

Paraguay **TODAY**



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**INDUSTRIA
Y COMERCIO**

GOBIERNO NACIONAL
Construyendo Juntos Un Nuevo Rumbo

Vibrant DEMOCRACY open to the WORLD



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Axis of ECONOMIES to Feed the World



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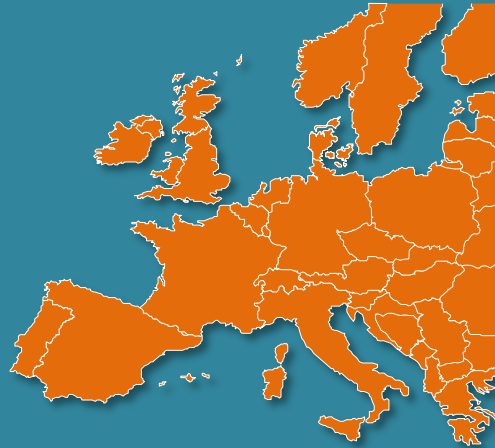
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Committed to integration based on “Win - Win” relationships:

REGION



EU



WORLD



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We have a joint agenda with
Brazil for *import
substitution from China*



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We have an
*agenda for trade,
technology
and investment
integration* with
Europe and the
World



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We have **young population**
eager for **opportunities**

Young and **Easy** to **Train** Population, with the **highest**
level of **productivity** in the **Region**, according to the
Multinational Corporations operating in Paraguay



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REASONS FOR INVESTING IN PARAGUAY

Profitability

*According to the Latin American Economic Commission of the United Nations (CEPAL), the **Return on Investment (ROI)** in 2013 was **22%** (average). Some sectors even higher ROI: financial, real estate. Paraguay offers free flow of capital and dividends. In 2013 two European corporations (TIGO and CERVEPAR) registered highest remittances of dividends*



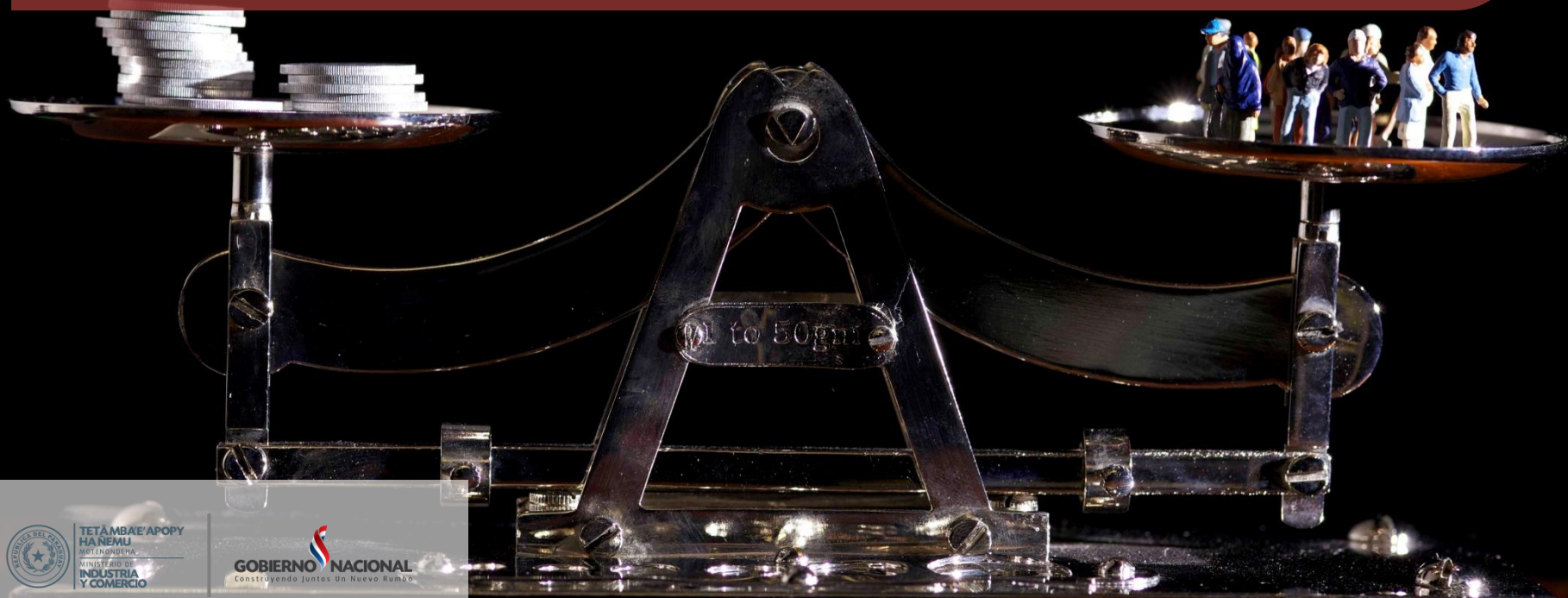
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Predictability

Parguay offers a record of Macroeconomic Stability and the Best Investment Climate in the Region, according to GVF and WB's Doing Business Index (Regional).

*International Reserves **2 a 1** to Debt, Price Stability (inflation rate below 5%), **4,8%** of GDP Growth in the last 11 years (average).*





Market Access

MERCOSUR and **EU** with **key tariff advantages**. Increasing exports of manufactured goods from the region



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Competitiveness

The most Competitive COSTS (taxes, energy, labour) within the region and even with comparison to asian countries. Young Labor Force eager to work.

MAIN COMPETITIVE ADVANTAGES IN PARAGUAY FOR COMPANIES

SECTOR	COMPETITIVE FACTORS	PARAGUAY VS. BRAZIL	
<ul style="list-style-type: none"> • Clothing • Shoes • Autoparts • Electronics • Agricultural Production • Quimical Products and Metalwork 	Labor:	Trained Labor Force	(-) 53,2%.
	Salary/Hour	Machinery Operator	(-) 29,3%.
	(Average in USD)	Untrained Labor Force	(-) 35,2%.
		Average Salary / Month	(-) 20,7%.
	Young Labor Force		(+) 8,0%.
	Electric Energy	USD/MWh	(-) 63,6%.
	Taxes	VAT	(-) 63,2%.
		Income Tax	(-) 60,0%.

Source: Supply Chain Report, IPIE - IDB, Progress Report, Jan 2014



OUTSOURCING

VOLUME OF EXPORTS

2000 – AGO/2013 (13 YEARS) 46 COMPANIES

+

AGO/2013 – 2015 (18 MONTHS) 48 COMPANIES

TOTAL 94 COMPANIES

80% BRAZILIAN COMPANIES

160
MM USD

2013

250
MM USD

2014



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GROWTH POTENTIAL

TRIPLE THE
AGRICULTURAL
OUTPUT



100.000 NEW
HOUSING p/year



3° LARGEST FLEET of
BARGES IN THE WORLD



ABUNDANCE

ELECTRIC
ENERGY AT
COMPETITIVE
PRICE



4° EXPORTER OF
SOYBEAN IN THE
WORLD



6° EXPORTER OF
CORN IN THE WORLD



6° EXPORTER OF
MEAT IN THE WORLD



**WORLD – CLASS
POTENTIAL**

POULTRY / PORK /
AGROECOLOGICAL
PRODUCTS



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Long term vision

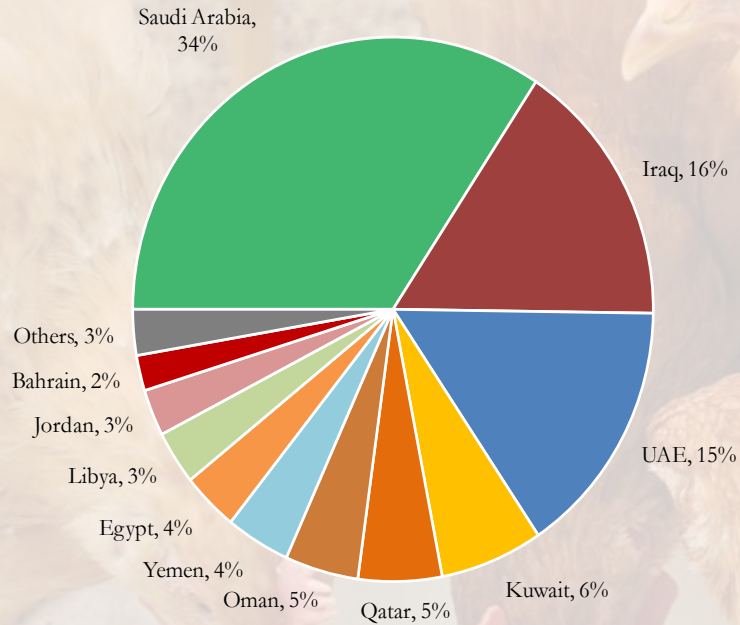
*Paraguay has defined its role as an **open country**, a **world-class food producer** with value added, vibrant **epicenter** for **MERCOSUR**, a **competitive platform** for business, with a **young** and **hardworking** population, **without poverty** and **high rates of development***



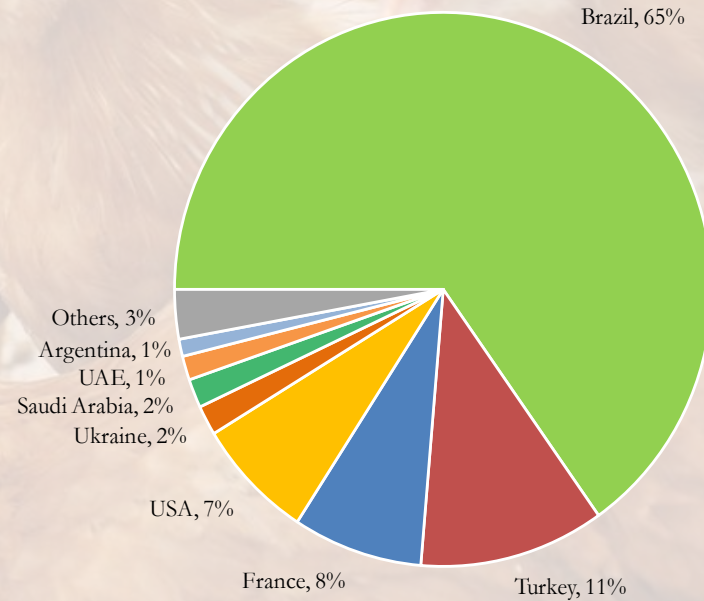
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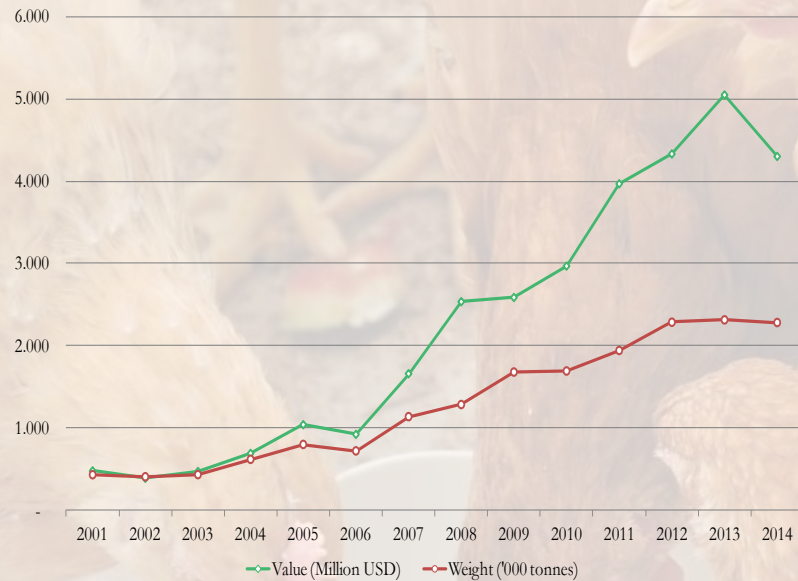
Poultry Imports in the Arab League



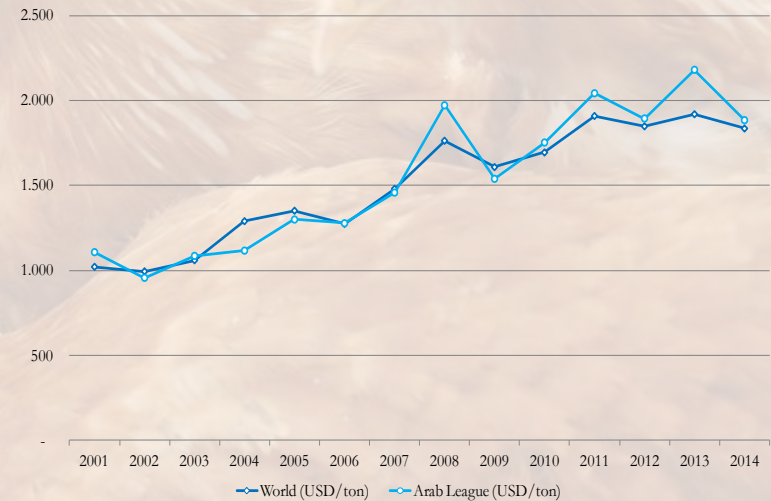
Poultry Exporters to the Arab League



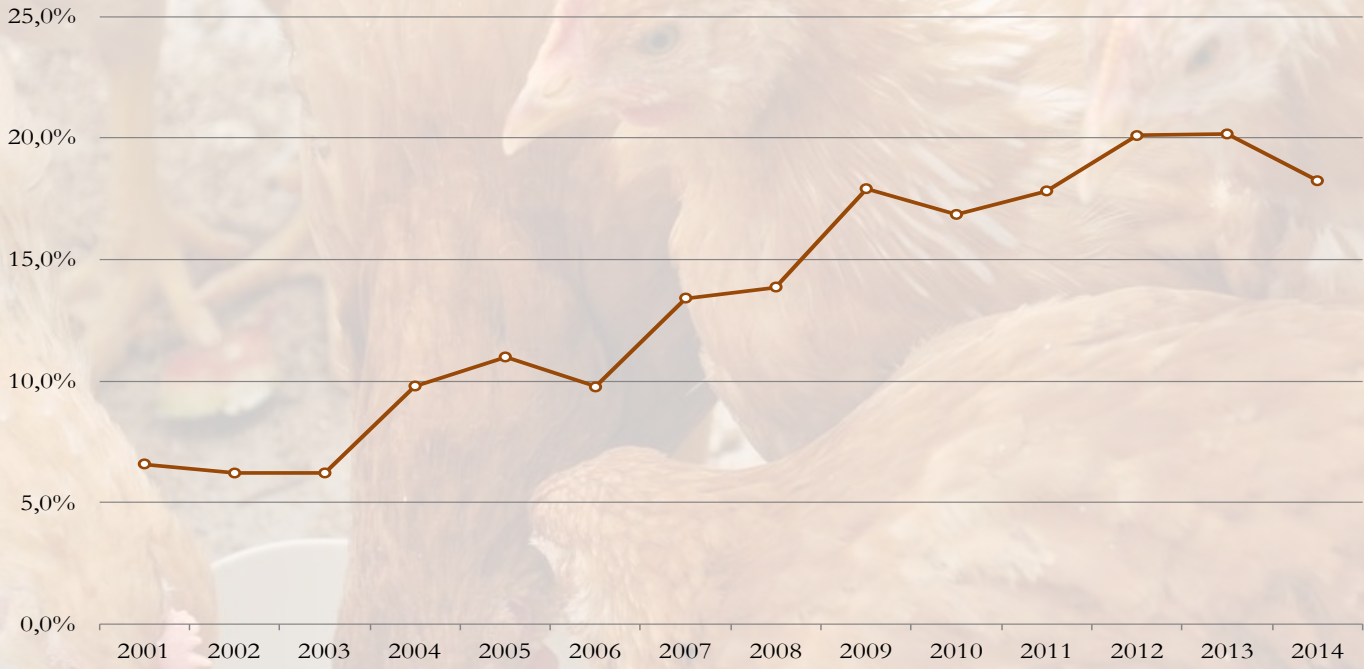
Poultry Imports Arab League



Poultry Import Prices



Participation of Arab League in Global Poultry Imports



POULTRY PRODUCTION IN PARAGUAY

GENERAL INFORMATION

- a. Total population: 20 million, including all categories, hens, chickens, roosters. In the permanent recycling.
- a. Static population on commercial farms, in 2013, 12.5 million head, according to SENACSA records.

HEALTH CONDITIONS

- The country is free from Newcastle disease, influenza Aviar and others.

PRODUCTION

Commercial production of poultry is carried out by four major companies and integrated farms.

The production is finished in 38-40 days with a mean body weight of 2.3 kg, mainly for local market.

MAIN EXPORT MARKETS POULTRY

YEAR	MARKET
2005	ERITREA, BURUNDI, IRAK, LIBERIA, RUSIA, SUDA; TURKEY
2006	LIBERIA, RUSSIA
2008	RUSIA
2009	RUSIA, VENEZUELA
2010	VENEZUELA
2011	VENEZUELA

ADVANTAGES OF POULTRY PRODUCTION IN PARAGUAY

Abundance of raw material: Soybean, Corn

Clean and affordable electrical energy (100% renewable)

Favourable climate conditions

Competitive Labor Cost

Lowest tax burden in the Region

Continuous growth of poultry stock during the last years





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THANK YOU

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