



음식료

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국제 곡물 가격/중국 아미노산 가격			현재가	기간변동률								주요 제품 가격 동향 (전일비)							
				10.21	1D	1W	1M	3M	YTD	% YoY	52w high	52w low	F&B 가격 동향		음식료 주요 News				
CBOT	옥수수	¢/부셸	387	-1.0%	-2.6%	4.5%	-10.1%	3.3%	5.5%	-14.8%	13.1%	라이신 가격 유지 기타아미노산 가격 유지 참치어가 유지	(국내양돈) 경기도 연천 민간인 출입통제선 내에서 발견된 야생 멧돼지 폐사체에서 아프리카돼지열병(ASF) 바이러스 검출 (세계일보)		라이신 6.5 0.0% 라이신(Feed) 6.6 0.0% DL-메티오닌 19.5 0.0% L-메티오닌 25.0 0.0% 쓰레오닌 6.7 0.0% 트립토판 46.5 0.0%				
	소맥	¢/부셸	524	-1.6%	2.4%	8.1%	4.2%	4.0%	1.7%	-4.4%	25.1%								
	대두	¢/부셸	933	-0.1%	-0.8%	5.7%	3.5%	5.8%	8.9%	-0.8%	17.1%								
	대두유	¢/lb	30.5	0.4%	1.9%	4.1%	8.5%	10.6%	4.6%	-1.4%	15.7%								
NYBOT	원당	¢/lb	12.3	-0.4%	-2.0%	10.6%	5.9%	2.0%	-11.7%	-12.4%	14.0%	옥수수(CBOT) 387 -1.0% 소맥(CBOT) 524 -1.6% 대두(CBOT) 933 -0.1% 대두유(CBOT) 30.5 +0.4% 원당(NYBOT) 12.3 -0.4% 참치(ATUNA) 1,000 0.0% 육계(국내) 1,390 -6.7% 돈육(국내) 3,309 -1.0%		(라면) 낱소 자료에 따르면 19년 상반기 농심 짜파게티 소매 매출액은 전년 대비 8.5% 성장한 910억원 수준 (디지털타임스)					
	오렌지	USD/lb	98	-1.2%	-1.3%	-2.0%	-5.7%	-21.6%	-29.6%	-32.1%	8.0%								
	커피	USD/lb	96	0.7%	1.6%	-2.1%	-10.2%	-5.4%	-21.1%	-21.1%	10.7%								
DALIAN Ex	대두	RMB/톤	3,370	0.1%	0.4%	-1.0%	-0.4%	6.7%	-8.7%	-8.7%	7.4%	옥수수(CBOT) 387 -1.0% 소맥(CBOT) 524 -1.6% 대두(CBOT) 933 -0.1% 대두유(CBOT) 30.5 +0.4% 원당(NYBOT) 12.3 -0.4% 참치(ATUNA) 1,000 0.0% 육계(국내) 1,390 -6.7% 돈육(국내) 3,309 -1.0%		(오비맥주) 유흥/외식 업소를 대상으로 테라를 빼면 카스를 반값에 납품하는 조건으로 프로모션을 진행하는 등 시장 점유율 1위 유지에 주력 중이라는 보도 (디지털타임스)					
	대두박	RMB/톤	3,062	1.5%	2.3%	5.7%	6.3%	11.8%	-14.4%	-14.4%	28.5%								
	옥수수	RMB/톤	1,809	-0.3%	0.3%	-1.4%	-6.3%	-1.8%	-1.0%	-8.6%	3.9%								
Mal Ex	팜유	USD/톤	2,215	0.3%	6.1%	2.5%	16.3%	10.5%	4.2%	-2.6%	25.9%	옥수수(CBOT) 387 -1.0% 소맥(CBOT) 524 -1.6% 대두(CBOT) 933 -0.1% 대두유(CBOT) 30.5 +0.4% 원당(NYBOT) 12.3 -0.4% 참치(ATUNA) 1,000 0.0% 육계(국내) 1,390 -6.7% 돈육(국내) 3,309 -1.0%		(오비맥주) 유흥/외식 업소를 대상으로 테라를 빼면 카스를 반값에 납품하는 조건으로 프로모션을 진행하는 등 시장 점유율 1위 유지에 주력 중이라는 보도 (디지털타임스)					
중국축산	라이신	RMB/kg	6.5	0.0%	0.0%	0.0%	-9.2%	-16.8%	-20.4%	-21.8%	0.0%								
	라이신(Feed Trade)	RMB/kg	6.6	0.0%	0.0%	-3.7%	-7.4%	-17.9%	-18.4%	-21.8%	0.0%								
	라이신(CJ중국호가)	RMB/kg	-	-	-	-	-	-	-	-	-								
	메티오닌	RMB/kg	19.5	0.0%	0.0%	5.4%	5.4%	-1.3%	-8.2%	-24.3%	12.7%								
	쓰레오닌	RMB/kg	6.7	0.0%	0.0%	0.8%	-11.8%	-11.8%	-11.8%	-17.3%	0.8%								
	트립토판	RMB/kg	46.5	0.0%	0.0%	3.3%	-1.1%	-16.2%	-21.2%	-21.2%	8.1%								
돼지고기	RMB/kg	42.5	0.0%	15.7%	16.2%	79.0%	103.0%	100.1%	0.0%	128.4%	도매유통가격 3,420	(생수) 13년 매출 5,057억원 → 17년 7,606억원으로 연평균 10.7% 성장률을 기록 (키즈맘)							
기타	참치어가(Atuna)	USD/톤	1,000	0.0%	0.0%	-23.1%	0.0%	-23.1%	-23.1%	-38.5%	-38.5%								
	육계(협회 평균가)	KRW/kg	1,390	-6.7%	-22.3%	0.0%	-6.7%	-39.3%	-26.5%	-48.3%	40.4%								
	돈육(협회 도매가)	KRW/kg	3,309	-1.0%	-1.2%	-37.0%	-24.5%	-2.7%	-14.2%	-46.1%	8.7%								
글로벌 주가 동향			단위	현재가	1D	1W	1M	3M	YTD	% YoY	52w high			52w low	Mkt Cap	PER(x)	PBR(x)	ROE(%)	EV/EBITDA(x)
아미노산	CJ제일제당	KRW	229,000	2.7%	5.5%	-2.1%	-19.5%	-30.7%	-31.7%	-36.7%	8.0%			3,447	16.0	0.7	4.3	10.9	
	Ajinomoto	JPY	2,024	0.6%	1.2%	-1.4%	9.8%	3.4%	9.3%	-2.2%	23.2%	1,112	20.8	1.7	8.5	9.4			
	ADM	USD	40.4	1.9%	-0.1%	-1.2%	0.4%	-1.4%	-18.4%	-18.4%	9.9%	23	14.8	1.1	7.9	10.3			
	Meihua	CNY	4.3	0.5%	-1.1%	-2.0%	-8.1%	2.6%	9.3%	-26.6%	10.5%	13	10.3	#N/A	N/A	#N/A	N/A		
	GBT	HKD	0.2	-1.0%	18.9%	33.6%	58.5%	298.0%	178.6%	-1.0%	457.1%	1.5	-	-	-	-			
	Evonik	EUR	24	1.6%	5.6%	4.5%	-6.6%	10.3%	-11.2%	-13.6%	13.3%	11	11.8	1.3	10.3	7.3			
중국 F&B	오리온	KRW	103,000	3.0%	1.5%	3.9%	21.7%	-14.2%	-	-16.9%	31.2%	4,072	-	-	-	-			
	Tingyi	HKD	10.6	0.4%	-0.8%	-5.0%	-18.3%	1.0%	-13.4%	-22.4%	10.8%	59	20.3	2.6	13.0	7.3			
	Want Want	HKD	6.4	0.3%	1.8%	4.2%	1.6%	16.4%	11.5%	-4.9%	21.8%	79	18.9	4.4	23.4	11.1			
	Tsingtao Brewery	HKD	46.3	-1.0%	-1.1%	-3.9%	-4.7%	46.5%	39.7%	-15.0%	55.4%	67	31.4	2.9	9.3	13.8			
	China Mengniu	HKD	31	0.3%	0.3%	4.2%	-1.7%	27.9%	34.8%	-6.7%	40.9%	123	23.8	3.7	16.2	16.9			
담배	KT&G	KRW	103,500	0.5%	1.0%	0.0%	4.7%	2.0%	3.5%	-5.5%	8.0%	14,210	12.4	1.6	13.3	7.0			
	Philip Morris	USD	81.8	1.6%	4.9%	14.9%	-7.8%	22.5%	-7.9%	-11.0%	24.0%	127	15.9	-	-	12.1			
	British American	GBP	2,648	-0.6%	-2.3%	-9.2%	-14.4%	5.9%	-19.7%	-26.8%	11.5%	61	8.2	0.9	10.8	9.0			
	Japan Tobacco	JPY	2,409	0.7%	1.6%	3.8%	-1.8%	-7.9%	-18.0%	-18.5%	10.5%	4,817	11.8	1.6	14.4	8.1			
주류	Ambev	BRL	19.0	1.7%	2.2%	-2.1%	5.0%	23.5%	12.6%	-7.9%	26.6%	299	24.5	4.9	20.8	13.3			
	Heineken	EUR	96.8	-0.9%	0.0%	-0.3%	-3.3%	25.3%	21.3%	-6.1%	28.9%	56	22.0	3.5	15.9	12.5			
	Asahi	JPY	5,359	1.3%	-2.2%	1.0%	6.4%	25.5%	11.4%	-2.4%	31.0%	2,592	16.3	2.0	12.8	11.0			
	하이트진로	KRW	27,250	0.6%	0.4%	0.9%	23.9%	64.2%	70.3%	-1.3%	78.1%	1,911	4,260.5	1.7	0.1	14.3			
	롯데칠성	KRW	140,500	0.7%	5.6%	-0.7%	-8.5%	0.4%	3.8%	-23.8%	10.6%	1,123	#N/A	N/A	1.0	-0.1			
	무학	KRW	8,890	-0.8%	-2.8%	-6.4%	-16.1%	-34.6%	-34.1%	-41.5%	1.8%	253	#N/A	N/A	0.5	-3.9			
글로벌 F&B	Danone	EUR	72.1	0.2%	-9.0%	-10.3%	-4.2%	17.2%	13.0%	-12.0%	19.6%	49	18.9	2.7	14.6	13.3			
	Kraft Foods	USD	27.8	0.7%	2.7%	-1.2%	-11.8%	-68.5%	-68.5%	-68.5%	11.2%	34	10.6	0.7	5.7	10.8			
	Starbucks	USD	85.4	-0.8%	-1.2%	-5.2%	-5.5%	32.5%	45.5%	-13.9%	47.0%	102	30.2	#N/A	N/A	-104.2			
	Nestle SA	CHF	102.0	-1.1%	-4.5%	-4.0%	-0.6%	27.8%	24.4%	-9.9%	30.3%	304	23.2	5.6	23.2	17.2			
	Coca Cola	USD	54.2	-1.0%	1.7%	0.6%	5.5%	14.5%	17.1%	-2.8%	21.3%	232	25.8	12.6	50.6	22.4			
	Pepsi Co	USD	136.1	-0.1%	-1.1%	1.0%	4.6%	23.2%	23.4%	-3.0%	28.4%	190	24.7	13.5	49.1	16.7			
	Nissin Food	JPY	8,210	1.2%	1.6%	4.2%	18.5%	19.0%	11.2%	-0.7%	27.7%	868	31.2	2.5	8.1	14.0			
	Toyo Suisan	JPY	4,410	1.0%	1.5%	-1.9%	-4.5%	15.0%	5.8%	-5.2%	20.7%	489	21.1	1.5	7.1	9.2			
	국내 F&B	농심	KRW	252,500	0.0%	3.7%	2.2%	5.2%	-0.8%	11.5%	-19.5%	18.0%	1,536	18.6	0.8	4.3	5.9		
오뚜기		KRW	583,000	0.0%	3.7%	-1.9%	-12.2%	-19.5%	-12.1%	-27.1%	5.8%	2,102	16.5	1.6	9.9	8.6			
대상		KRW	22,500	0.4%	6.4%	0.2%	-10.0%	-10.2%	-9.5%	-24.7%	9.2%	780	8.6	0.8	9.8	5.9			
풀무원		KRW	9,130	-0.2%	-3.2%	-2.9%	-26.1%	14.7%	-16.2%	-33.4%	17.4%	348	14.7	-	-	-			
매일유업		KRW	88,900	-0.2%	-4.1%	-7.8%	3.1%	12.8%	-	-7.8%	23.8%	697	-	-	-	-			
동원F&B		KRW	230,500	-1.3%	2.7%	3.1%	-20.8%	-19.8%	-11.0%	-24.8%	9.8%	890	12.5	1.3	10.8	8.3			
동원산업		KRW	234,500	3.8%	5.2%	5.2%	-3.5%	15.5%	-8.2%	-14.9%	22.5%	862	8.9	0.8	8.8	7.2			
롯데제과		KRW	37,550	-2.6%	3.3%	2.5%	-3.1%	-28.7%	-29.4%	-34.1%	26.0%	3,939	7.2	0.4	7.5	13.3			
크라온제과		KRW	8,410	-1.3%	-0.2%	-3.3%	-11.0%	-9.6%	-	-24.9%	2.9%	105	-	-	-	-			
빙그레	KRW	57,600	-1.2%	2.9%	0.0%	-13.3%	-20.6%	-19.0%	-25.5%	4.3%	567	14.5	1.0	6.9	4.6				
식자재유통	Sysco	USD	79.5	0.4%	0.7%	1.6%	12.1%	26.8%	11.8%	0.0%	32.5%	41	20.9	15.1	63.3	13.0			
	MARR	EUR	19.0	-0.6%	-6.2%	-9.1%	-4.4%	-7.8%	-16.3%	-16.3%	3.8%	1.3	18.5	3.7	20.3	11.6			
	CJ프레시웨이	KRW	25,600	-0.2%	2.0%	-6.9%	-15.4%	-3.4%	-8.4%	-26.5%	19.3%	304	16.3	1.4	9.2	6.7			
	신세계푸드	KRW	73,500	-0.1%	-0.3%	-5.3%	-10.8%	-13.9%	-23.1%	-27.9%	9.7%	285	21.7	0.9	3.5	7.8			
	현대그린푸드	KRW	11,900	0.0%	9.2%	-0.8%	-10.2%	-16.8%	-9.2%	-20.7%	9.2%	1,163	10.6	0.6	6.1	5.6			
	롯데푸드	KRW	439,500	0.3%	2.3%	-1.7%	-16.9%	-38.0%	-36.9%	-40.0%	6.9%	497	-	-	-	-			
	SPC삼립	KRW	95,200	-0.1%	-1.2%	-3.6%	-5.3%	-25.3%	-27.0%	-33.2%	17.2%	821	18.9	2.4	12.8	9.8			