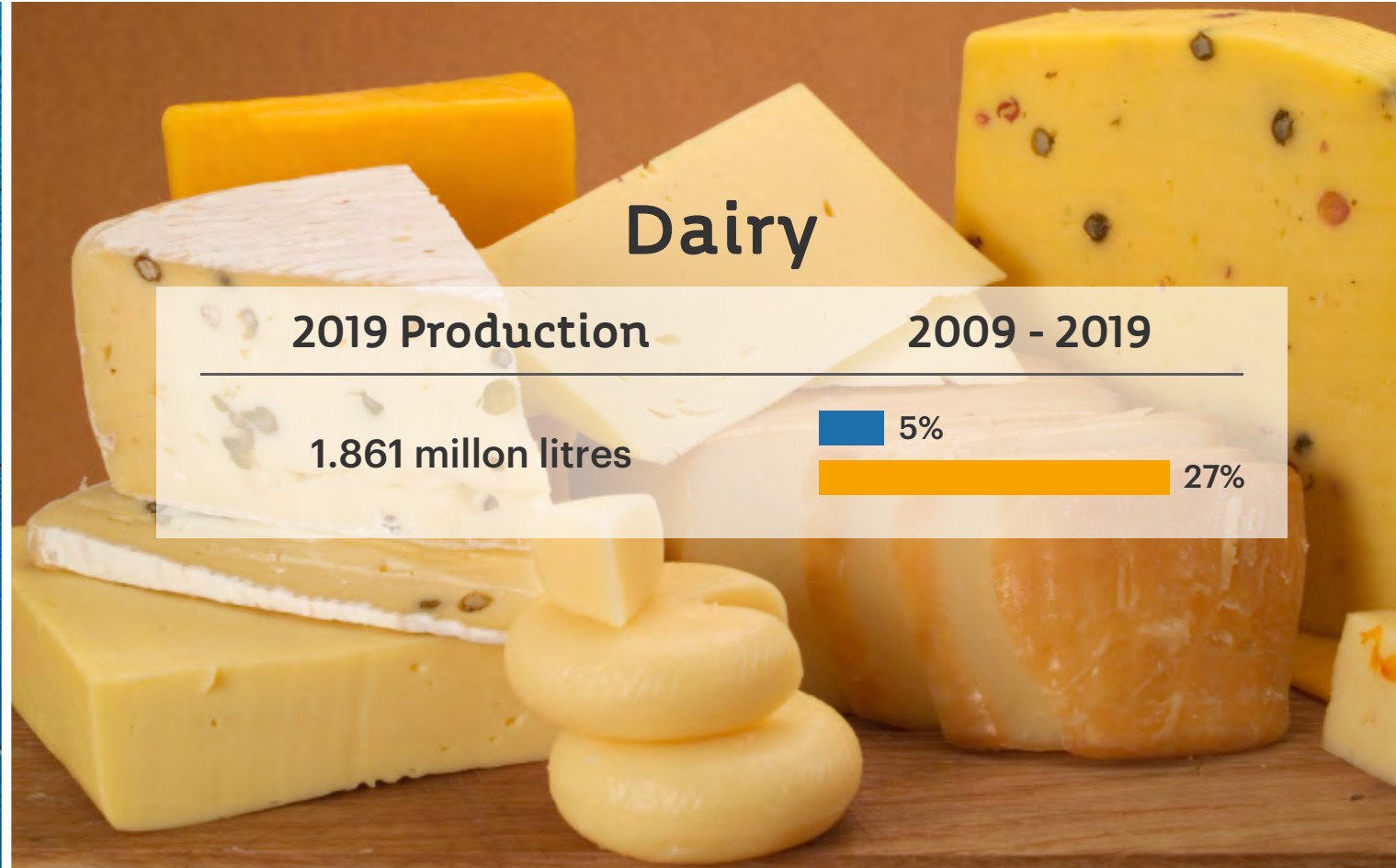
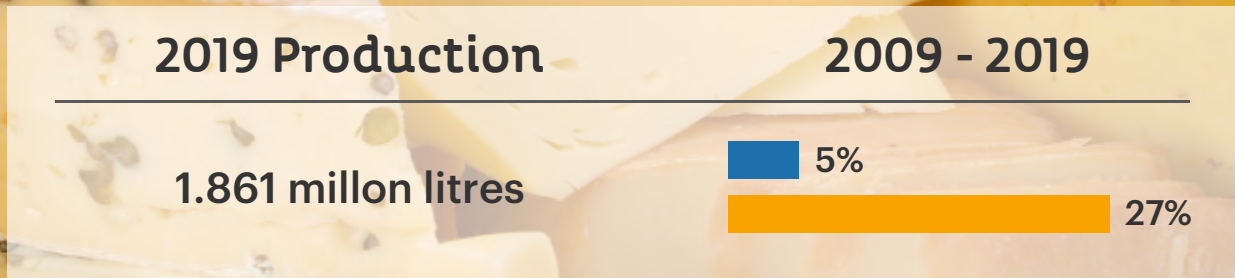


Dynamic and productive sector

Rice



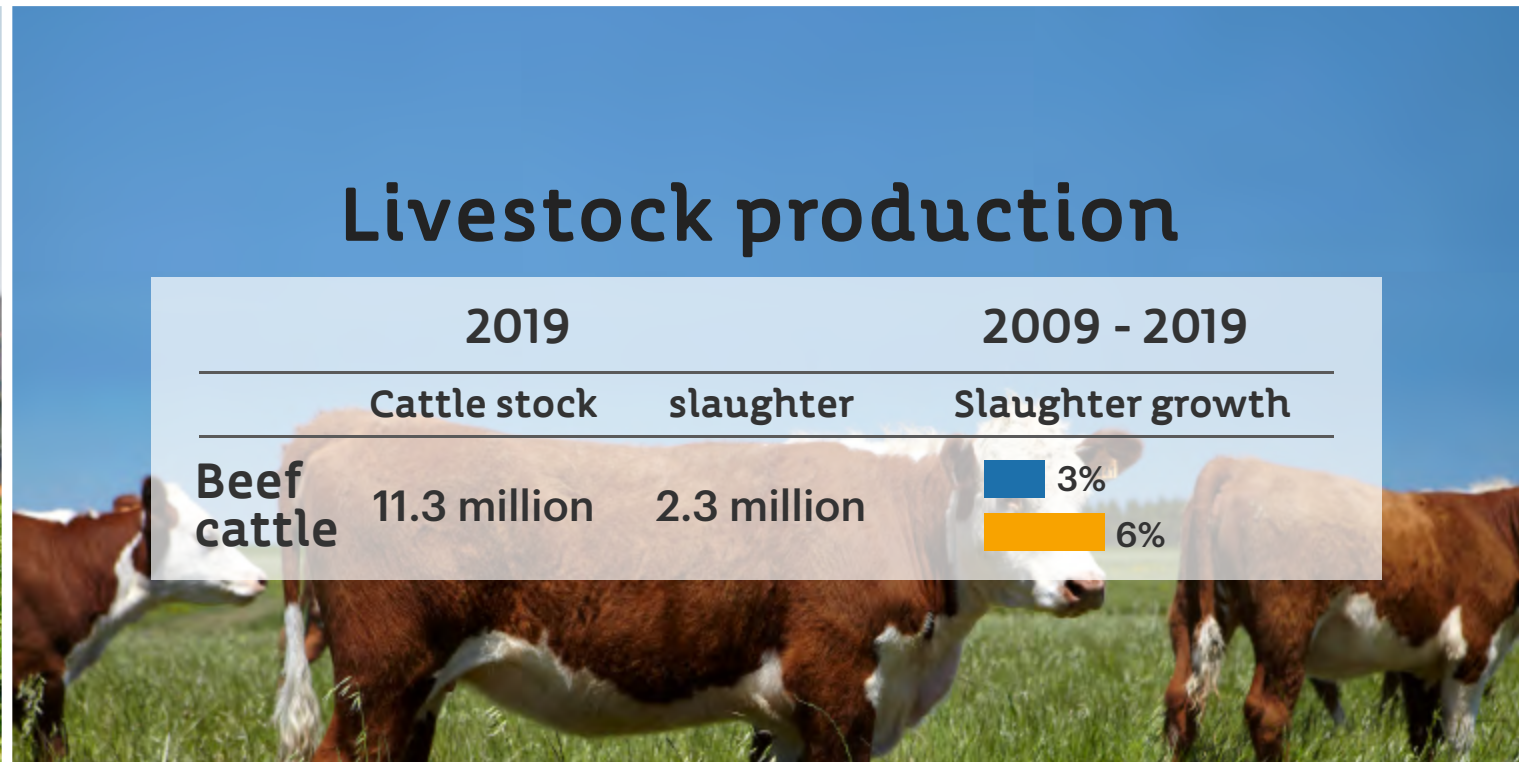
Dairy

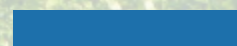



Soy



Livestock production



 production growth / rise in heads slaughtered
 productivity growth



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Uruguay, a global supplier

Export of goods

18%
Cellulose

8%
Dairy products

18%
Other agro

6%
Soy

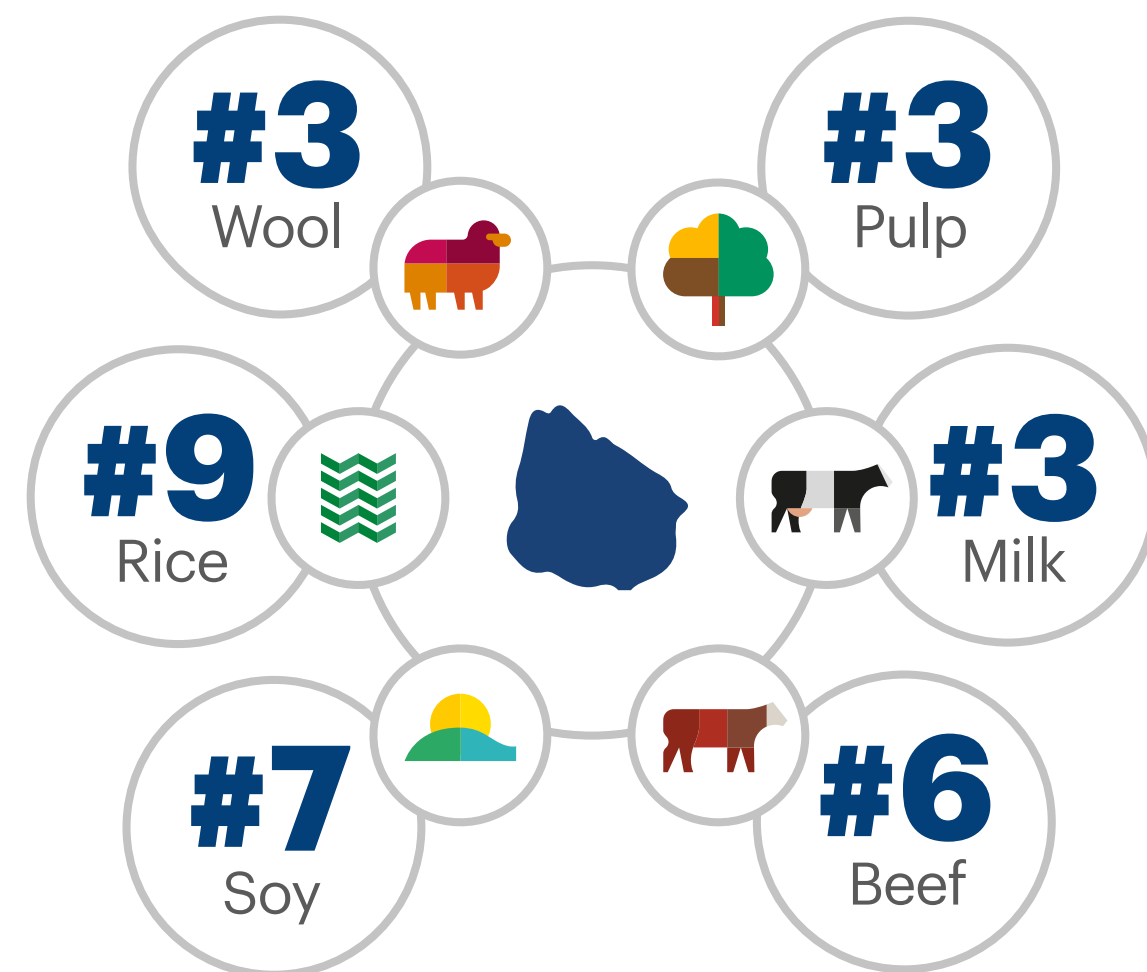
5%
Wood

20%
Other goods

18%
Beef

4% Rice

3% Meat by-products



Sources: Uruguay XXI based on data from the National Customs Authority, Nueva Palmira Free Trade Zone and Montes del Plata/OPYPA-UNASEP (Office of Agricultural Planning and Policy, and Private Sector Support Unit, respectively).



Market diversification

NORTH AMERICA

- United States 7%
- Mexico 4%
- Canada 0,4%

11%

BEEF
CELLULOSE
WOOD AND BY-PRODUCTS

EUROPE

24%

- Netherlands 7%
- Italy 4%
- Turkey 3%

CELLULOSE
BEEF
LIVESTOCK

ASIA AND MIDDLE EAST

32%

- China 26%
- Israel 1%
- IraK 1%

BEEF
CELLULOSE
SOY

SOUTH AMERICA

24%

- Brazil 12%
- Argentina 5%
- Paraguay 2%

DAIRY PRODUCTS
RICE
MALT

AFRICA

4%

- Algeria 2%
- South Africa 1%
- Nigeria 0,2%

DAIRY PRODUCTS
FISH
RICE

