



# **ANÁLISIS DEL MERCADO DEL SECTOR CÁRNICO Y TENDENCIAS DE FUTURO**

**Josep Collado  
FECIC-CONFECARNE**

**VIII SEMINARIO DE ANÁLISIS DE MERCADOS  
DE MATERIAS PRIMAS PARA LA ALIMENTACIÓN ANIMAL**

# **SECTOR CÁRNICO TENDENCIAS DE FUTURO**

**Josep Collado Bosch  
Barcelona, 27 de mayo de 2009**

# 1. INTRODUCCIÓ

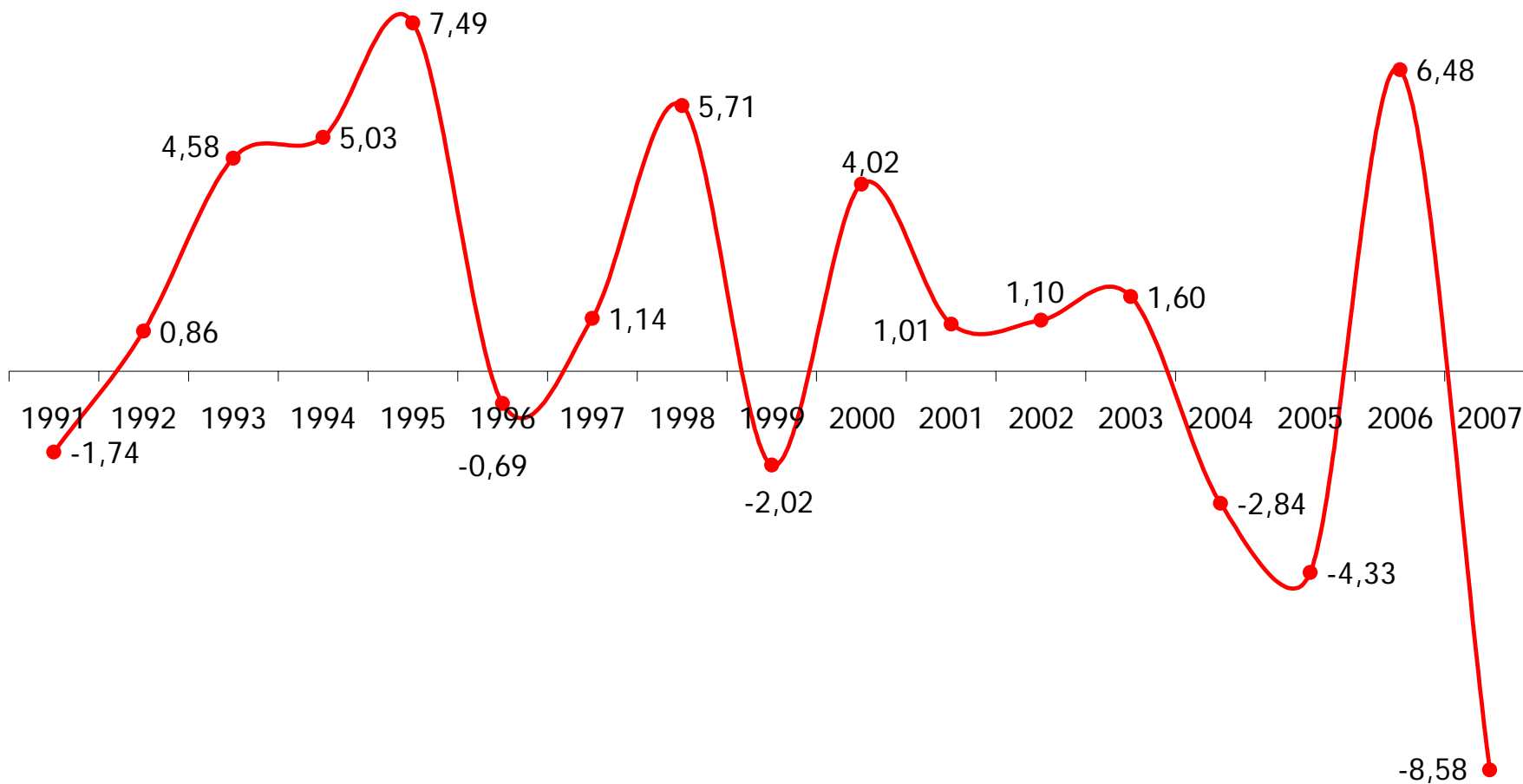
## LA INDUSTRIA CÁRNICA ESPAÑOLA DATOS ECONÓMICOS

CIFRA TOTAL DE NEGOCIO	18.532 MILL. DE EUROS
PORCENTAJE SOBRE LA FACTURACIÓN	20,3%
PORCENTAJE DE LA IND. CÁRNICA SOBRE EL PIB TOTAL DE ESPAÑA	2%
PORCETAJE DE LA IND. CÁRNICA SOBRE EL PIB INDUSTRIAL DE ESPAÑA	14%
CIFRA TOTAL DE EXPORTACIONES DE LA INDUSTRIA CÁRNICA	2.317 MILL. DE EUROS
EMPLEO DIRECTO	88.000 TRABAJADORES

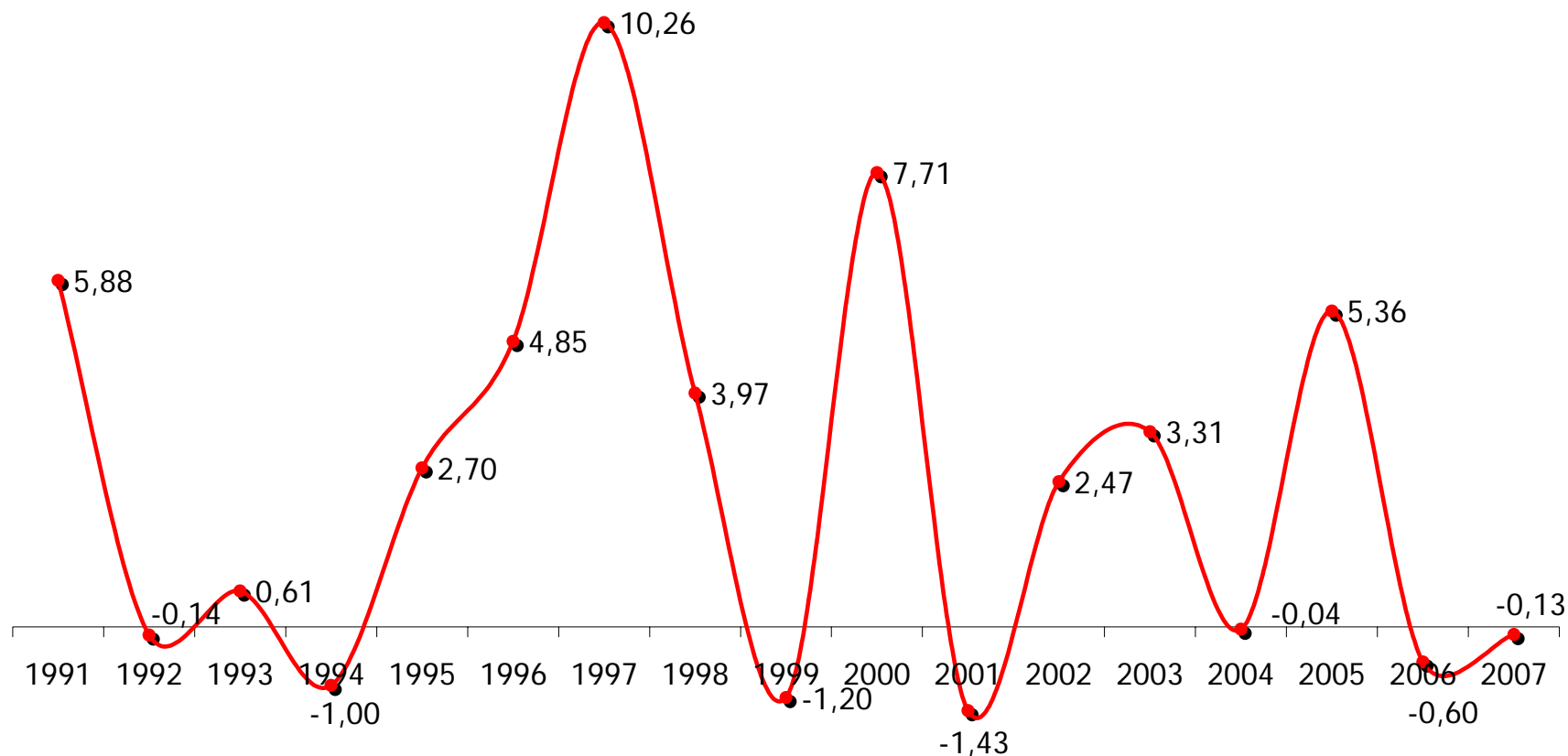
Fuente: CONFECARNE (con datos 2007 de INE, Agencia Tributaria, AESAN)

## **2. DE DÓNDE VENIMOS**

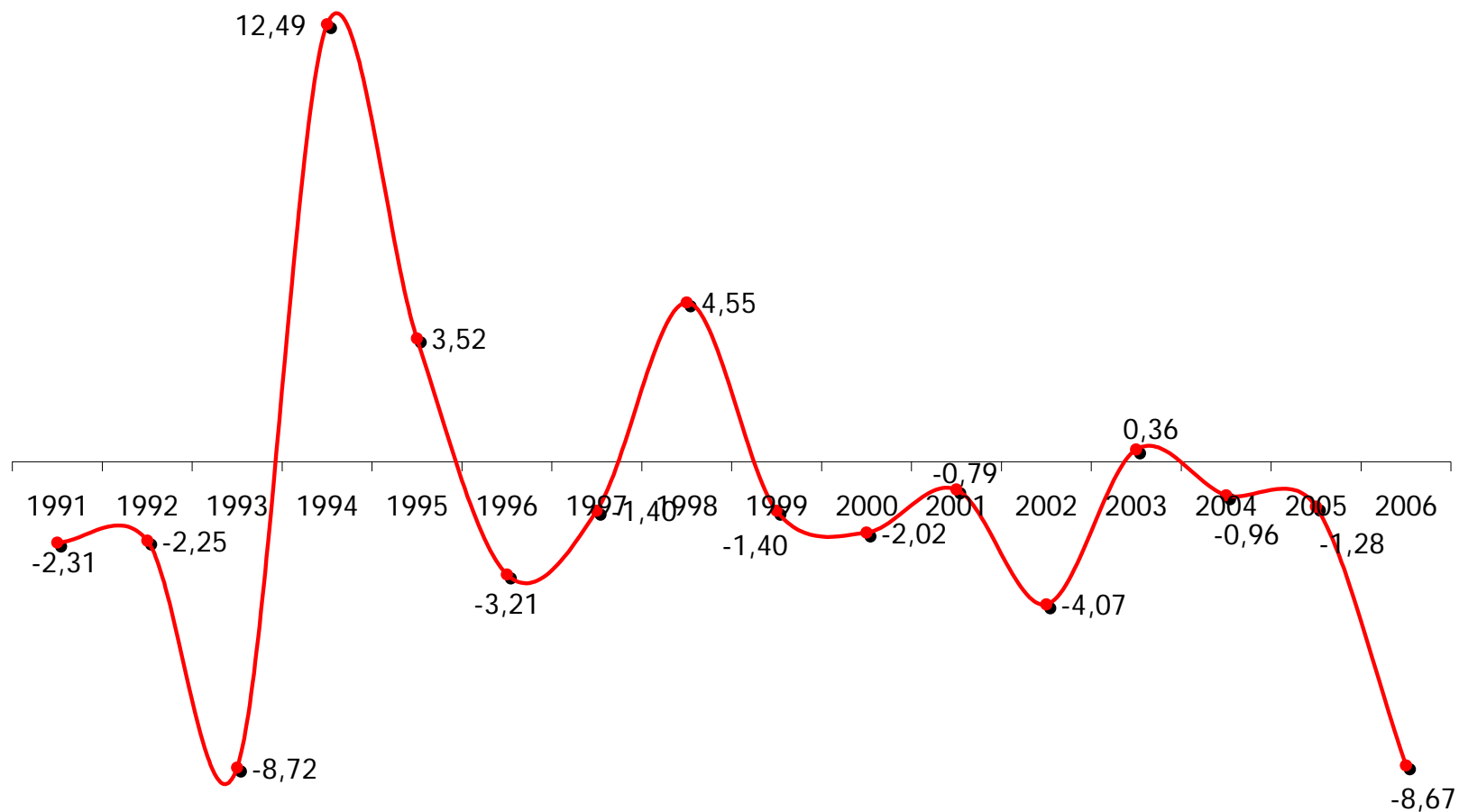
# Evolución producción de carne de vacuno 1991-2008



# Evolución producción de carne de porcino 1991-2008



# Evolución producción de carne de ovino 1991-2008





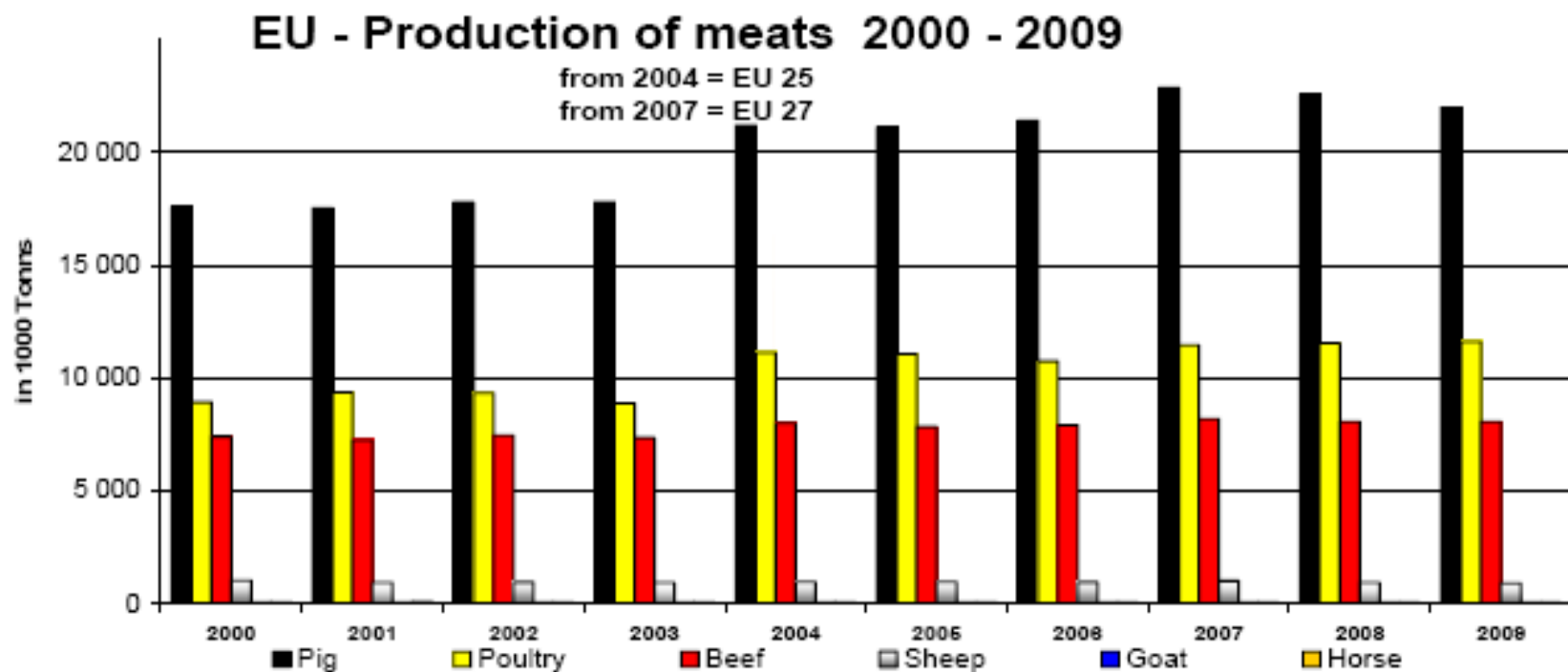
## **3. DÓNDE ESTAMOS**

# Evolución especies España 2000-2008

## Evolución de la Producción Cárnica a España <sup>Tn</sup>

AÑOS	ESPECIES						TOTAL
	PORCINO	VACUNO	OVINO	CAPRINO	EQUINO	AVES	
2000	2.912.390	631.784	232.331	18.801	6.732	986.712	<b>4.788.750</b>
2001	2.992.707	642.033	236.409	15.369	8.639	1.307.265	<b>5.202.422</b>
2002	3.122.577	654.161	239.500	15.101	5.742	1.331.700	<b>5.368.781</b>
2003	3.189.508	703.452	236.242	13.915	4.777	1.330.030	<b>5.477.924</b>
2004	3.076.120	713.886	231.463	13.373	5.001	1.268.319	<b>5.308.162</b>
2005	3.163.039	715.331	224.126	13.621	5.070	1.287.422	<b>5.408.609</b>
2006	3.235.241	670.408	214.179	11.690	5.275	1.260.853	<b>5.397.646</b>
2007	3.439.442	643.167	196.189	10.446	5.168	1.328.091	<b>5.622.503</b>
2008*	3.484.364	658.333	156.985	9.253	6.210	1.375.295	<b>5.690.440</b>

Font: Boletín Mensual de Estadísticas Agroalimentarias del MARM



Pig	17 564	17 532	17 784	17 793	21 197	21 100	21 400	22 858	22 538	21 989
Poultry	8 939	9 381	9 357	8 885	11 142	11 084	10 754	11 454	11 558	11 629
Beef	7 401	7 265	7 466	7 361	8 019	7 854	7 915	8 203	8 065	8 065
Sheep	1 046	943	964	946	985	985	970	1 024	942	920
Goat	74	74	74	69	75	73	68	72	73	72
Horse	79	94	71	66	78	64	70	56	53	53
<b>Total</b>	<b>35 104</b>	<b>35 290</b>	<b>35 716</b>	<b>35 120</b>	<b>41 495</b>	<b>41 160</b>	<b>41 178</b>	<b>43 667</b>	<b>43 228</b>	<b>42 729</b>
Change prev. Year		0.5%	1.2%	-1.7%	18.2%	-0.8%	0.0%	6.0%	-1.0%	-1.2%

Graph based on monthly Cronos data, except for the poultry.  
Production of poultry DG AGRI

## Consumo aparente Vacuno

<b>VACUNO</b>				
	<b>PRODUCCIÓN</b>	<b>IMPORT</b>	<b>EXPORT</b>	<b>CONSUMO APARENTE</b>
<b>2000</b>	631.784	72.344	136.863	567.265
<b>2008</b>	658.333	101.839	139.223	620.949

# Consumo aparente Porcino

<b>PORCINO</b>				
	<b>PRODUCCIÓN</b>	<b>IMPORT</b>	<b>EXPORT</b>	<b>CONSUMO APARENTE</b>
<b>2000</b>	2.912.390	104.839	410.588	2.606.641
<b>2008</b>	3.484.364	107.907	1.026.119	2.566.152

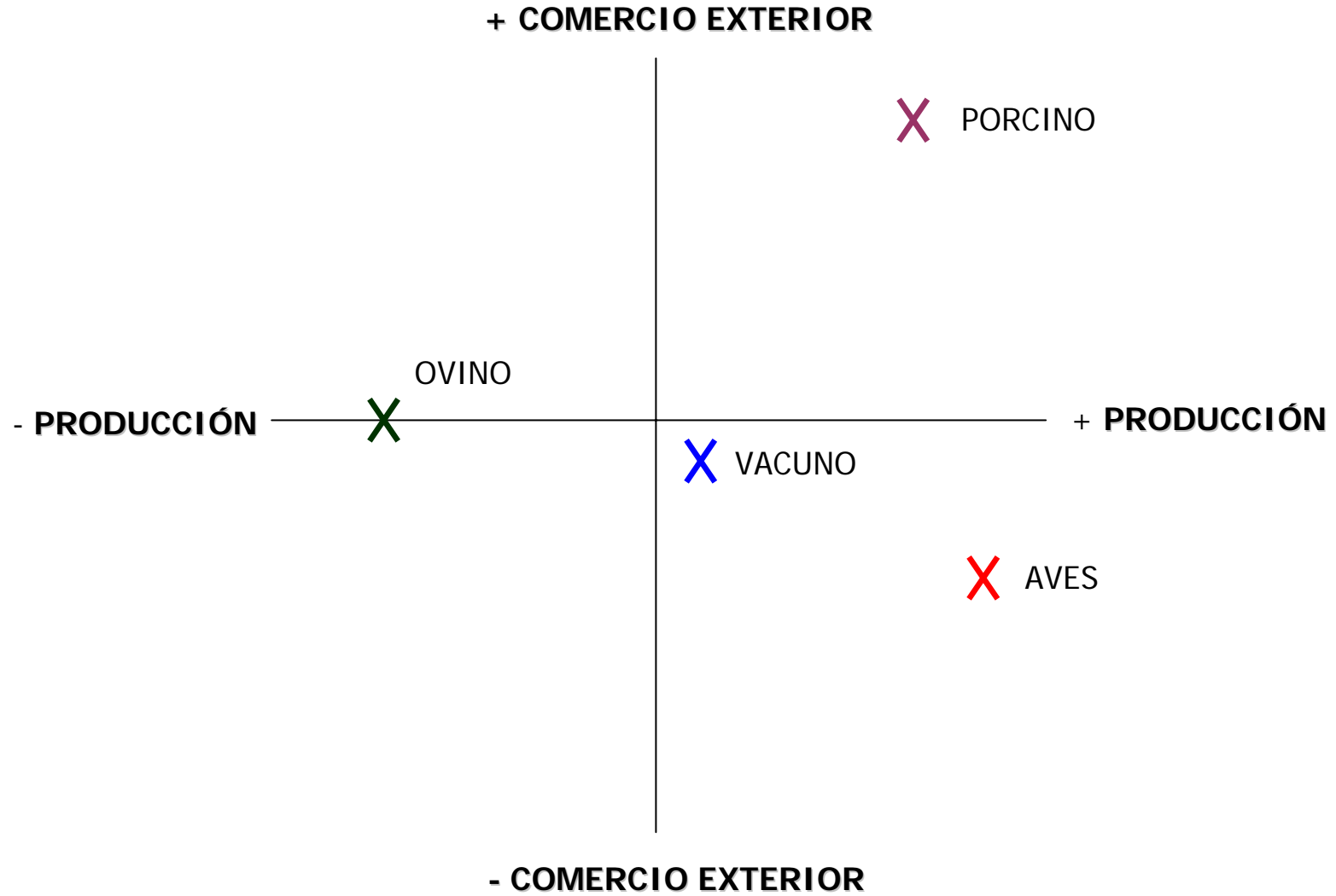
## Consumo aparente Ovino

<b>OVINO</b>				
	<b>PRODUCCIÓN</b>	<b>IMPORT</b>	<b>EXPORT</b>	<b>CONSUMO APARENTE</b>
<b>2000</b>	232.331	11.392	18.036	267.226
<b>2008</b>	156.985	11.343	20.631	182.127

## Consumo aparente Aves

<b>AVES</b>				
	<b>PRODUCCIÓN</b>	<b>IMPORT</b>	<b>EXPORT</b>	<b>CONSUMO APARENTE</b>
<b>2000</b>	986.712	98.882	63.987	1.021.607
<b>2008</b>	1.375.295	118.980	93.838	1.400.437

# Resumen Posicionamiento

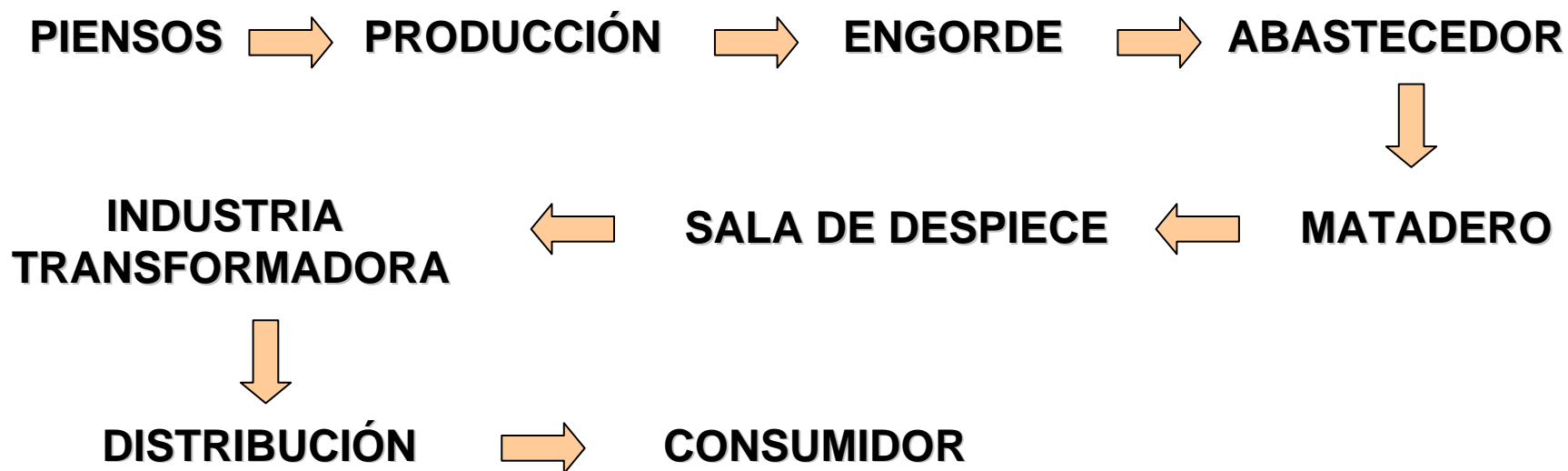




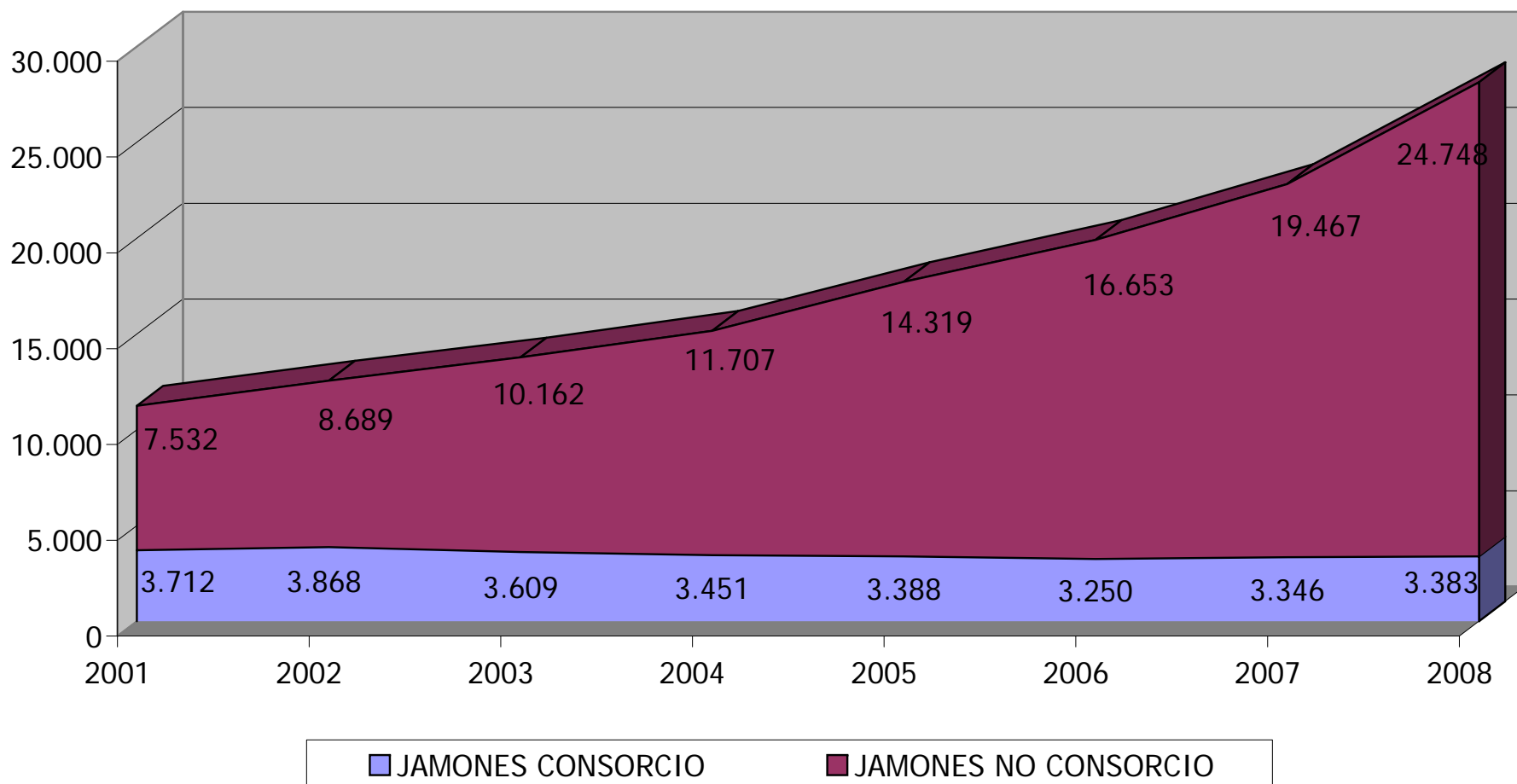
- **Nº de instalaciones industriales:**

- Mataderos: 714
- Salas de despiece: 2.001
- Industrias de elaborados: 4.055

Fuente: Confecarne (con datos 2007 de INE, Agencia Tributaria, AESAN)



# Evolución Exportación Jamón

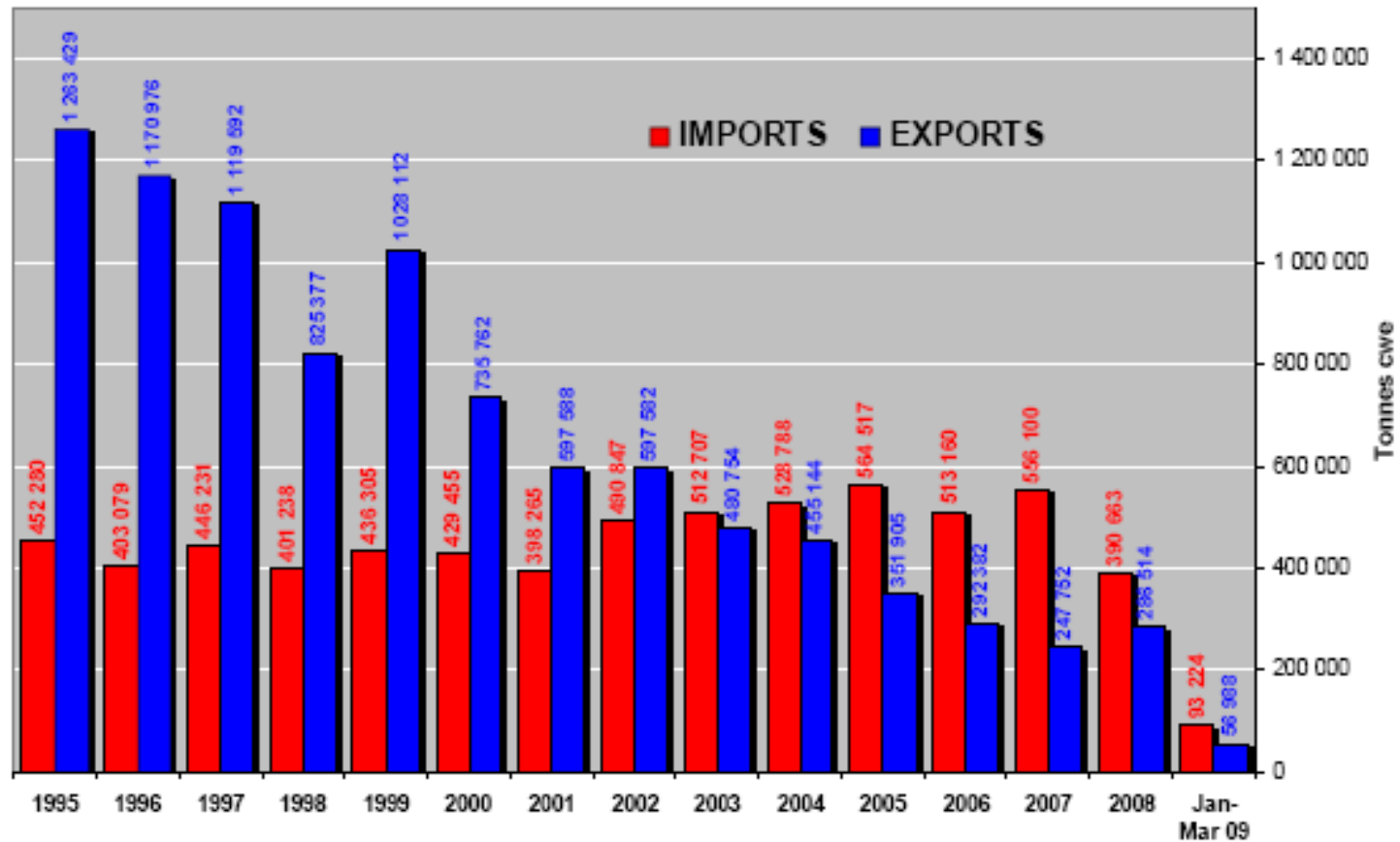


Fuente: Fundación Jamón Serrano

## **4. HACIA DÓNDE VAMOS**

## **Caso Vacuno**

## EU net import of beef and live animals



## EU exports of beef and live animals (1): Trade figures (COMEXT – tonnes cwe)

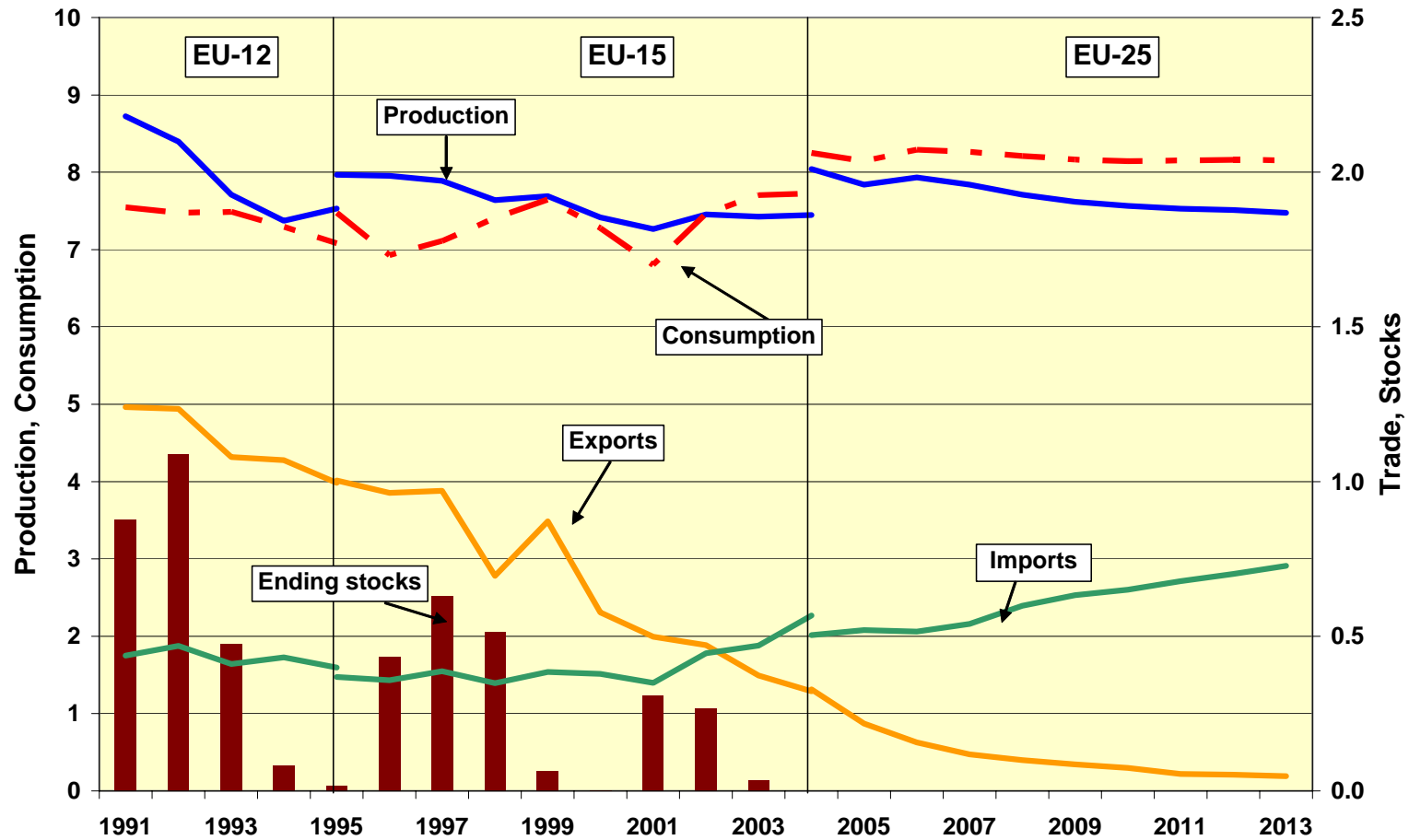
Destinations	2005		2006		2007		2008		Jan-Mar 09	
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%
Russia	138 372	39.3%	145 342	49.7%	87 277	35.2%	100 358	35.0%	13 914	24.4%
Croatia	14 405	4.1%	9 723	3.3%	16 470	6.6%	18 191	6.3%	5 277	9.3%
Switzerland	5 027	1.4%	10 162	3.5%	14 458	5.8%	25 918	9.0%	4 404	7.7%
Ivory coast	2 808	0.8%	4 938	1.7%	6 949	2.8%	8 982	3.1%	2 685	4.7%
Angola	19 066	5.4%	8 628	3.0%	11 109	4.5%	7 766	2.7%	2 048	3.6%
Nigeria	9 628	2.7%	172	0.1%	16 174	6.5%	2 265	0.8%	134	0.2%
EXTRA EU15-25-27	351 905		292 382		247 752		286 514		56 988	
% change			- 17%		- 15%		+ 16%		+ 0.7%	

Fuente: DG AGRI, European Commission

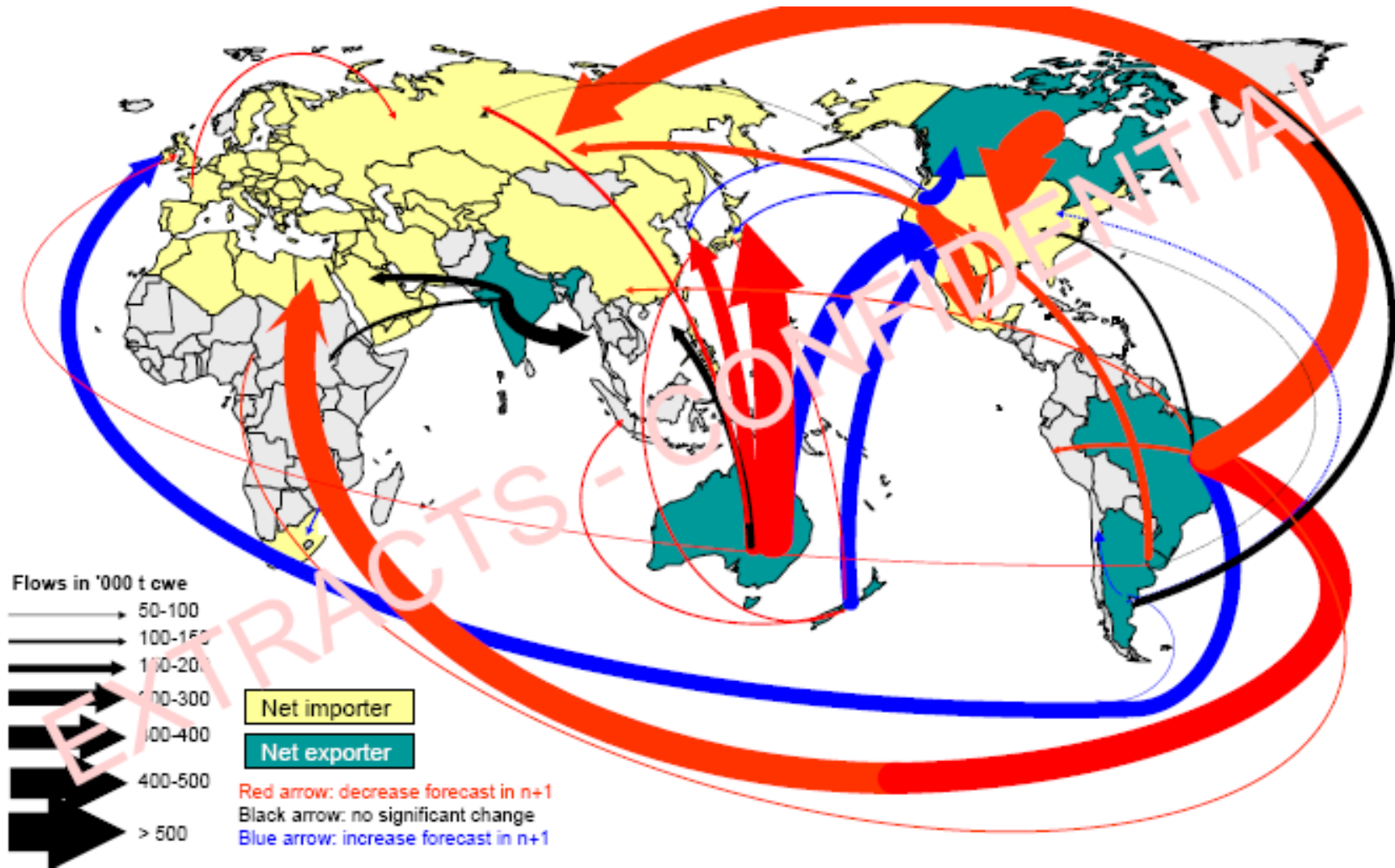
## EU imports of beef and live animals (1): Trade figures (COMEXT – tonnes cwe)

Origins	2005		2006		2007		2008		Jan-Mar 09	
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%
Brazil	348 695	61.8%	331 762	64.7%	363 932	65.4%	169 866	43.5%	31 585	33.9%
Argentina	113 244	20.1%	82 865	16.1%	97 658	17.6%	90 183	23.1%	27 995	30.0%
Uruguay	45 842	8.1%	45 350	8.8%	39 544	7.1%	66 235	17.0%	19 089	20.5%
Australia	10 247	1.8%	12 366	2.4%	10 019	1.8%	12 957	3.3%	3 699	4.0%
New Zealand	5 978	1.1%	7 195	1.4%	5 772	1.0%	12 442	3.2%	3 332	3.6%
USA	832	0.1%	956	0.2%	2 746	0.5%	6 540	1.7%	2 012	2.2%
Namibia	12 573	2.2%	8 063	1.6%	10 467	1.9%	10 348	2.6%	1 661	1.8%
Botswana	10 359	1.8%	7 118	1.4%	13 929	2.5%	10 481	2.7%	1 082	1.2%
Switzerland	2 633	0.5%	1 979	0.4%	2 855	0.5%	2 919	0.7%	963	1.0%
Chile	2 115	0.4%	2 036	0.4%	2 844	0.5%	2 550	0.7%	611	0.7%
Serbia	955	0.2%	1 912	0.4%	2 324	0.4%	1 784	0.5%	224	0.2%
EXTRA EU15-25-27	564 517		513 160		556 100		390 663		93 224	
% change			- 9%		+ 8%		- 30%		- 13.0%	

Fuente: DG AGRI, European Commission







## **Caso Porcino**

### Pork livestock in 2007 (1,000 head)

Note: for regional data, the dates for and kinds of studies are not the same for all countries (cf. sources).

Country

Country	Livestock
Germany	26 948
Spain	25 617
Poland	17 621
France	14 968
Denmark	13 170
Netherlands	11 710
Italy	9 273
Roumania	6 645
Belgium	6 200
United Kingdom	4 674
Hungary	3 860
Austria	3 286
Czech Rep.	2 662
Portugal	2 345
Sweden	1 728
Ireland	1 575
Finland	1 427
Greece	1 038
Slovakia	952
Lithuania	923
Bulgaria	865
Slovenia	543
Cyprus	472
Latvia	414
Estonia	375
Luxembourg	86
Malta	77
<b>Europe 27</b>	<b>159 453</b>

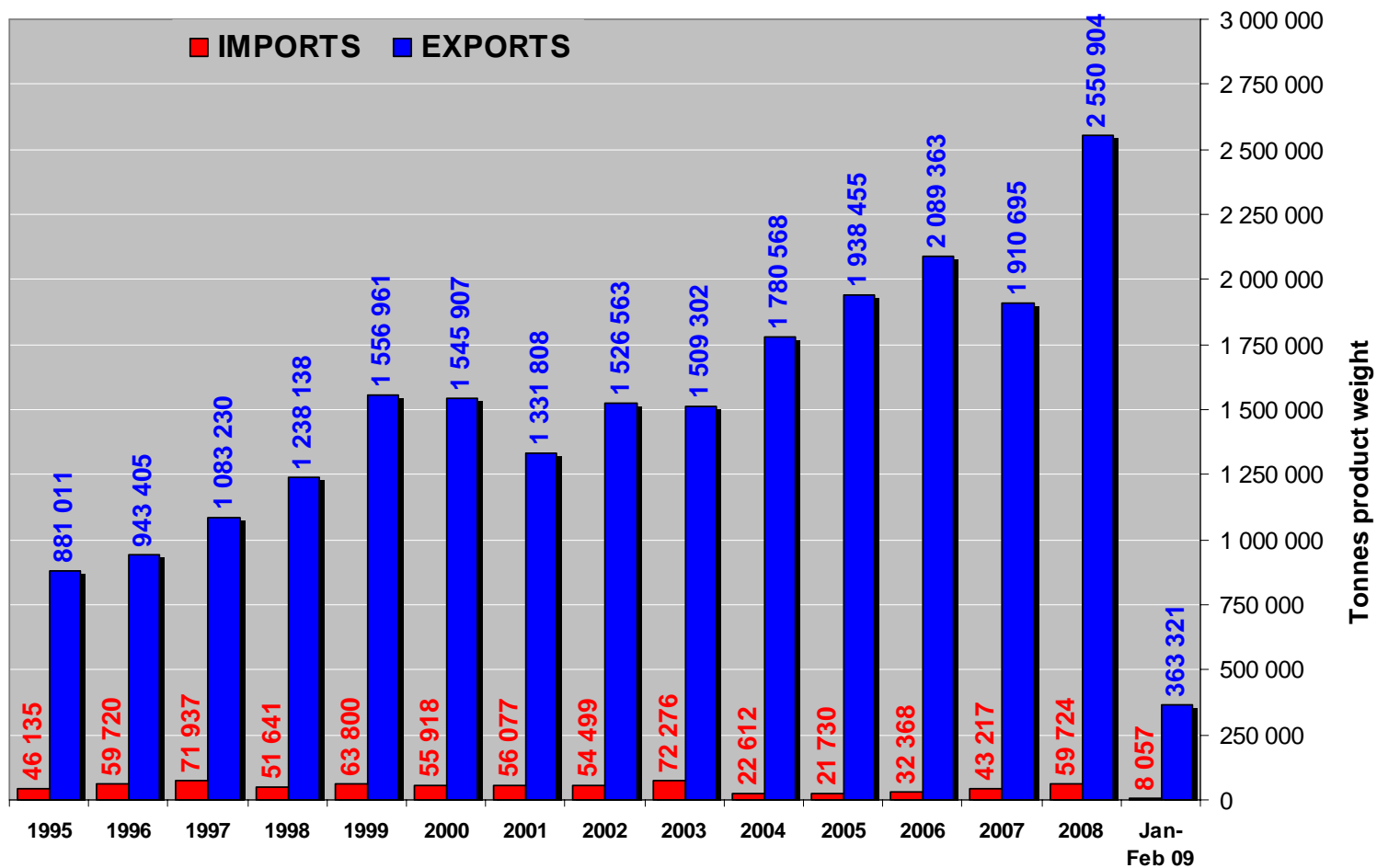
European regions with over 1.8 million pigs

Région	Contry	Livestock	Growth 2007/2000 en %	UAA (1000 ha)	Density (pigs/km <sup>2</sup> UAA)
1 Mainland Denmark	DK	10 641	+17	1 858	39 596
2 South-East Netherlands	NL	10 531	-11	815	1 292
3 Brittany	F	8 337	+2	1 786	467
4 Lower Saxony	D	8 079	+8	2 626	308
5 Rhineland-North Westphalia	D	6 314	+2	1 522	415
6 Catalonia	SP	6 102	+4	1 182	516
7 Flanders	B	5 898	-14	622	948
8 Aragon	SP	5 462	+55	2 417	226
9 Greater Poland (Wielkopolskie)	PL	4 609	+4	1 746	264
10 Lombardy	I	4 132	+8	1 120	369
11 Castile Leon	SP	3 853	+24	5 127	75
12 Bavaria	D	3 731	+2	3 293	113
13 Andalusia	SP	2 680	+13	4813	56
14 Eastern Hungary (Alföld és Észak)	HU	2 271	-16	3 333	68
15 Baden-Wurtemberg	D	2 219	-1	1 444	154
16 Kujawsko-Pomorskie	PL	2 210	+10	1 031	214
17 Castille-la Mancha	SP	2 164	+67	4 718	46
18 Murcia	SP	2 066	+22	629	329
19 Mazovia	PL	1 873	+2	2 030	92
20 Romania Northwest+Center	RO	1 843	+29	3 984	46

Livestock data per region: 2007, Roumania : estimates

IFIP according to national sources and Eurostat

# Evolución Import-Export 1995/2008



Fuente: Comisión Europea de Agricultura y Desarrollo Rural

## EU exports of selected PIG products: Trade figures (COMEXT – tonnes product weight)

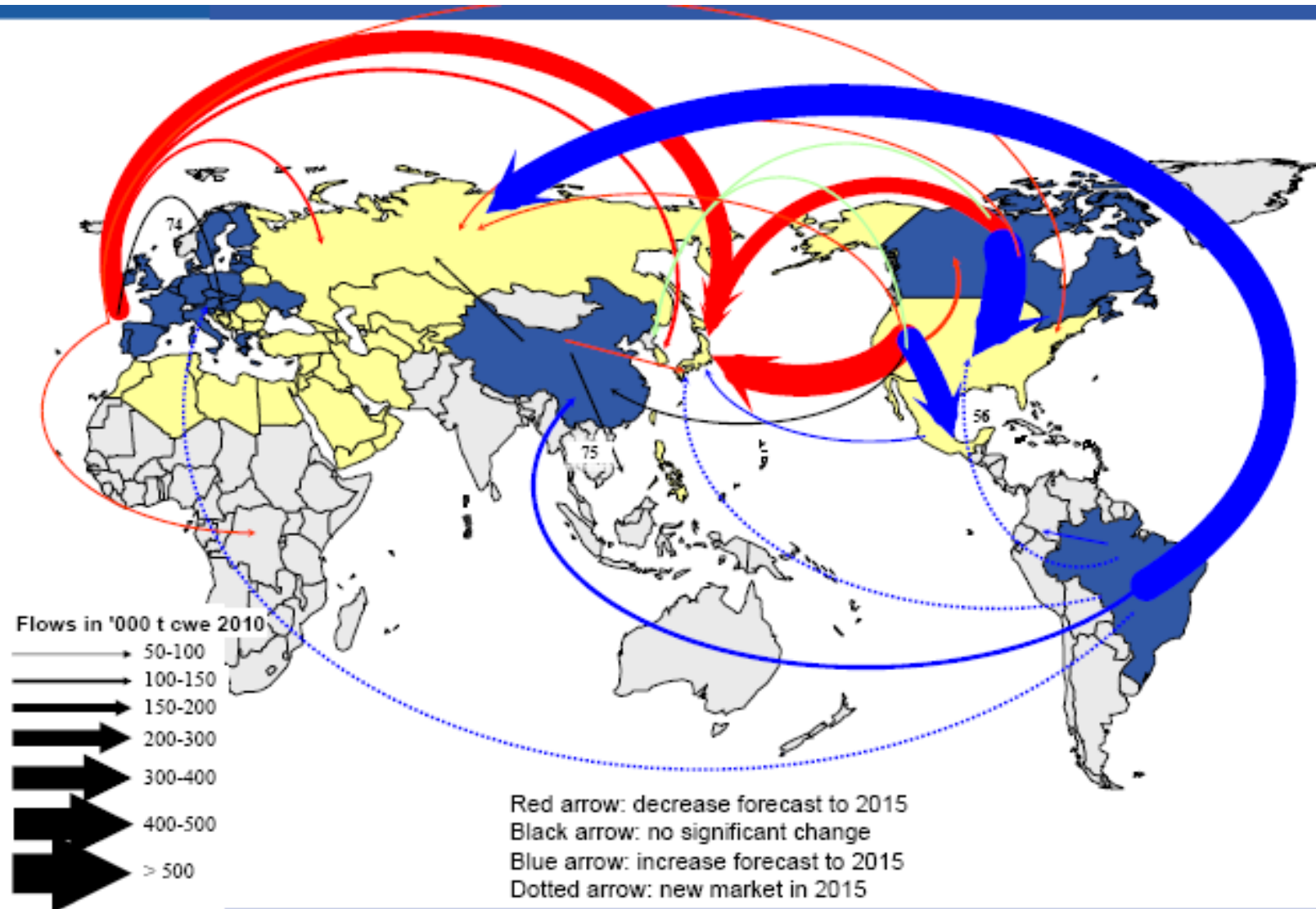
	2005		2006		2007		2008		Jan-Feb 09		Compared to Jan-Feb 08
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Russia	485 437	25.0%	687 402	32.9%	647 057	33.9%	764 117	30.0%	97 611	26.9%	- 11%
Hong Kong	139 578	7.2%	138 554	6.6%	243 203	12.7%	454 242	17.8%	77 726	21.4%	+ 9%
China	70 788	3.7%	53 785	2.6%	86 291	4.5%	146 138	5.7%	27 788	7.6%	+ 15%
Japan	305 731	15.8%	249 380	11.9%	232 951	12.2%	236 120	9.3%	27 288	7.5%	- 27%
Ukraine	47 814	2.5%	9 789	0.5%	2 757	0.1%	188 006	7.4%	25 312	7.0%	+++
South Korea	117 671	6.1%	142 599	6.8%	137 443	7.2%	115 693	4.5%	16 743	4.6%	- 21%
Croatia	59 964	3.1%	56 785	2.7%	56 171	2.9%	63 706	2.5%	9 569	2.6%	- 10%
USA	72 843	3.8%	67 048	3.2%	66 527	3.5%	61 288	2.4%	9 487	2.6%	- 22%
Angola	34 356	1.8%	40 757	2.0%	48 637	2.5%	48 922	1.9%	7 985	2.2%	+ 1%
Australia	28 126	1.5%	29 579	1.4%	34 583	1.8%	45 604	1.8%	7 824	2.2%	+ 8%
Belarus	48 506	2.5%	59 586	2.9%	10 529	0.6%	55 090	2.2%	4 968	1.4%	- 24%
Philippines	20 896	1.1%	23 321	1.1%	34 217	1.8%	40 911	1.6%	3 521	1.0%	- 50%
EXTRA EU15-25-27	1 938 455		2 089 363		1 910 695		2 550 904		363 321		
% change			+ 8%		- 9%		+ 34%		- 2.4%		

Fuente: DG AGRI, European Commission

**EU imports of selected PIG products**  
Trade figures (COMEXT – tonnes product weight)

	2005		2006		2007		2008		Jan-Feb 09	
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%
Chile	4 994	23.0%	7 568	23.4%	12 347	28.6%	17 132	28.7%	2 781	34.5%
Sw itzerland	4 933	22.7%	8 934	27.6%	10 476	24.2%	12 368	20.7%	2 708	33.6%
USA	3 532	16.3%	5 380	16.6%	9 065	21.0%	21 547	36.1%	1 033	12.8%
Croatia	2 189	10.1%	3 930	12.1%	2 863	6.6%	3 964	6.6%	503	6.2%
Serbia	716	3.3%	523	1.6%	1 217	2.8%	1 181	2.0%	24	0.3%
Russia	280	1.3%	313	1.0%	280	0.6%	583	1.0%	22	0.3%
Canada	79	0.4%	252	0.8%	2 660	6.2%	53	0.1%	18	0.2%
EXTRA EU15-25-27	21 730		32 368		43 217		59 724		8 057	
% change			+ 49%		+ 34%		+ 38%		- 4.1%	

Fuente: DG AGRI, European Comission



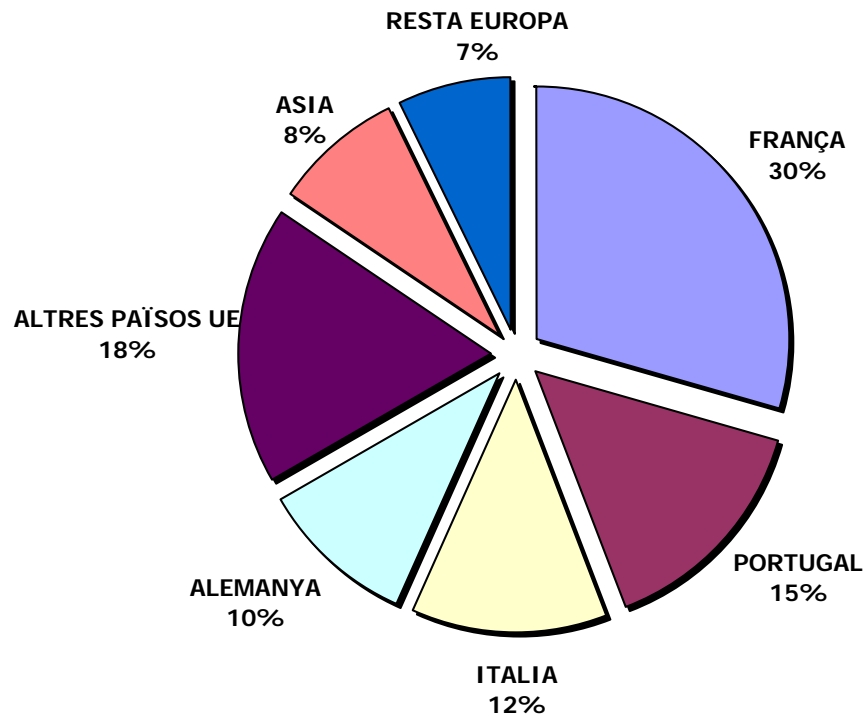
## **5. CONCLUSIONES**



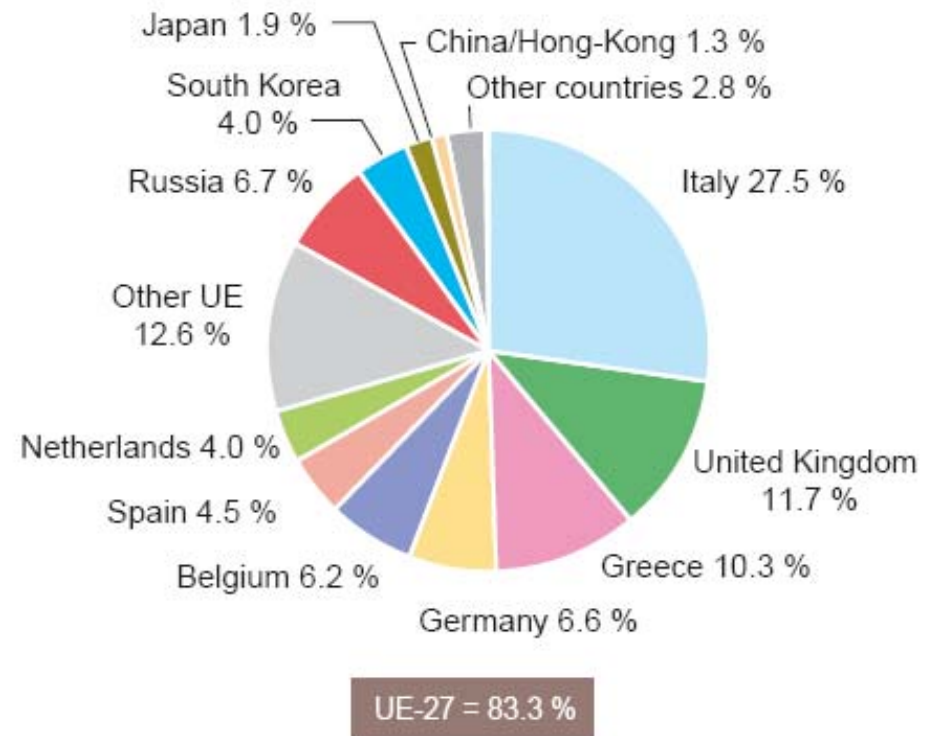
# Mercados Francés vrs. Español

## Customers in 2007

DESTÍ EXPORTACIONS CARNS PORCÍ. ANY 2008

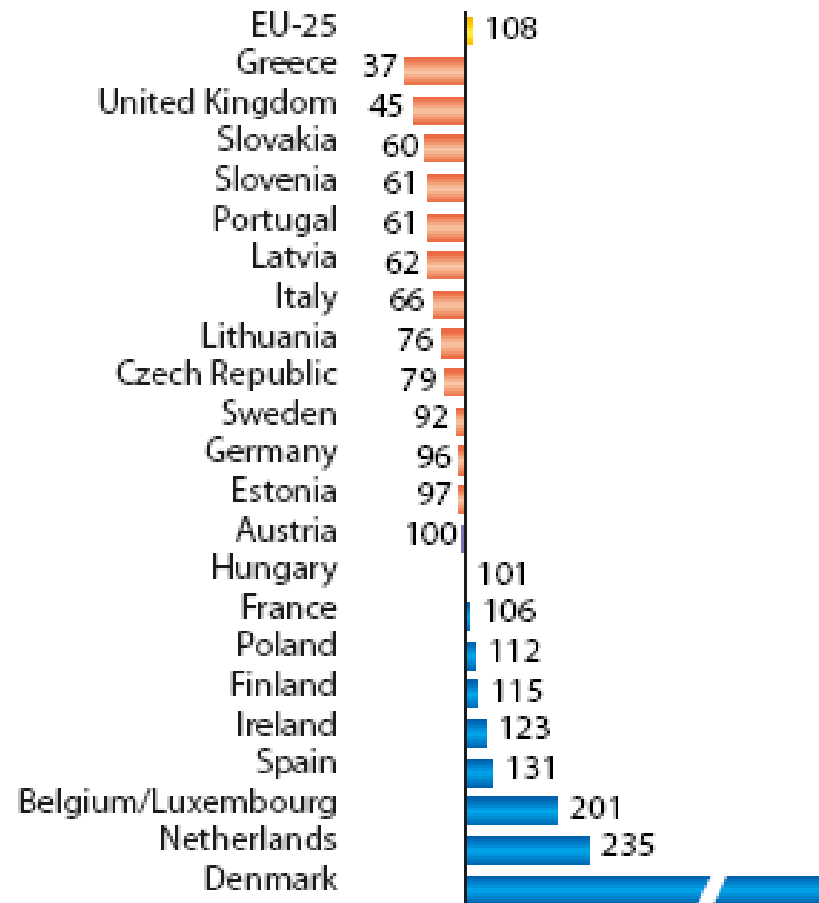


Share of each country in total exports

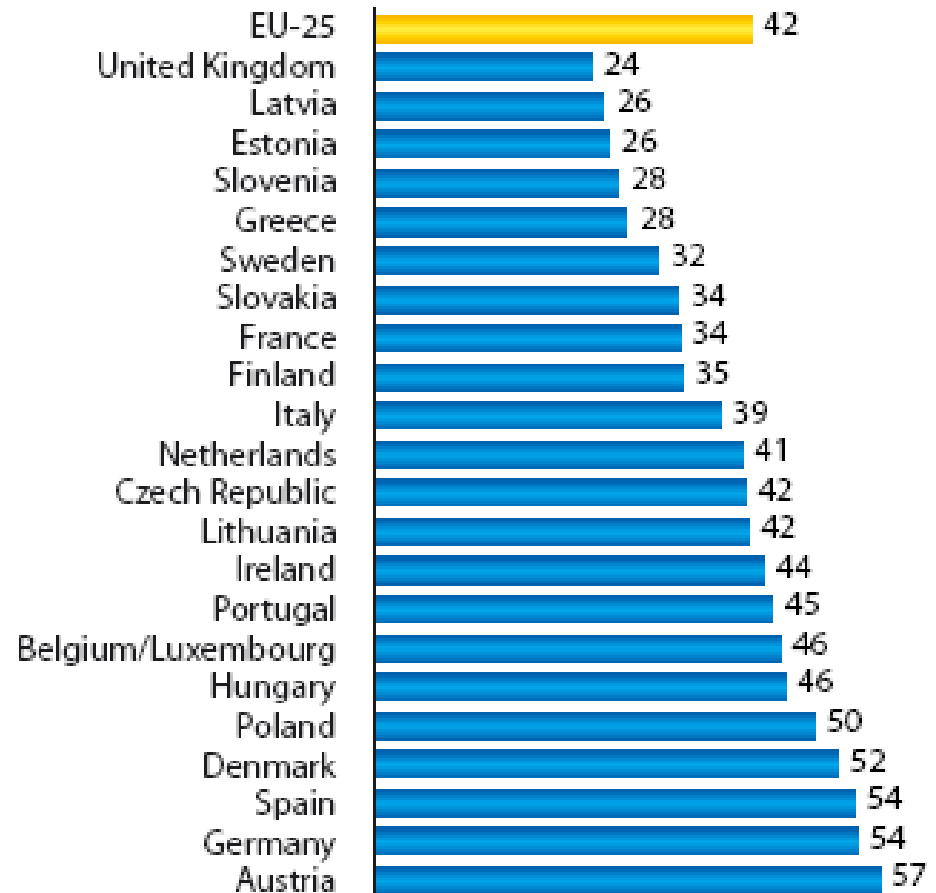


# Análisis de producción-consumo

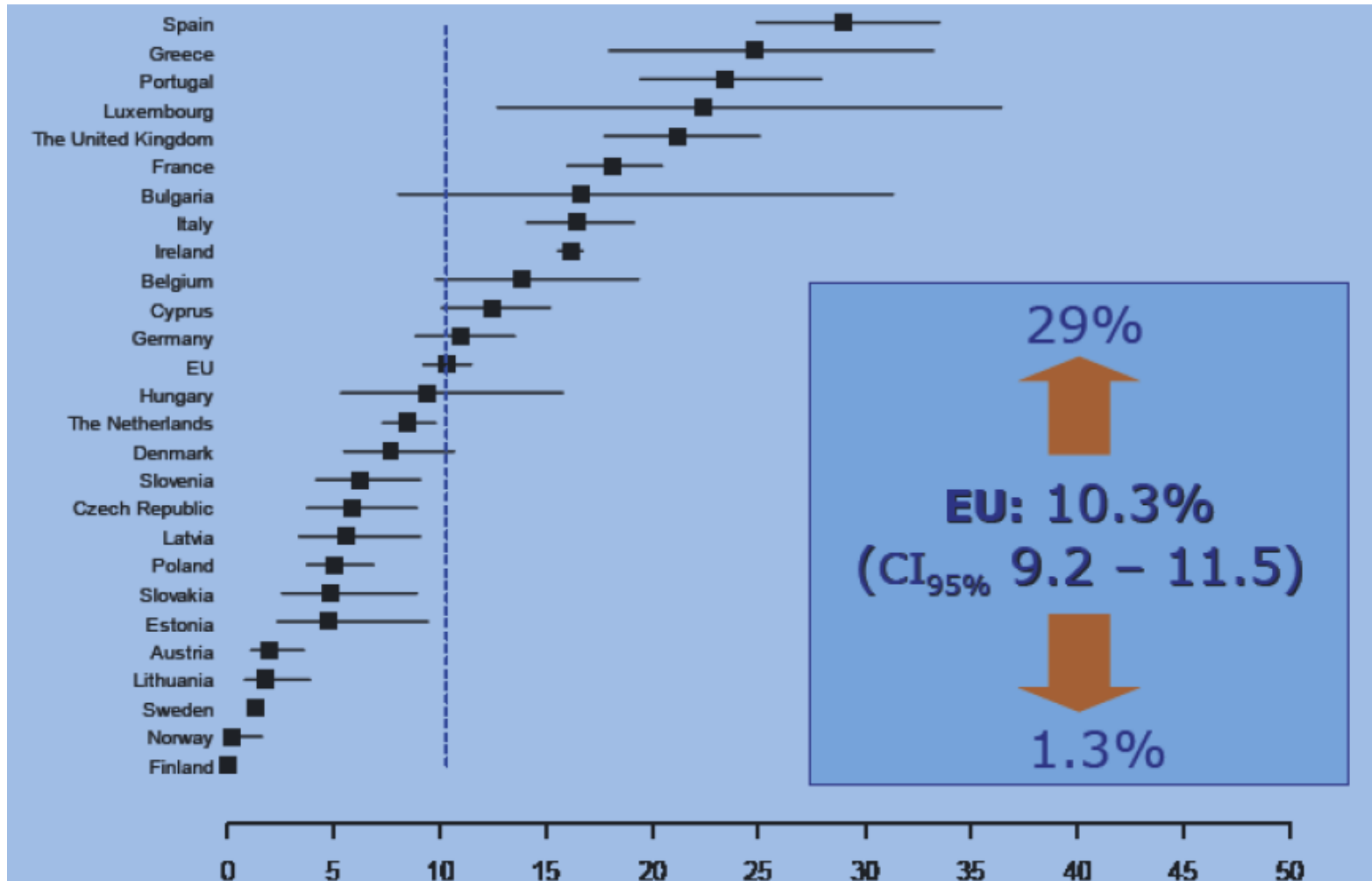
## Self-supply in 2006 (%)



## Consumption per inhabitant in 2006 (kg)



# Prevalencia Salmonela



**GRACIAS**



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