

# **PERSPECTIVAS DE LA CADENA DE GANADOS Y CARNES**

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**STOCK BOVINO MUNDIAL 2012 = 1,6 billones de animales**

**FAENA BOVINA MUNDIAL 2012 = 325 millones de animales**

**TASA DE EXTRACCIÓN 20,31%**

|                                               | Enero        | Febrero     | Marzo       | Abril        | Mayo         | Junio        | Acum. 2013 y var Acum 2012 |
|-----------------------------------------------|--------------|-------------|-------------|--------------|--------------|--------------|----------------------------|
| <i>Faena (miles)</i>                          | <b>1.084</b> | <b>991</b>  | <b>992</b>  | <b>1.069</b> | <b>1.078</b> | <b>1.012</b> | <b>6.227 (+12%)</b>        |
| <i>Producción (miles ton res)</i>             | <b>241</b>   | <b>220</b>  | <b>221</b>  | <b>237</b>   | <b>239</b>   | <b>223</b>   | <b>1.380 (+10%)</b>        |
| <i>Exportaciones (miles ton res)</i>          | <b>16</b>    | <b>15</b>   | <b>16</b>   | <b>17</b>    | <b>19</b>    | <b>17</b>    | <b>101 (+7%)</b>           |
| <i>Consumo (miles ton res)</i>                | <b>225</b>   | <b>204</b>  | <b>205</b>  | <b>220</b>   | <b>220</b>   | <b>206</b>   | <b>1.280 (+10%)</b>        |
| <i>Cons. Kg/hab/año</i>                       | <b>65</b>    | <b>59</b>   | <b>60</b>   | <b>64</b>    | <b>64</b>    | <b>60</b>    | <b>62 (+10%)</b>           |
| <i>Precio Ternero</i>                         | <b>12,0</b>  | <b>12,1</b> | <b>12,0</b> | <b>11,3</b>  | <b>11,2</b>  | <b>11,4</b>  | <b>-5%</b>                 |
| <i>Precio Novillito Consumo</i>               | <b>8,5</b>   | <b>10,4</b> | <b>10,4</b> | <b>10,3</b>  | <b>10,2</b>  | <b>10,1</b>  | <b>+12%</b>                |
| <i>Precio Novillo Exportación</i>             | <b>9,1</b>   | <b>10,4</b> | <b>10,4</b> | <b>10,2</b>  | <b>10,0</b>  | <b>9,90</b>  | <b>+14%</b>                |
| <i>Precio minorista</i>                       | <b>38,7</b>  | <b>40,0</b> | <b>41,0</b> | <b>41,4</b>  | <b>41,0</b>  | <b>41,1</b>  | <b>+6%</b>                 |
| <i>Precio Rump &amp; Loin UE (miles u\$s)</i> | <b>14,4</b>  | <b>14,7</b> | <b>14,8</b> | <b>14,1</b>  | <b>13,7</b>  | <b>13,5</b>  | <b>+4%</b>                 |

TUDO LO QUE SE  
PRODUZCA TIENE  
COLOCACION EN LOS  
MERCADOS INTERNO Y  
EXTERNO

# CONSUMO FUTURO DE CARNES

|                                 | <b>2012<br/>MTM</b> | <b>2050<br/>MTM</b> | <b>Tasa anual de<br/>crecimiento</b> |
|---------------------------------|---------------------|---------------------|--------------------------------------|
| <b>Consumo<br/>Mundial</b>      | <b>258</b>          | <b>455</b>          | <b>1,3 %</b>                         |
| <b>Países en<br/>Desarrollo</b> | <b>149</b>          | <b>317</b>          | <b>1,7%</b>                          |
| <b>Países<br/>Desarrollados</b> | <b>109</b>          | <b>138</b>          | <b>0,5%</b>                          |
| <b>Zona Asia<br/>Pacífico</b>   | <b>7</b>            | <b>41</b>           | <b>4%</b>                            |

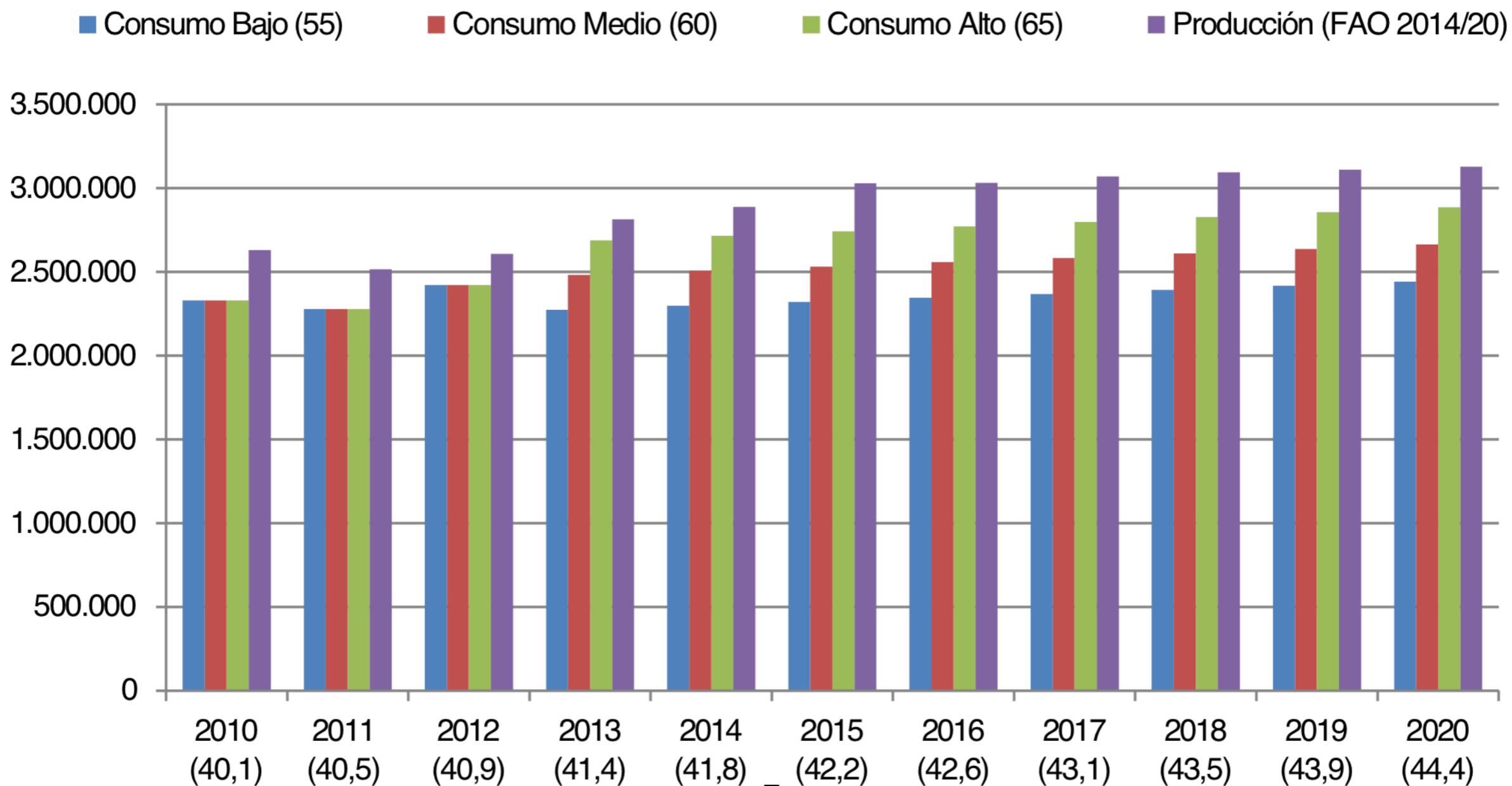
## DEMANDA DE CARNE BOVINA



El desafío de una producción ganadera sustentable

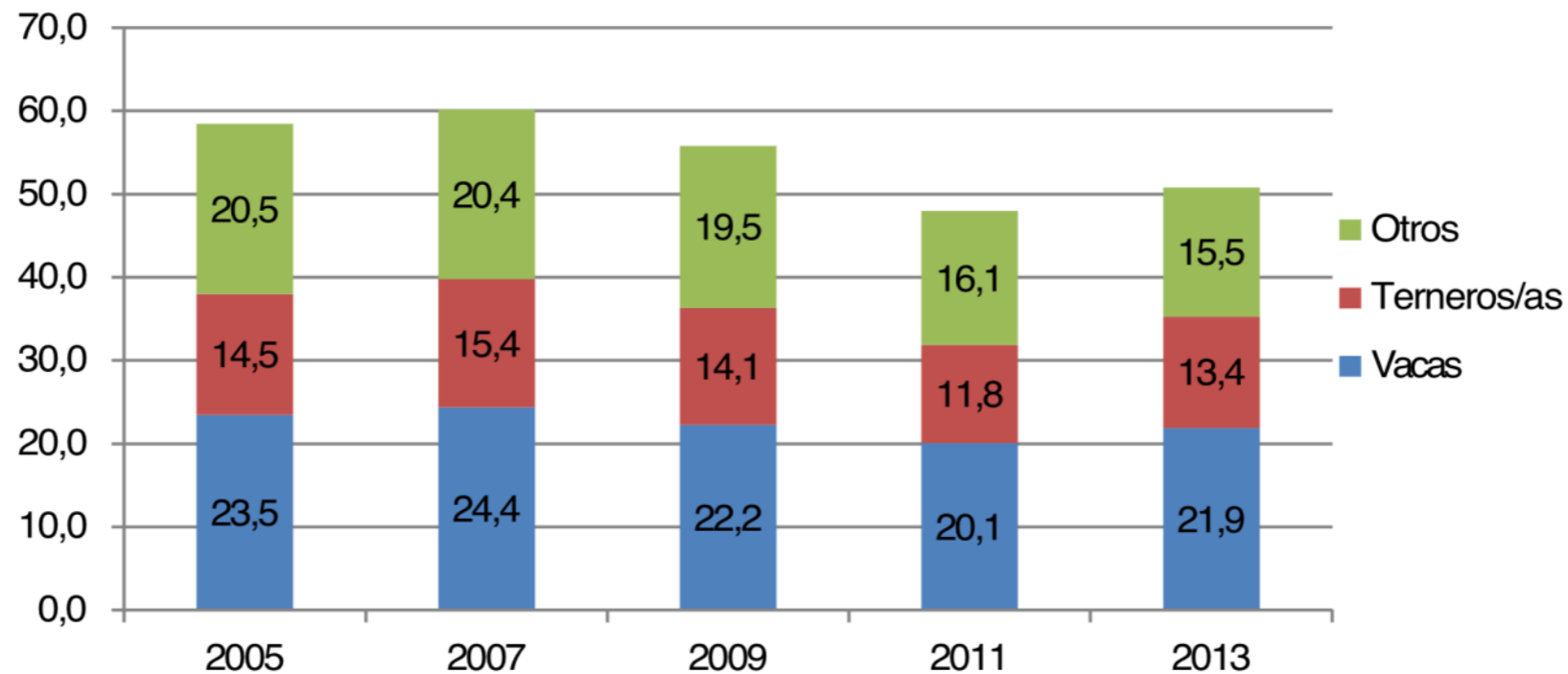
## CURVA DE CRECIMIENTO DEMOGRAFICO ARGENTINO ASOCIADA A LA PRODUCCION DE CARNE

### Proyección de la Producción y el Consumo Interno

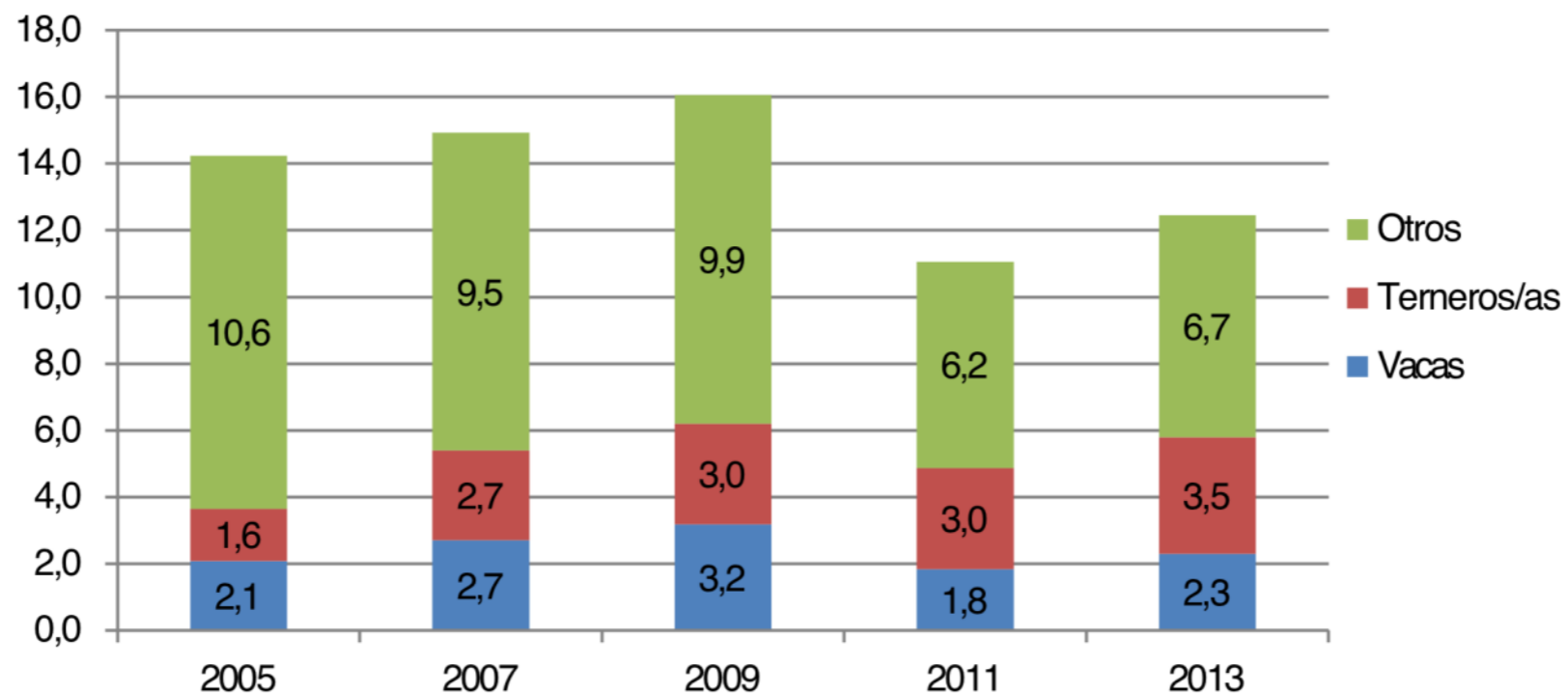


# EVOLUCIÓN DE STOCK Y FAENA

## Stock Bovino- Argentina (millones de cabezas)

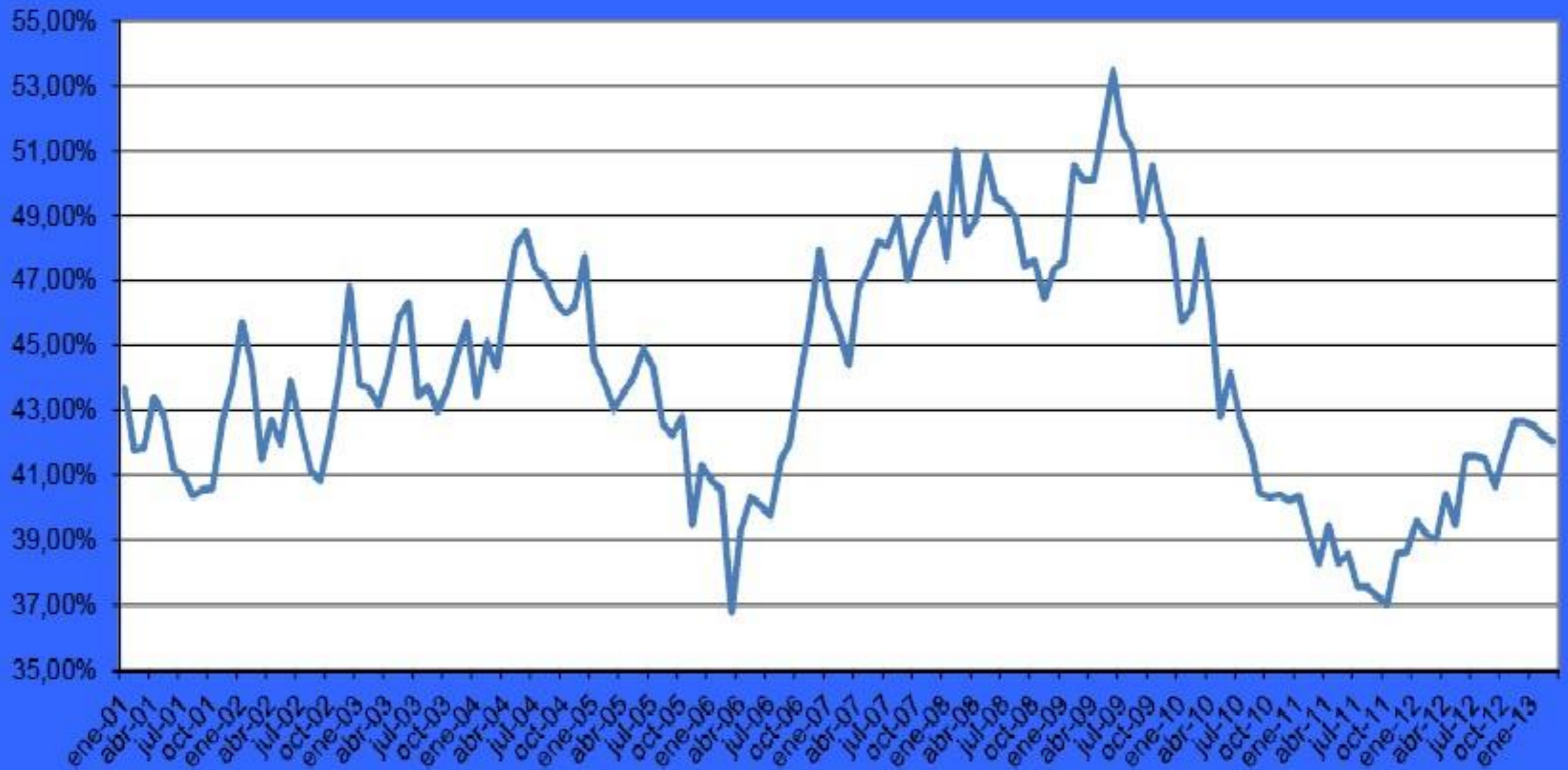


## Faena de bovinos-Argentina (millones de cabezas)

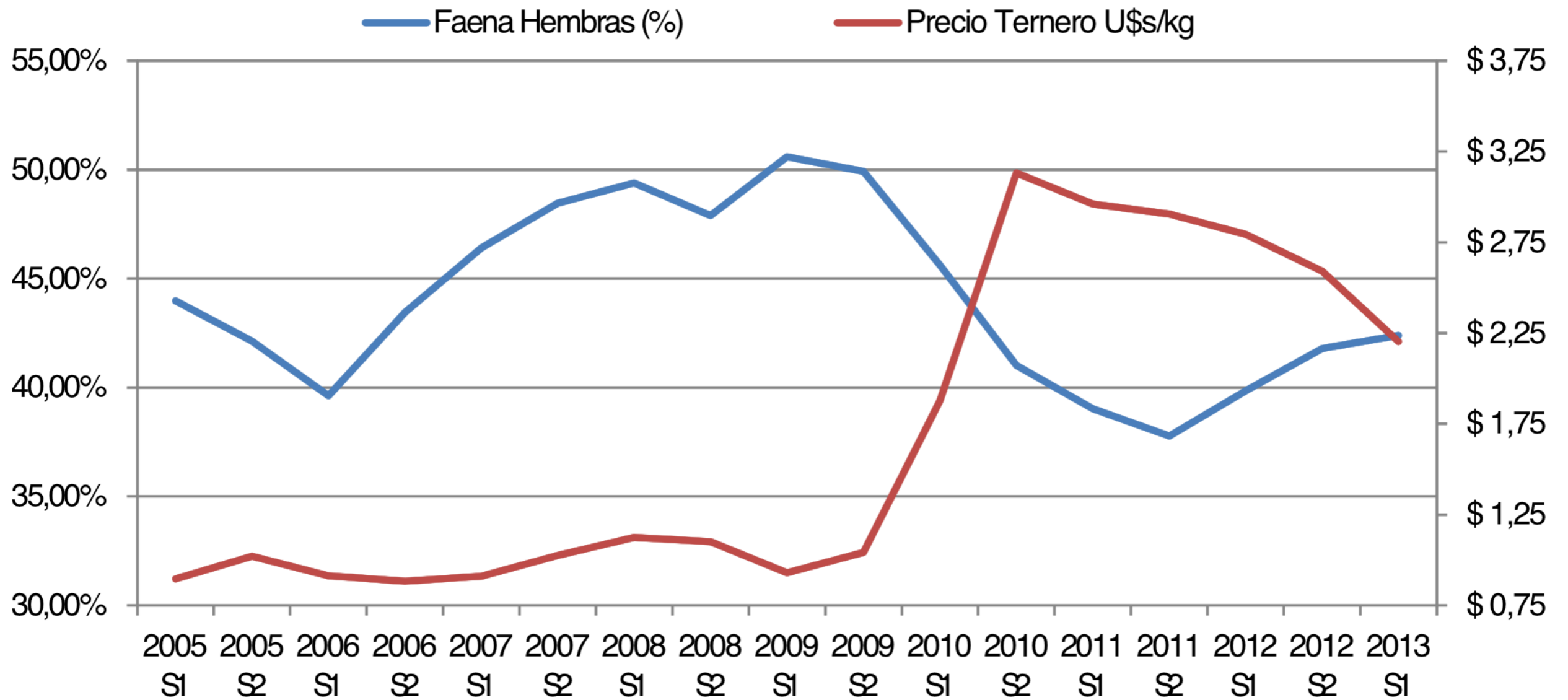




## Faena Hembras (% Faena Clasificada)



# Precio de los terneros y faena de hembras



# THE KEY: ENHANCING PRODUCTIVITY



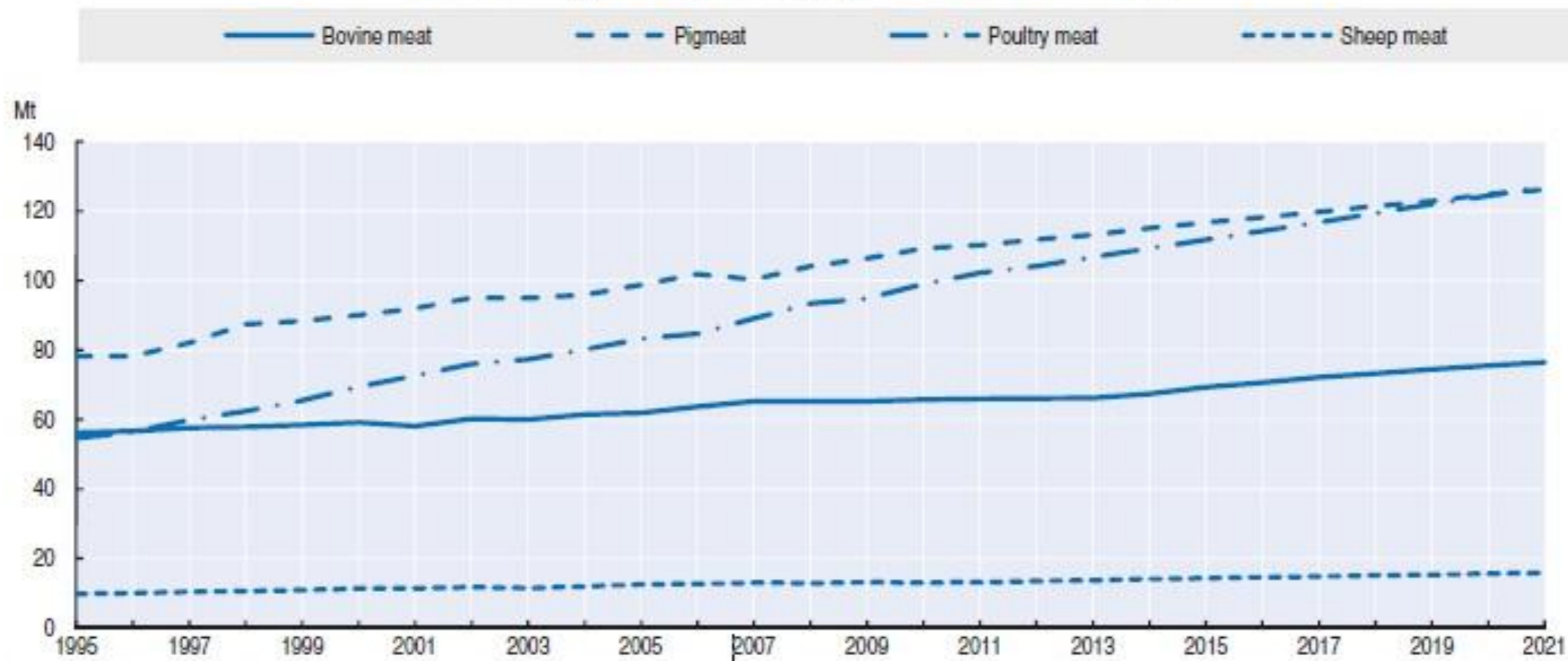
| Cattle Numbers |                     |                    |                    | Productivity Indicators |                   |                      |
|----------------|---------------------|--------------------|--------------------|-------------------------|-------------------|----------------------|
|                | <i>Inventory</i>    | <i>Slaughtered</i> | <i>Meat Output</i> | <i>Offtake Rate</i>     | <i>Carcass Wt</i> | <i>Slaughter Age</i> |
| USA            | <i>Million head</i> |                    | <i>1000 tons</i>   | <i>Percent</i>          | <i>Kg/head</i>    | <i>Years</i>         |
| 1981           | 114.4               | 38.1               | 10.4               | 33%                     | 271.4             | 3.0                  |
| 1990           | 98.2                | 37.6               | 12.3               | 38%                     | 327.2             | 2.6                  |
| 2012f          | 93.9                | 33.7               | 11.5               | 36%                     | 340.4             | 2.8                  |
| <b>Brazil</b>  |                     |                    |                    |                         |                   |                      |
| 1981           | 122.3               | 16.5               | 3.0                | 13%                     | 181.8             | 7.4                  |
| 1990           | 171.0               | 31.1               | 6.6                | 18%                     | 211.2             | 5.5                  |
| 2012f          | 226.7               | 42.3               | 9.6                | 19%                     | 226.8             | 5.4                  |
| <b>EU</b>      |                     |                    |                    |                         |                   |                      |
| 1981           | 97.0                | 35.0               | 8.0                | 36%                     | 235.2             | 2.8                  |
| 1990           | 92.0                | 33.0               | 8.0                | 36%                     | 253.8             | 2.8                  |
| 2012f          | 86.5                | 28.0               | 7.9                | 32%                     | 283.9             | 3.1                  |

# PRODUCCION DE CARNE EN EL MUNDO

## PROYECCIONES

Figure 7.3. Globally, poultry will overtake pigmeat as largest meat sector

Production growth: By meat type, 1995-2021 (c.w.e. or r.t.c.)



Source: OECD and FAO Secretariats.

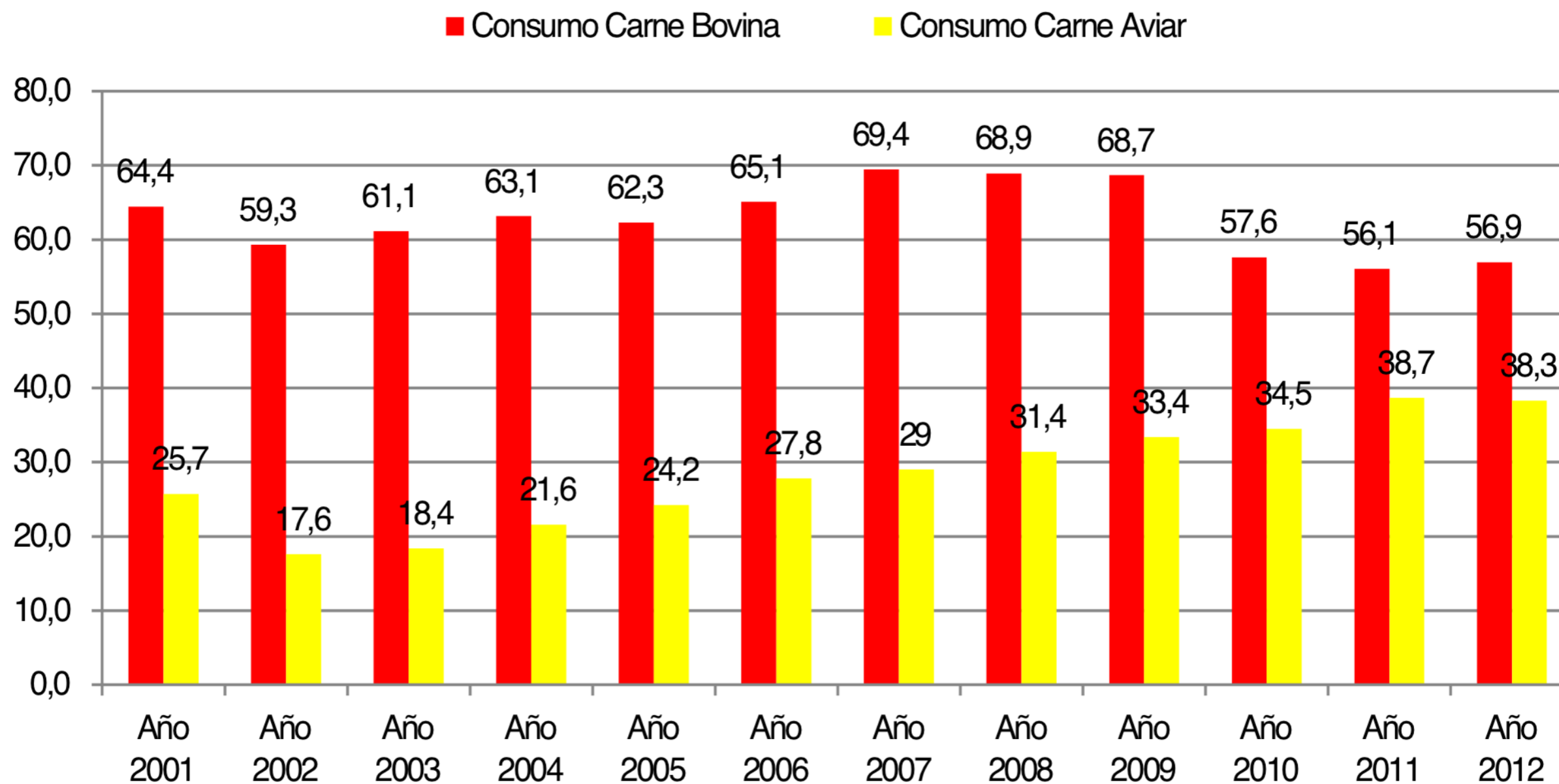
StatLink  <http://dx.doi.org/10.1787/888932640103>

Fuente: Perspectivas Agrícolas, OCDE/FAO, 2011-2021

# CONSUMO INTERNO

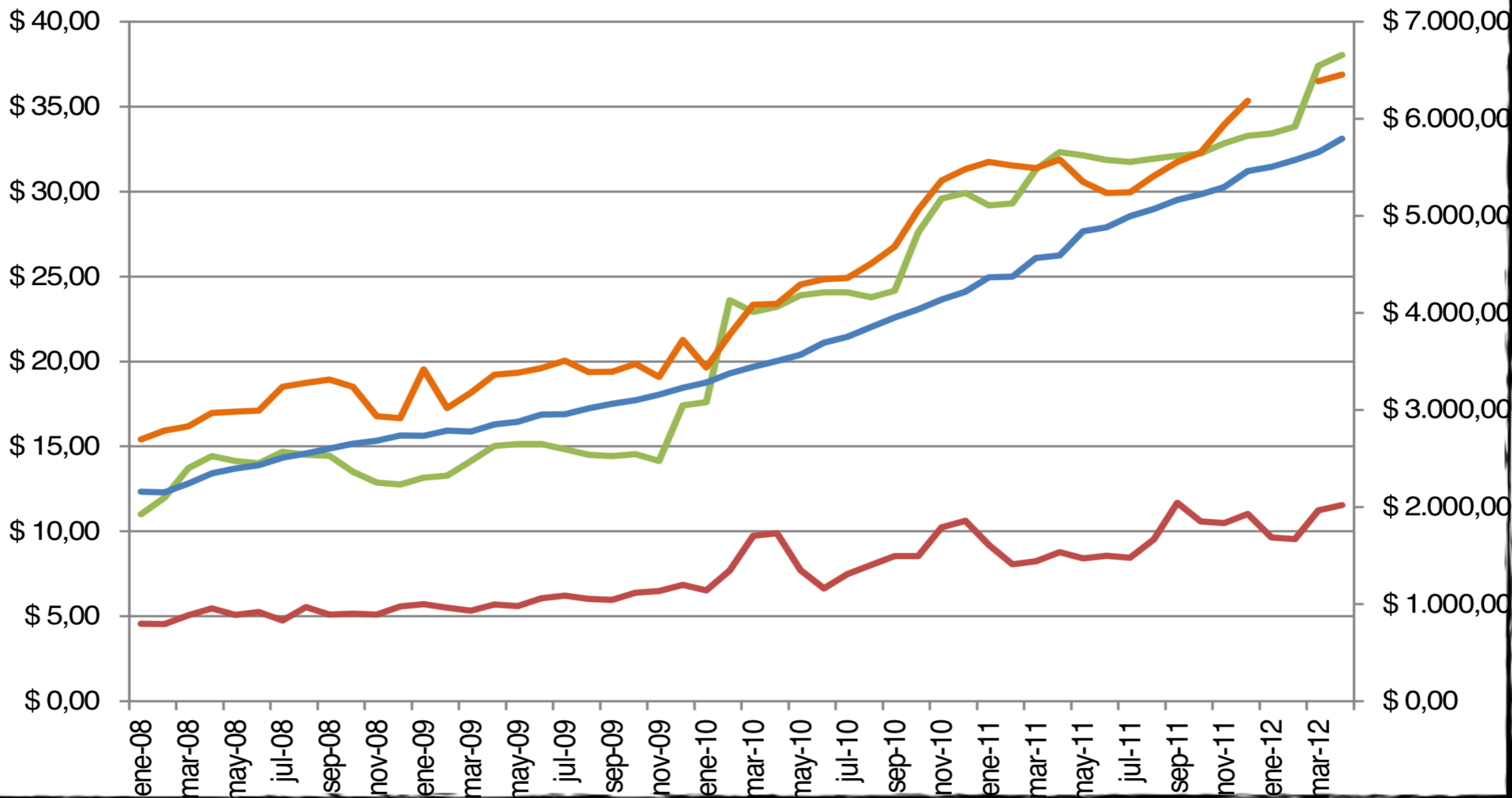
# CONSUMO INTERNO

## Evolución del Consumo Interno Aparente (kg/hab/año)



# Evolución de precios cárnicos e ingresos de consumidores

- Precio del Pollo
- Precio de la carne porcina
- Precio de la Carne Bov
- Salario promedio sector privado formal



# MERCADO EXTERNO

FUERTEMENTE VOLATIL  
AFECTADO POR

- TASA DE CRECIMIENTO DE LOS PAISES
- PODER ADQUISITIVO
- VOLUMENES REQUERIDOS
- ASPECTOS SANITARIOS

20  
**PRECIOS EN ALZA !**



# EUA: carne bovina vai virar um artigo de luxo?

Postado em 20/02/2013

Os preços da carne bovina deverão aumentar 10% no verão nos Estados Unidos, levantando a preocupação de produtores e vendedores sobre a carne se tornar um artigo de luxo. “Não podemos deixar que a carne bovina se transforme em uma lagosta”, disse o presidente da Associação de Criadores de Gado de Iowa, Ed Greiman of Garner.

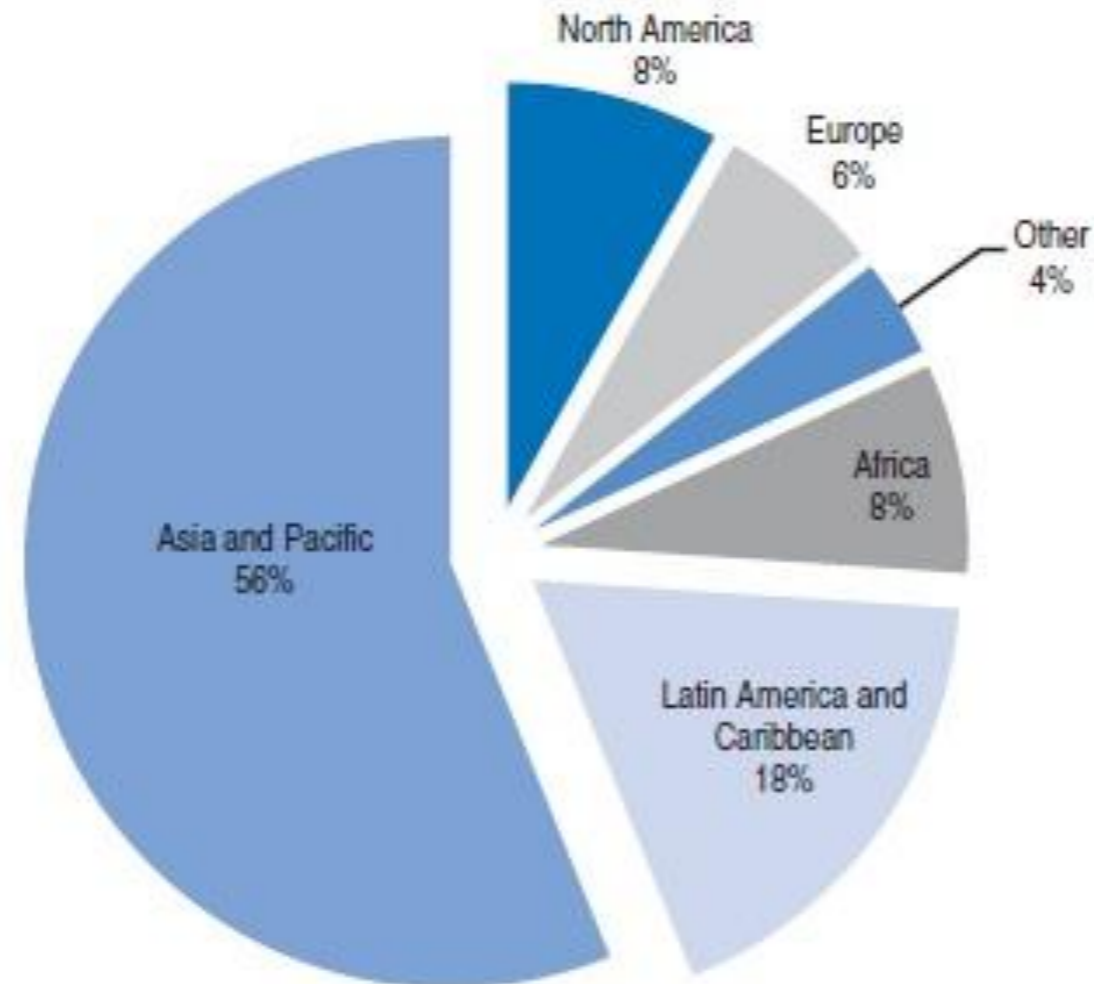
Os preços varejistas da carne bovina aumentaram em média US\$ 1 por libra (US\$ 2,2/quilos) desde 2007. Os preços do gado aumentaram 25% nos últimos dois anos, à medida que o rebanho do país caiu para seu menor nível em seis décadas, enquanto a demanda no comércio exterior aumentou.

Gráfico 1




# CRECIMIENTO DE LA DEMANDA POR REGIONES

Figure 7.4. Increase in meat demand, by region, between 2021 and the base period

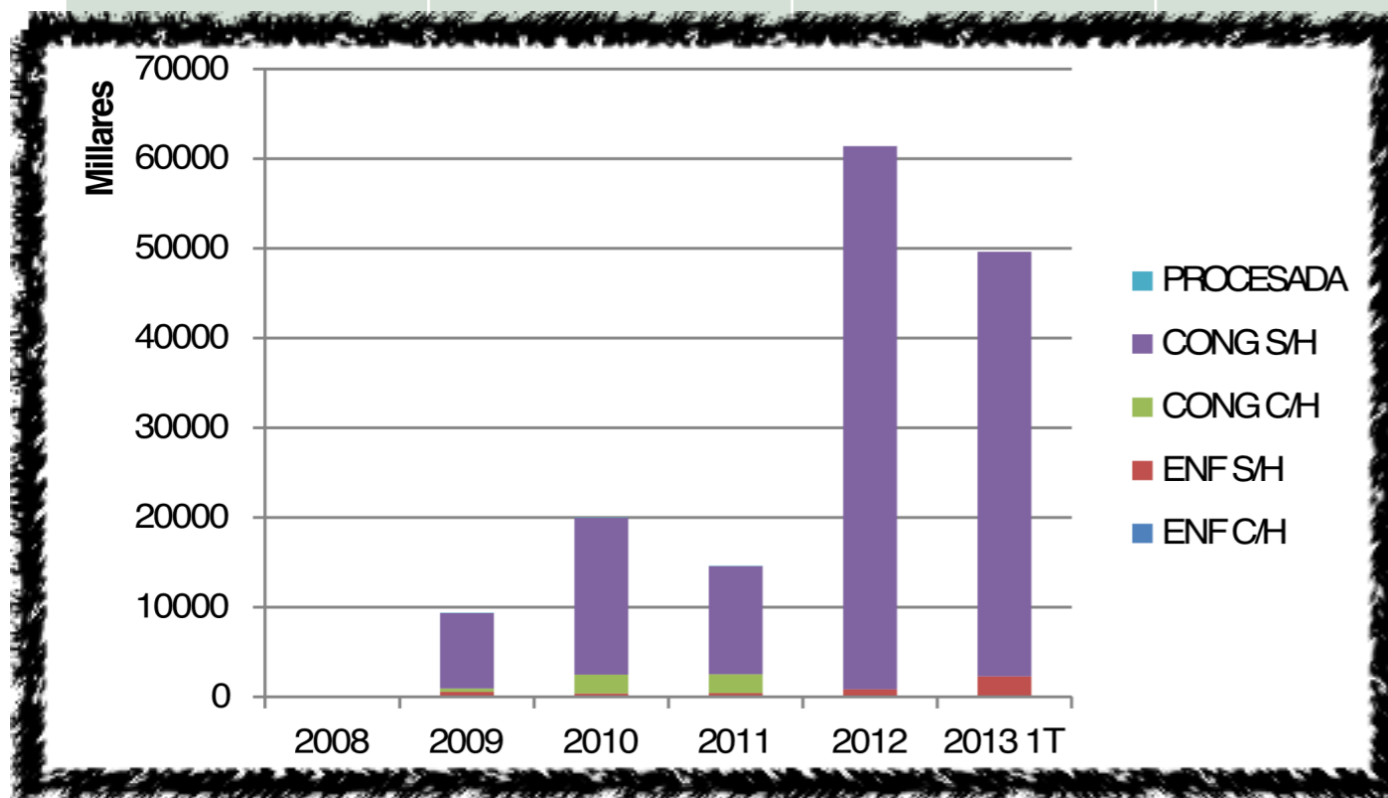


Source: OECD and FAO Secretariats.

StatLink  <http://dx.doi.org/10.1787/888932640122>

# CHINA

|                 | Enfriada     | Congelada     | Procesada | TOTAL         | Equiv. Rch    |
|-----------------|--------------|---------------|-----------|---------------|---------------|
| <b>2009</b>     | <b>559</b>   | <b>8.794</b>  | <b>7</b>  | <b>9.360</b>  | <b>13.841</b> |
| <b>2010</b>     | <b>381</b>   | <b>19.586</b> | <b>48</b> | <b>20.014</b> | <b>29.109</b> |
| <b>2011</b>     | <b>433</b>   | <b>14.156</b> | <b>5</b>  | <b>14.595</b> | <b>20.929</b> |
| <b>2012</b>     | <b>862</b>   | <b>60.525</b> | <b>0</b>  | <b>61.386</b> | <b>92.080</b> |
| <b>2013 1ºT</b> | <b>2.298</b> | <b>47.335</b> |           | <b>49.632</b> | <b>74.449</b> |

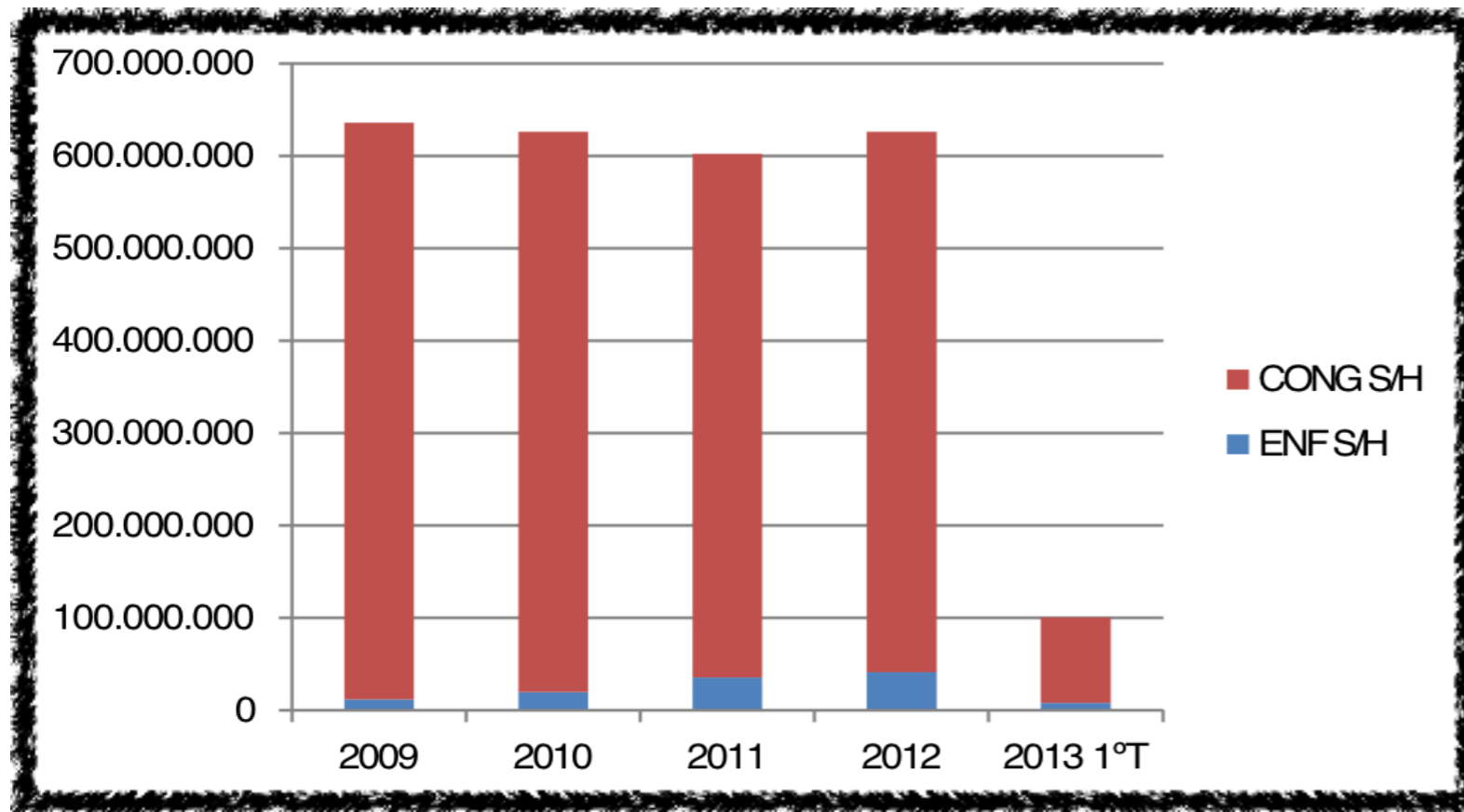


| Año          | Precio prom congelada |
|--------------|-----------------------|
| <b>09</b>    | <b>U\$s 2.916</b>     |
| <b>10</b>    | <b>U\$s 3.530</b>     |
| <b>11</b>    | <b>U\$s 5.051</b>     |
| <b>12</b>    | <b>U\$s 4.018</b>     |
| <b>13 1T</b> | <b>U\$s 4.083</b>     |

# RUSIA

Rusia – Importaciones de carne bovina fresca– Toneladas Netas – Años 2009-2013

|                 | Enfriada      | Congelada      | TOTAL          | Equiv. Rch     |
|-----------------|---------------|----------------|----------------|----------------|
| <b>2009</b>     | <b>11.765</b> | <b>624.077</b> | <b>635.842</b> | <b>953.762</b> |
| <b>2010</b>     | <b>19.748</b> | <b>606.083</b> | <b>625.830</b> | <b>938.746</b> |
| <b>2011</b>     | <b>35.732</b> | <b>566.545</b> | <b>602.276</b> | <b>903.414</b> |
| <b>2012</b>     | <b>41.165</b> | <b>584.615</b> | <b>625.780</b> | <b>938.670</b> |
| <b>2013 1ºT</b> | <b>8.099</b>  | <b>92.293</b>  | <b>100.392</b> | <b>150.588</b> |



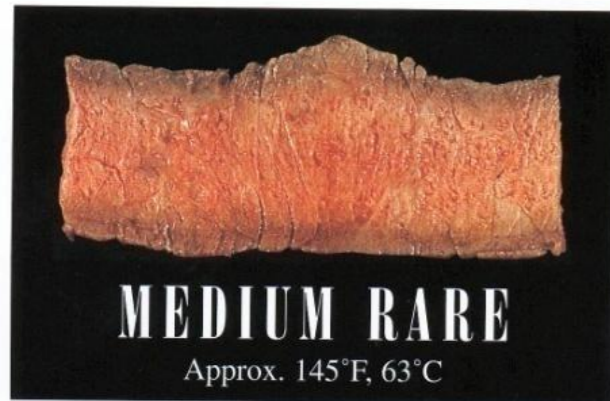
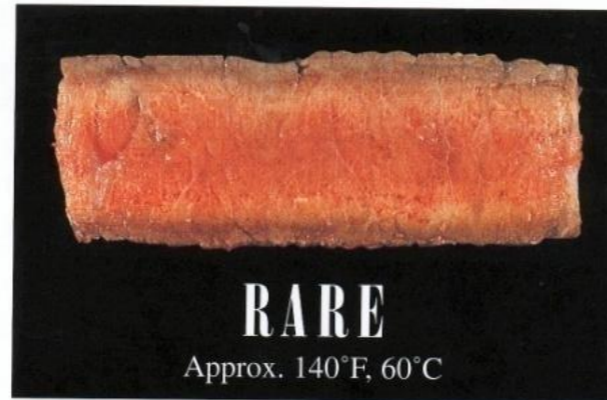
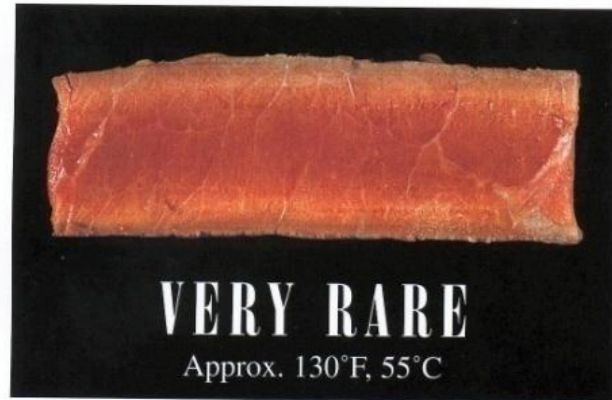
| Año          | Precio prom congelada |
|--------------|-----------------------|
| <b>09</b>    | <b>U\$s 3.517</b>     |
| <b>10</b>    | <b>U\$s 3.419</b>     |
| <b>11</b>    | <b>U\$s 3.913</b>     |
| <b>12</b>    | <b>U\$s 4.419</b>     |
| <b>13 1T</b> | <b>U\$s 4.382</b>     |

En el año 2012, Australia y EE.UU. despacharon cada uno unas mil toneladas de carne refrigerada a Rusia a un precio promedio superior a u\$s 16,000.

**MUCHAS GRACIAS**

# BEEF STEAK COLOUR GUIDE

Degrees of Doneness



# How would you like your steak?



**RARE**



**MEDIUM RARE**



**MEDIUM**



**MEDIUM WELL**



**WELL DONE**

