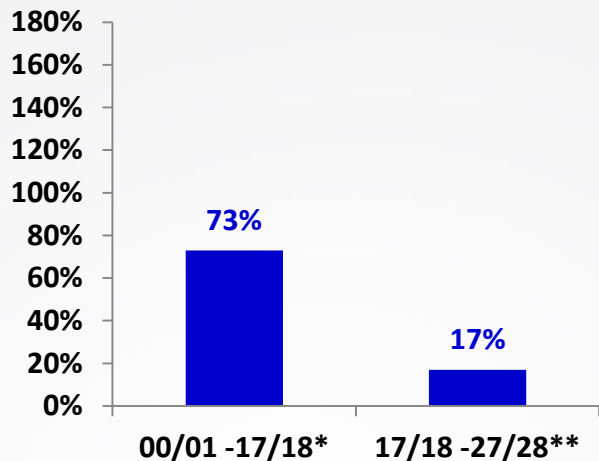


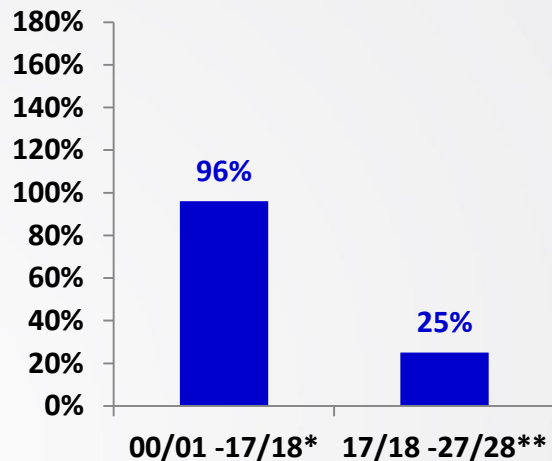
**Aumento sostenido de la demanda
y una oferta más diversificada en el
siglo XXI: desafíos del maíz
argentino frente a la “*nueva
competencia*”**

Crecimiento del comercio mundial, en %

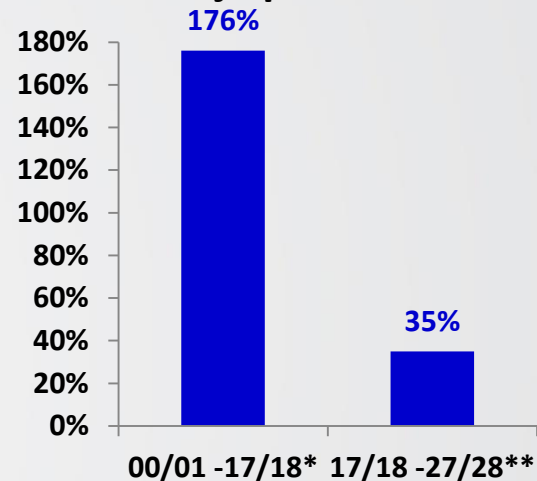
Trigo (*all wheat*)



Maíz

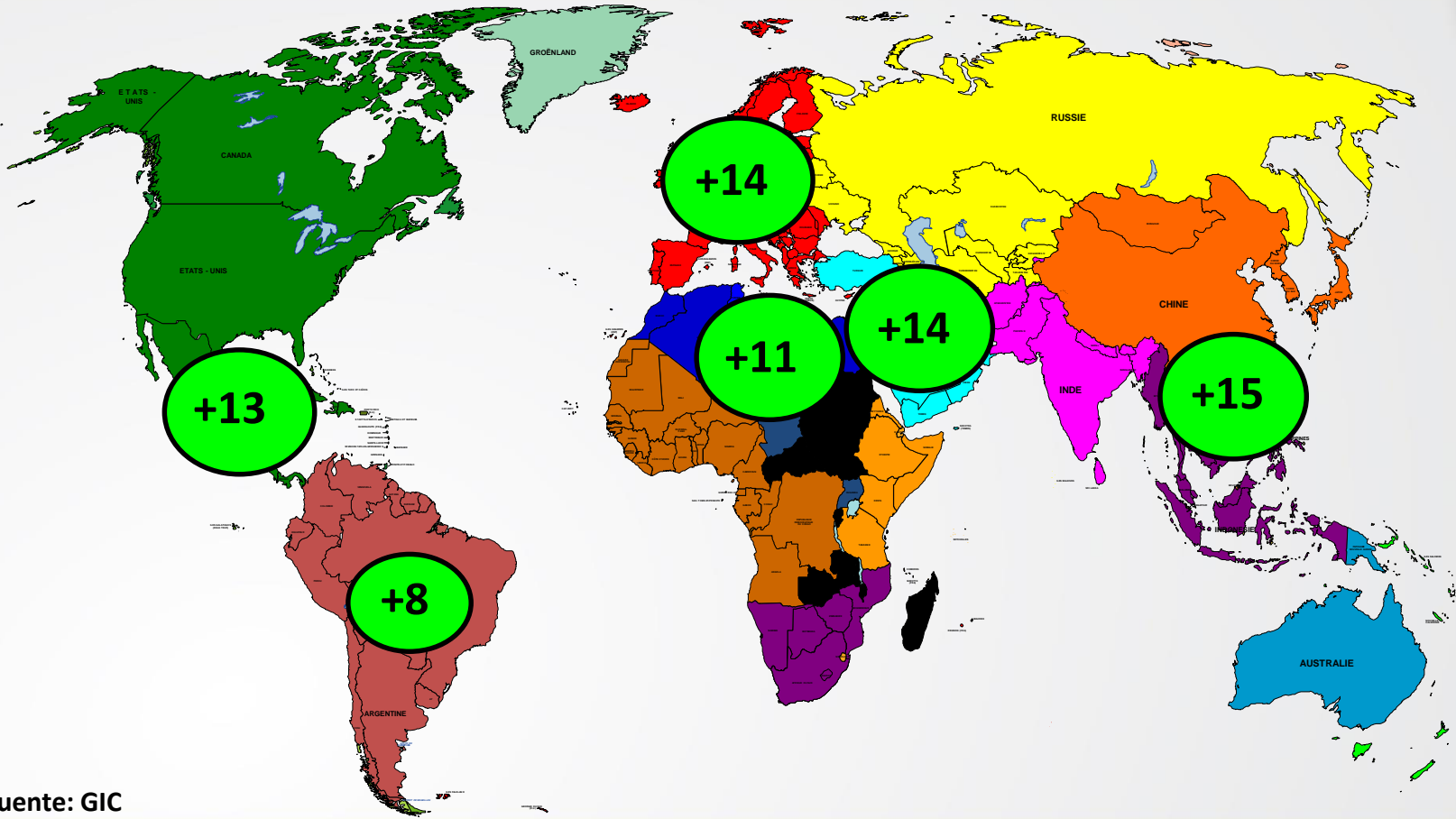


Soja poroto



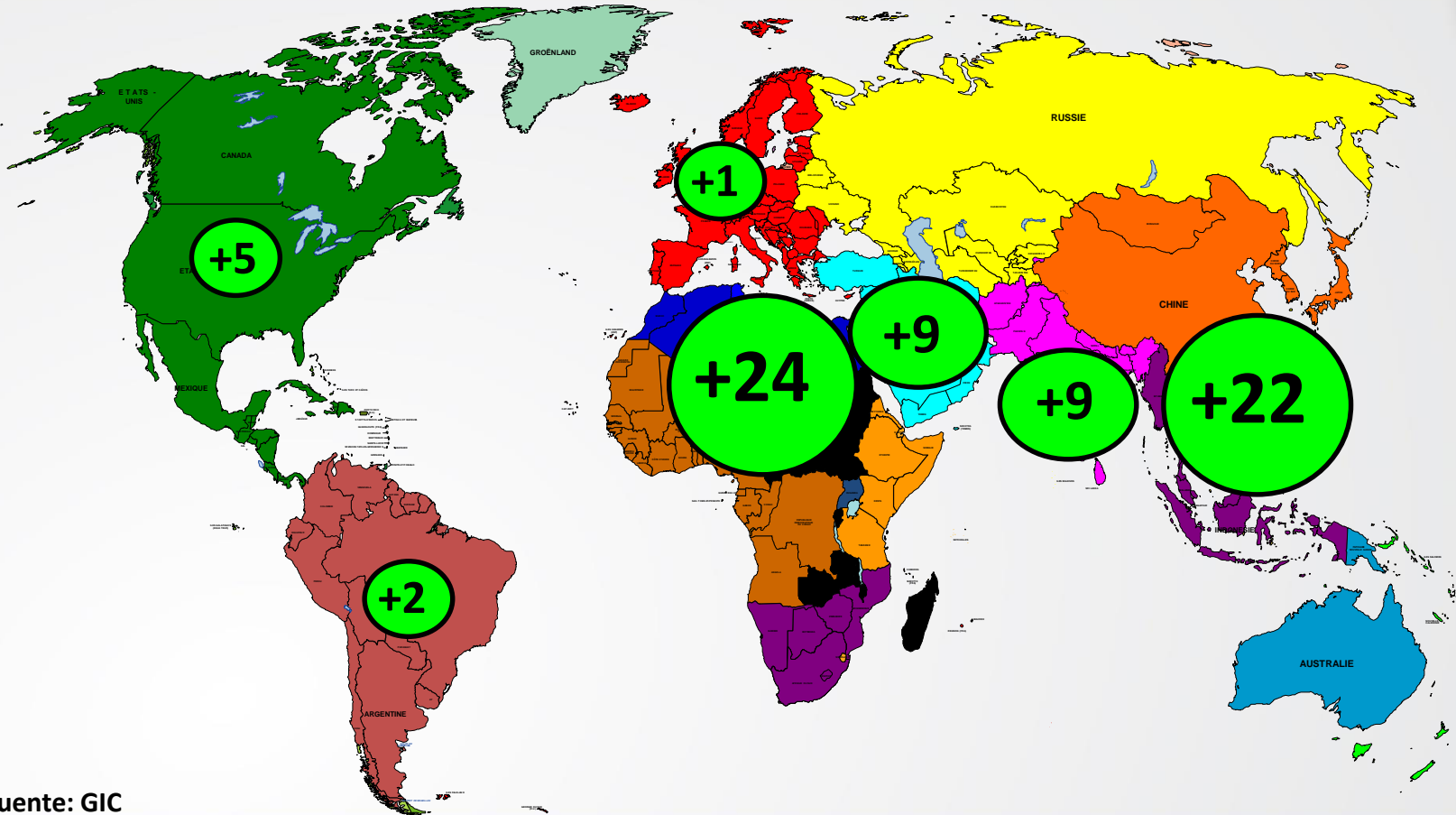
Fuente: * Estimación GIC. ** Proyección USDA febrero 18

Crecimiento del comercio mundial de maíz 00/01 – 17/18, en Mot.

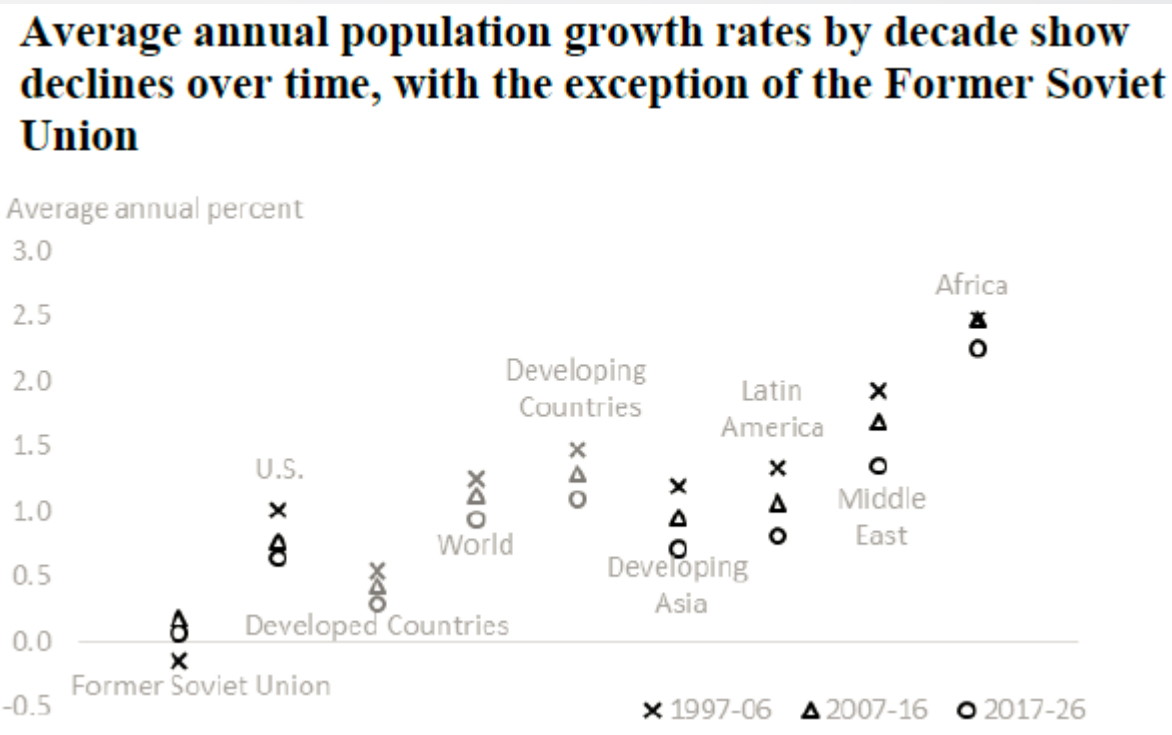


Fuente: GIC

Crecimiento del comercio mundial de trigo 00/01 – 17/18, en Mot.

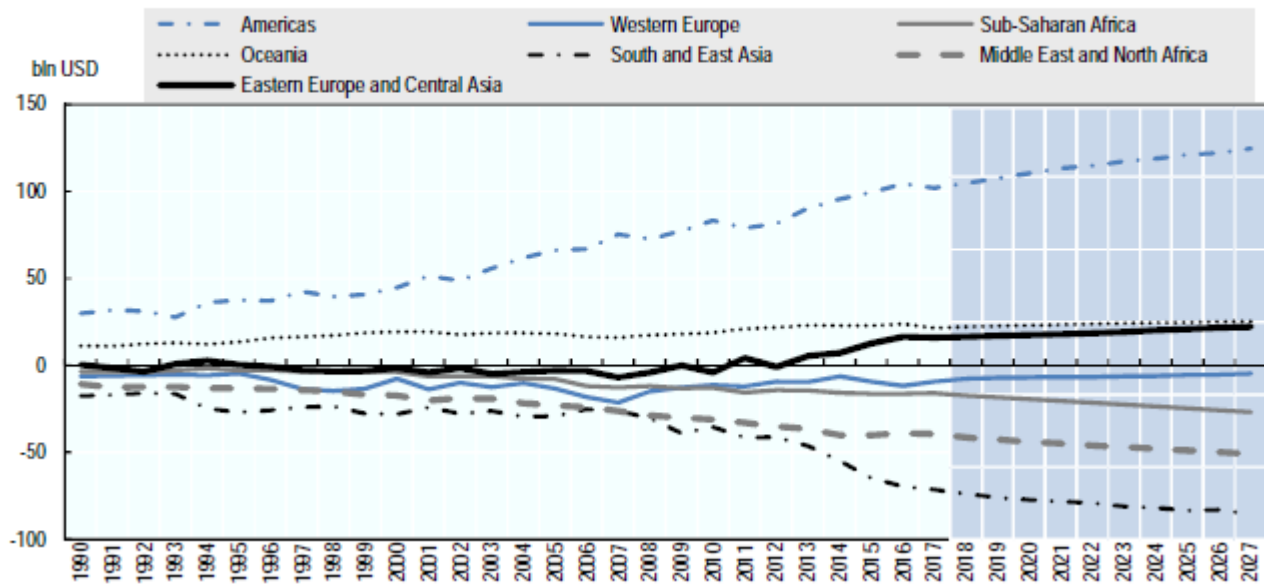


Fuente: GIC



Fuente: Proyección USDA febrero 18

Figure 1.18. Agricultural trade balances by region, in constant value, 1990-2027



Fuente: Proyección OECD-FAO 2018

Diversificación de la oferta internacional en el siglo XXI



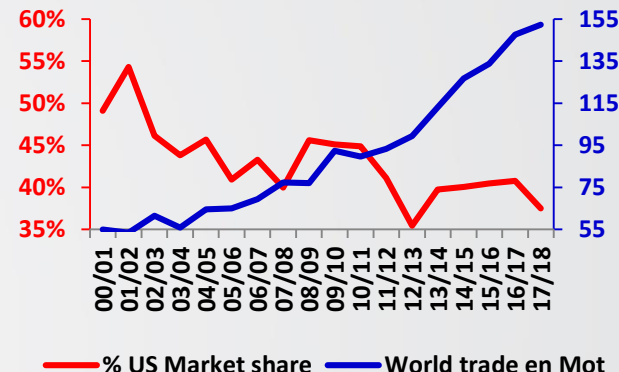
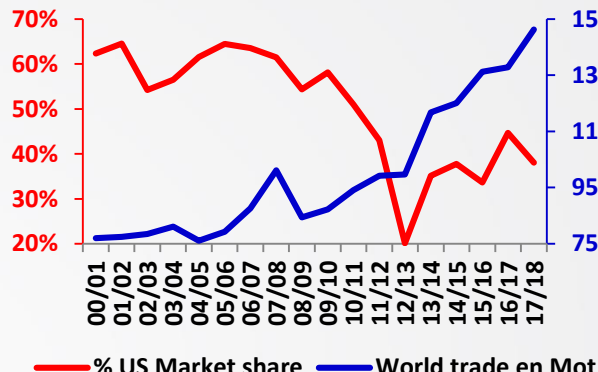
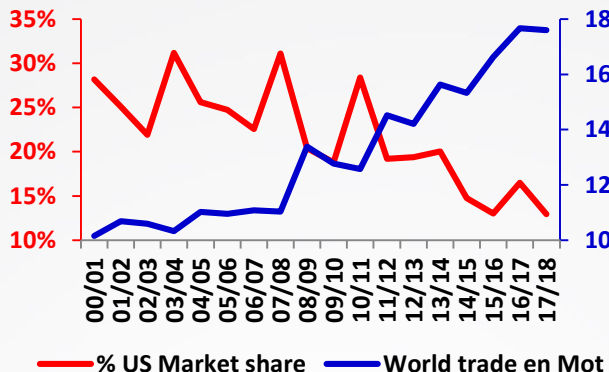
Trigo (all wheat)



Maíz

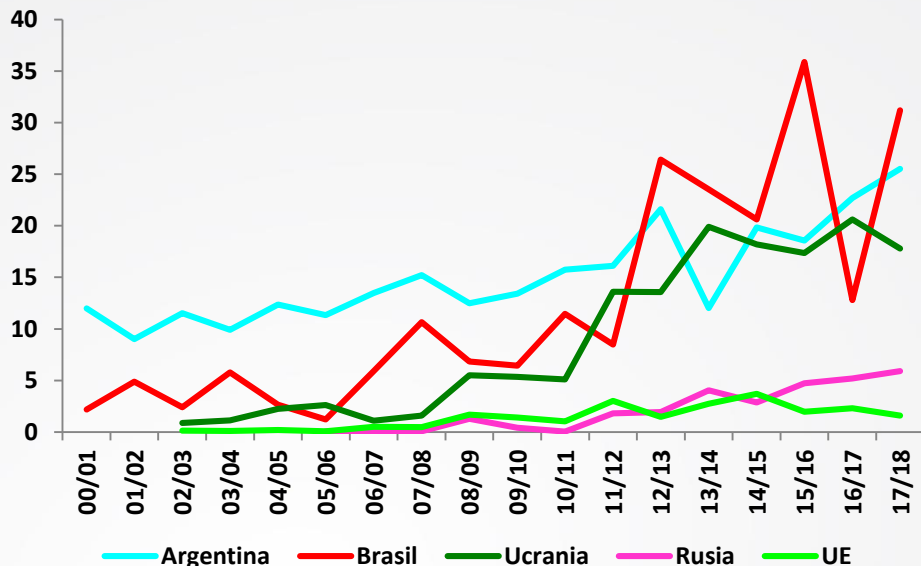


Soja poroto

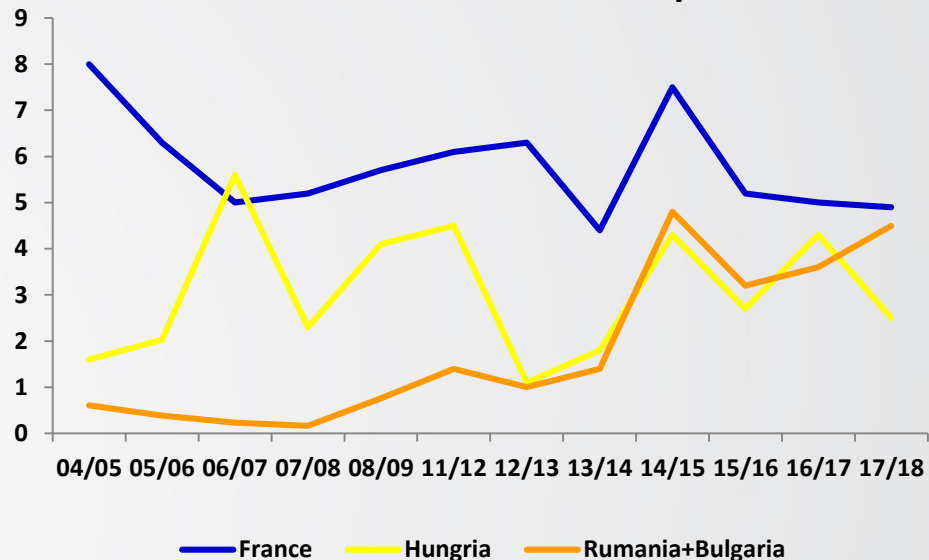


Fuente: GIC

Intercambio mundial

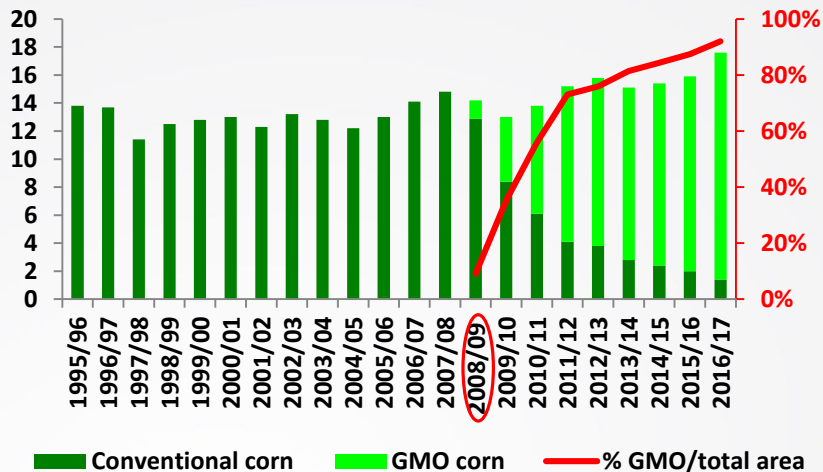


Intercambio intraeuropeo

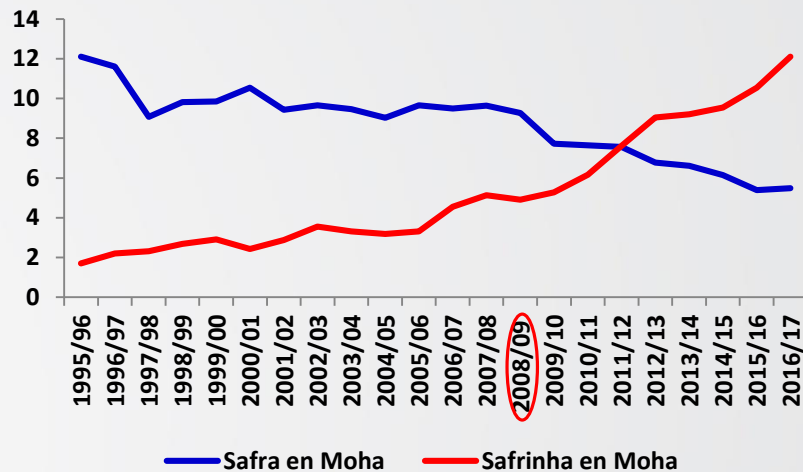


Fuente: GIC

Evolución del área de maíz, en Moha



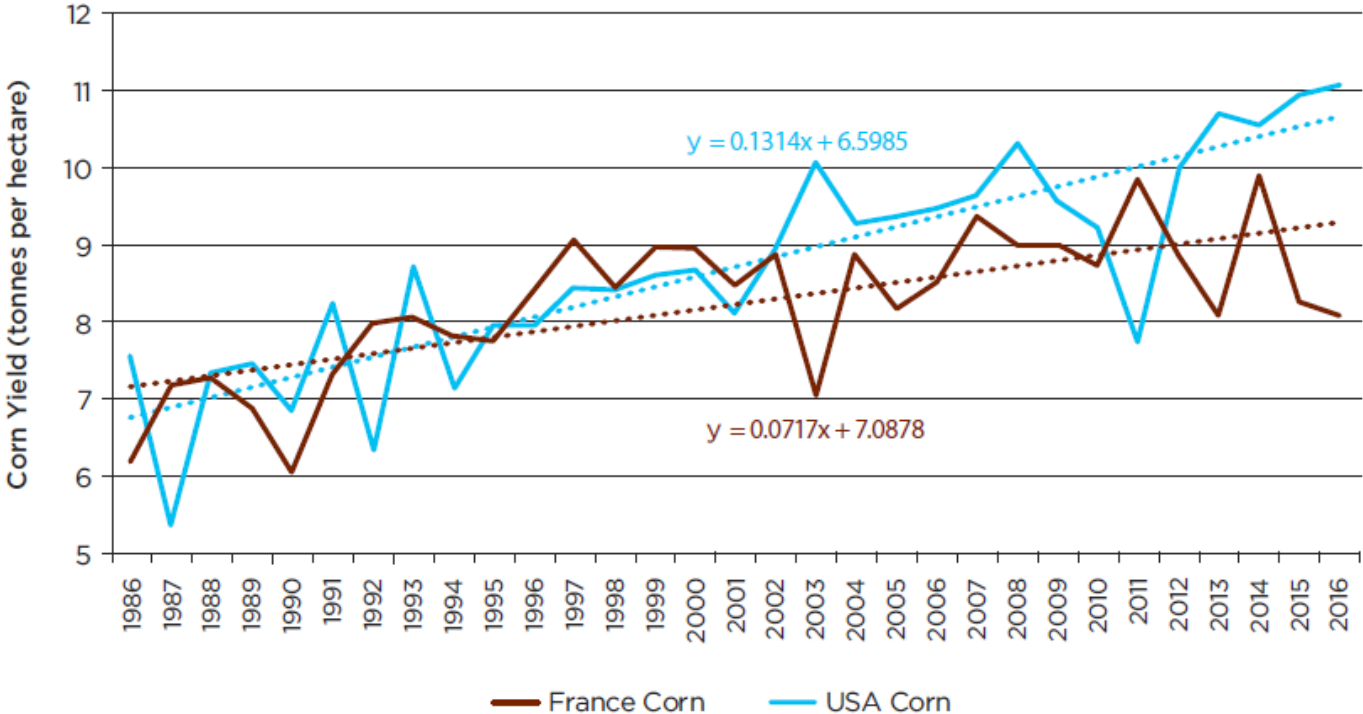
Evolución del área safra/safrinha, en Moha



Fuente: COGO Inteligência em Agronegócio. CONAB

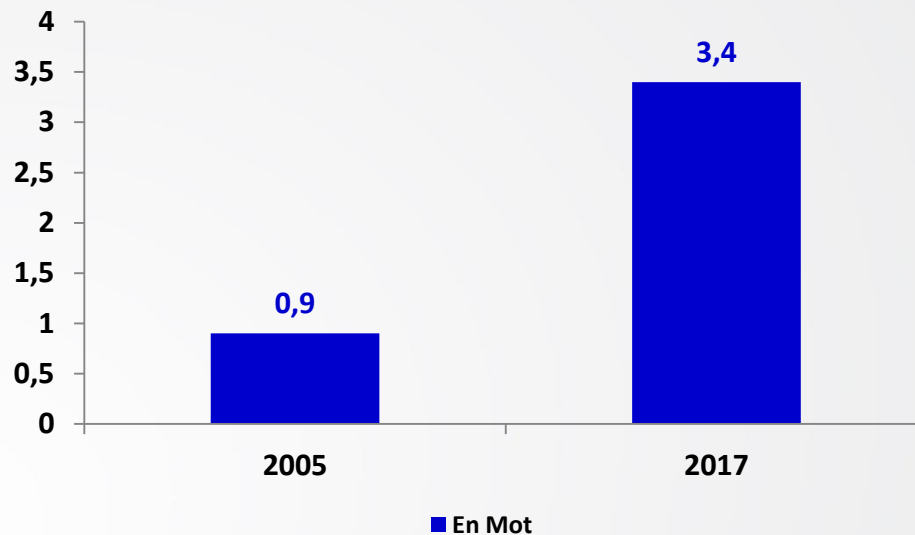
El costo de darle la espalda a la biotecnología

Figure 7: Historical Corn Yields in France and USA



Fuente: AgbiInvestor. The challenges facing agriculture and the plant science industry in the EU, September 18

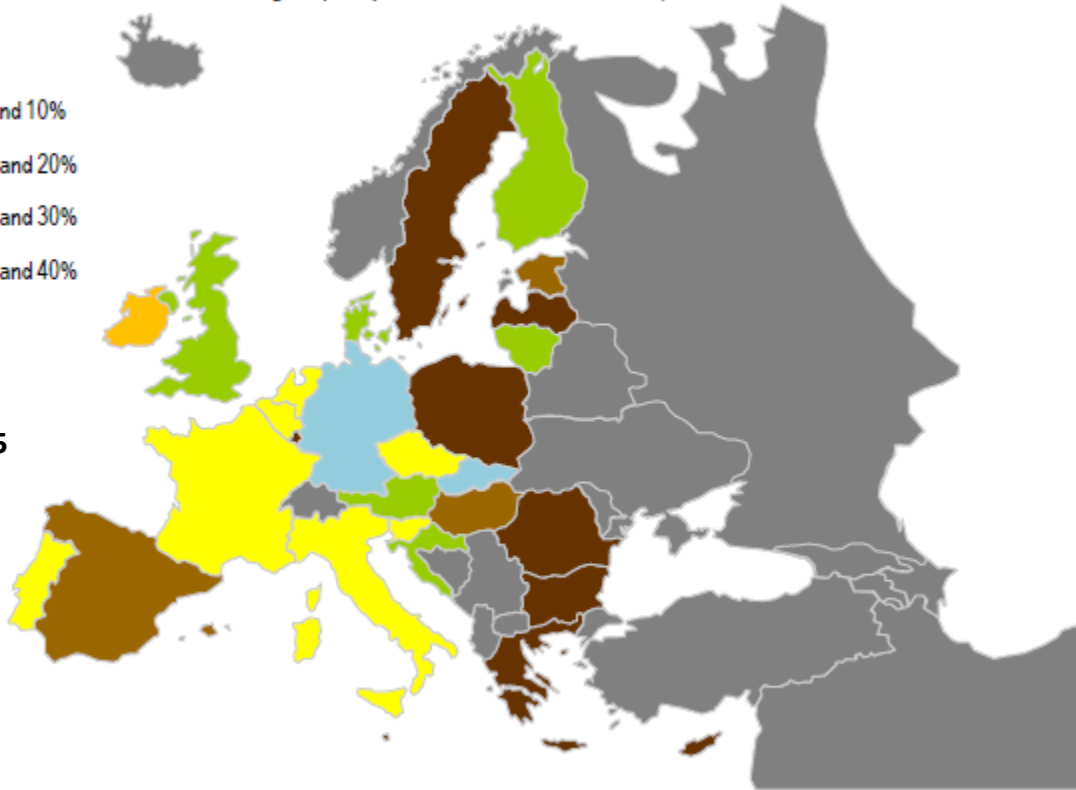
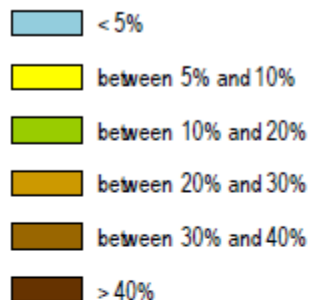
Capacidad de almacenaje de terminales portuarias



Fuente: propia

UE: en especial al este, apuesta a la capacidad de almacenaje

Figure 2.2 – Percentage increases in national storage capacity in the EU-28 Member States, 2005-2015

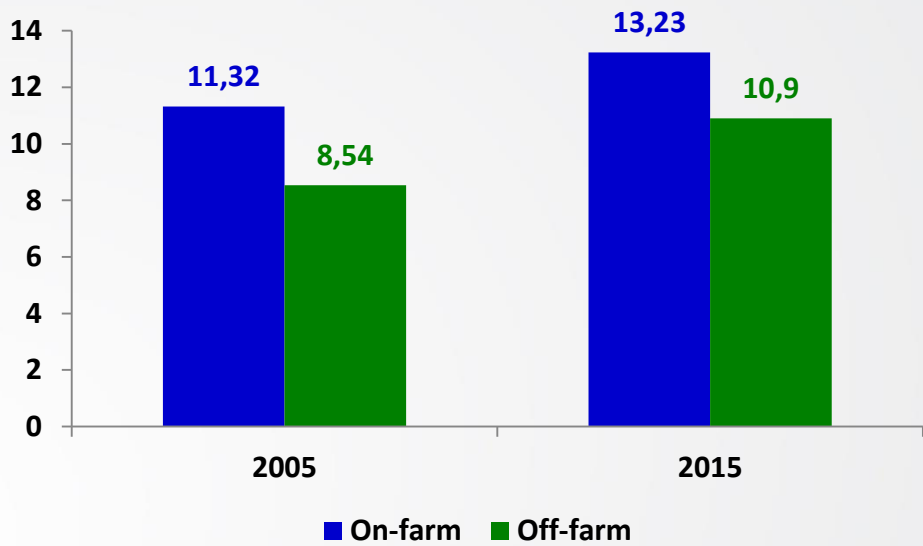


Capacidad
almacenaje/necesidad en 2015

Francia	126%
Hungría	141%
Rumania	129%
Bulgaria	158%
España	111%

Fuente: Comisión Europea. Study on storage capacities and logistical infrastructure for EU agricultural commodities trade, November 17

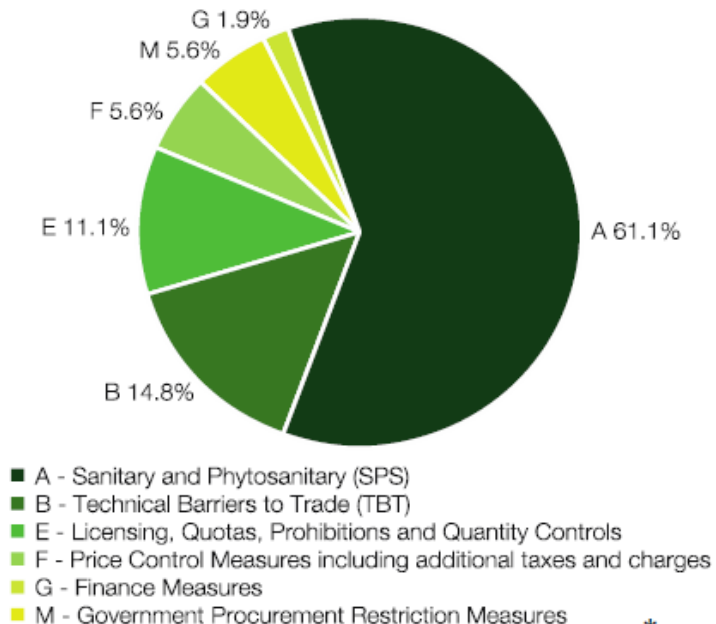
Capacidad de almacenaje permanente en miles de millones de bushels



Fuente: Statista

NTMs identified for the grains industry by UNCTAD*

Grain NTMs by UNCTAD classification

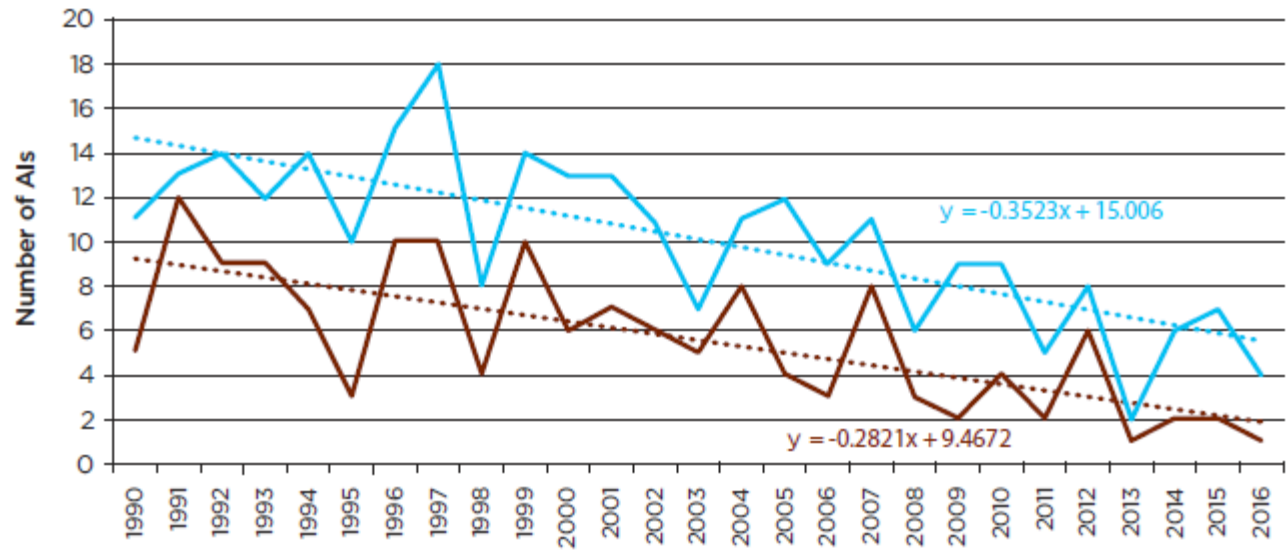


* UN Conference on Trade and Development

Fuente: Grain Trade Australia. Impact of Non-Tariff Measures. London June 18

Apostar a las BPA, y no a la prohibición de activos

Figure 27: Number of New Agrochemical Active Ingredients Introduced Globally and Registered in the EU



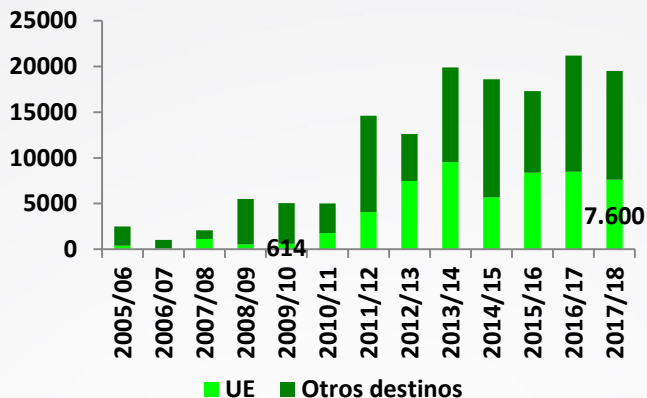
Source: AgbiInvestor

— Global Introductions — Registered in EU

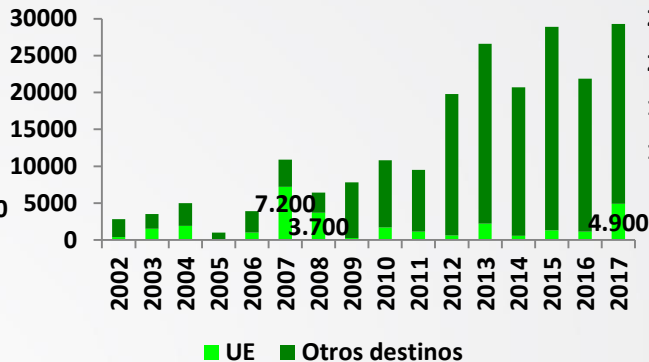
Fuente: AgbiInvestor. The challenges facing agriculture and the plant science industry in the EU, September 18

La pérdida de mercados no es sectorial, es de todos...

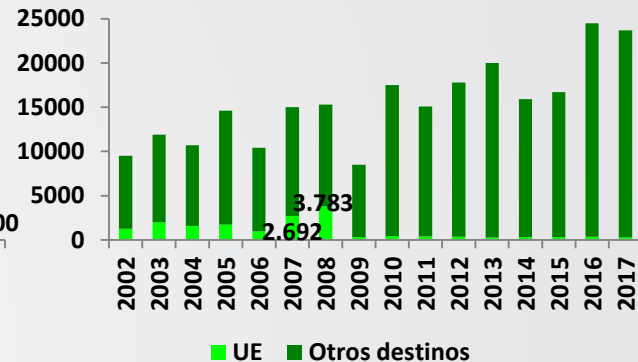
Ucrania: exports de maíz en miles t



Brasil: exports de maíz en miles t



Argentina: exports de maíz en miles t



Fuente: Comisión Europea, COMEX, INDEC

Mexico Buyer Team Purchases U.S. Feed Grains During Export Exchange 2016

The Council **invested \$100,700** of Market Access Program (MAP) funds in sponsoring the participation of these 24 participants to Export Exchange 2016. With all sales initiated or finalized at this event valued at \$17.5 million, this produced a **return on investment (ROI)** of \$173 per every \$1 of MAP invested.



Muchas gracias por su atención