



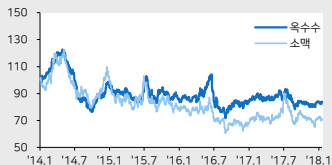
국제 곡물 가격/중국 아미노산 가격	단위	현재가	기간변동률								주요 제품 가격 동향 (전일비)						
			01.20	1D	1W	1M	3M	YTD	% YoY	52w high	52w low	F&B 가격 동향		음식료 주요 News			
CBOT	옥수수	¢/부셸	353	0.3%	1.8%	0.9%	1.1%	0.5%	-3.8%	-10.1%	7.0%	라이신 가격 하락 기타아미노산 가격 하락	라이신 8.7 -1.1%	라이신(Feed) 8.8 0.0%	(오리온) 곡물집 17년 약 9개월간 2,300만개(250억원) 판매 (이코노믹리뷰)		
	소맥	¢/부셸	423	-0.6%	0.5%	-0.2%	-1.7%	-1.0%	-0.2%	-21.6%	9.2%						
	대두	¢/부셸	977	0.4%	3.5%	2.4%	-0.7%	2.7%	-8.7%	-8.7%	8.1%						
	대두유	¢/lb	32.3	0.2%	-2.0%	-2.1%	-3.4%	-2.4%	-8.9%	-8.9%	4.1%						
NYBOT	원당	¢/lb	13.3	1.3%	-6.6%	-9.1%	-5.9%	-12.6%	-34.3%	-37.4%	5.6%	라이신 8.7 -1.1%	라이신(Feed) 8.8 0.0%	라이신(CJ CJ)	DL-메티오닌 20.6 0.0%		
	오렌지	USD/lb	147	0.9%	7.6%	5.4%	-2.5%	7.7%	-12.6%	-23.0%	16.7%						
	커피	USD/lb	121	0.1%	-0.8%	-1.5%	-2.5%	-3.9%	-19.6%	-22.0%	6.9%						
DALIAN Ex	대두	RMB/톤	3,137	0.3%	0.1%	-9.4%	-14.0%	2.8%	-25.3%	-27.8%	2.8%	L-메티오닌 20.3 0.0%	쓰레오닌 10.5 -1.9%	트립토판 111.0 0.0%	음식료 4Q17 실적 발표일정 2/1(목): KT&G 2/7(수): CJ프레시웨이 2/8(목): 동원F&B		
	대두박	RMB/톤	2,797	0.0%	-1.0%	-3.3%	-3.2%	-2.7%	-8.1%	-11.8%	10.4%						
	옥수수	RMB/톤	1,814	-0.3%	-0.9%	4.8%	10.7%	4.4%	20.9%	-2.6%	21.5%						
Mal Ex	팜유	USD/톤	2,435	-1.2%	-1.6%	-0.6%	-10.9%	-0.4%	-24.9%	-26.3%	4.1%	옥수수(CBOT) 353 +0.3%	소맥(CBOT) 423 -0.6%	대두(CBOT) 977 +0.4%	대두유(CBOT) 32.3 +0.2%	원당(NYBOT) 13.3 +1.3%	
중국축산	라이신	RMB/kg	8.7	-1.1%	-3.3%	-17.1%	-3.3%	-7.4%	-16.3%	-17.1%	8.7%						
	라이신(Feed Trade)	RMB/kg	8.8	0.0%	-0.6%	-11.6%	-2.2%	-5.1%	-13.9%	-13.9%	11.0%						
	라이신(CJ중국호가)	RMB/kg	9.5	0.0%	0.0%	-3.1%	-3.1%	-5.0%	-32.1%	-32.1%	0.0%						
	메티오닌	RMB/kg	20.6	0.0%	-4.8%	-9.3%	-13.3%	-7.4%	-17.1%	-17.1%	3.8%						
	쓰레오닌	RMB/kg	10.5	-1.9%	-8.7%	-20.8%	-12.5%	-17.3%	1.0%	-27.6%	15.4%						
	트립토판	RMB/kg	111.0	0.0%	-2.6%	-9.4%	16.8%	-9.4%	63.2%	-9.4%	70.8%						
돼지고기	RMB/kg	22.0	0.0%	0.5%	0.9%	2.5%	0.7%	-9.8%	-10.8%	6.5%							
기타	참치(아타나)	USD/톤	1,550	0.0%	-1.6%	-13.9%	-34.0%	-8.8%	-8.8%	-6.1%	-34.0%						
	육계(협회 평균가)	KRW/kg	1,390	0.0%	7.8%	7.8%	-26.5%	7.8%	0.0%	-46.3%	16.8%						
	돈육(협회 도매가)	KRW/kg	4,056	0.5%	3.0%	-6.5%	-3.7%	4.7%	-11.7%	-34.0%	6.6%						
글로벌 추가 동향	단위	현재가	1D	1W	1M	3M	YTD	% YoY	52w high	52w low	Mkt Cap						PER(x)
아미노산	CJ제일제당	KRW	358,000	-1.0%	-8.7%	-3.4%	-3.8%	-2.2%	0.0%	-13.9%	6.9%	4,717	12.4	1.2	10.0	8.4	
	Ajinomoto	JPY	2,077	-1.2%	-2.2%	-1.6%	-9.0%	-2.1%	-7.8%	-17.4%	1.4%	1,187	20.3	1.8	9.2	9.6	
	ADM	USD	41.0	1.2%	1.0%	2.1%	-6.2%	2.2%	-8.9%	-12.8%	5.1%	23	15.0	1.3	8.5	9.4	
	Meihua	CNY	5.3	0.8%	-2.4%	-2.0%	-16.4%	2.9%	-21.7%	-30.4%	4.5%	17	12.3	1.6	13.9	7.4	
	GBT	HKD	0.1	1.7%	3.4%	11.8%	-6.8%	1.7%	-42.5%	-42.5%	13.9%	0.8	-	-	-	-	
	Evonik	EUR	32	0.8%	3.0%	1.9%	4.3%	1.9%	9.1%	-2.6%	18.3%	15	14.2	2.0	12.3	7.3	
중국 F&B	오리온	KRW	115,000	2.2%	6.0%	-2.1%	22.6%	10.0%	-	-9.4%	42.9%	4,546	-	-	-	-	
	Tingyi	HKD	17.1	7.4%	11.0%	17.4%	41.7%	12.6%	100.0%	7.4%	102.1%	96	37.6	3.9	11.0	12.0	
	Want Want	HKD	6.9	4.1%	5.6%	16.9%	12.0%	5.6%	41.2%	0.1%	41.2%	86	22.6	5.1	23.5	13.2	
	Tsingtao Brewery	HKD	45.4	-3.3%	-1.8%	17.9%	45.0%	12.7%	55.2%	-4.7%	55.2%	65	32.4	2.8	8.9	15.9	
	China Mengniu	HKD	26	1.2%	8.9%	21.7%	22.3%	13.3%	83.5%	1.2%	88.2%	103	25.6	3.3	13.5	14.8	
담배	KT&G	KRW	106,500	0.0%	0.9%	-12.0%	0.5%	-7.8%	8.6%	-14.8%	11.5%	14,622	12.2	1.7	14.7	7.0	
	Philip Morris	USD	108.9	3.7%	3.9%	0.7%	-3.3%	3.1%	16.5%	-11.4%	16.5%	169	20.4	-	-	14.7	
	British American	GBP	5,062	2.3%	0.2%	1.3%	4.0%	0.9%	9.2%	-10.3%	10.9%	116	16.3	7.3	24.1	11.5	
	Japan Tobacco	JPY	3,619	-0.4%	-0.7%	-2.2%	-4.9%	-0.3%	-3.3%	-14.3%	0.8%	7,238	14.8	2.3	16.5	9.8	
주류	Ambev	BRL	22.0	0.4%	0.7%	6.8%	1.1%	3.4%	27.5%	-0.6%	30.8%	346	25.5	7.5	29.6	14.7	
	Heineken	EUR	88.7	0.7%	1.0%	0.2%	3.5%	2.1%	25.9%	-1.2%	28.2%	51	21.0	3.2	16.4	11.3	
	Asahi	JPY	5,719	3.0%	0.5%	-0.4%	14.7%	2.3%	54.3%	-5.5%	55.5%	2,766	18.3	2.4	14.2	13.1	
	하이트진로	KRW	22,900	-0.4%	-8.0%	-5.2%	-9.5%	-5.0%	8.3%	-15.7%	15.1%	1,606	19.4	1.3	6.5	9.1	
글로벌 F&B	롯데칠성	KRW	1,363,000	3.1%	1.7%	3.3%	0.9%	2.6%	-3.1%	-28.4%	13.1%	1,090	22.5	0.8	3.5	7.8	
	무학	KRW	19,450	0.8%	-1.3%	6.9%	4.0%	-1.0%	-16.5%	-26.5%	12.4%	554	7.8	0.9	12.4	2.1	
국내 F&B	Danone	EUR	70.4	1.4%	1.4%	-0.7%	-0.4%	0.6%	17.4%	-2.0%	21.4%	47	18.6	2.9	15.8	13.6	
	Kraft Foods	USD	88.2	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	52	22.7	0.0	0.0	14.5	
	Starbucks	USD	61.3	0.3%	2.1%	5.6%	12.4%	6.7%	4.8%	-5.1%	16.2%	87	24.6	17.0	58.9	14.9	
	Nestle SA	CHF	82.3	-0.3%	-0.1%	-1.6%	-1.9%	-1.8%	11.6%	-4.3%	14.3%	256	21.6	3.8	17.7	15.0	
	Coca Cola	USD	47.2	0.6%	2.4%	2.2%	1.4%	2.8%	14.2%	-0.6%	16.6%	201	23.5	9.9	39.8	19.1	
	Pepsi Co	USD	120.2	0.9%	2.8%	1.3%	7.1%	0.2%	17.0%	0.2%	17.4%	171	21.2	12.6	60.6	13.9	
	Nissin Food	JPY	8,120	0.0%	-1.7%	-1.1%	12.3%	-1.3%	35.8%	-3.7%	37.6%	954	31.8	2.3	7.7	16.6	
	Toyo Suisan	JPY	4,775	0.1%	-0.7%	-2.2%	9.3%	-0.8%	19.5%	-2.7%	22.3%	529	22.9	1.7	7.7	9.8	
국내 F&B	농심	KRW	320,500	0.8%	-3.0%	-10.5%	-5.7%	-9.5%	-1.1%	-14.8%	10.3%	1,949	16.4	1.0	6.2	6.6	
	오뚜기	KRW	779,000	0.5%	-0.5%	-4.1%	3.9%	-3.3%	21.7%	-12.0%	22.7%	2,680	19.3	2.2	11.8	11.9	
	대성	KRW	25,750	2.4%	-3.6%	-8.7%	14.4%	-6.5%	-2.1%	-9.8%	20.0%	892	11.4	1.0	8.6	8.1	
	풀무원	KRW	166,500	0.0%	-4.9%	5.0%	47.3%	-3.2%	18.9%	-7.2%	50.7%	634	0.0	-	-	-	
	매일유업	KRW	68,600	1.6%	4.6%	4.1%	2.4%	3.5%	-	-19.5%	8.4%	522	-	-	-	-	
	동원F&B	KRW	248,000	1.0%	10.2%	10.0%	28.5%	6.0%	22.5%	-8.8%	40.1%	957	16.4	1.5	9.4	9.5	
	동원산업	KRW	321,500	-1.8%	-0.8%	0.3%	29.9%	-4.3%	-8.1%	-12.9%	31.2%	1,081	7.3	1.0	14.9	6.6	
	롯데제과	KRW	67,200	-0.7%	-1.8%	8.9%	5.0%	3.2%	0.5%	-23.4%	14.3%	4,951	21.9	0.9	4.6	6.8	
	크라온제과	KRW	14,500	1.4%	-0.3%	2.8%	-16.4%	3.2%	-	-40.1%	4.7%	182	-	-	-	-	
	빙그레	KRW	63,600	-0.2%	0.6%	1.3%	4.1%	0.8%	0.3%	-12.9%	9.7%	627	15.3	1.1	6.9	4.9	
	식자재유통	Sysco	USD	63.2	1.6%	3.3%	3.6%	15.3%	4.1%	14.4%	0.9%	28.7%	33	22.3	12.9	59.3	12.4
		MARR	EUR	22.5	0.3%	5.2%	8.3%	-3.6%	4.5%	25.6%	-4.0%	25.9%	1.5	22.3	4.6	21.5	13.9
CJ프레시웨이		KRW	35,500	0.9%	2.9%	-6.9%	-0.1%	-10.8%	-6.3%	-24.9%	15.3%	421	19.7	2.3	10.5	9.2	
신세계푸드		KRW	129,500	0.4%	-0.4%	-4.1%	-2.6%	-2.3%	-7.2%	-27.0%	8.8%	501	15.9	1.5	9.5	7.3	
현대그린푸드		KRW	15,400	3.7%	3.4%	2.7%	0.0%	3.0%	-4.3%	-17.2%	5.8%	1,505	12.6	0.9	7.4	5.8	
롯데푸드		KRW	549,000	0.5%	-0.7%	-1.8%	-7.7%	-0.7%	-11.4%	-18.3%	1.5%	621	-	-	-	-	
SPC삼립		KRW	149,000	1.4%	1.4%	-5.7%	15.5%	-4.8%	-8.6%	-33.3%	24.7%	1,286	21.6	3.4	17.4	13.2	

F&B Chart

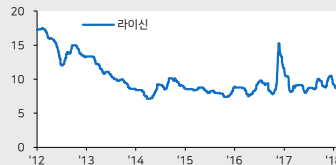
↑ · 시총 단위는 십억, 백만

자료: Bloomberg

12.1.1=100 옥수수, 소맥 (2012.1.1=100)



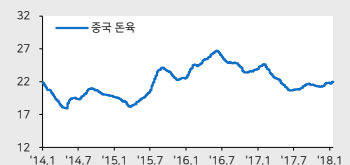
12.1.1=100 중국 라이신



12.1.1=100 중국 메티오닌



12.1.1=100 중국 돈육



12.1.1=100 대두, 원당 (