

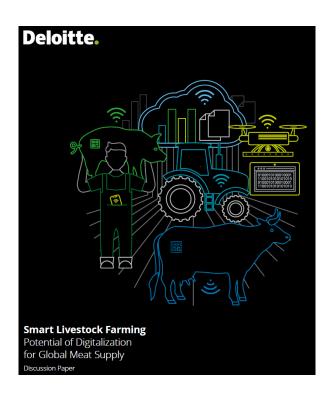


Content

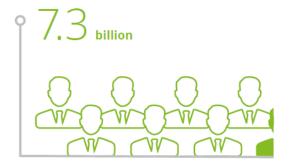
- Framework; sustainability and digitalization
- Two practical cases for business development

KEY CHALLENGES IN THE MEAT PRODUCTION SECTOR

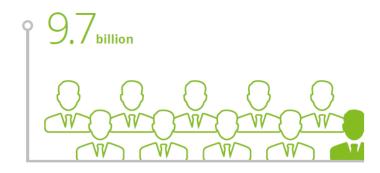
Increases in global population welfare are expected to lead to an increase in meat from 334 million tonnes* in 2050.



Global population will increase almost 40% by 2050



From 7.3 billion people in 2015 ...



... to 9.7 billion in 2050

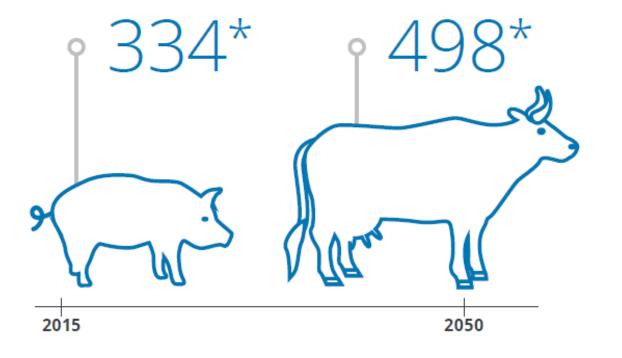
Global per capita income will almost double by 2050



From \$15,628 in 2015 ...

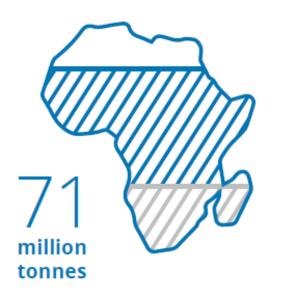


... to \$30,333 in 2050

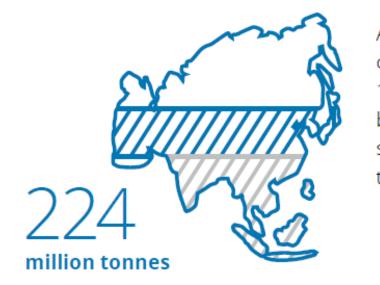


All indicates that consumption will continue to grow until 2050.

Most of this demand growth will come from developing regions, especially Africa and Asia



Africa will increase its meat consumption more than 2.5-fold from 20 to 71 million tonnes by 2050. Per capita consumption will rise from 18 to 30 kg per year.



Asia will increase its me consumption by 50% from 150 to 224 million tonner by 2050. Per capita con sumption will rise from to 43 kg per year.

Deloitte, 2019

- A detailed evaluation of land and water resources, as well as of manure land requirements, showed that the land and water available today will be sufficient at a global level until 2050
- Even under a worst-case scenario, where production remains at current levels and demand for livestock products and crops increases by 70 and 100% respectively, global resources would be sufficient
- However, regional shortages will very likely occur over the coming years and decades as spare land and water is often not readily accessible, located far away from where it is needed, or suffers from other constraints such as pollution or past disease outbreaks
- Therefore, a reduction of land and water use, as well as of manure generation, will be especially important for regions where resource constraints are already apparent today

By available land and water, we can produce what we need, if there are not unexpected events.



Land and water

If global emissions growth continues, GHG emissions will reach 139 Gt in 2100 and the earth's temperature will be 4.5°C above preindustrial levels.

Under business as usual (BAU), GHG emissions would increase from 5.2 Gt per year today to almost 8 Gt in 2050.

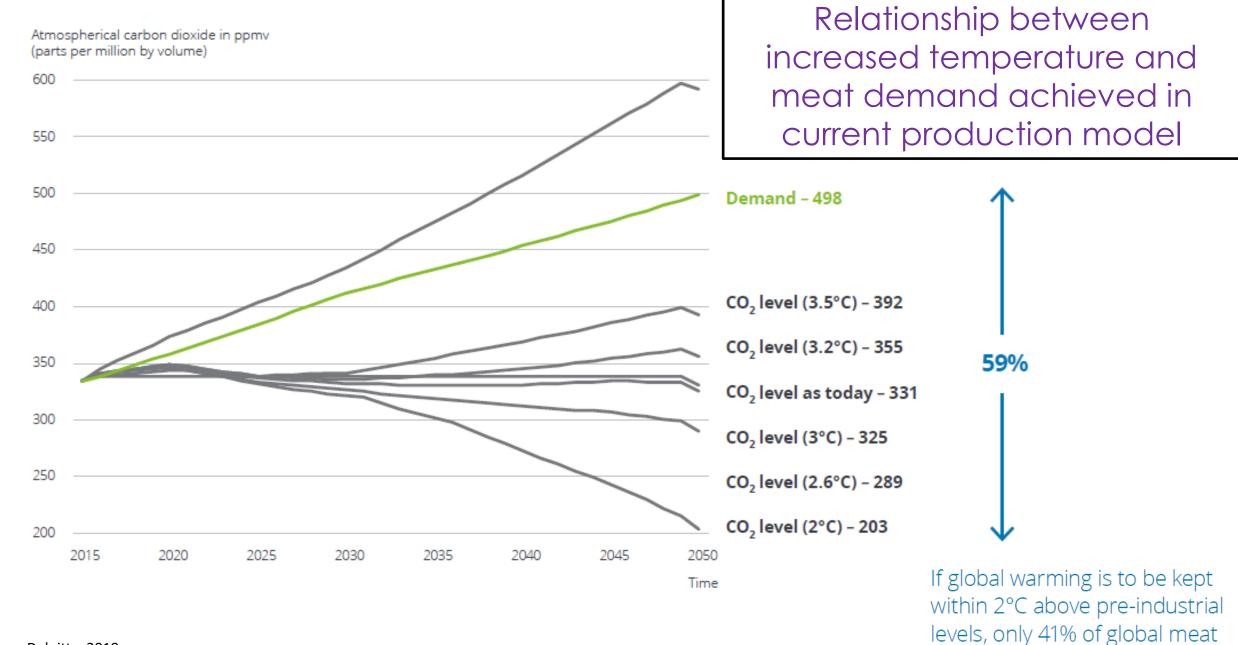
As governments have realised the threat of global warming, agreements have been reached to reduce emissions. The meat sector plays a crucial role in achieving these targets, accounting for almost 10% of emissions.

To keep global warming below 2°C, meat emissions have to be reduced to 3.2 GT by 2050.

But by emissions, we can't

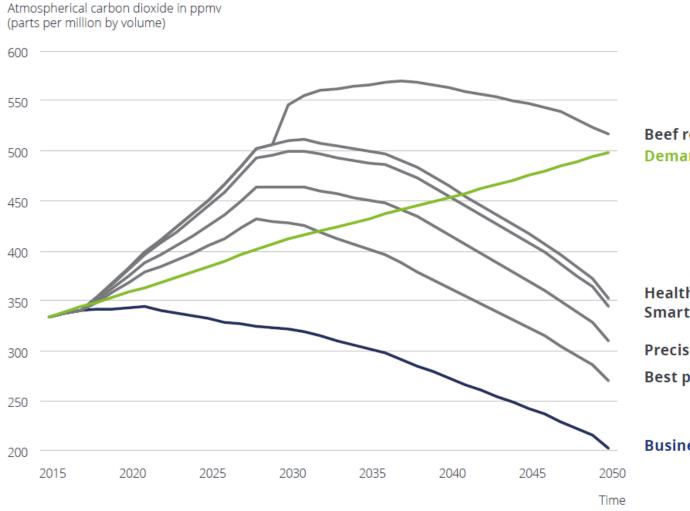


Temperature and GHG



demand can be met by 2050

Solutions are complementary and cumulative



Beef reduction – 516 Demand – 498

Health monitoring - 353 Smart waste management - 344

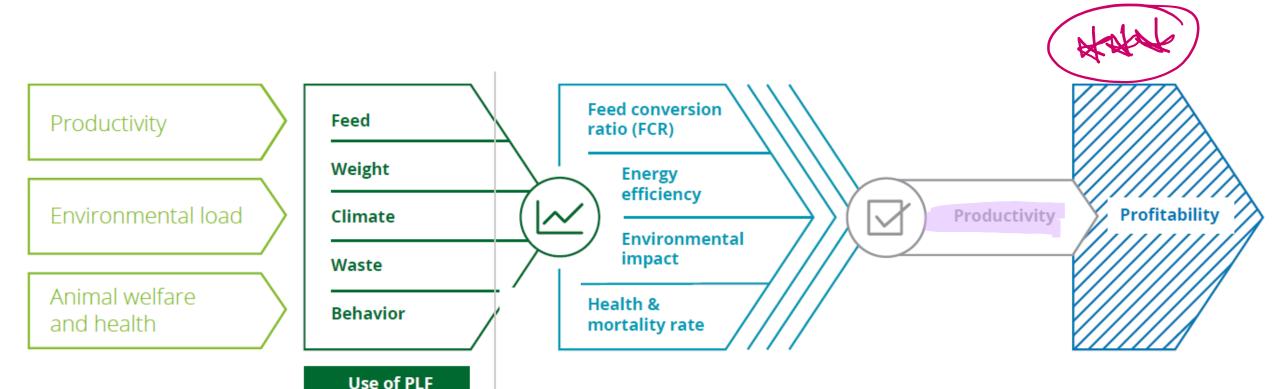
Precision feeding - 310

Best practice roll-out - 271

Business as usual - 203

In the context of a 2°C maximum increase we can only achieve production with cumulative measures.

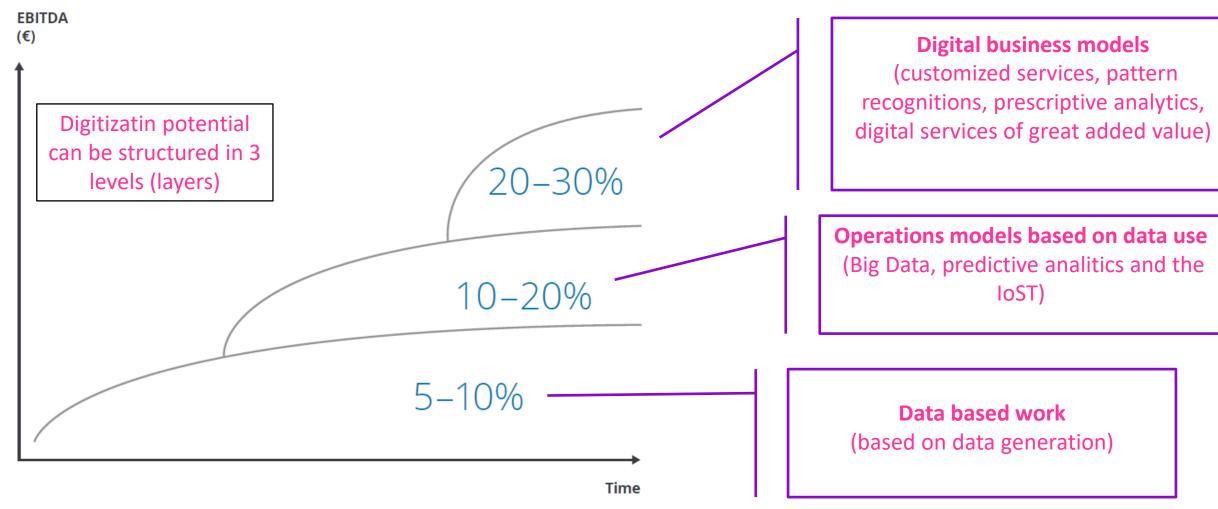
Deloitte, 2019



We will not be able to achieve these goals without technology

Operations can be improved further when farmers also share the information collected across the supply chain with relevant stakeholders, such as veterinarians, slaughterhouses, meat processors, and animal feed producers.

Digital business models improve companies results



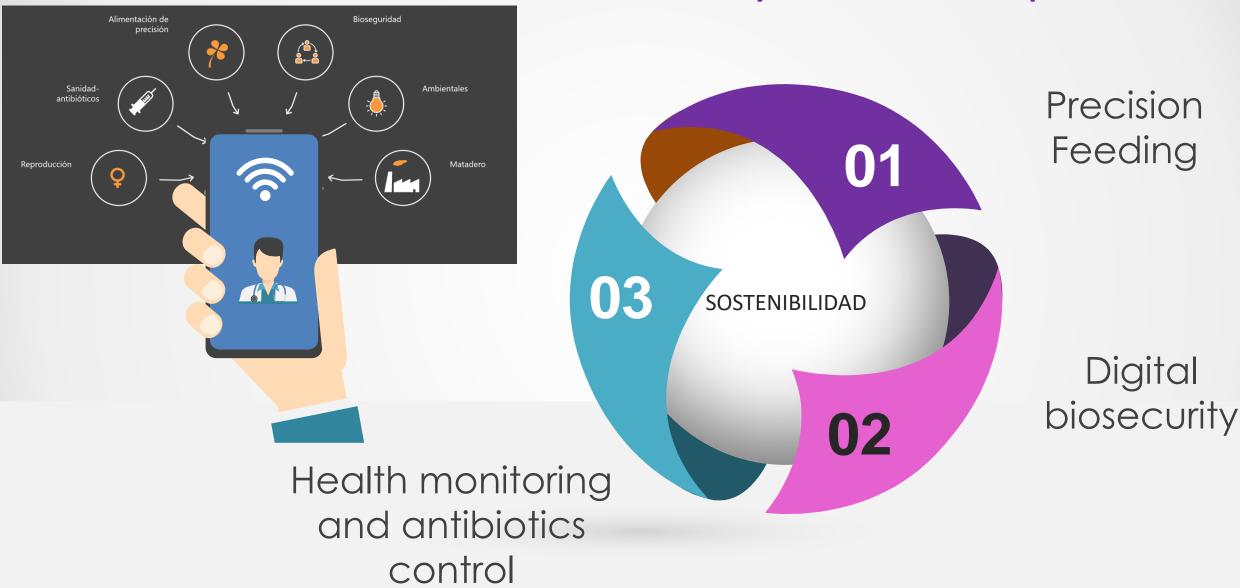


Farm visits are becoming very difficult; remote monitoring makes more sense than ever

Highest biosecurity context ever

COVID-19

Vets as farms advisors are a key role in this process

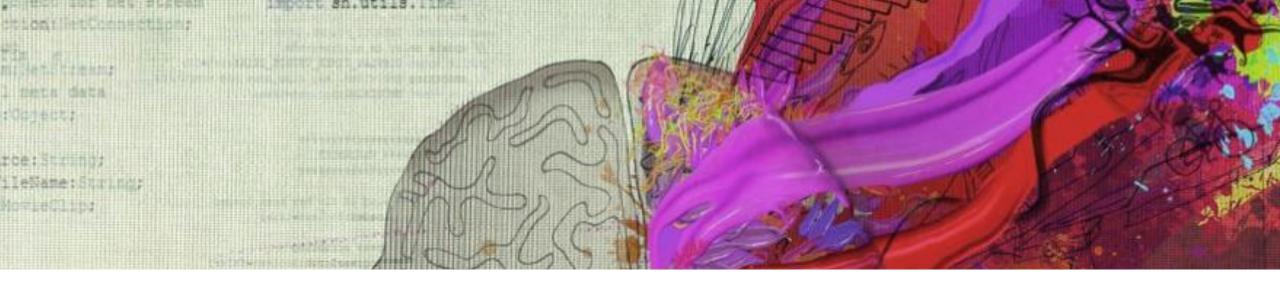




Business case 1

Digital biosecurity control

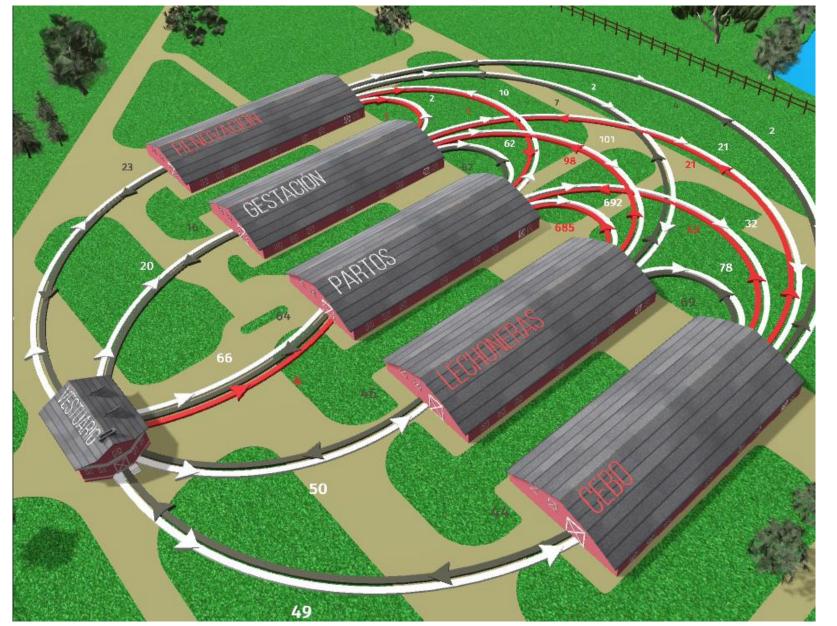


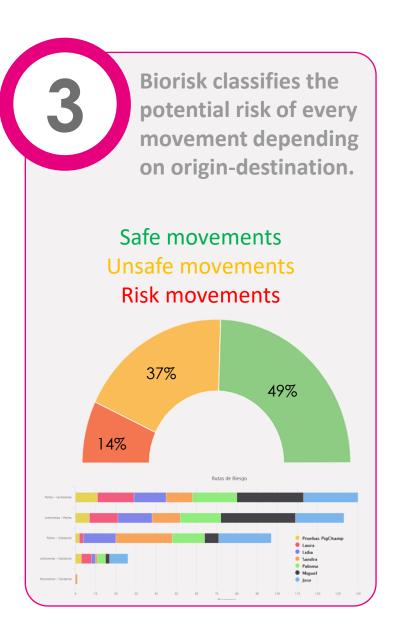


We must move from guessing to facts and that means Working protocol + data



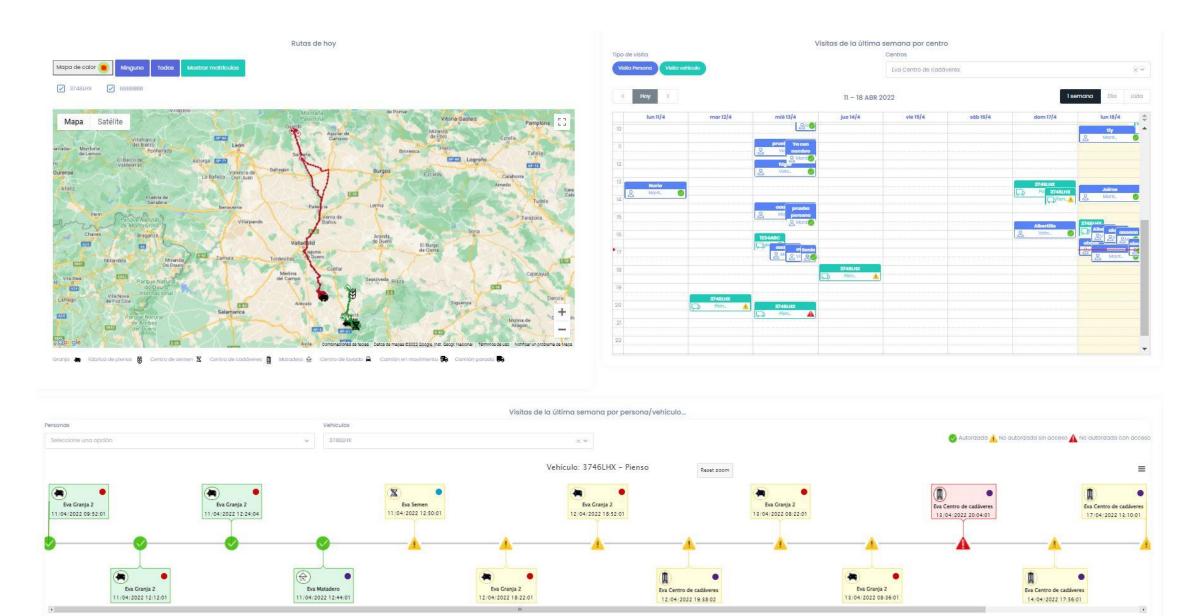
Internal biosecurity control



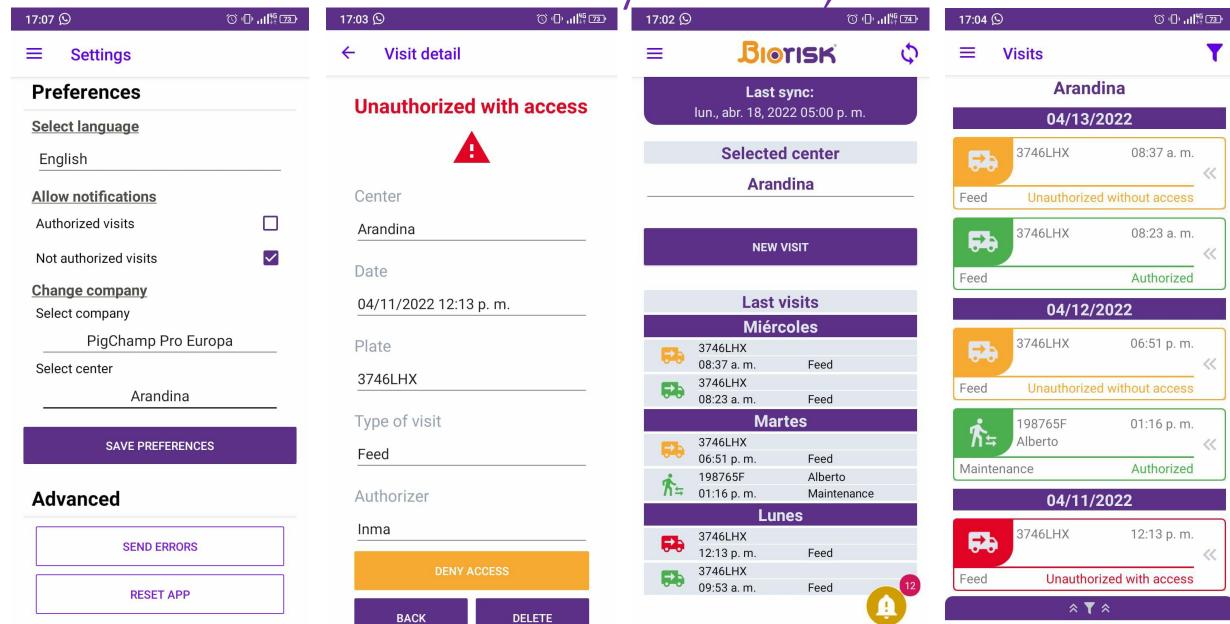




External biosecurity control; visitors



External biosecurity control; visitors





Business case 2

Health monitoring and antibiotics control



Platform for real-time control and monitoring of animal health, including control of the use of medicines and vaccines with continuous online support from veterinary experts.







Health monitoring real-time



Lotes abiertos

97

Notificaciones activas

22



- Active batches
- Progress
- Mortality
- Notifications

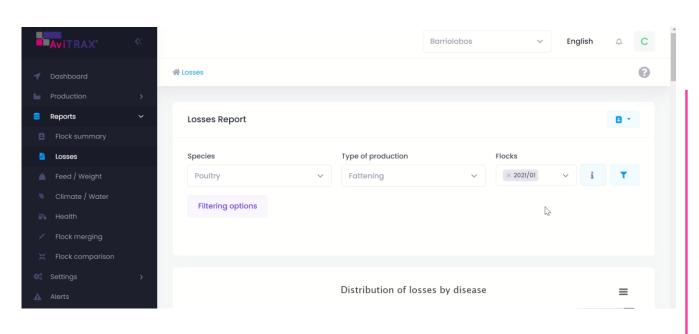
Antibiotic use, total consumption, per animal and per kg of animal entered

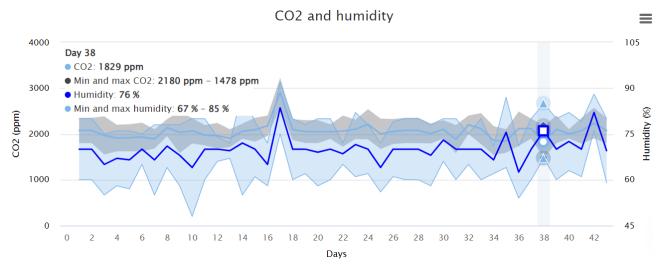
Consumo total y ratio de dosificación

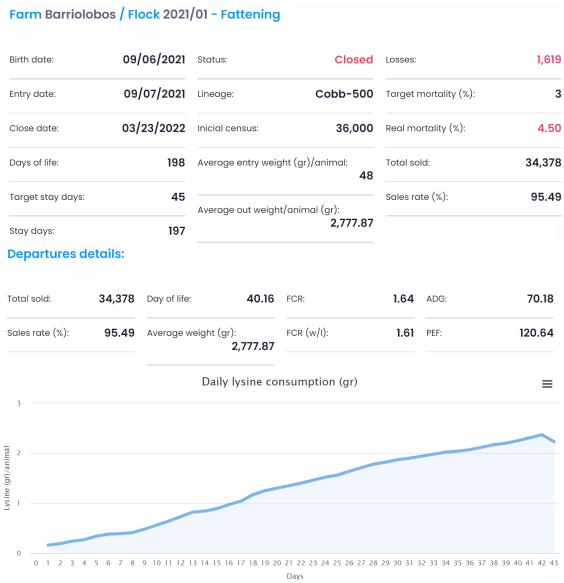
Buscar:							Copiar	CSV	Excel	PDF	Imprimir
Principio activo 🔠	Ratio de dosificación	1) Situación	↑↓ Total c	onsumido	ŢΙ	Total consumido / animal en	trado	ŢΪ	Día med	dio de vi	da 🕕
Enrofloxacina	1.1	Correcto	60670.	0 mg		6.5 mg			37.1		
Gentamicina	0.9	Correcto	5120.0	mg		7.9 mg			42.2		
Marbofloxacino	1.1	Correcto	31500.0	mg		7.5 mg			39.3		
Tiamulina	1.0	Correcto	343246	3.1 mg		173.1 mg			31.1		
Tildipirosina	1.1	Correcto	87032.) mg		13.0 mg			30.5		
Acido clavulánico	0.3	Inframedicado	34380.	5 mg		8.7 mg			34.9		
Amoxicilina	0.4	Inframedicado	232275	.5 mg		19.7 mg			36.1		

- Simple and visual warnings
- Alerts for withdrawal periods

Health and antibiotics control real time







Conclusions

- 1. Sustainability and digitalization are a solid binomial
- 2. We need to set up a reliable remote moniroting of health, production and antibiotics use.
- 3. Veterinarians have a better position than ever having a key role to address these needs in the context of the digital transformation

