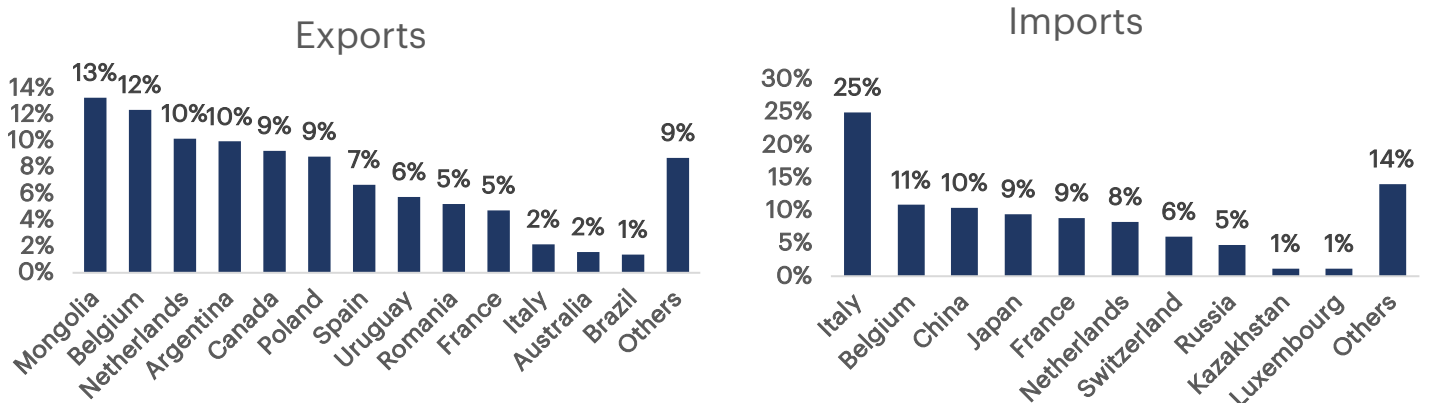


1. INTERNATIONAL TRADE IN HORSEMEAT

TRADE IN MEAT AND BY-PRODUCTS

World consumption of horsemeat is mainly concentrated in some European countries, mainly Italy, Belgium, France, Russia, Switzerland, among others. In these countries it is considered a quality product and there are butcher shops specializing in horsemeat, offering commercial cuts similar to beef, sausages and processed products. Horse products are also found in supermarkets and restaurants. Outside of Europe, China and Japan also demand this type of meat. Total annual exports are 120,754 tones, equivalent to US\$ 434,425 million.

CHART N°1- HORSE MEAT EXPORTS AND IMPORTS (% OF WORLD TOTAL)



Source: prepared by Uruguay XXI based on FAOSTAT data, 2019.

Horsemeat is considered to be of high nutritional value and low in fat, rich in minerals, iron and vitamins. It is also used for medicinal purposes in the production of immunosera, due to the blood volume and because they are good antibody producers from which homologous serums are obtained to enrich culture media and heterologous serums including anti-arachnid, antivenom, tetanus, botulinum and diphtheria antitoxin.

2. HORSEMEAT EXPORTS IN URUGUAY

MEAT AND BY-PRODUCTS

Horsemeat production in Uruguay is a minor activity that stems from the different uses of these animals (work, competition, pleasure). There is no commercial breeding for meat production as in some other countries, especially in Europe.

TABLE N°1 -ANNUAL SLAUGHTER -INAC

Year	Heads slaughtered
2000	44,453
2001	53,351
2002	35,674
2003	38,030
2004	40,006
2005	36,273
2006	39,471
2007	38,879
2008	45,133
2009	39,088
2010	37,136
2011	43,466
2012	41,578
2013	29,268
2014	37,710
2015	38,238
2016	33,790
2017	37,512
2018	39,78
2019	41,168

Source: prepared by Uruguay XXI based on data from the National Meat Institute (INAC)

Since 2000, national equine slaughtering has been around 40,000 heads per year. There are three authorized plants: Sarel S.A -located in the department of Canelones- which accounted for 46% of total exports of horsemeat and by-products in 2020, Agroindustrial del Este -located in the department of Treinta y Tres- with 36% of total exports for the same period, and Clay S.A - located in the department of Canelones- with 18% of it.

Total horsemeat exported in 2020 was US\$ 20 million, constituting the main source of foreign exchange for the sector. The main exportable product from the slaughter industry in the last three years was chilled boneless horsemeat, which accounted for 58% of total horsemeat exports

in 2020. On the other hand, forequarters made US\$ 4 million in 2020, followed by hindquarter cuts that reach US\$ 3 million for the same period.

In terms of export destinations, Belgium and Russia are the main destinations for Uruguayan horsemeat, accounting for 75% of the turnover.

TABLE 2 – HORSEMEAT EXPORTS

Product description	NCM10	NCM10 description	2018		2019		2020	
			US\$	Kg. Neto	US\$	Kg. Neto	US\$	Kg. Neto
Meat of horses, asses, mules or hinnies, fresh, chilled or frozen	0205000020	chilled boneless horse meat	18.495.557	3.026.754	15.077.340	2.785.339	11.681.872	2.335.832
	0205000041	forequarters	6.551.638	2.421.017	7.016.530	2.796.073	4.032.179	1.643.125
	0205000044	pieces of hindquarters	1.616.230	494.756	2.148.919	562.074	3.861.097	1.293.587
	0205000043	pieces of forequarters	346.397	117.011	448.294	149.340	499.890	174.543
	0205000049	other meat	410.563	216.235	156.555	79.225	96.143	62.750
	0205000042	hindquarters					75.659	25.520
	0205000015	cuts of hindquarters					30.912	4.828
Total			27.420.385	6.275.773	24.847.639	6.372.050	20.277.753	5.540.184

Source: elaborated by Uruguay XXI based on DNA data.

TABLE 3 – EXPORT DESTINATIONS FOR HORSEMEAT

Destination	2018		2019		2020	
	US\$	Part. (%)	US\$	Part. (%)	US\$	Part. (%)
Belgium	10.228.060	37%	8.657.426	32%	11.401.632	56%
Russian Federation	2.883.684	11%	3.376.958	12%	3.800.482	19%
France	10.513.803	38%	8.844.902	32%	3.390.689	17%
Kazakhstan	1.397.260	5%	2.045.155	7%	685.225	3%
Hong Kong		0%		0%	577.427	3%
Vietnam	1.563.355	6%	622.869	2%	303.843	1%
Poland	392.791	1%	551.175	2%	60.950	0%
Japan	31.101	0%	49.505	0%	39.584	0%
Spain					17.922	0%
Switzerland	206.943	1%				
Germany	81.054	0%	99.632	0%		
Thailand			475.971	2%		
Belarus	61.165	0%	124.047	0%		
Netherlands	61.169	0%				
Total	27.420.385	100%	24.847.639	91%	20.277.753	100%

Source: elaborated by Uruguay XXI based on DNA data.