

STRATEGIC PLAN

2021-2028



inac
Instituto Nacional de Carnes



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1. ABOUT US

The National Meat Institute (INAC) is a non-state, public entity created by Decree-Law No. 15605, of July 27, 1984, for the proposal, advice and execution of the National Meat Policy formulated by the Executive Branch.

INAC's objective is to promote, regulate, coordinate and monitor activities of production, transformation, storage, transportation and marketing of bovine, ovine, equine, pork, goat, poultry, rabbit and small game meats, as well as their offal, by-products and meat products.

INAC is managed and led by a board of eight members, made up of two delegates of the Executive Branch; one of them, the President, appointed on the proposal of the Ministry of Livestock, Agriculture and Fisheries (MGAP) and the other, as Vice President, on the proposal of the Ministry of Industry, Energy and Mining (MIEM).

The private sector is represented by six directors. Three of them representing rural producers: one for the Rural Association, another for the Rural Federation and a third shared between the National Commission for Rural Development and the Federated Agrarian Cooperatives. The other three representing the manufacturing sector: Chamber of the Meat Packing Industry, Association of Meat Packers of Uruguay, and one shared between the Association of Slaughter Plants Domestic Market, and Uruguayan Chamber of Poultry Processors.



MISSION

To formulate, provide counsel on and implement policies aimed at fostering the expansion of the meat industry, and to contribute to the productive, economic and environmental development for the benefit of society.

VISION

To establish Uruguay as a trusted provider of premium-quality meat, garner recognition for both the industry brand and its affiliated companies, enhance market presence across diverse regions, and champion the meat industry as a pivotal driver of Uruguay's **economic and sustainable development**.





2. PRINCIPLES OF THE STRATEGIC PLAN

Uruguay stands out as the Latin American country boasting the highest per capita income and the most equitable income distribution in the region.

The meat industry makes a significant contribution to the creation of wealth in our country. It is present all along the national territory through multiple links (primary production, industrialization, transportation, commerce, demand for inputs) and is responsible for an important proportion of employment and investment, due to its multiplier effect.

To continually enhance income creation and distribution, it is imperative to fortify the meat industry by crafting optimal conditions for its expansion.

This vision of strength is based on two aspects: the meat industry's potential for sustainable production growth and the enhancement of competitiveness on both the national and international stages. Such growth must be executed with a steadfast commitment to fair competition mechanisms among companies in diverse sectors.



3. GENERAL OBJECTIVES OF THE STRATEGIC PLAN

The overall goal of this plan is to enhance productivity while conscientiously addressing environmental considerations and elevating the value of products. This strategic approach is designed to ensure that the meat industry retains its pivotal role in the country's development and continues to make meaningful contributions to society.

This contribution is not only evident in economic aspects but also in social ones; the meat industry is strongly connected to the country's identity and culture, family development and countryside roots, as well as the quality of life of people who seek a healthy diet.

With these dimensions in mind, the objective is to expand meat production, under international environmental commitments, from current levels —700 thousand tons— to a balanced level of 1 million tons ECW, and to reach an average value of 5,400 USD per ton FOB (2030 goal).



INAC's mandate is to build collaborative visions among the key economic stakeholders within the industry. It involves formulating, advising on, and implementing industry policies aimed at enhancing the competitiveness of companies, all while considering the prevailing macroeconomic landscape.



We are focused on enhancing entry into global markets and establishing the Uruguayan meat industry brand. Concurrently, we aim to instill confidence in both local and international consumers regarding the quality of our meats. This involves elevating productivity within the framework of sustainable policies, advocating for proper quality standards, and ensuring the integrity and wholesomeness of both products and processes.

INAC's executive action is defined by this plan, which has a well-determined allocation of human and economic resources, annually prioritized goals, relevant progress monitoring indicators and periodic evaluations established by the Institute's Board.

Although the objectives established show a specific numerical goal - both in production and value - the key lies in formulating and embracing a vision of growth for all meats and within a defined dimension.

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4. PILLARS

Following are the pillars that serve as the organizational framework for the challenges and objectives essential to achieving these goals.





PILLAR 1. DEMAND STIMULUS

Value creation begins with demand. This pillar proposes to increase the volume of exports and to continue developing the demand of the domestic market through better access, positioning of the industry brand and creation of added value.

The challenges and objectives for INAC are differentiated by species:

Bovine- The challenge is to raise knowledge on priority markets, (e.g.: Southeast Asian countries), the industry brand strategy and the management of trade barriers. The objective is to deepen the most profitable markets, expand access to priority ones and guarantee the positioning of the industry brand to make the private sector more attractive.

Poultry- The focus is to boost exports and ensure free trade rules. To move forward in this challenge the aim is to promote sustainable exports by positioning this product in strategic markets, such as China and MENA countries.

Ovine- Sheep meat has the challenge of obtaining a position in specific markets, mainly Brazil and the United States, as well as improving access to potential markets.

Swine- For this meat, the goal is to increase the presence in the domestic market to guarantee the increasing supply of meat in the medium term, without neglecting the export strategy.

PROGRAMS OF PILLAR 1

MARKET ACCESS

Ensure access to world markets by creating the best positioning conditions.

POSITIONING OF INDUSTRY BRAND

Understand priority markets to position the industry brand in the target markets.

SUPPORT FOR EXTERNAL PROMOTION

Coordinate promotional efforts with exporting and importing companies.

DOMESTIC CONSUMPTION

Encourage consumption in consumer segments and improve the perception of the value of meat at the domestic level.





PILLAR 2. CREATION OF A SUSTAINABLE OFFER

To meet an increasingly challenging demand, Uruguay needs to ensure greater volumes of **high-quality meat with greater efficiency** that meets the needs of consumers and the demands of destination markets, and at the same time stimulates the sustainability of the industry (economic, social and environmental).

The objective of this pillar is the creation of a sustainable supply of meat that meets planned demand, and emphasizes the efficiency of the entire chain. Likewise, it highlights the need to guarantee good competitiveness, effective productive capacity and improvement in meat quality standards, creating a positive environmental impact.

As an example, some of the strategic projects being carried out are the sector agendas of the different meat chains.

PROGRAMS OF PILLAR 2

DEVELOPMENT FOR ECONOMIC IMPROVEMENT

Collaborate with the development of productive capacity to improve genuine competitiveness in companies in the industry. Focus on the country side, logistics and manufacturing sector.

MEAT QUALITY

Collaborate in the creation of technical elements for the characterization and improvement of Uruguayan meat standards. Guarantee emphasis on health and food safety.

ENVIRONMENTAL SUSTAINABILITY

Environmental efficiency with positive impact within the framework of the government's environmental priorities. Emphasis on water care, biodiversity, and emissions mitigation to minimize the footprint in the chain.





PILLAR 3. MEDIATION IN THE VALUE CHAIN

INAC's nature is to interact with a broad spectrum of interests and needs of different stakeholders. It faces the challenge of ensuring that everyone participates actively and in a coordinated manner in the development of the industry.

Mediation must be addressed swiftly and efficiently through flexible laws with strict compliance.

In practical terms, this means a compact, relevant, easily accessible body of regulations with an effective inspection and penalty system that deters irregular behavior.

The objective of this pillar is to ensure the wholesomeness of the products and processes in the chain, guaranteeing the transparency, efficiency and reliability of the information to facilitate the relationship of the stakeholders in the industry. Thus, the reason for the existence of INAC's information systems is emphasized: supporting **commercial transparency**, **formalization**, promoting **fair competition** and the virtuous circle of **investment**, **innovation** and **comprehensive improvement** of the chain.

PROGRAMS OF PILLAR 3

AUDITS OF STANDARDS

Formalize, set simple and achievable standards to improve the quality of Uruguayan meats.

PROMOTION OF FORMALIZATION

Promote the formalization of all companies in the meat industry.

INFORMATION FOR COMMERCIAL TRANSPARENCY

Provide and expand the use of detailed and reliable information for all stakeholders in the chain.





PILLAR 4. **EXTERNAL INFLUENCE**

The meat sector is intricately connected to a diverse range of stakeholders both locally and internationally, subject to pressures from various perspectives.

INAC's role is to act proactively in using research evidence and scientific arguments to communicate and promote the virtues of production systems and the nutritional attributes of meat to society and public policy makers.

PROGRAMS OF PILLAR 4

NUTRITION AND HEALTH

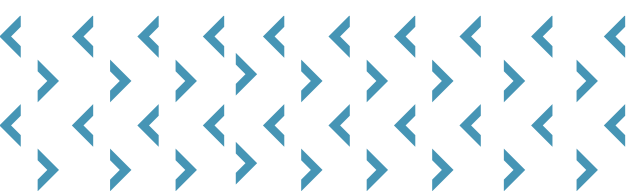
Focus on the consumer to highlight the contribution of meat to a healthy life with emphasis on the benefits of consuming Uruguayan meat.

ENVIRONMENT AND SUSTAINABILITY

Focus on society to communicate the contribution of animal production to the environment and biodiversity.

GOVERNMENT

Promote alliances with government agents that foster the development of the meat sector. INAC's role as an opinion influencer and public policy advisor will be reinforced through communication.





PILLAR 5. **INSTITUTIONAL EFFICIENCY**

INAC is committed to implementing best practices to enhance organizational efficiency while fostering transparency withing the industry and among the Uruguayan society.

This pillar proposes to take INAC to new levels of efficiency, professionalization, modernization and capacity for action to provide support to the needs of the sector.

Additionally, it should identify strategic processes to ensure the best execution with efficient use of resources. The optimization of resources will be closely aligned with investments in process and resource development, people empowerment and internal communication.

PROGRAMS OF PILLAR 5

PROCESSES

Continuous improvement of INAC's internal processes, with emphasis on efficiency, transparency and effectiveness.

SYSTEMS

Investment in systems and tools that provide INAC and its users with a good experience.

PEOPLE

Develop INAC's talent through training and clarity of responsibilities to put it at the service of the institute and its users.

MANAGEMENT

The necessary running to guarantee the efficient operation of INAC and the resources available.

INFRASTRUCTURE

The necessary elements to guarantee the efficient operation of INAC and the resources available.





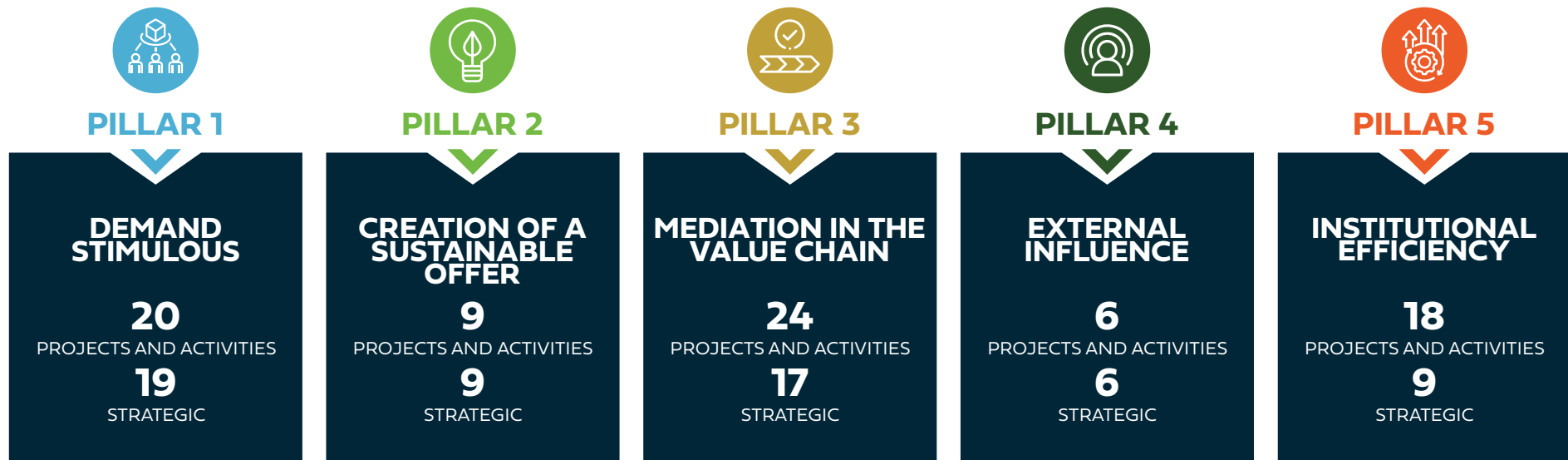


IN SUMMARY

The Industry Strategic Plan, envisioning 2030, aims to harmonize incentives across all stakeholders in the meat supply chains, fostering a virtuous circle of investment, innovation, and ongoing enhancement of products and processes in the meat industry.

That is why the General Vision of the development of the chains is reflected in transversal Objectives, both in quantitative and qualitative aspects. Articulating these goals facilitates a deeper comprehension of the effort and institutional collaboration required between the public and private sectors to attain them. Moreover, it is noteworthy that this level of management ensures continual auditing and accountability to diverse stakeholders—a prerequisite in the contemporary governance of such organizations.

The Strategic Plan – along with its corresponding Annual Plans - serves as the internal framework for organizing the institute's actions and priorities. Above all, it imparts direction, clarity, and cohesion to its objectives, ensuring transparency in processes that contribute to adding value to both the sector and society.



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