



VIV ASIA 2019

BANGKOK, THAILAND
13-15 MARCH



INTERNATIONAL TRADE SHOW FROM FEED TO FOOD FOR ASIA

Featuring **Food Engineering**

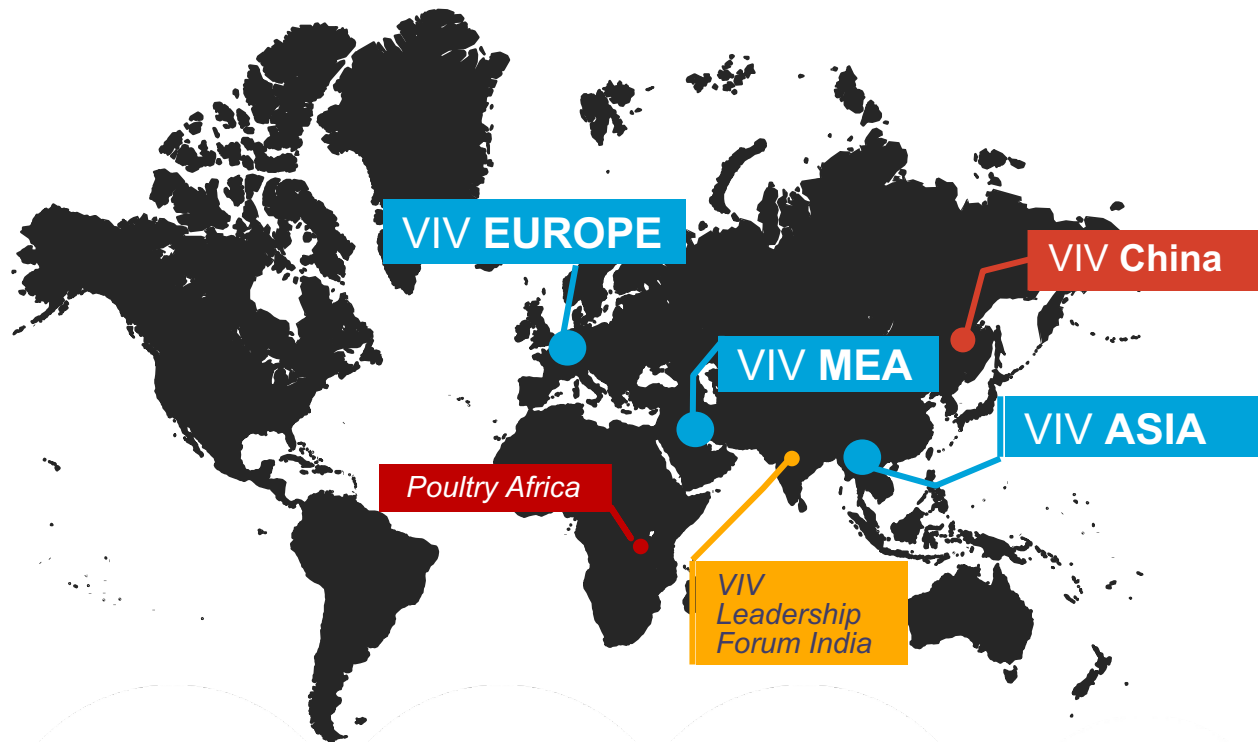
Market
Outlook



WWW.VIV.NET

VIV worldwide

The global business network linking producers from Feed to Food



VIV worldwide is the business network linking professionals from Feed to Food. The combination of **VIV trade shows**, **VIV online 24/7** and **VIV trade summits** create the unique platform that offers boundless opportunities to the animal protein supply chain players. Started in the Netherlands, VIV developed with dedication a worldwide network through 40 years of experience and interactions with the industry, becoming today the leading platform in the most important markets of the world.

VIV is multispecies: the network and its events include poultry broilers and layers, pigs, cattle and calves and aquaculture

WWW.VIV.NET



* Visits based on the most recent edition



Southeast Asia

Rising consumer demand

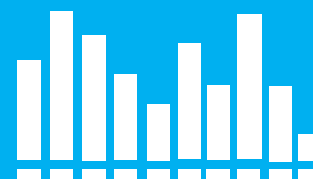
Consumption

Beef	2,2 million t.
Eggs	3,5 million t.
Shrimp	3,7 million t.
Pork	6,4 million t.
Chicken	6,7 million t.

Production

Eggs	456,000 t.
Beef	4,7 million t.
Shrimp	3,5 million t.
Pork	4,5 million t.
Chicken	7,35 million t.

GDP



2,7 trillion \$

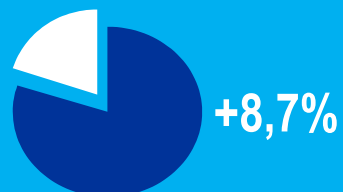
**10 nations of ASEAN*

Equipment

\$18 billion expected to increase to \$29 billion by 2022

**Global: meat, seafood, dairy*

CAGR rate



**ASEAN: chilled & frozen meat, shrimp*

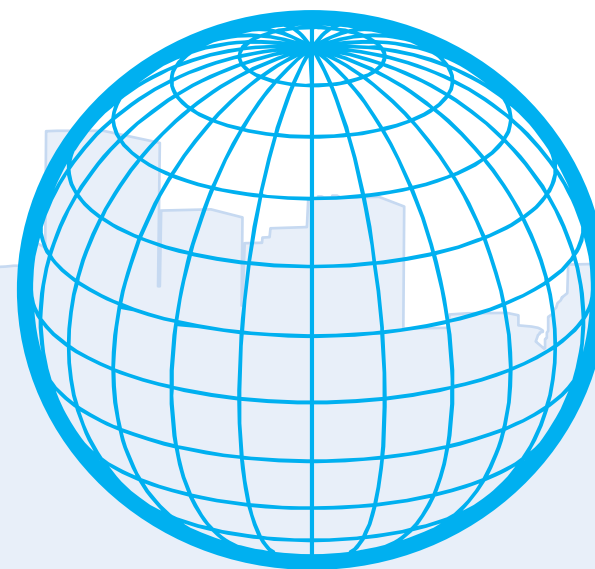
Retail value



**ASEAN: eggs, shrimp, meat*

641,775,797

**Cambodia, Indonesia, Laos,
Malaysia, Myanmar, Philippines,
Singapore, Thailand, Vietnam, Brunei**



Southeast Asia

Rising consumer demand

Consumption

Beef	14,8 million t.
Eggs	95,5 kg capita/year
Seafood	143 kg capita/year
Dairy	48,5 million t.
Chicken	19,8 million t.

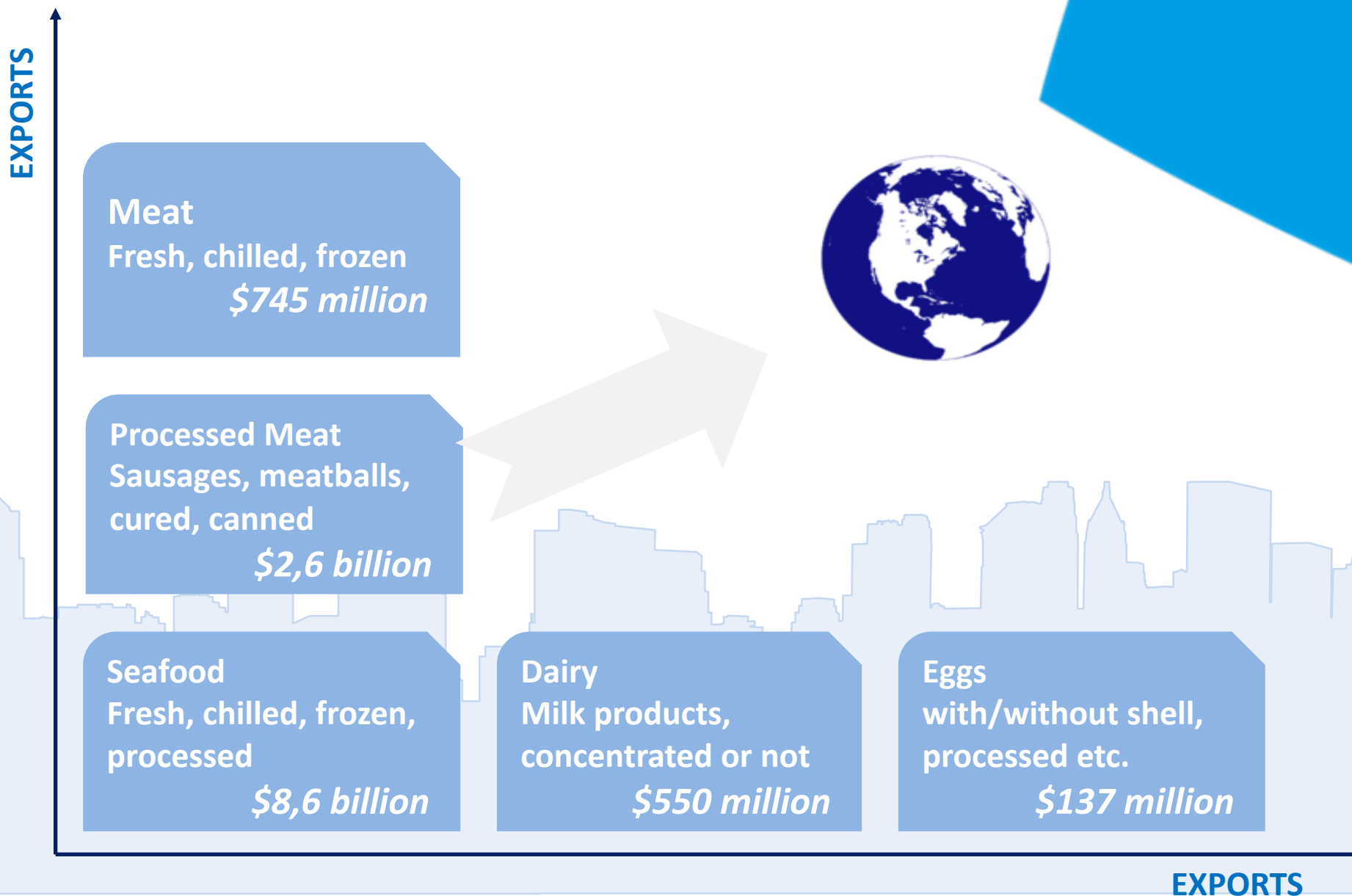
Production

Dairy	215,1 million t.
Beef	10,2 million t.
Seafood	69,6 million t.
Pork	54,6 million t.
Chicken	18,6 million t.

3,074,450,000

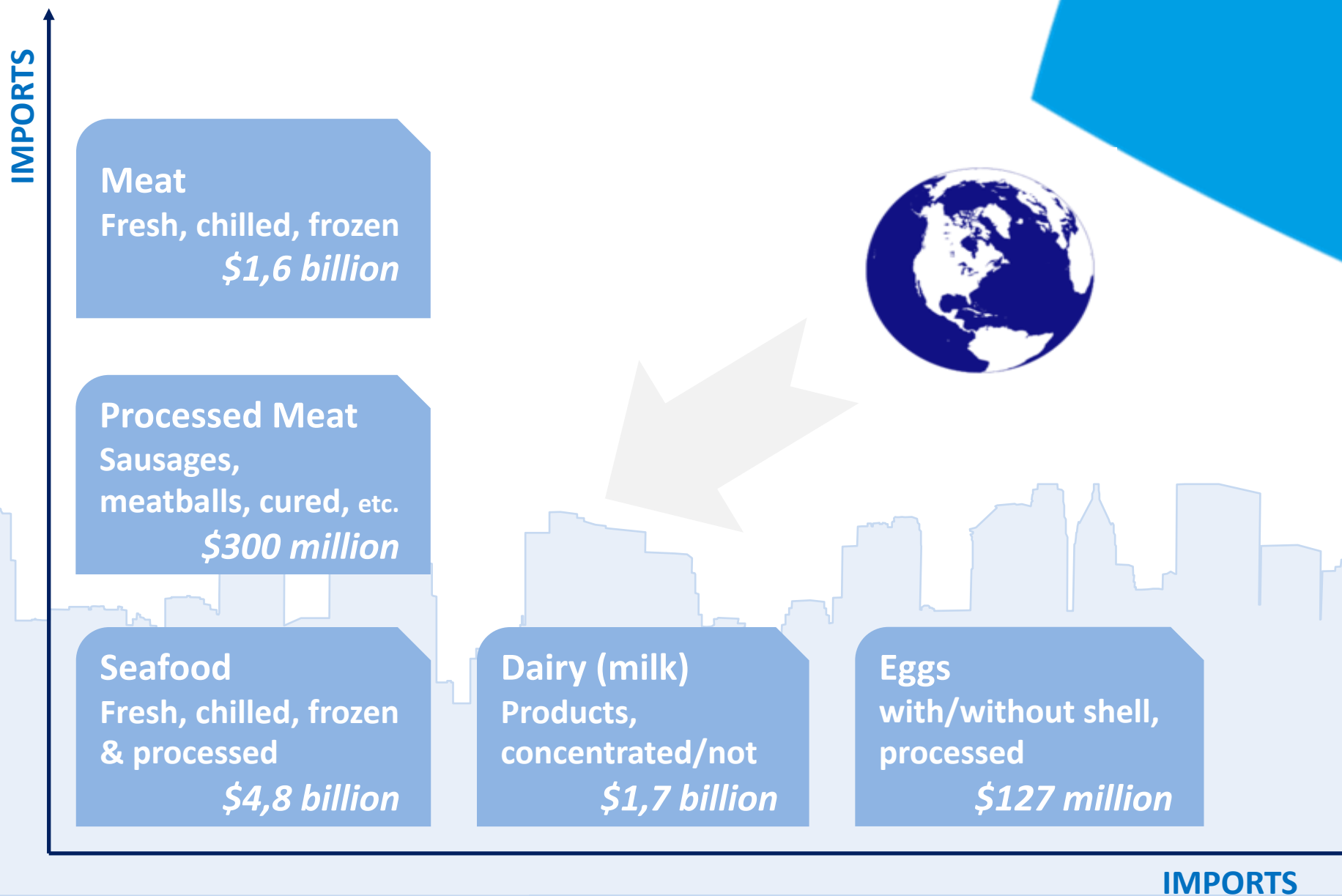
*India
Pakistan,
China
Japan
South Korea*





ASEAN

import



Thailand

...the gateway to Southeast Asia

17% Production cost

- Accounts for processing lines

Stable development rate

- Opportunities for consolidation & automated lines

\$535 million

- Meat sales in Thailand (fresh, chilled, frozen)

2,1 million tons

- Seafood sales.

\$2,8 billion

- Dairy-product sales in Thailand 2017-2018

7,5% exports

- Forecast increase for 2019.

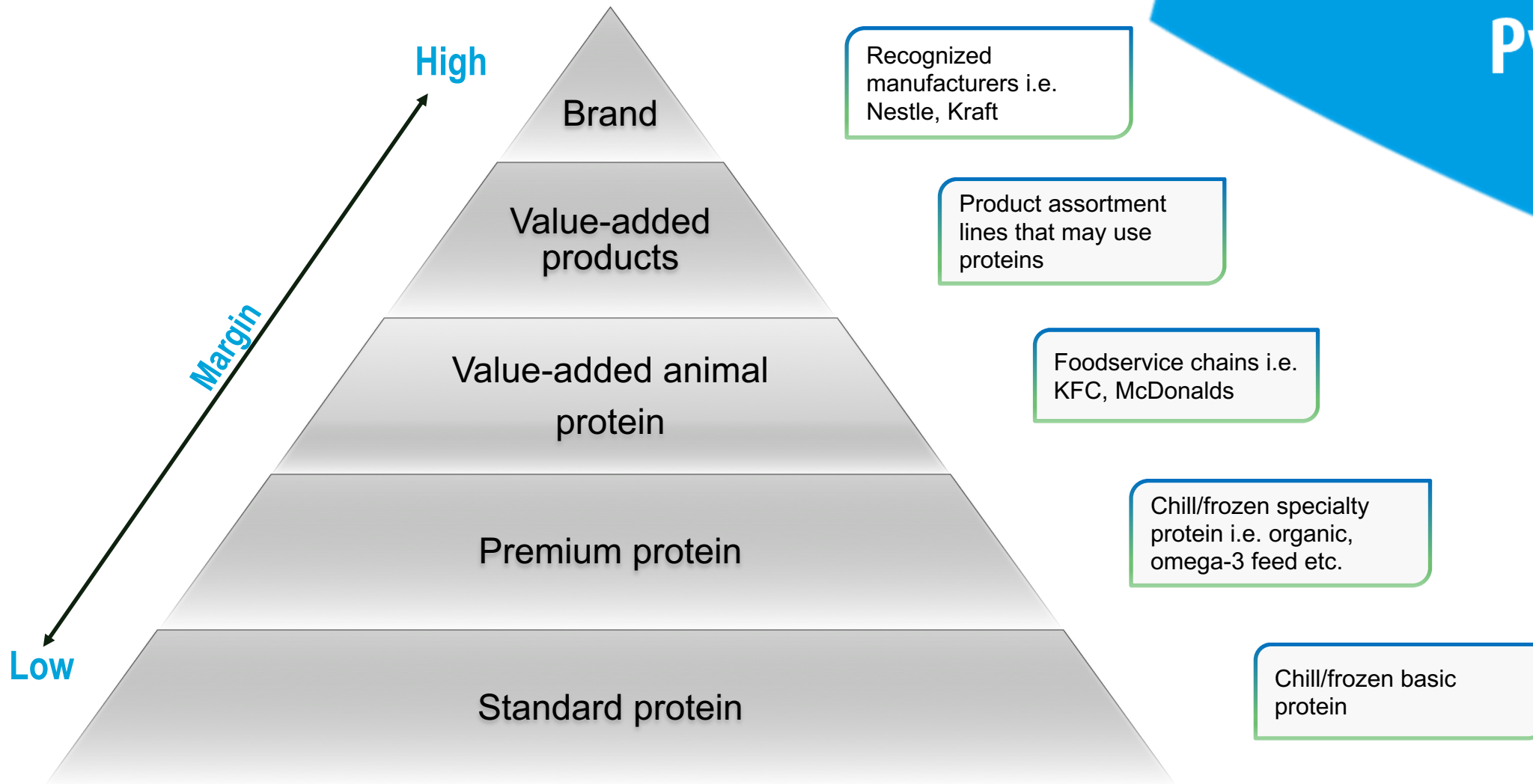
\$245 million

- Ready-meals sales that may use meat/seafood

24% trade

- Stays in the ASEAN family.

Hierarchy Pyramid



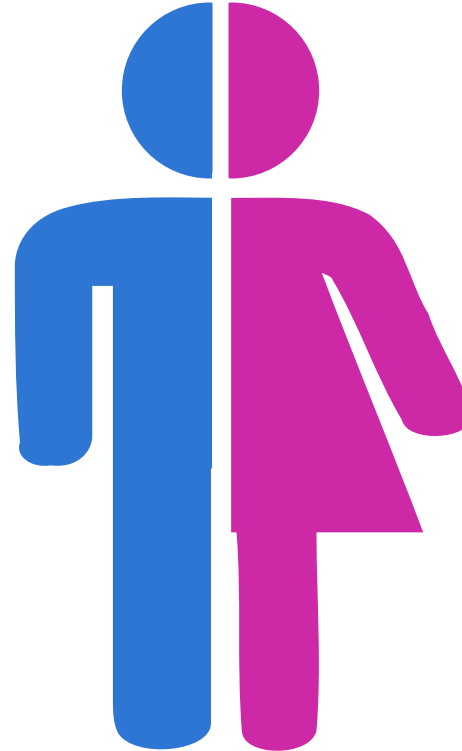
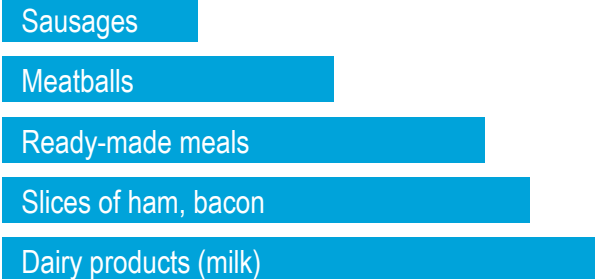
ASEAN Consumers



60% Top Retailers

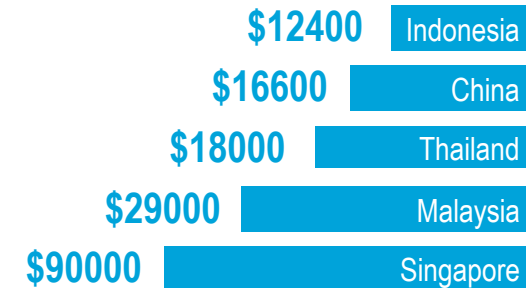
Control the mobile & online shopping with own-apps

Retail Trends



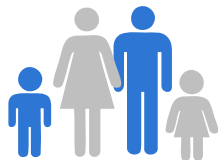
54% Urban GDP

More than half of the region's population & GDP resides in urban cities



Affluence

The 5 most affluent consumers in SE Asia per capita
**excl. Japan, South Korea*



Family size.

Smaller families due to increasing child bearing cost

51%

Active smartphone users shopping online



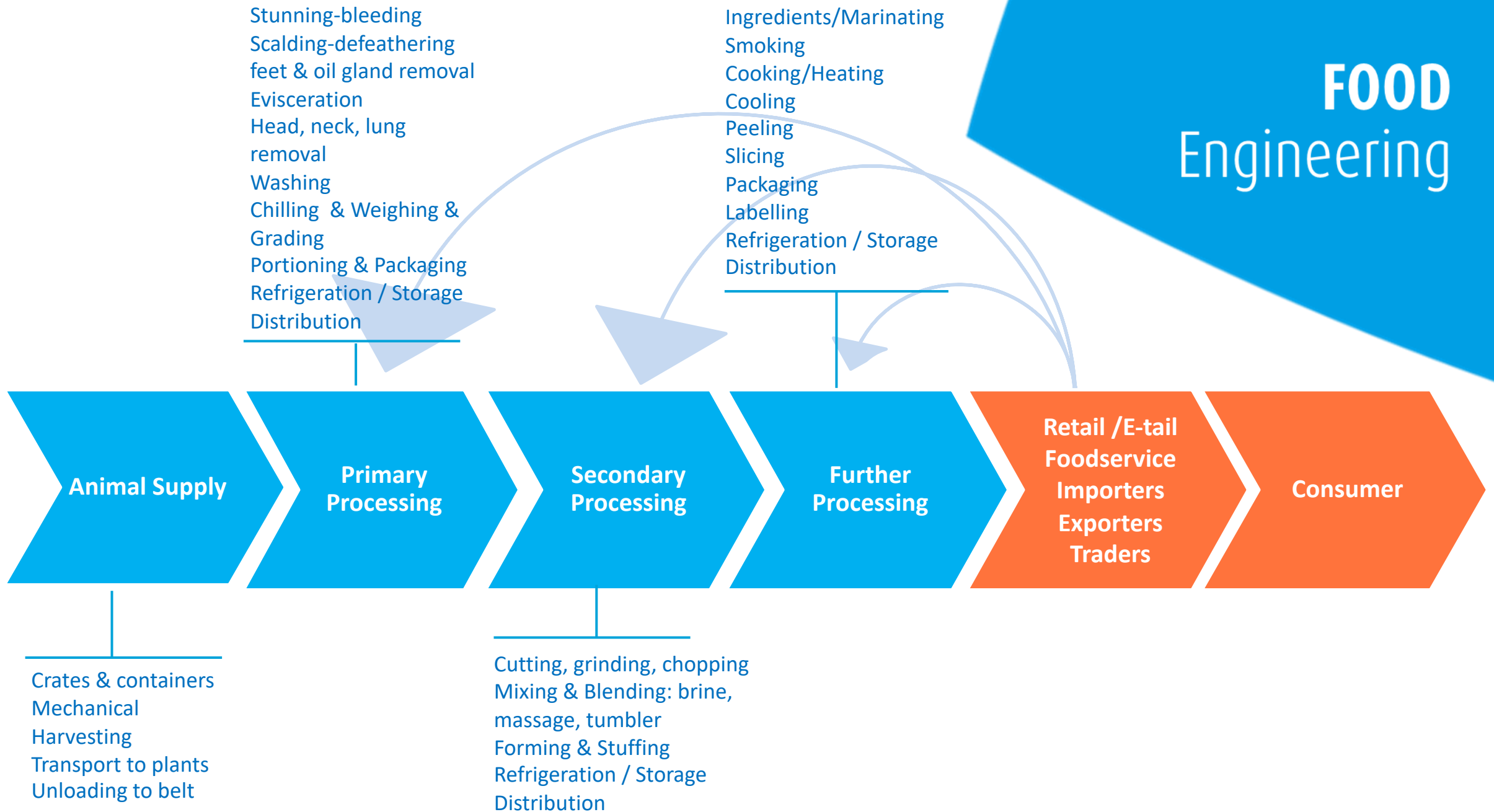
19%

of income is spent in food & beverages

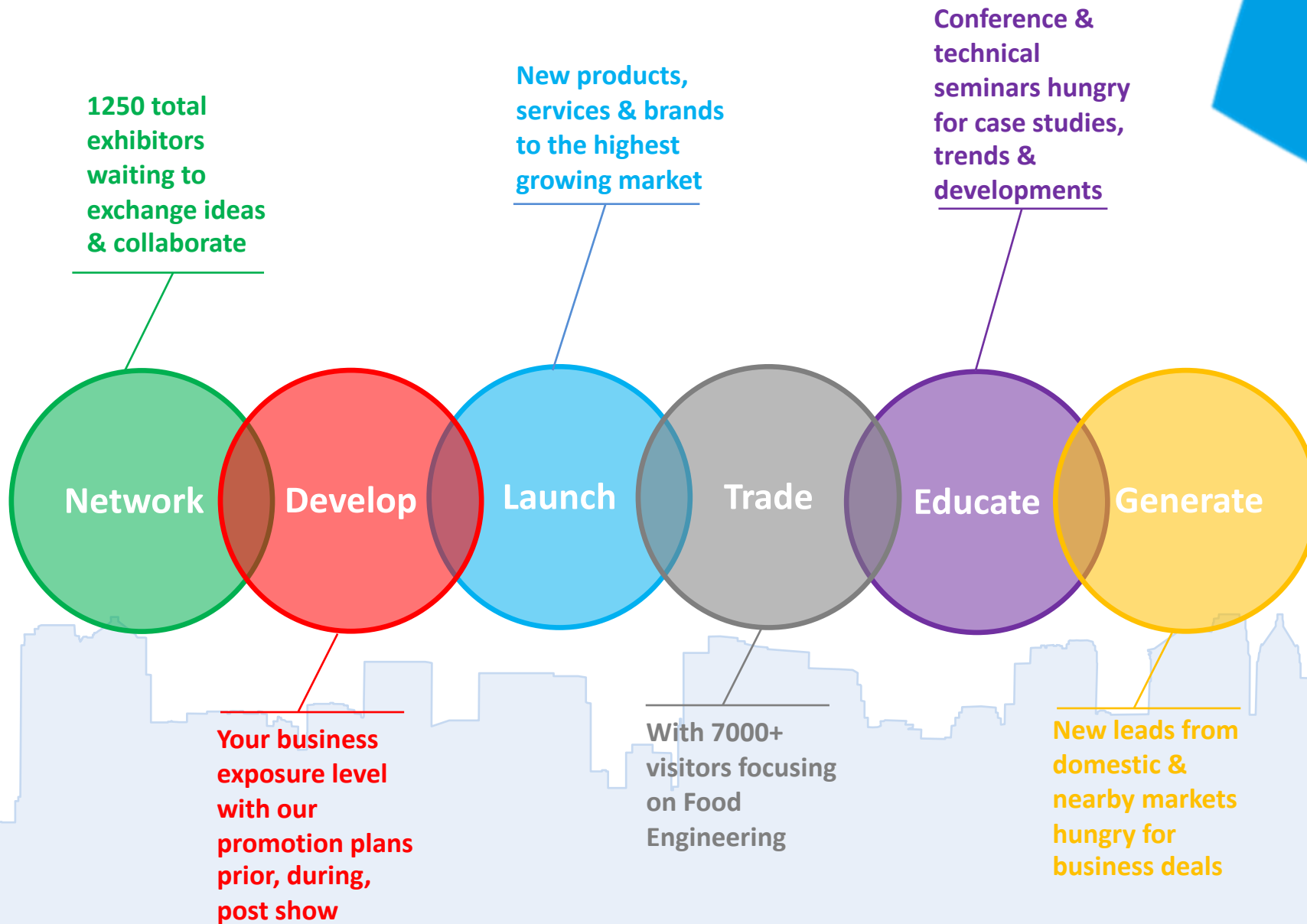
Urbanized lifestyle.

Apartments, quality life, purchasing fmcg products due to higher incomes

FOOD Engineering



FOOD Engineering



“How many reasons do you need to join VIV ASIA?”