

zyrcular

FOODS

PROTEINA / INTEGRAL / ORIGEN

Santi Aliaga



Jornadas Interempresas.net
TRANSFIRIENDO CONOCIMIENTO

MARTES, 4 DE OCTUBRE DE 2016 WORLD TRADE CENTER - SALÓ PORT VELL

I FÓRUM CÁRNICO: ESCENARIO DE FUTURO DEL SECTOR

Mesa redonda: El futuro del sector cárnico a debate.

Daniel Gómez, Categories Marketing Director de Campofrio. **David Campoy**, Commercial & Business Development Director de Ulabox. **Mar Galtés**, Redactora sección Economía en La Vanguardia. **Santi Aliaga**, Economista y Controller Grupo Vall Companys. **Víctor Yuste**, Director General del Foro Interalimentario

[Descargar ponencia](#)

La Sra. Mar Galtés actúa como moderadora.



GatesNotes THE BLOG OF BILL GATES

MEAT MARKET

Future of Food

Learn how food scientists are reinventing meat - and how it can benefit everyone.

By **Bill Gates** | **March 18, 2013** • 2 minute read

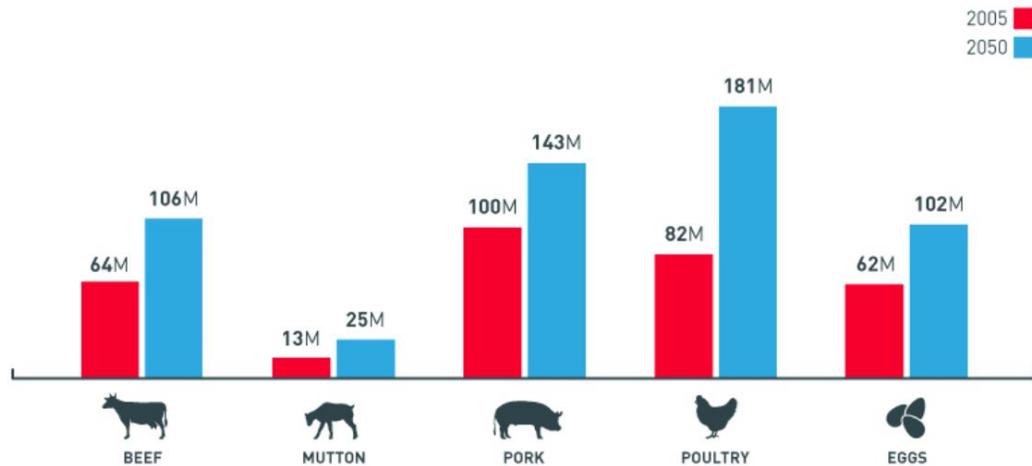


¿ QUÉ ESTÁ PASANDO?

MENOR CONSUMO DE CARNE ... aquí ...

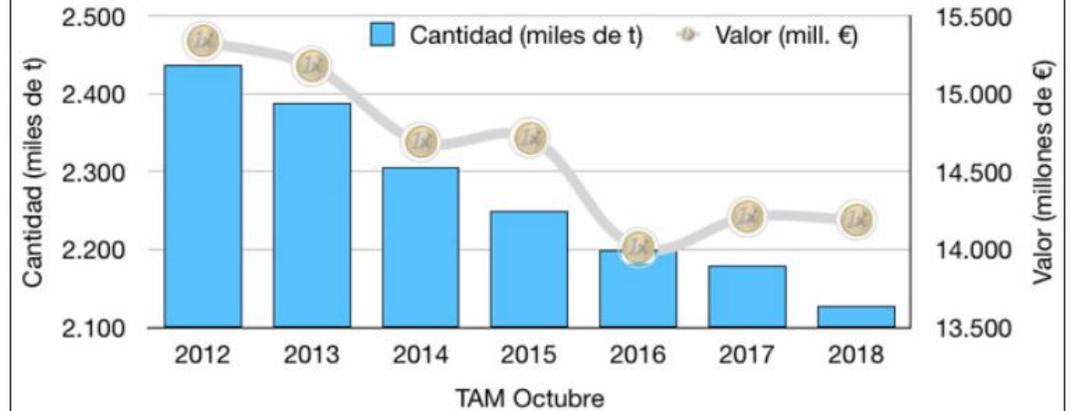
GLOBAL DEMAND FOR MEAT

2005 vs. 2050
(in tonnes)

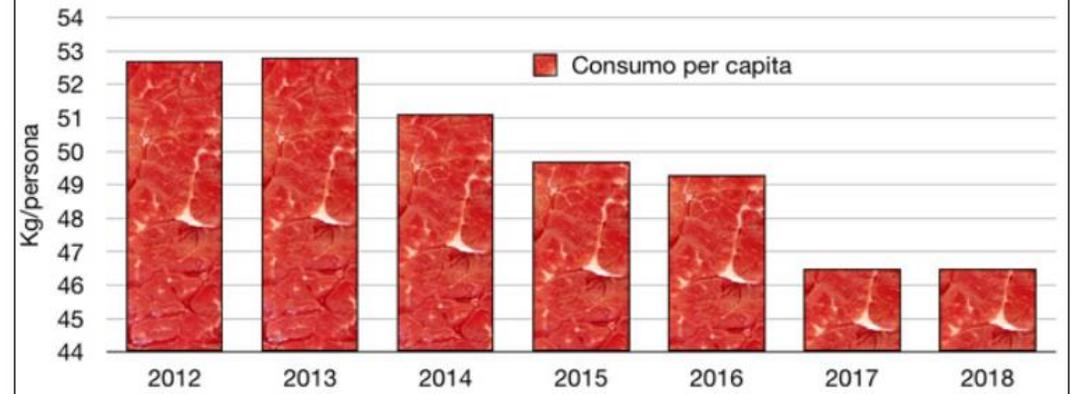


Source: Food and Agriculture Organization of the United Nations, ESA Working Paper No. 12-03, p. 131

Evolución del consumo de carnes y productos cárnicos en los hogares españoles



Evolución del consumo per capita de carnes y productos cárnicos en los hogares españoles (TAM Octubre)





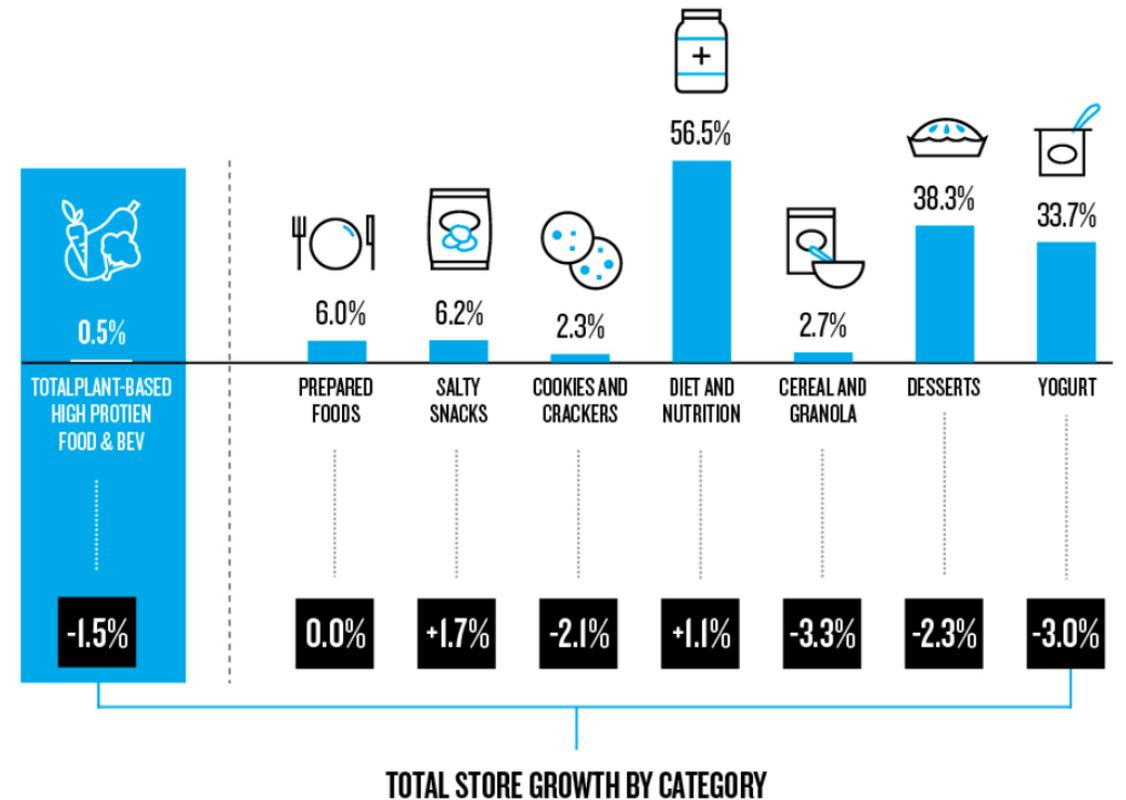
¿ QUÉ ESTÁ PASANDO?

CRECIMIENTO DEL SEGMENTO PLANT BASED EN VARIAS CATEGORIAS

n

HIGH PROTEIN PLANT-BASED FOODS ARE SEEING STRONG GROWTH IN SELECT AISLES

Plant-based high protein Food & Bev: High growth categories

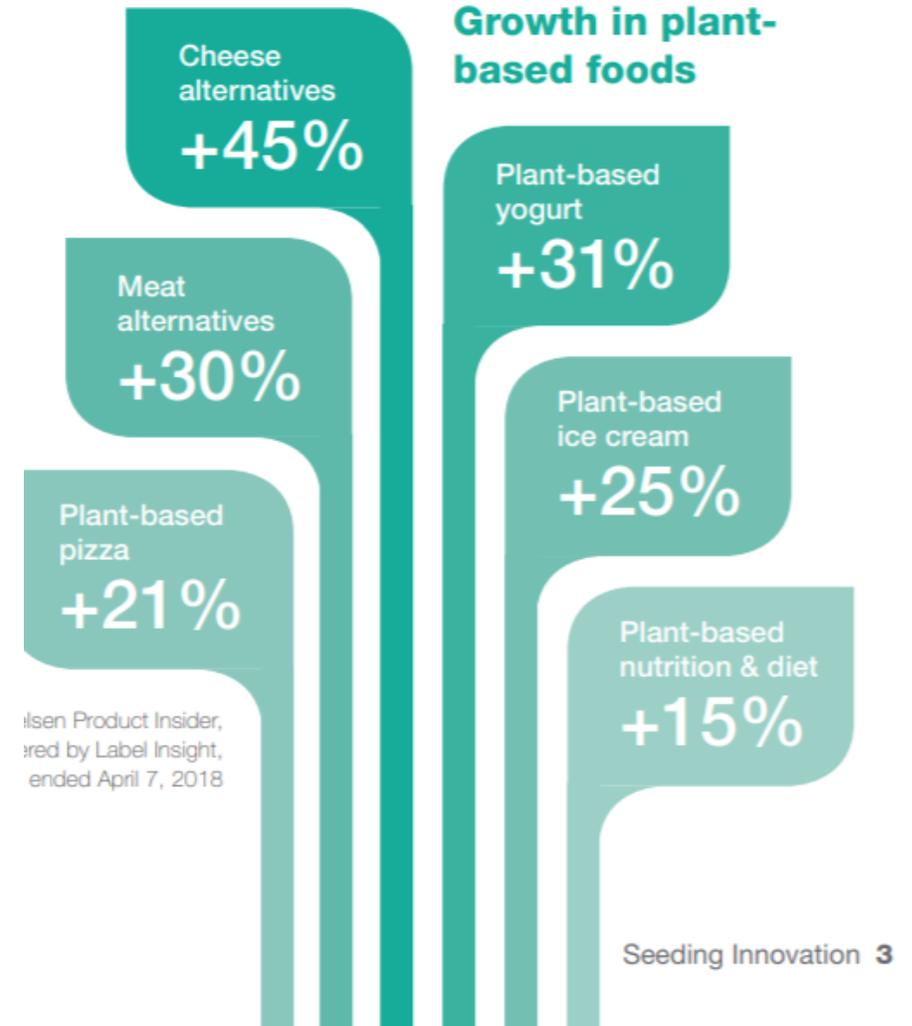




¿ QUÉ ESTÁ PASANDO?

FACTORES A CONSIDERAR:

1. **DRIVERS:** Salud – Medioambiente – Bienestar animal. Por áreas geográficas.
2. **CONSCIOUS EATING:** ¿Qué hay en mi comida y como afecta al planeta?
3. **PLANT FORWARD AGENDA:** Millenials – Gen Zers
4. **ECO INDULGENCIA**
5. **INTRODUCCIÓN NUEVAS DIETAS:** generaciones más jóvenes
6. **ASF:** 25% oferta mundial carne porcina
7. **ADOPCIONES REGIONALES** de los productos
8. **2030 FLEXITARIAN / LESSITARIAN MENUS**
9. **ESTRATEGIA “SÍ, ADEMÁS” VS “O...O”** – Cárnicos vs Food Co’s
10. **VENTURE CAPITAL**





¿ QUÉ ESTÁ PASANDO?

¿MOMENTUM ACTUAL
Y HORIZONTE
TEMPORAL DE LOS
PRODUCTOS PLANT
BASED?

Gartner Hype Cycle for Emerging Technologies, 2019



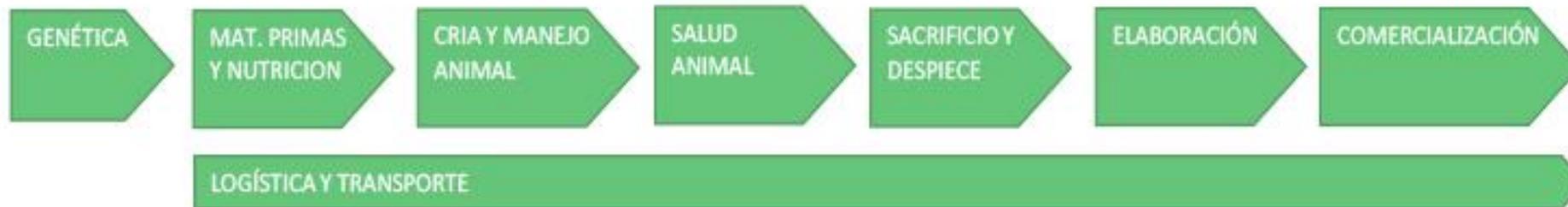
gartner.com/SmarterWithGartner

Source: Gartner
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CADENAS DE VALOR: PROTEINA CÁRNICA VS PROTEINA VEGETAL

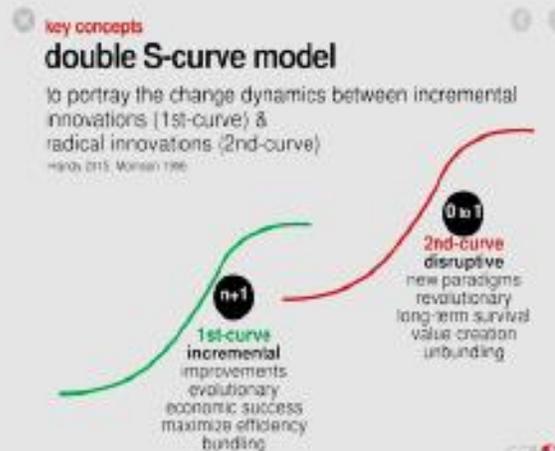
PC



PV



MATERIAS PRIMAS



I+D FORMULACIÓN

DESARROLLO CATEGORIA

ESTUDIO MERCADO Y CONSUMIDOR

COMUNICACIÓN

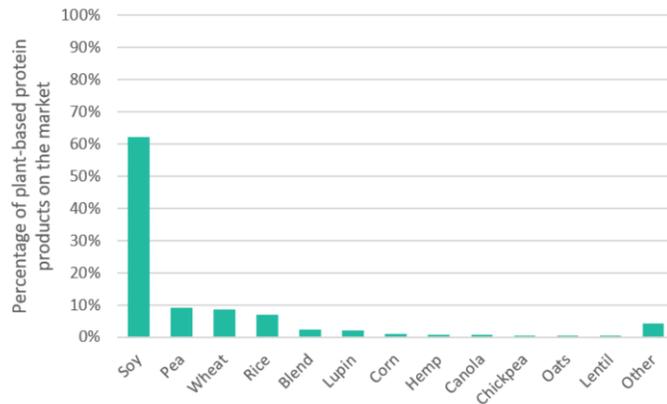
DISEÑO DE PLANTA Y TECNOLOGIA

DIGITAL SELLING



DECISIONES DE DISEÑO DE PRODUCTO Y OPTIMIZACIÓN DE SUPPLY CHAIN

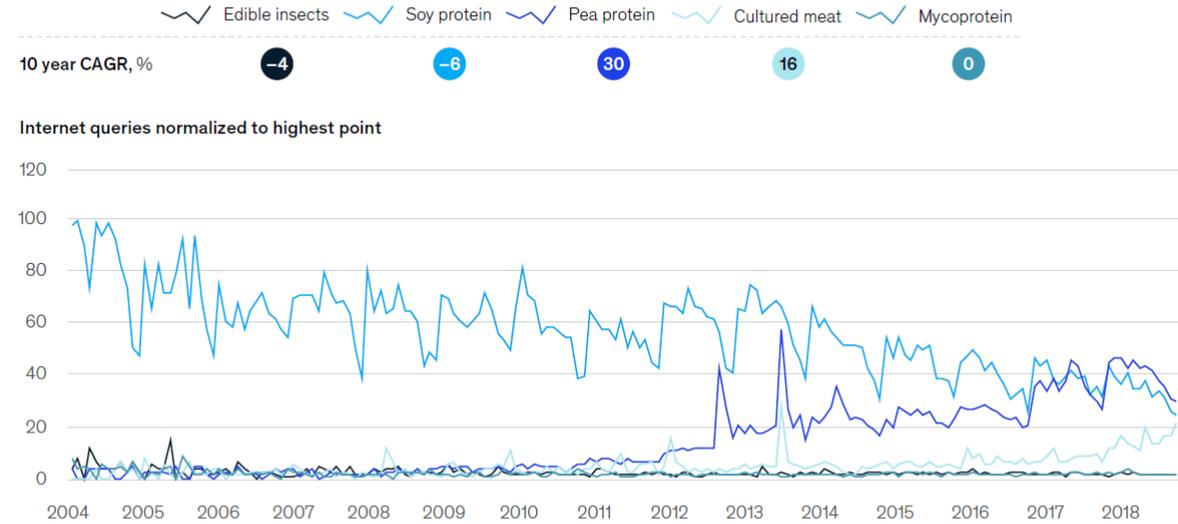
Current Plant Protein Landscape



Source: GFI Supplier Database

Consumer interest in soy protein declined over a 15-year period, while interest in pea protein is growing.

Interest in different alternative proteins, 2004–19



Alternative proteins: The race for market share is on

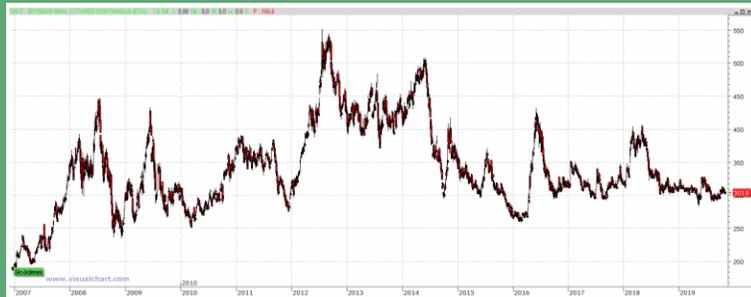


Our Top 10 Food Trends for 2020 5. Plant-Based, Beyond Soy



DECISIONES DE DISEÑO DE PRODUCTO Y OPTIMIZACIÓN DE SUPPLY CHAIN

* Proveedores globales



READY FOR EVERYTHING

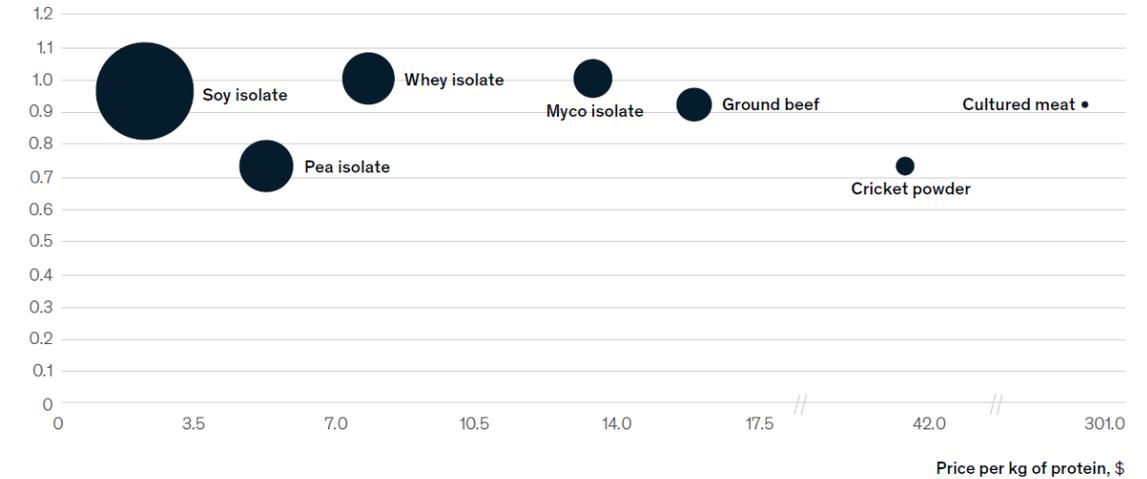
Exhibit 5

Soy and pea protein are the most competitively priced alternative proteins.

Protein alternatives price vs PDCAAS

Bubble size represents PDCAAS per price, 8

Protein digestibility-corrected amino acid score



Source: Dietary protein quality evaluation in human nutrition: Report of an FAO Expert Consultation, Food and Agriculture Organization, Food and Nutrition paper, number 92, March/April 2011, fao.org.

Cadena de suministro del concentrado de soja / guisante





DECISIONES DE MODELO DE NEGOCIO: COMPRAR y DISTRIBUIR, EXTERNALIZAR, PRODUCIR Y COLABORAR (start-up's)

Tecnología, proceso y... ¡Escalabilidad!

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TEXTURE . TASTE
PLANT PROTEIN

PRODUCT ASSORTMENT

Ojah & Plenti®
Plenti® is a 100% plant-based meat alternative developed and produced by Ojah BV. Through a unique, in-house developed technology, Plenti® gives a mouthwatering texture, outstanding nutritional value and has incredible versatile possibilities in the kitchen. We provide the highest quality meat alternative, giving you the opportunity to take your share in the meat-free market.

Plenti Chunks naturel
• Pack weight: 2,5 - 7,5 kg
• Dimensions: 50x30x10 mm
• Protein source: soya

Plenti Strips wok seasoned
• Pack weight: 2,5 - 7,5 kg
• Dimensions: 30x12x12 mm
• Protein source: soya





DECISIONES DE I+D+i

De nuevo...

¡Integración, externalización y presupuesto!

BEYOND MEAT, INC.
Condensed Statements of Operations
(In thousands, except share and per share data)
(unaudited)

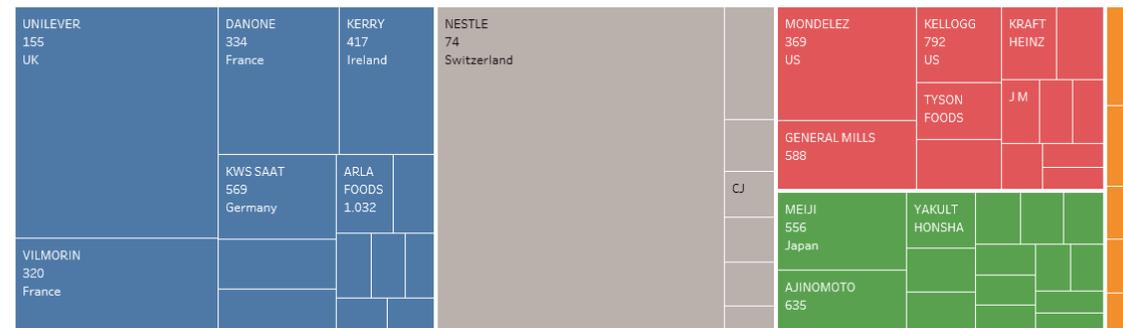
	Three Months Ended		Nine Months Ended	
	September 28, 2019	September 29, 2018	September 28, 2019	September 29, 2018
Net revenues	\$ 91,961	\$ 26,277	\$ 199,418	\$ 56,420
Cost of goods sold	59,178	21,235	133,123	46,709
Gross profit	32,783	5,042	66,295	9,711
Research and development expenses	5,951	2,165	14,661	6,267
Selling, general and administrative expenses	20,944	10,353	47,636	23,133
Restructuring expenses	2,319	528	3,560	1,170
Total operating expenses	29,214	13,046	65,857	30,570
Income (loss) from operations	3,569	(8,004)	438	(20,859)

R&D intensity: 10%

EU Scoreboard 2018 (World 2500)

Select indicator: R&D 2017/18 (€million) Country: (Todo) Industry: Food Producers

World top 2500 R&D investors



<https://iri.jrc.ec.europa.eu/data>

2%



R.O.E



- Curva de aprendizaje...parcial
- Estandarización de producto
- Escalabilidad
- Seguridad alimentaria y trazabilidad
- Relación con los canales de distribución
- Capacidad instalada



- Consumer centricity...alimentación!
- ¿Cómo se come? ¿Qué se come?
- Diseño organizativo – Disrupción – EDGE
- Modelos abiertos colaborativos
- Prima de riesgo del arranque
- Cuenta de resultados y estructura de márgenes
- Política comunicativa
- Competencia food companies
- Partnership start ups

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FOODS

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