



SECTOR PROFILE
MEAT AND
MEAT
PRODUCTS

MEAT AND MEAT PRODUCTS SECTOR

The meat and meat products sector includes mainly the production and export of beef and veal. To a lesser extent, other sectors such as leather production; pork, poultry, sheep, goat meat, honey, and fish production.

The production and export of beef and veal represents the second agricultural sector that generates the highest foreign exchange earnings for the country, accounting for 12.1% of the country's GDP.

In Paraguay, there are currently modern plants that operate in accordance with international

standards under the supervision of the National Animal Health and Quality Service (SENACSA), the official sanitary authority, which are periodically audited by the veterinary services of importing countries.

Paraguay exports beef, offal, and bovine by-products to more than 55 countries, which in 2021 generated foreign exchange of values close to USD 2 billion in 2021, ranking it as the 7th largest beef exporter in the world.



SECTOR POTENTIAL

The beef and veal sectors still have a great capacity for growth, both in terms of the quantity of produced meat and also in terms of improving the markets to which it has access. Approximately 90% of cattle raising is done on pasture (grass fed) and with wide-range methods, which allows the produced meat to be of high quality and with a superior flavor to that produced by intensive fattening systems.

Through the implementation of international quality certifications and increased traceability, it is possible to access "premium" markets, and with the implementation of technologies at the

production level, it is possible to significantly increase the livestock herd in all species.

Combined with a good marketing strategy, this would allow the product to access premium markets that appreciate this type of meat. Poultry and pork production are in full expansion, both in terms of the number of produced animals and in industrial capacities. This is mainly due to the integration of value chains of grain production (corn and soybeans), with poultry and swine production. This makes it possible to add value to grains by transforming them into meat.



At the industrial level, four new meatpacking plants are expected to open by 2023.

PORK: The opening of the Taiwanese market indicates a key moment for this sector. Southeast Asia and the South American regions represent a promising market. The possibility of producing meat from grains produced in Paraguay (corn and soybeans) and adding value to these raw materials represents a great business opportunity associated with the value chain of this product. There is a great potential for the opening of meatpacking plants in this segment.

SHEEP MEAT: The upcoming opening of the first sheep meat packing plant (Chajhá) is also a

turning point for this sector, since for the first time in Paraguay it will be possible to slaughter sheep in an export slaughterhouse.

This will develop a new value chain and strengthen new links, such as transport and specific services, as a result of the newly generated demand.

The conditions are ripe for this sector's rapid development, due to a favorable production environment and the high international demand for high-value sheep meat.

An additional benefit is the development of the family-based agriculture sector.



INVESTMENT INCENTIVE REGIMES AND PREFERENCES

- Hilton Quota: 1,000 tons per year at a differentiated price and with customs exonerations
- 481 Quota: Very close to forming part of this quota.
- 10% IRAGRO tax on agricultural activities
- **All current investment incentive regimes apply** ([See Country Profile](#))



MAIN SECTOR INDICATORS

GDP

12.1%

Participation in the
National GDP
(2017 – ARP)

World Export Ranking
(2021 – FAS/USDA)





Number of Companies (2020 – SENACSA)



Number of Slaughterhouses (2020 – SENACSA)



Number of employees/ Ranching and Meat Sector (ARP)

358,000

Percentage of
the National
Labor Force (ARP)

11.3%

Composition of companies according to their size (2010 – INE)



Large
100%

Foreign Direct Investment (2019 - Central Bank)



USD 61.7
Millions

Livestock Herd (2020 – SENACSA)



14
Cows
Millions



1.5
Swine
Millions

Annual Slaughter (2020 – SENACSA)



2.1
Cows
Millions



0.63
Swine
Millions



74
Birds
Millions



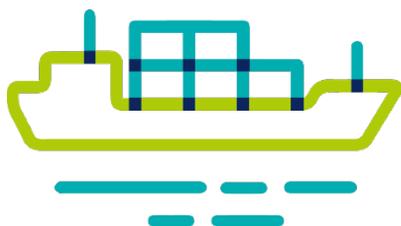
Geographical Location of Meat Slaughterhouses



- Central
- Boquerón
- Concepción
- San Pedro
- Amambay

USD 1,944

Millions Exports
(2021 – Central Bank)



Main Export Products

(2021 – Central Bank)

● USD 1,599

Millions Meats

● USD 121

Millions Offals

● USD 224

Millions Sub-Products

Export Destinations

(2021 - Rediex)



Chile
44%



Rusia
20%



Republic of China (Taiwan)
10%



Brazil
9%



Israel
3,8%



European Union
2%



Other Markets
8%



LIST OF MAIN COMPANIES

COMPANY BOVINE MEAT	COMPANY CHICKEN MEAT	COMPANY SWINE MEAT
<ul style="list-style-type: none"> Cooperativa Multiactiva Neuland Ltda. 	<ul style="list-style-type: none"> Pollpar S.A. 	<ul style="list-style-type: none"> Unión de Productores de Itapúa S.A. - UPISA
<ul style="list-style-type: none"> Frigochorti 	<ul style="list-style-type: none"> Granja Avícola La Blanca S.A. 	
<ul style="list-style-type: none"> Frigochaco 		
<ul style="list-style-type: none"> Frigorífico Guaraní 		
<ul style="list-style-type: none"> Athena Foods S.A. 		
<ul style="list-style-type: none"> Frigorífico Concepción 		
<ul style="list-style-type: none"> Friego Norte S.A. 		
<ul style="list-style-type: none"> Avicar Foods Import Export S.R.L. 		

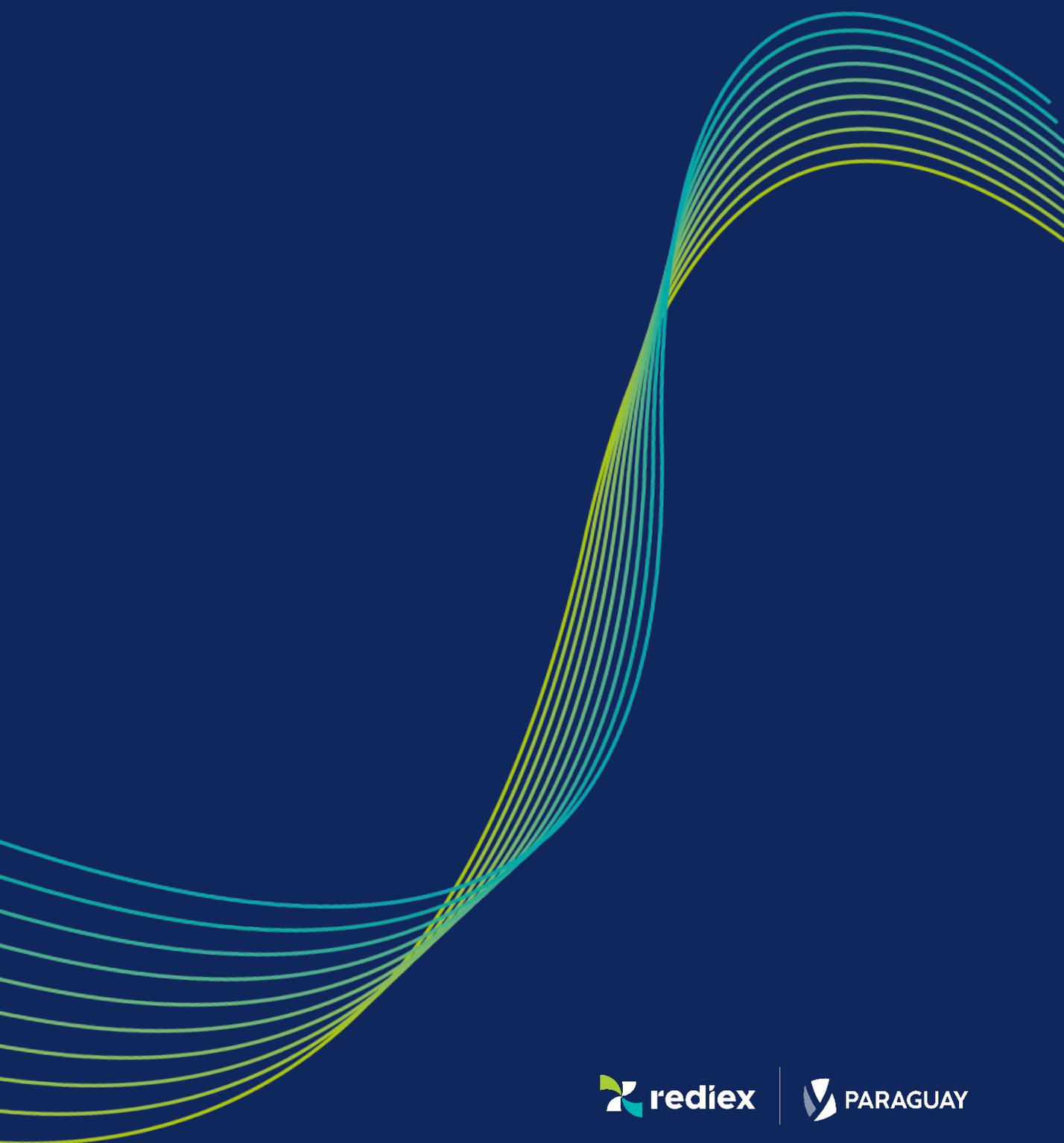


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