

Uruguay beef and sheepmeat industry

Prepared by National Meat Institute (INAC), November 2023.¹

Uruguayan beef production and exports represent 1% and 5% of worldwide total, respectively. Globally, Uruguay ranks among the top 10 beef exporters. In 2022, Uruguay's beef and by-product exports exceeded USD 2 billion, accounting for almost 20% of the country's total goods exports.²

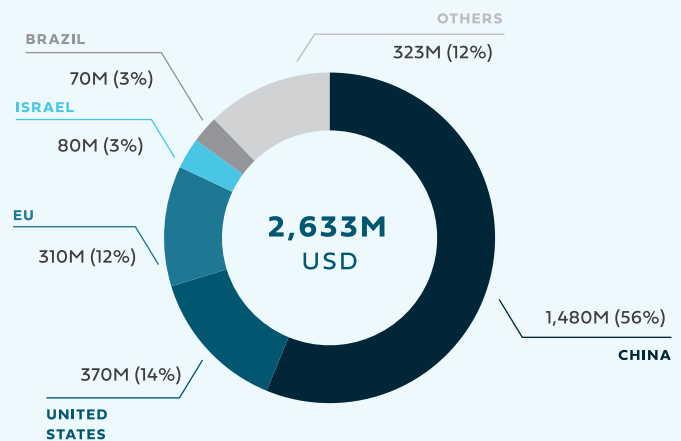
Herd facts and figures³

- Around 48,900 farms are involved in the cattle industry. More than half are family farms.
- There are 11,7 million head of cattle and 6,1 million head of sheep in our country.
- This represents more than 3 cattle per capita.
- More than 90% of the entire herd is destined to meat production. The most popular breeds are Hereford and Angus.
- Each cattle has 1 hectare to roam.
- Hormone and antibiotic use as growth promoters are forbidden by law since 1962 and 2011, respectively.
- According to FAO, Uruguay is the country with the largest share of agricultural land worldwide. More than 80% of the surface has agricultural use.

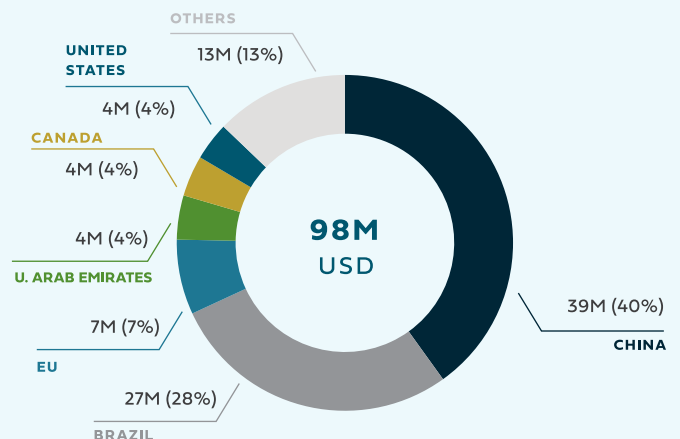
People in the industry⁴

- Around 90.000 people are employed in the red meat industry, including on-farm production, processing, and associated services.

2022 Uruguay's beef exports by country



2022 Uruguay's sheepmeat exports by country



Commercialization

- Uruguay produces around 600.000 tons CWE⁵ of beef per year.
- Most of the cattle is pasture raised and grass-fed. Only around 15% of all cattle processed is produced under grain finished system (120 days – short fed).
- Around 20.000 tons CWE of sheep meat is commercialized between domestic market and exports.

Domestic value and consumption

- Uruguayans ate 92,5 kg of meat on average during 2022.
- Beef consumption represented 49% of the total consumed meat.
- These numbers position the country among the top 5 per capita beef consumers and among the top 10 per capita meat consumers worldwide.

Export value and volume

- Uruguay exports around 80% of its total beef production to more than forty countries, considering the European Union as a single unit.
- Uruguay has sanitary access to more than 3 quarters of the importing market. This means that the country is one of the best 5 countries in this metric. Uruguayan beef is mainly imported by the most sophisticated markets, for example: US, Japan, Korea, European Union, Switzerland and China.
- Almost 90% of sheep meat is exported.

¹ Data up to 2022 unless otherwise stated. Data source is INAC unless otherwise stated.

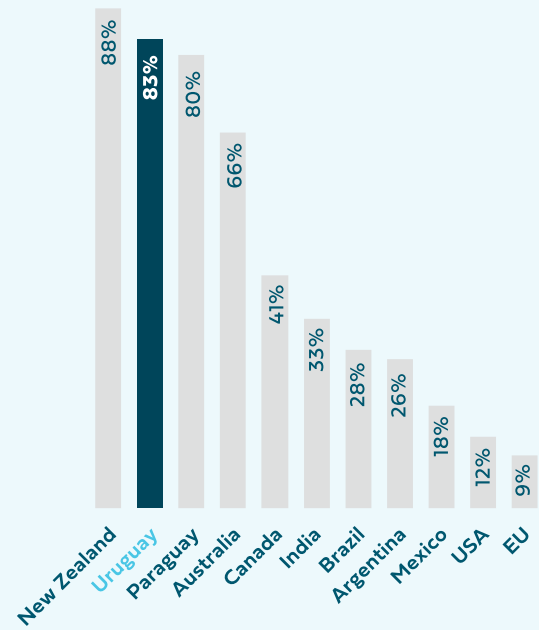
² Source: INAC, Uruguay XXI.

³ Source: Ministry of Livestock, Agriculture and Fisheries (MGAP).

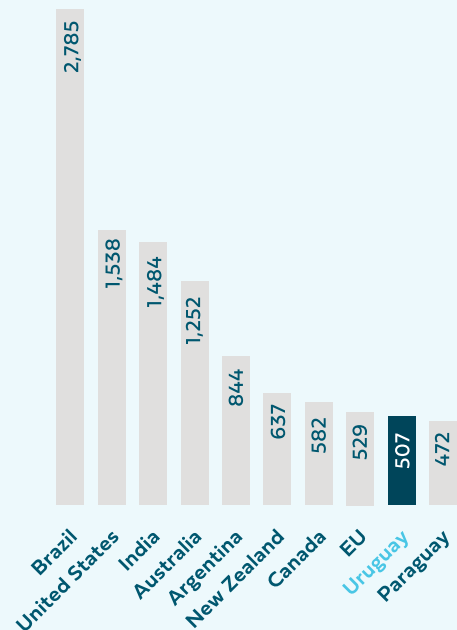
⁴ Source: MGAP.

⁵ Carcass Weight Equivalent.

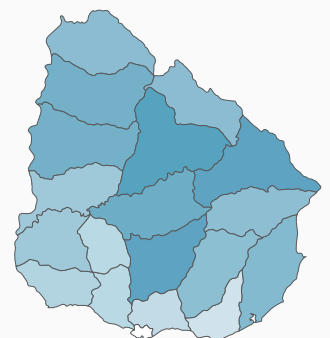
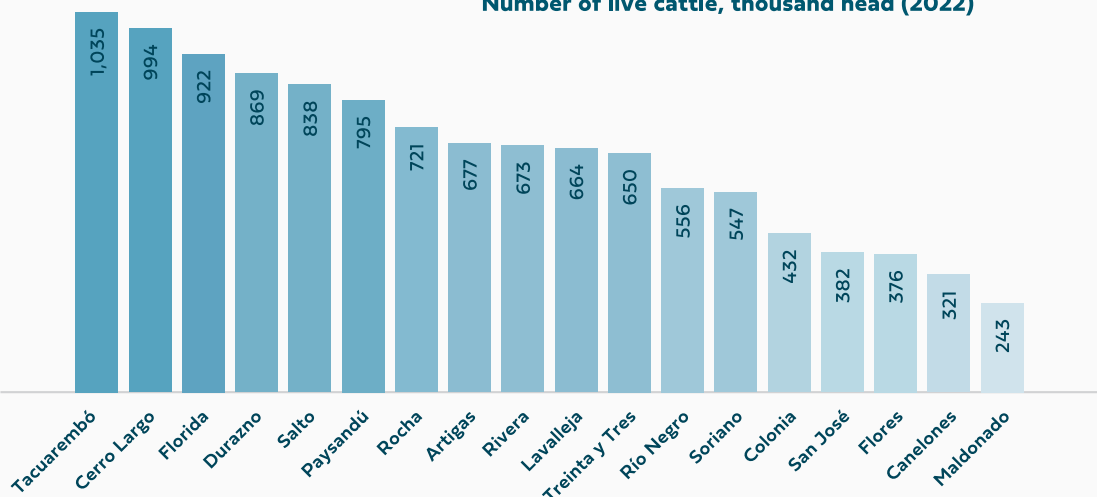
2022 Beef exports / Production ratio by country



Top ten beef exporting countries (thousand tons CWE)



Number of live cattle, thousand head (2022)



11,7
Million head of cattle