

SEMINARIO: TENDENCIAS INTERNACIONALES DE CONSUMO DE CARNE BOVINA, LOS NUEVOS AVANCES EN SU ROL NUTRICIONAL Y LA IMPORTANCIA DE LA CALIDAD DESDE ORIGEN.

Importancia de las tendencias de consumo para los procesos de producción y comercialización sustentable de carne bovina para mercados nacional y de exportación

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Para entender la evolución de los consumidores hay que tener una mirada holística de lo que hacemos



Estudio: ¿Qué es lo más valorado por los nuevos consumidores?

SUSTAINABILITY LEADERSHIP

Importance of Company Practice / Policies in Purchasing Decisions

Respondents indicating "Very Important" (Top Box Score)

Avoids inhumane treatment of animals

48%

+9PP
vs 2013

Provides safe working conditions

45%

+5PP
vs 2013

Tries to reduce waste and pollution

35%

+6PP
vs 2013

Truly cares about communities where it does business

31%

+5PP
vs 2013



La era de los consumidores

AGES OF MODERN HISTORY

Age of
Manufacturing

Age of
Distribution

Age of
Information

Age of
The Customer



Mass production makes industrial powerhouses successful

Global connections & transportation systems make distribution key

Connected PCs and supply chains mean those that control information lead the market

Empowered buyers demand a new level of customer obsession



Evolución de los consumidores

..ya no solo alimentos seguros y saludables..

Los últimos 20 años

- Libre de Contaminación
- Que no enfermen
- Contenido nutricional y alimenticio focalizado en menos grasas, menos calorías , menos sodio, mayor fortificación

HOY y los próximos....

Los consumidores consideran mas factores (especialmente las personas mas comprometidas con la salud y el bienestar).

- **Quien lo hizo?**
- **Quien es el dueño de la empresa que lo hizo?**
- **Como se produjo?**
- **Como fueron tratados los animales?**
- **Trataron a los trabajadores de manera justa?**
- **Puedo reutilizar o reciclar el embalaje?**
- **Cual es el impacto ambiental de su producción y transporte?**
- **Tiene Ingredientes nocivos o no naturales?**
- **Es nutritivo, hará el trabajo, le gustara a mi familia, es precio es adecuado?**



Source: Deloitte, The Hartman Group, Center for Food Integrity, IFIC (all 2015)

Y, ¿Que buscan los consumidores en los mercados emergentes?

Chinese consumers' top 10 beef choice motivators		Top 5 attributes SEA consumers look for on-pack when making beef purchases				
✓	100% All natural	Singapore	Malaysia	Indonesia	Thailand	Vietnam*
✓	Safety certification	Safety	Halal	Halal	Safety	Origin
✓	Quality grading or guarantee	Freshness	Safety	Freshness	Natural	Quality
✓	Nutritional information	Natural	Freshness	Safety	Freshness	Use-by-date
✓	Organic	Value	Natural	Natural	Value	Freshness
✓	No added hormones	Origin	Value	Value	Origin	Price
✓	Colour of the meat					
✓	Country of origin					
✓	Antibiotic-free					
✓	Non-genetically modified					

Source: MLA Global Consumer Tracker China, 2018

Source: MLA Global Tracker (Singapore, Malaysia, Indonesia, Thailand); MLA ASEAN Attractive Cities Study (Vietnam), 2018

* Based on top attributes consumers look for on-pack when purchasing meat

Mercados objetivo de Chile

Top 5 beef choice motivators			
	UAE	Saudi Arabia	Jordan
1	100% all natural	100% all natural	Meat colour
2	Halal certification	Quality grading	No blood in pack
3	Quality grading	Halal certification	Halal certification
4	Animal welfare credentials	Safety certification	Country of origin
5	Safety certification	Animal origin	Date packed

Source: MLA Global Tracker UAE, Saudi Arabia and Jordan, 2017



Aun la dieta omnívora es la dieta más común a nivel mundial



Omnivorous

73%



Regularly eat both animal and non-animal products



Flexitarian

14%



Only occasionally eat meat or fish



Vegetarian

5%



Do not eat meat but eat other animal products (eggs, cheese, milk)



Vegan

3%



Do not eat animal products at all

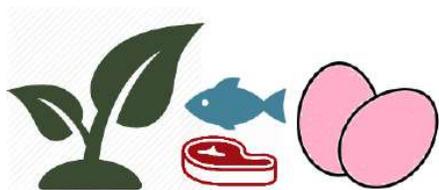


Pescatarian

3%



Do not eat meat but do eat fish



27% 25% 22%

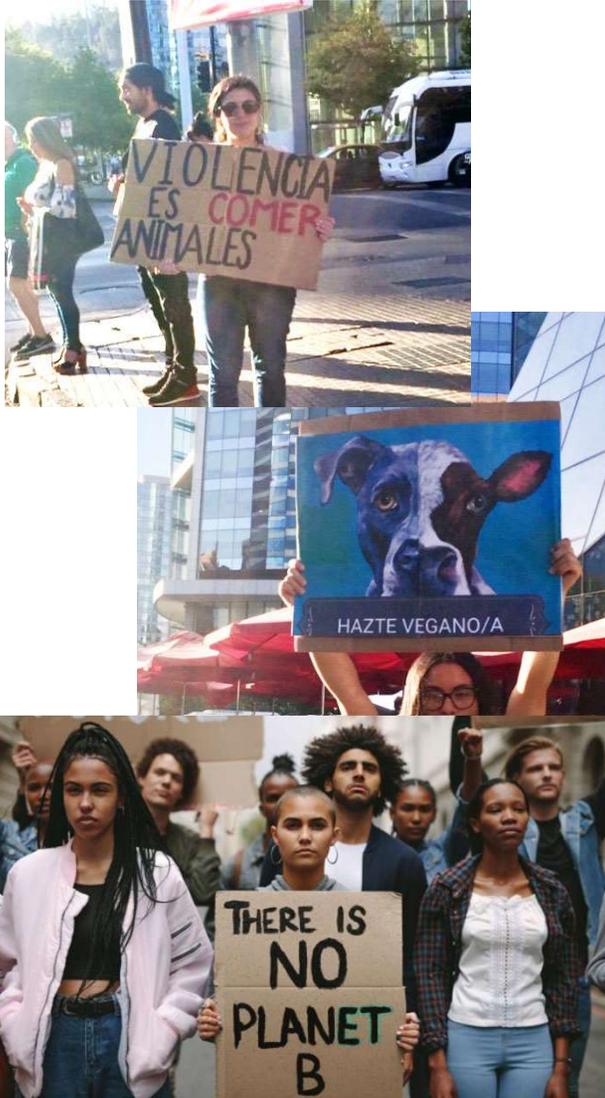
Perú, Malasia y Chile son los que tienen el mayor % personas FLEXITARIANOS



Mientras más Ingresos y mayor edad, mayor es la dieta basada en carne

Mucha información al consumidor en contra de la carne

Animalistas, Medioambientalistas



Corporaciones

PUBLICIDADES QUE CONFUNDEN AL CONSUMIDOR...

¿Cuánto contamina una vaca?

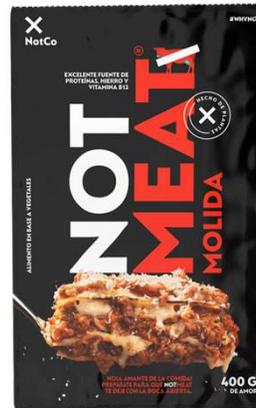
¿Sabías que las vacas contaminan más de lo que pensamos? Descubre cuánto puede llegar a contaminar una vaca y por qué motivos emiten gases contaminantes.



tos/cuanto



Intereses económicos



Entonces, ¿que informamos a los consumidores y como?, sobre nuestros productos

Certificaciones

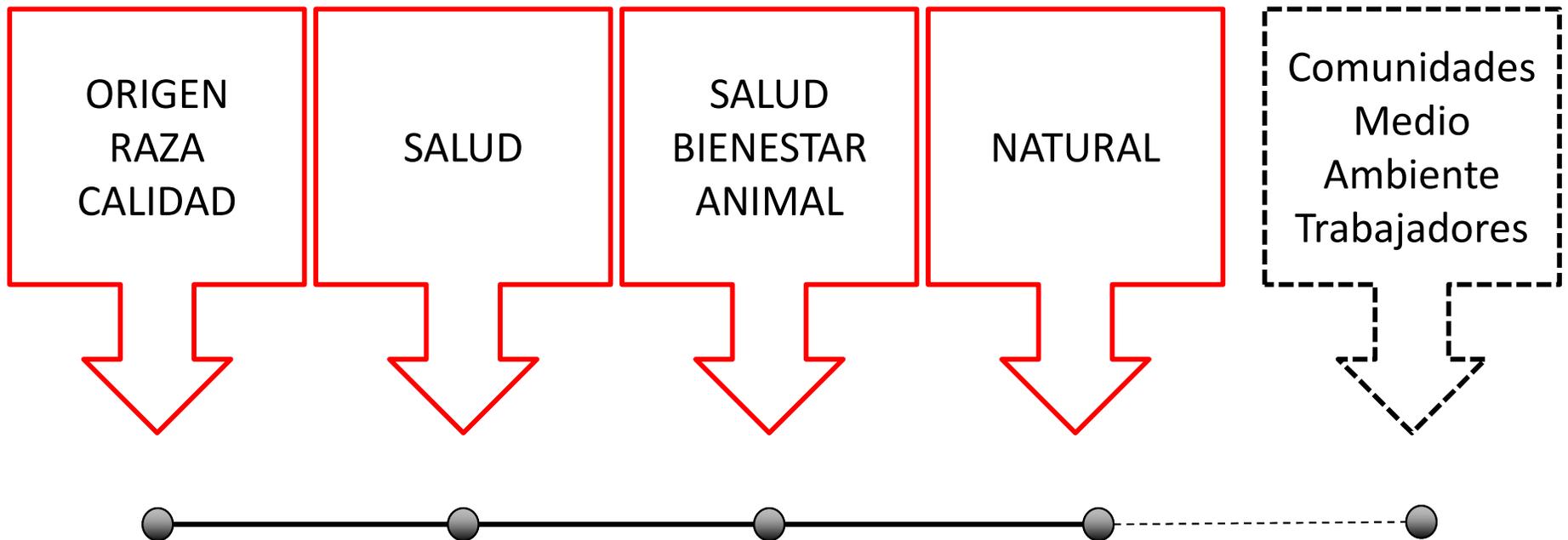
FOOD SYSTEM CERTIFICATIONS TIMELINE



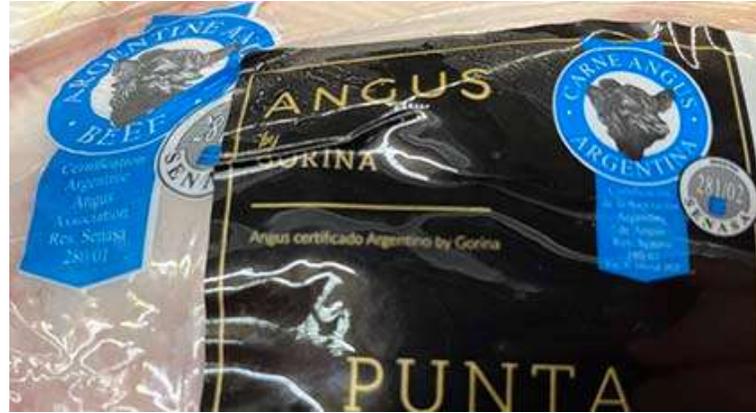
Mas información en el mismo producto:

Etiquetas, Sellos, Código inteligentes, Información nutricional

Como la comunicación esta evolucionando de acuerdo a los nuevos valores esperados por los consumidores



ORIGEN – RAZA - TERNEZA



Los aspectos de Salud



Salud + Bienestar Animal

STEP 5+	ANIMAL CENTERED; ENTIRE LIFE ON SAME FARM
STEP 5	ANIMAL CENTERED; NO PHYSICAL ALTERATIONS
STEP 4	PASTURE CENTERED
STEP 3	ENHANCED OUTDOOR ACCESS
STEP 2	ENRICHED ENVIRONMENT
STEP 1	NO CAGES, NO CRATES, NO CROWDING



Volviendo a lo NATURAL, con la menor intervención humana



Y como se relaciona la carne en las tendencias globales de los consumidores de alimentos

#trending2020

Culinary · Consumer · Industry

No Plan[et] B

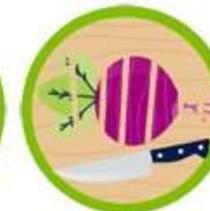
Never before have we been more confronted with the complications of the earth's finite resources. And never before has the effects of our consumption habits been questioned to this extent. Consumers are now challenging existing production methods by deep diving into the sourcing, preparation, technology and packaging processes, with their eye on a more sustainable future.



SOURCE MATTERS



RETHINK MATERIALS



ROOT TO LEAF



GIVING BACK

Shareworthy

Sharing experiences with the community through word of mouth or social media is a part of our daily lives. This keeps us on a continuous search for new, exciting and unique experiences that are #shareworthy.



SHAPES, TEXTURES & COLORS



FOOD WITHOUT BORDERS



SIGNATURE STORY

Food Technology

New breakthroughs in IT, equipment and food science are revolutionizing the culinary world. Augmented Reality and Virtual Reality are becoming commonplace. Material innovations and future production methods are on the rise, with food hacking also presenting new possibilities.



DIGITAL FOOD



EQUIPMENT SCIENCE



FOOD HACKING

The New Nostalgix

In a rapidly changing world, we have strong desires for lasting experiences and familiar recipes from the good old days. Whether we'd like an authentic taste or a fancy twist, one thing remains: we seek a memorable experience.



CELEBRATING HERITAGE



X-FACTOR

Mindfulness

Food and beverages have gained importance in our lives due to a greater understanding of their impact on our health and social lives. People increasingly think about the why, what and where, taking into consideration whether they are on the go or cozy at home. So choose your food mindfully and enjoy it!



KNOW YOUR FOOD



BODY BOOST



NAUGHTY FOOD



RIGHT CHOICE, RIGHT MOMENT



Debemos tener consciencia de los impactos que genera nuestra producción sobre los clientes, los animales, las comunidades locales, el medioambiente, es decir, sobre la sociedad en general

