



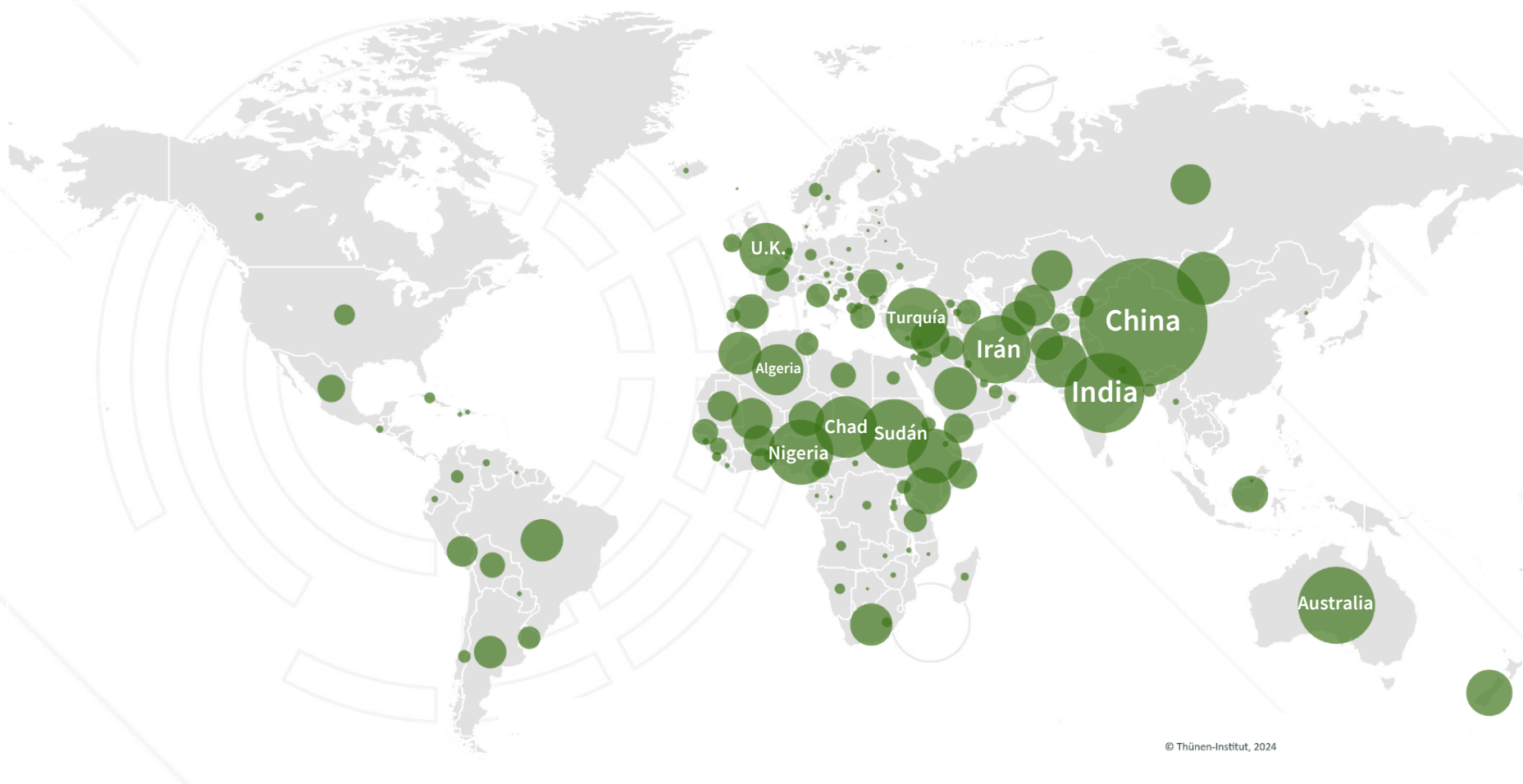
PANEL INTERNACIONAL OVINO DE CARNE

RESULTADOS
PRELIMINARES 2023



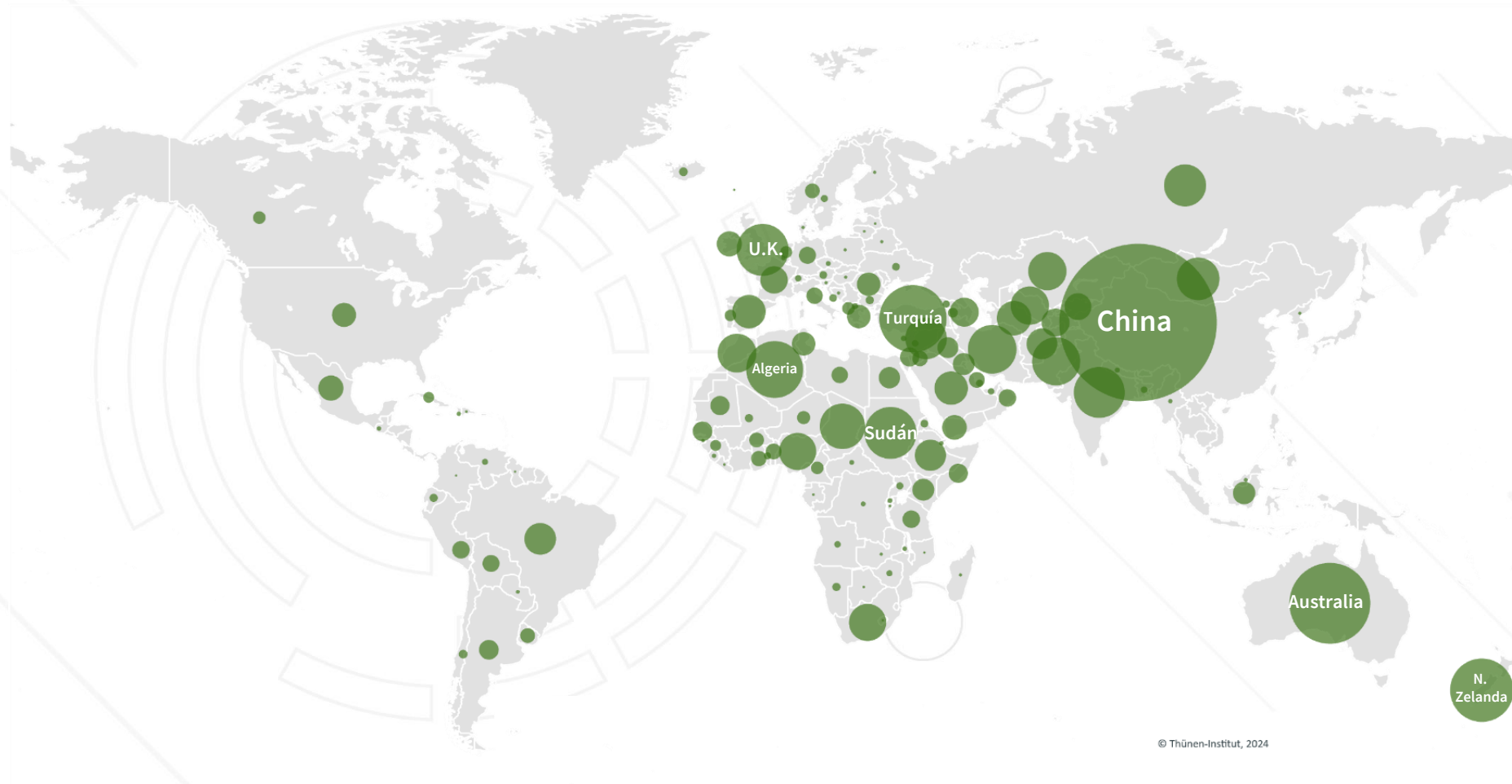
REDESTECO RENGRATI ENTORNO GLOBAL





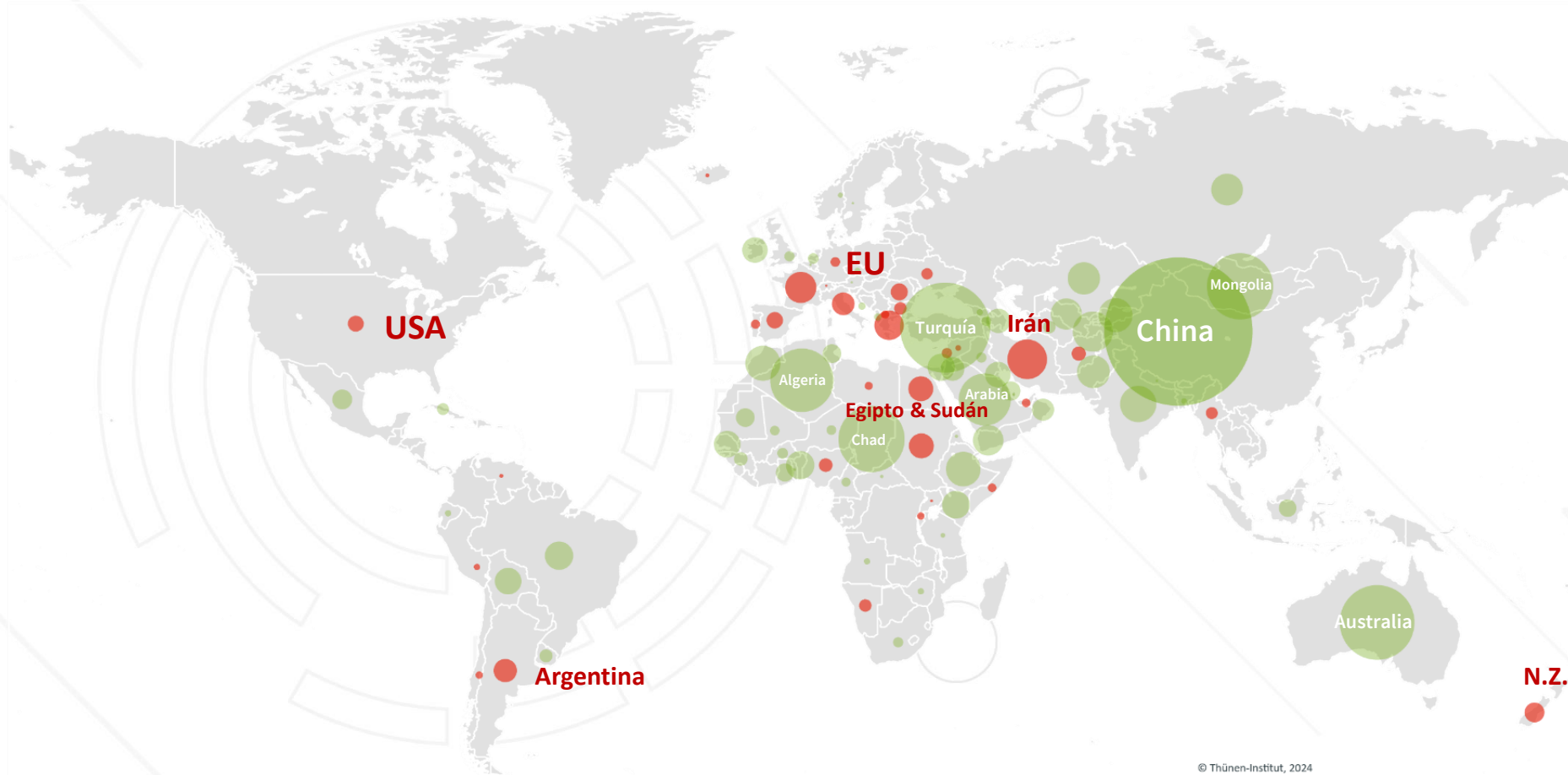
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Fuente: FAOStat



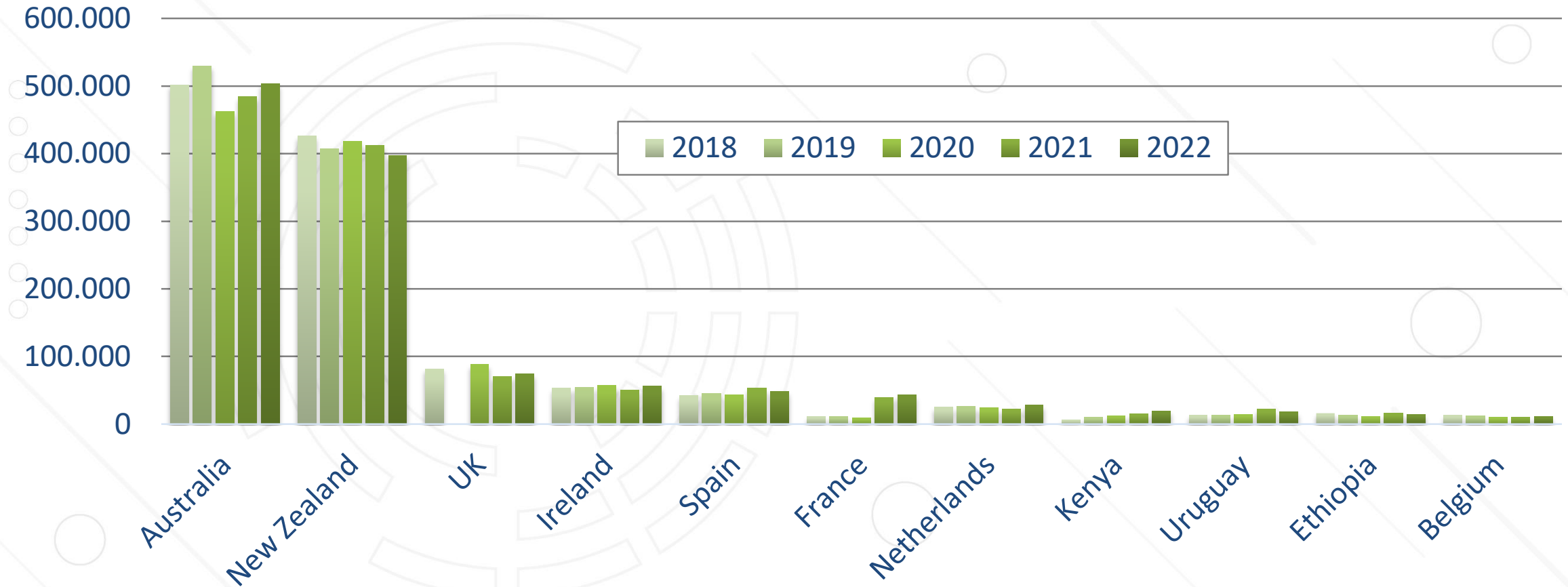
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Fuente: FAOStat

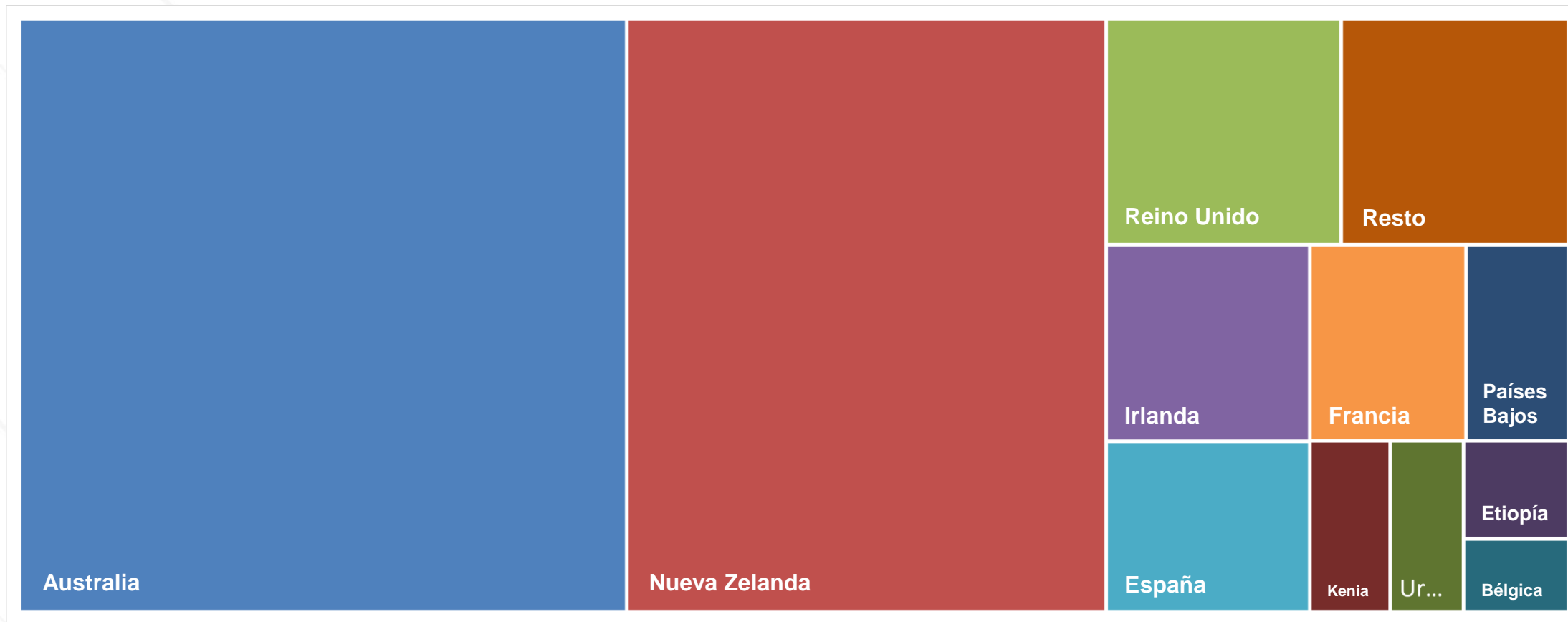


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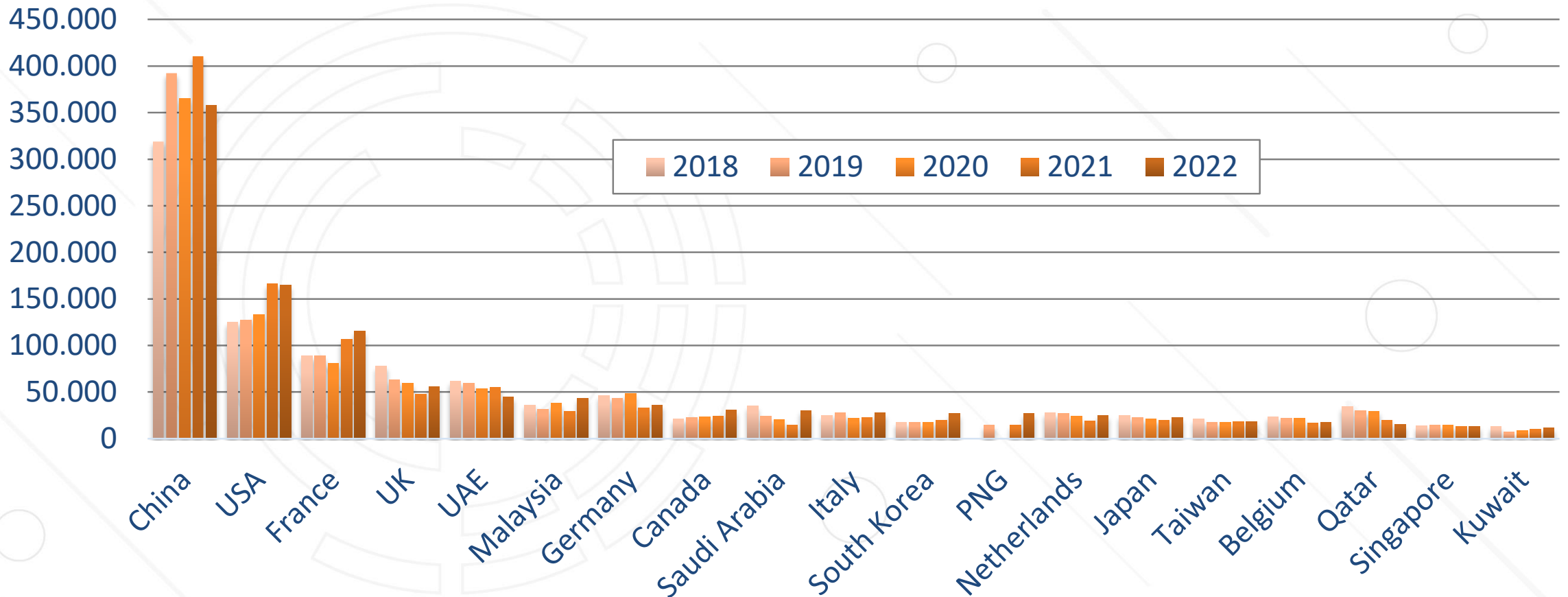
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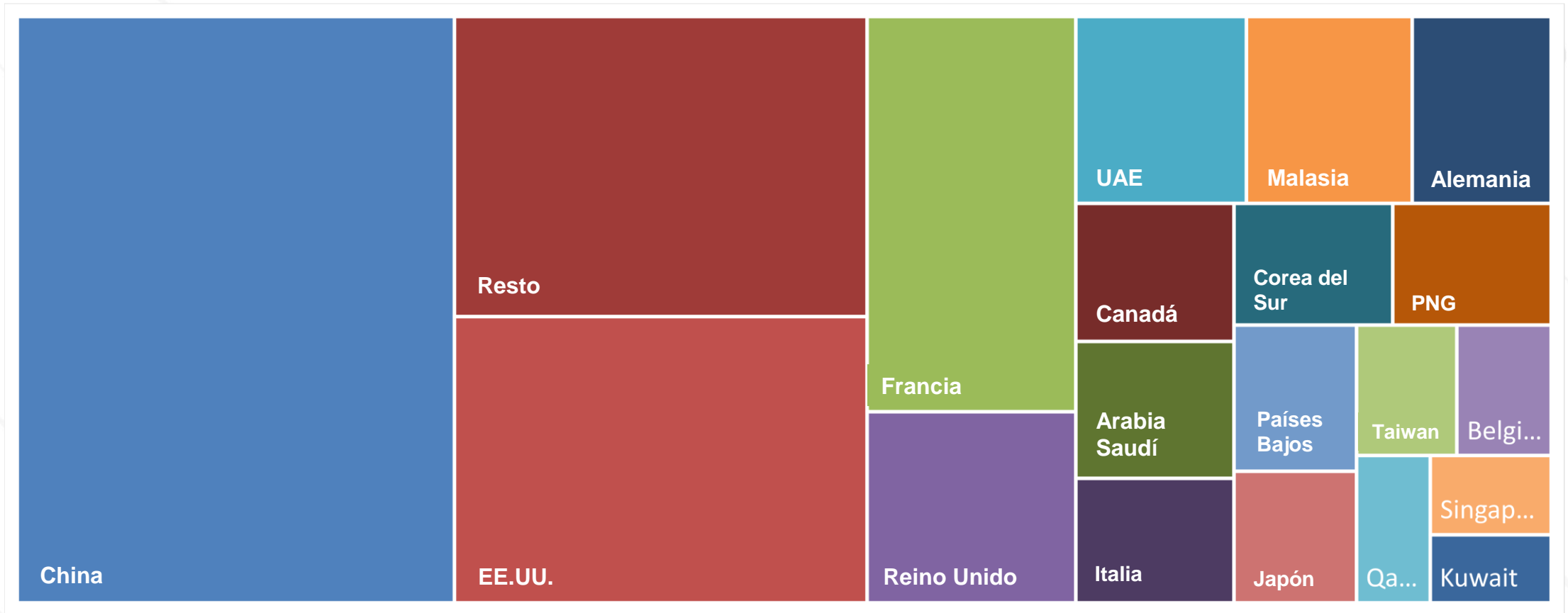
Fuente: PSD/FAS/USDA



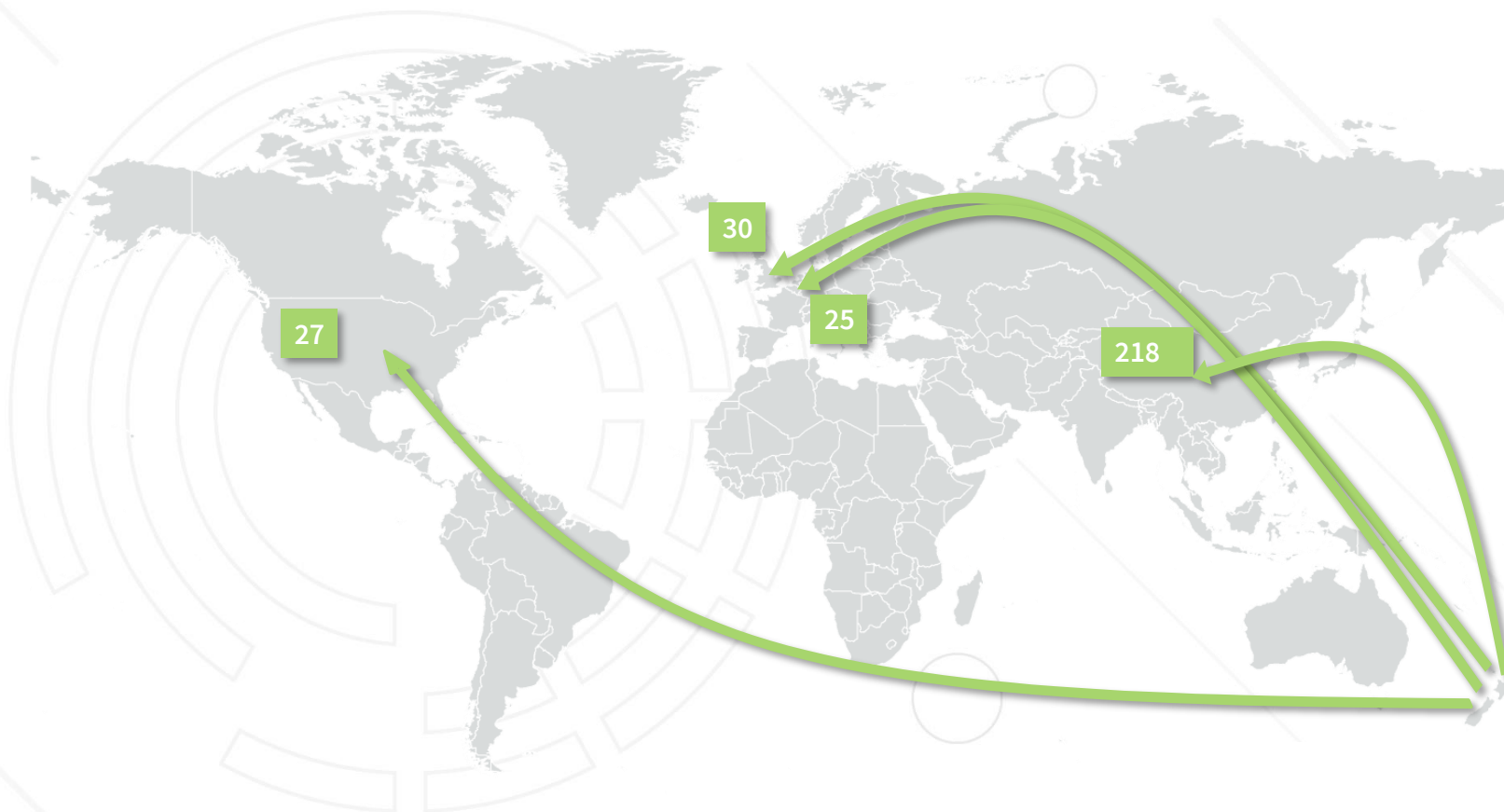
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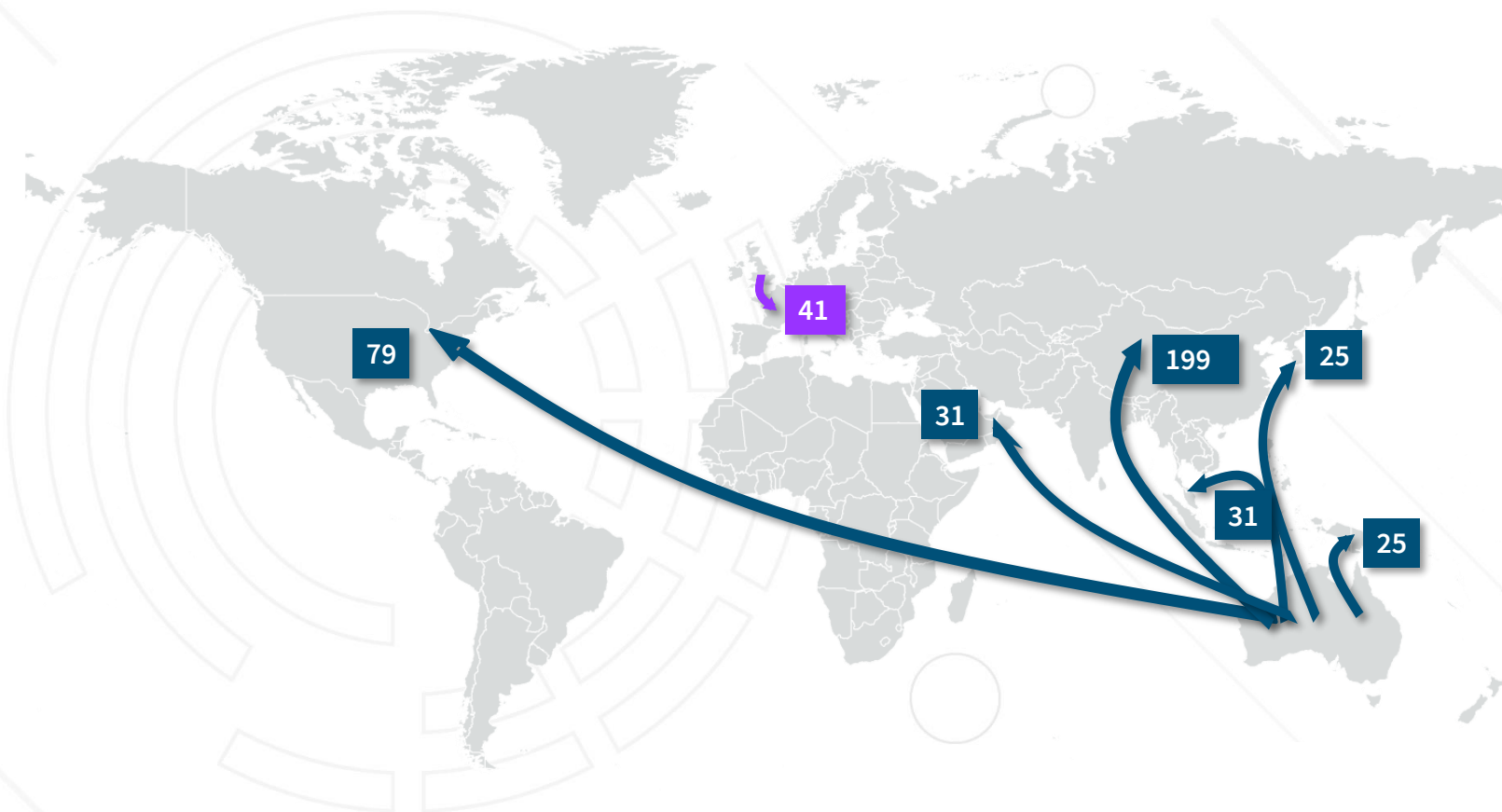
Fuente: ITC Trade Data Base



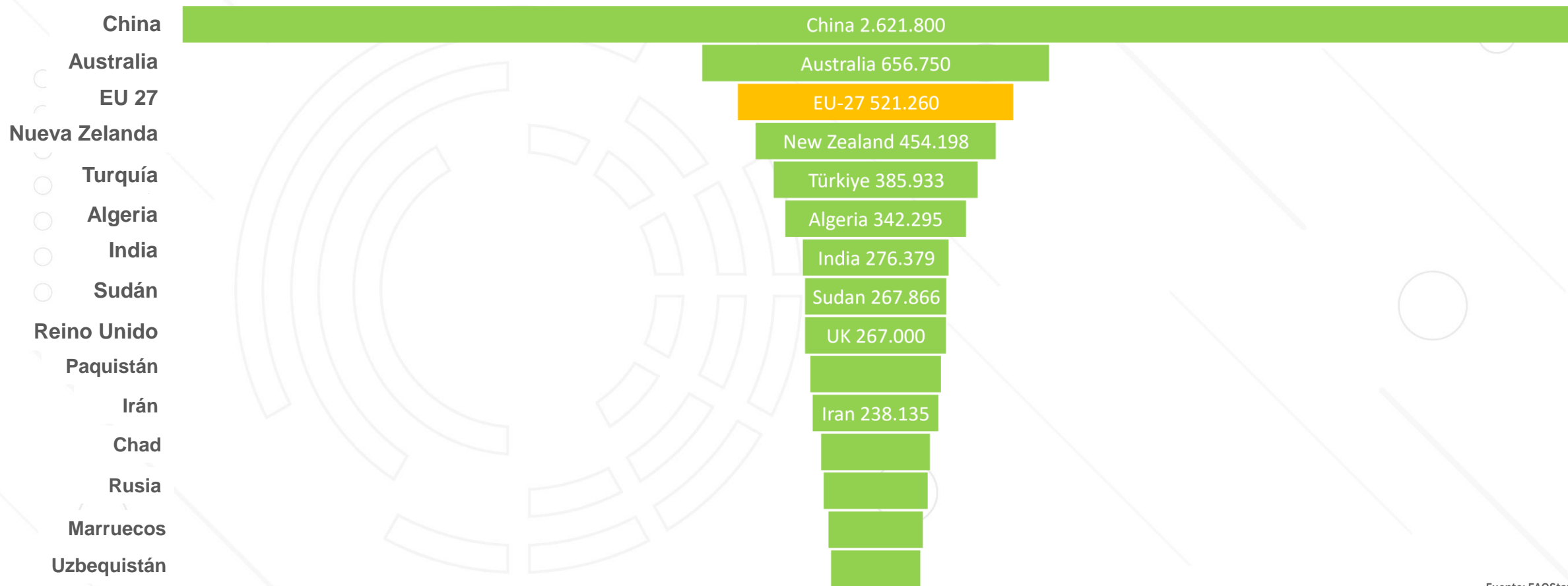
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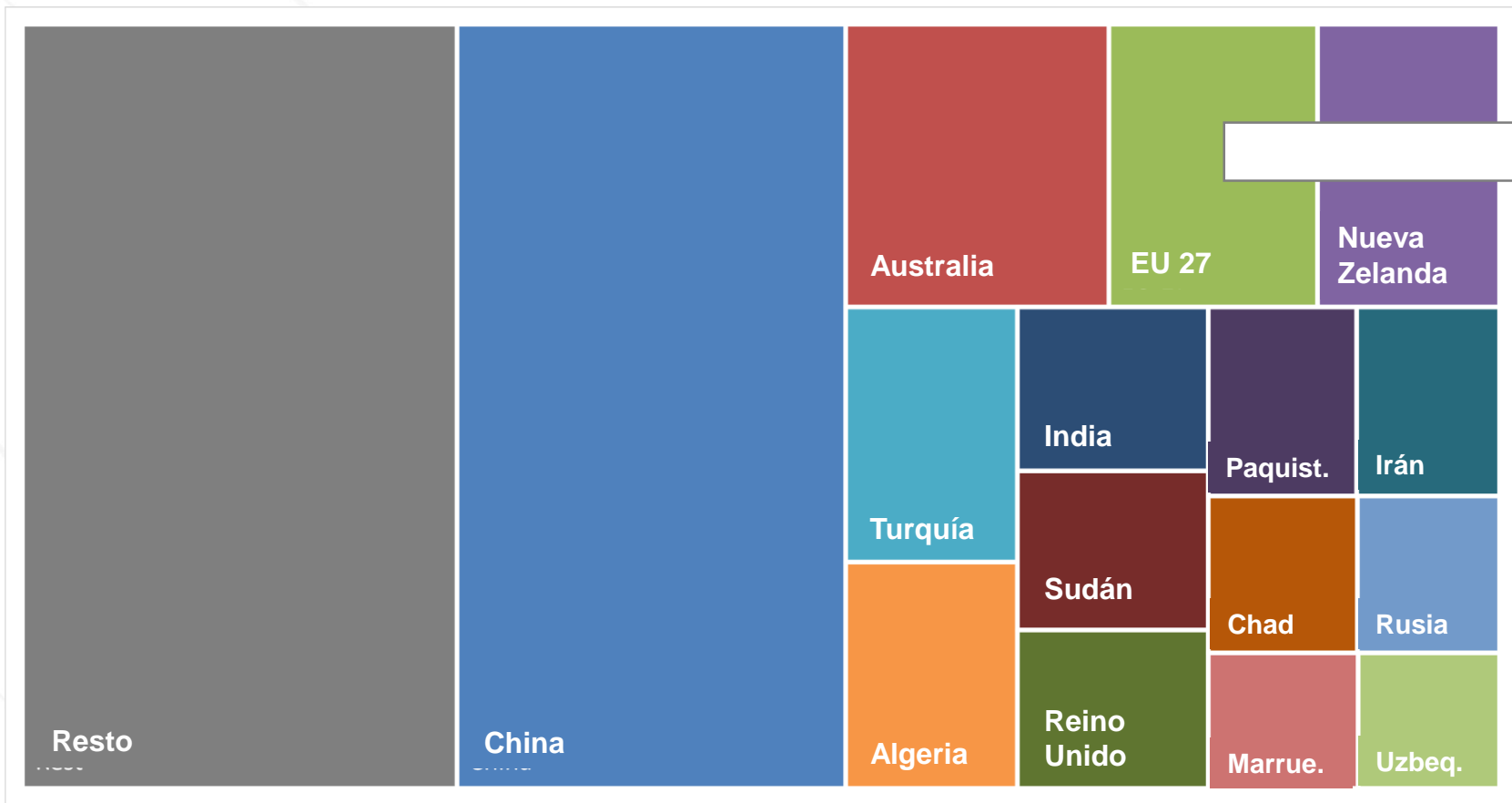
Fuente: UNComtrade



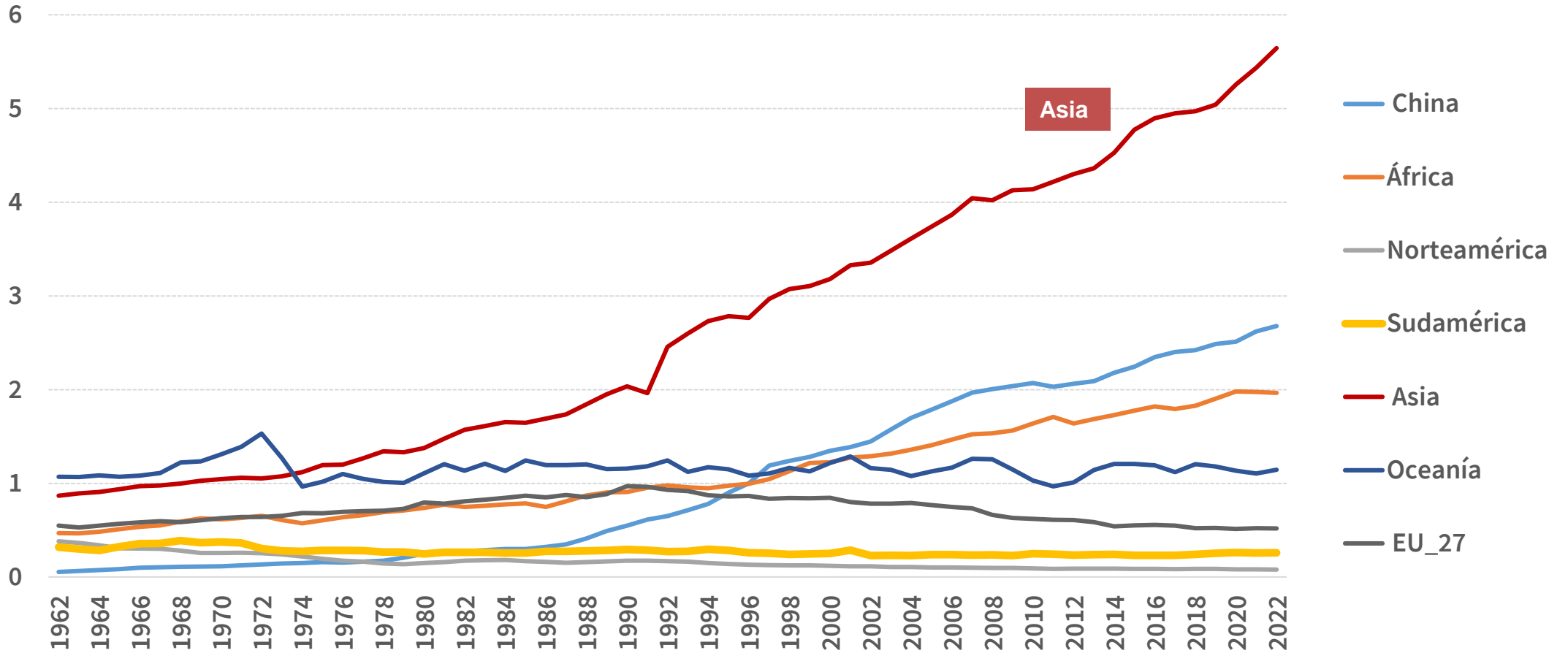
Fuente: UNComtrade



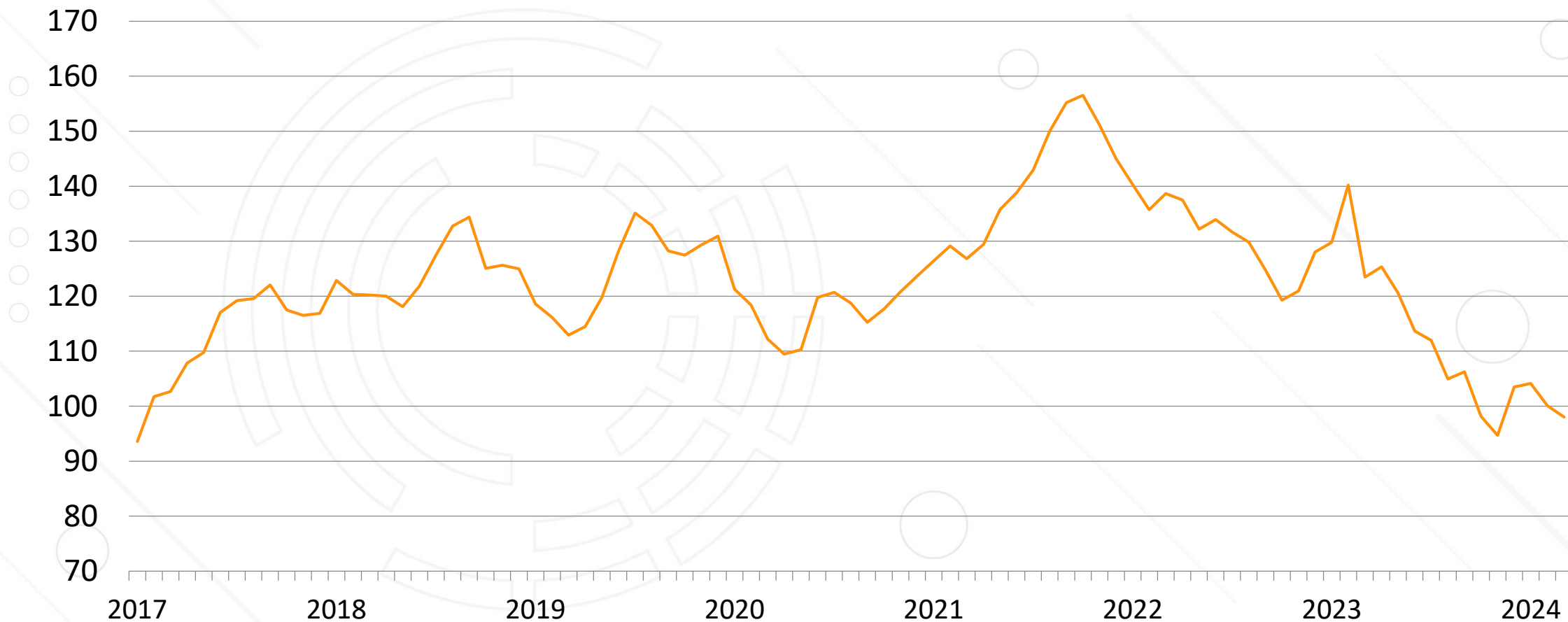
Fuente: FAOstat



Fuente: FAOstat

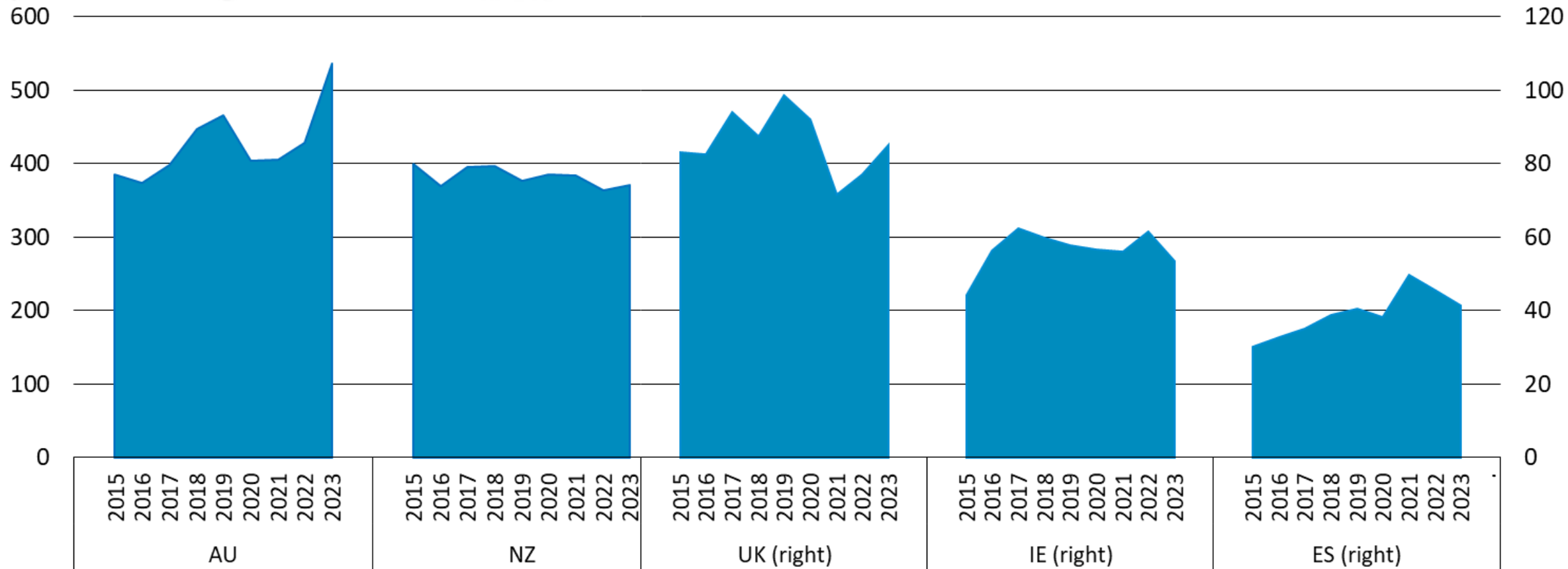


Fuente: OECD / FAO

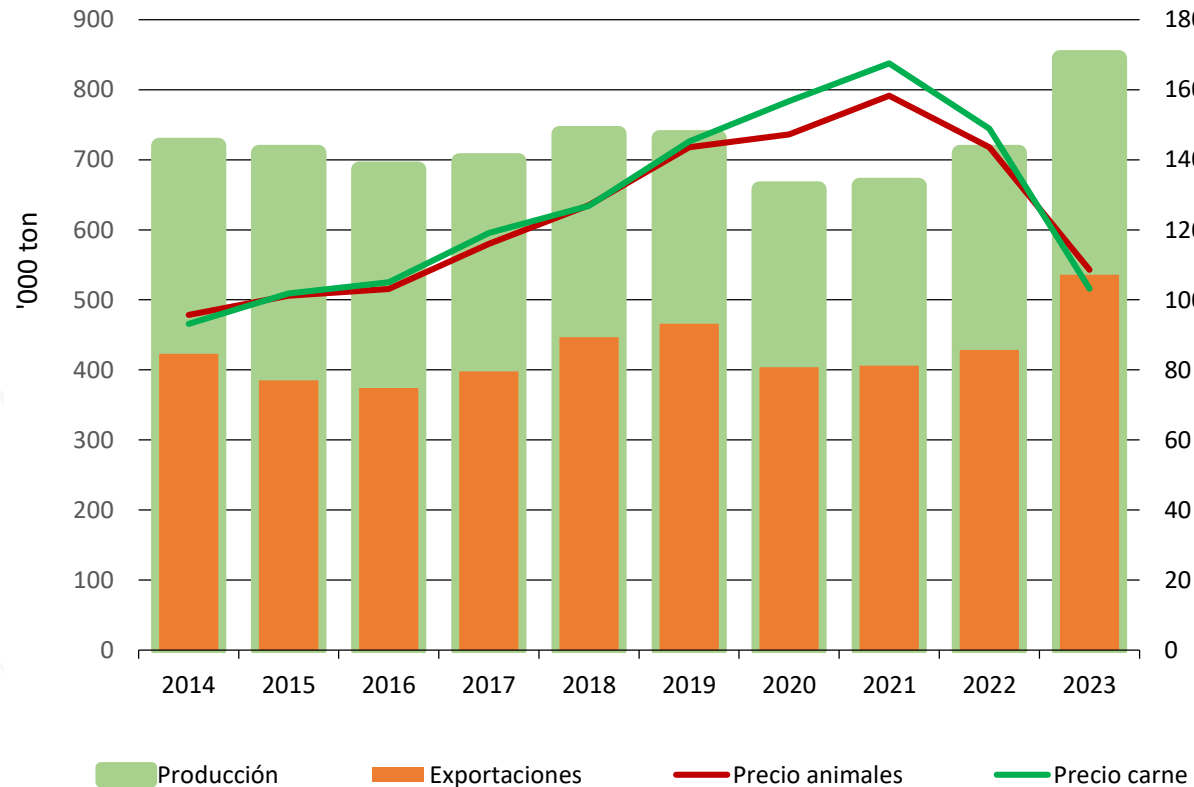


Fuente: FAOStat

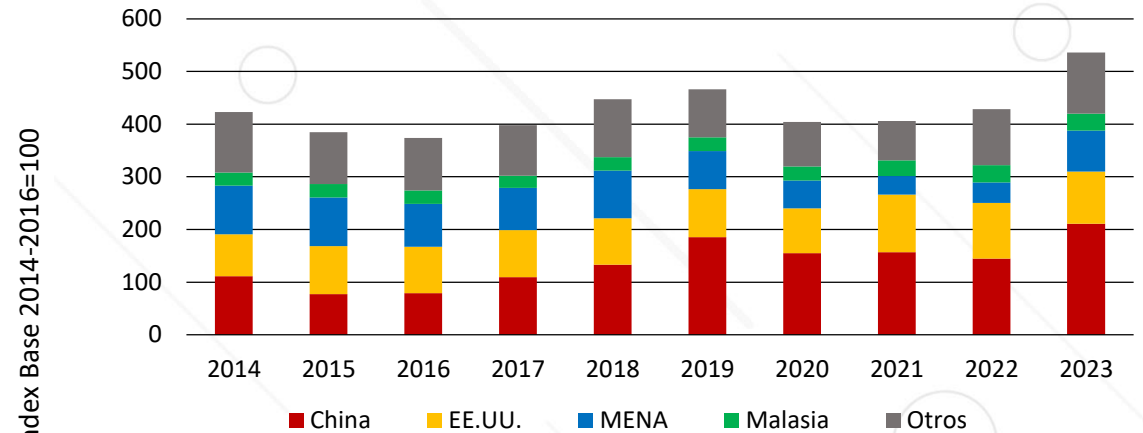
Evolución de las exportaciones en 5 países clave (toneladas),
2015 - 2023



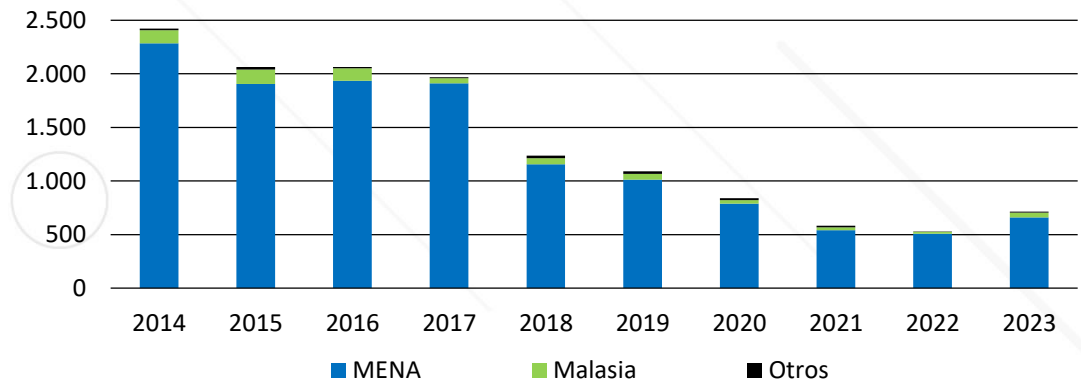
Producción de carne, exportaciones y precios

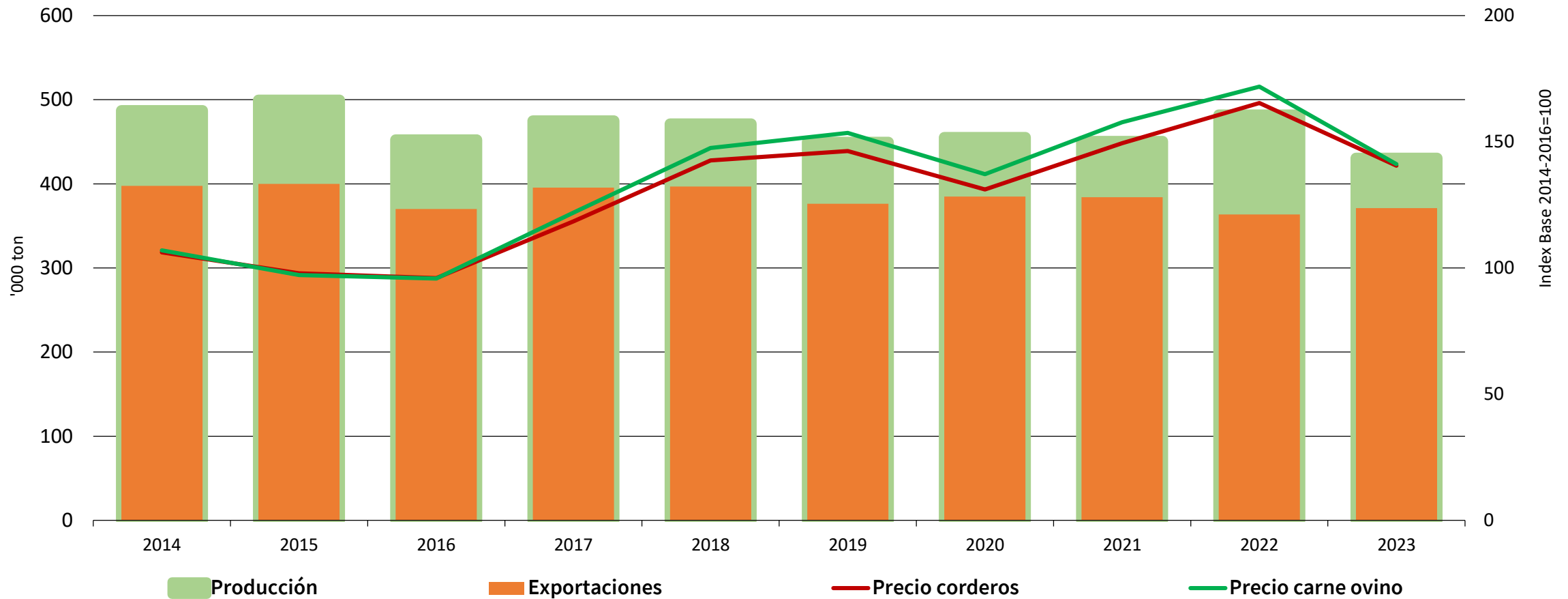


Exportaciones de carne, toneladas

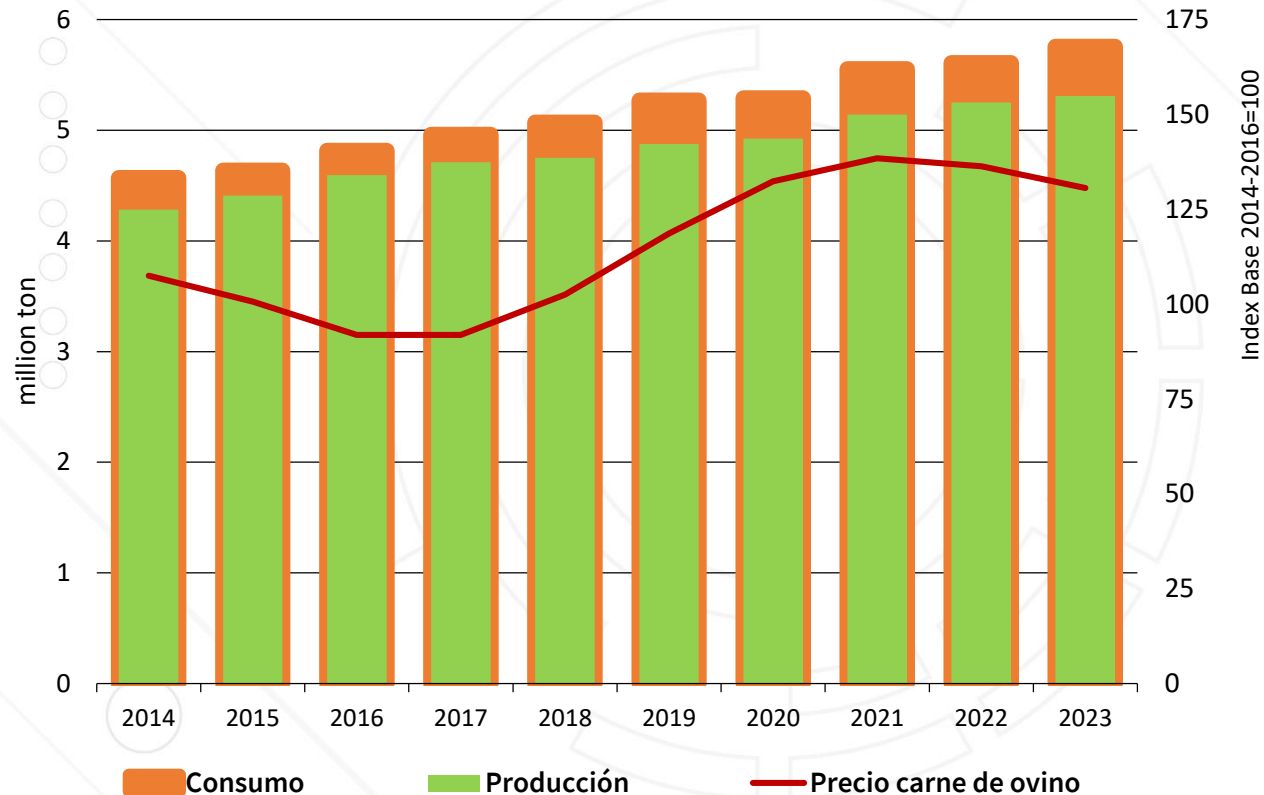


Exportaciones de animales, cabezas

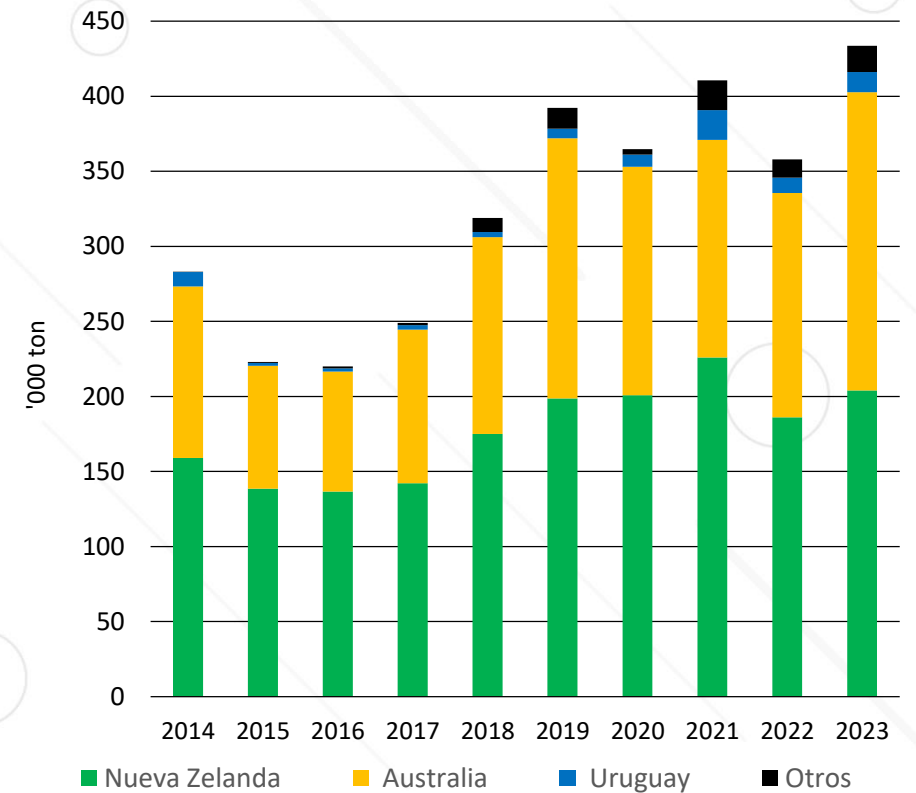




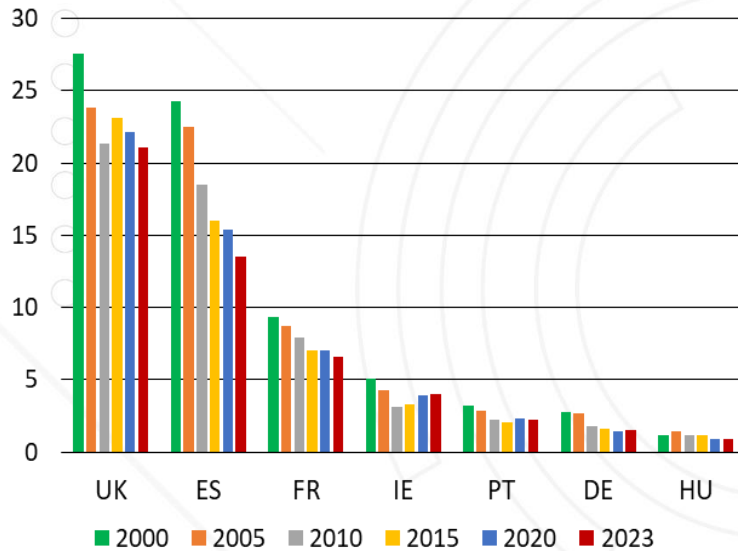
Producción de carne, consumo y precio



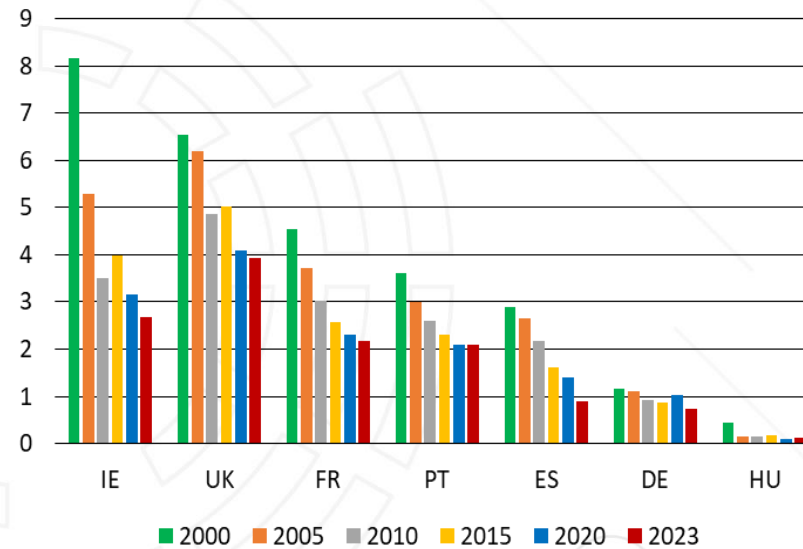
Importaciones de carne de ovino



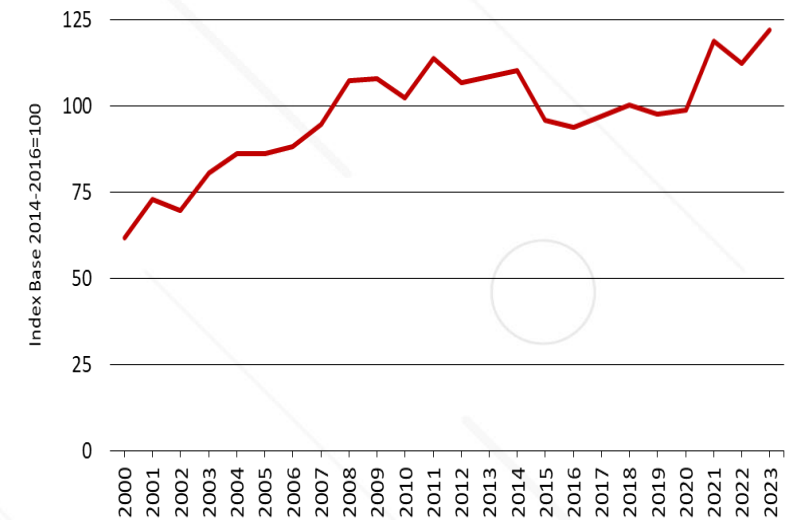
Censo de ovino, cabezas



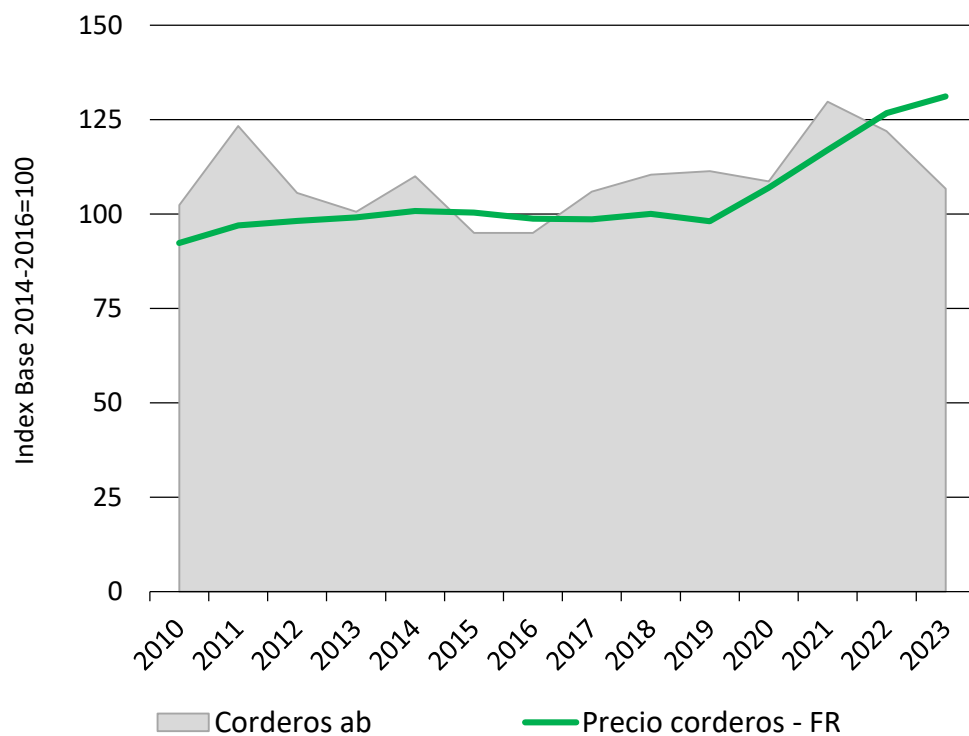
Consumo de carne de ovino, kg/capita



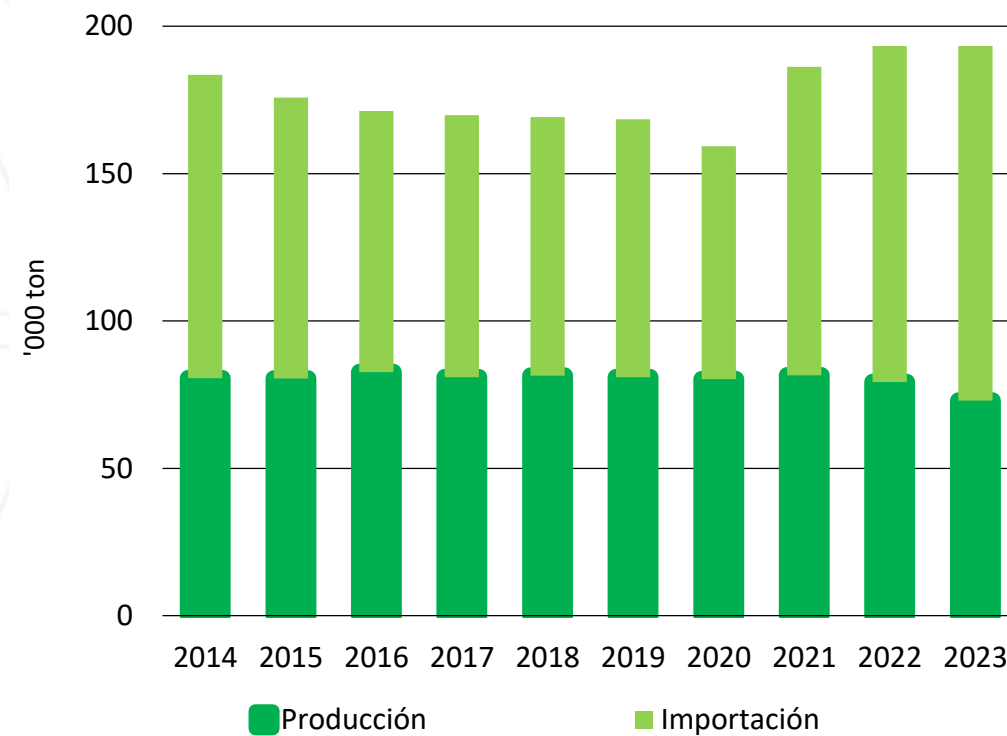
UE + UK precio de corderos

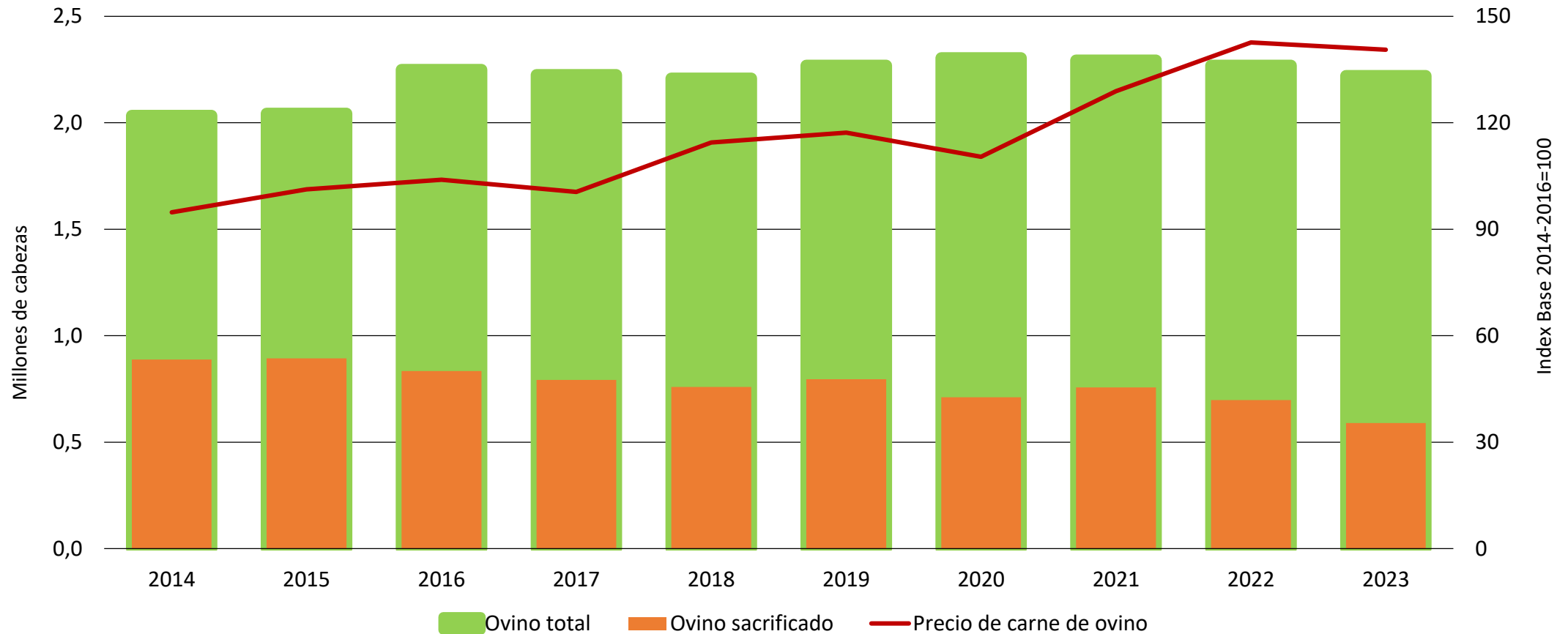


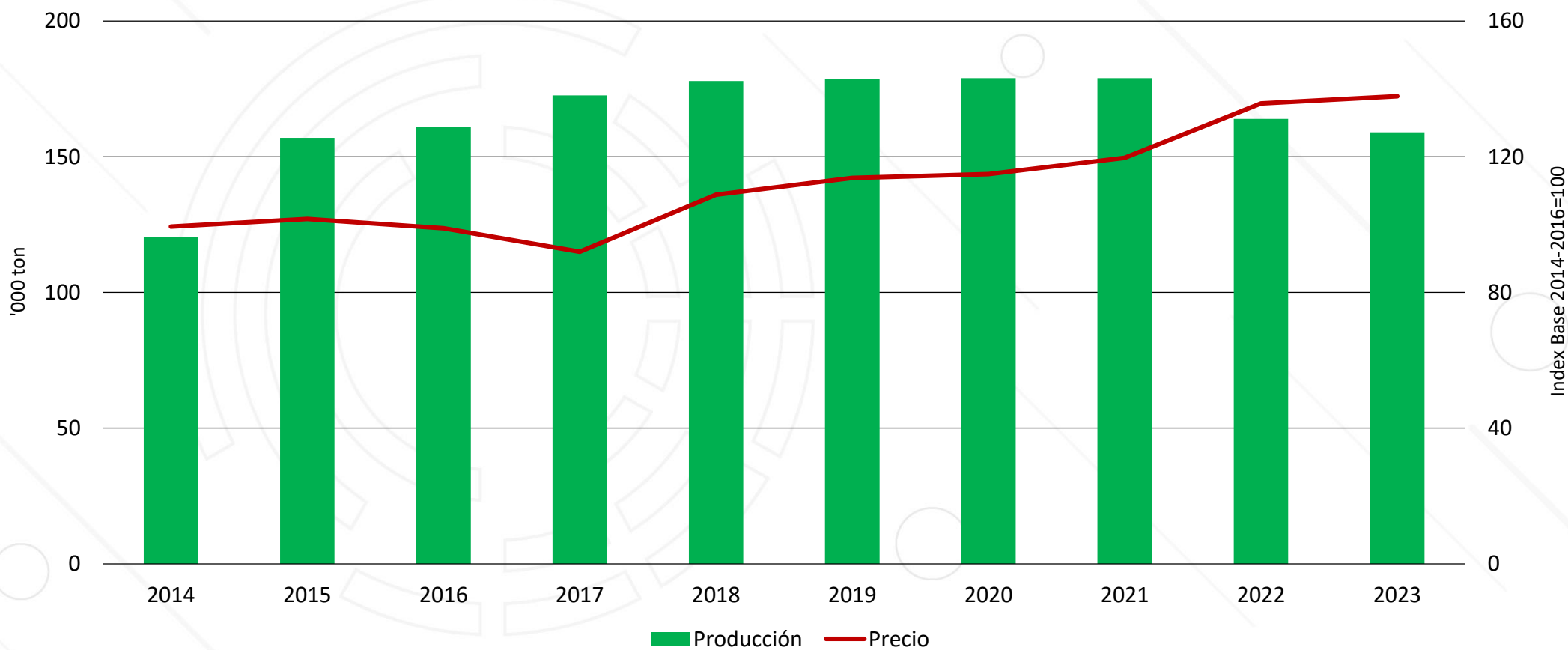
Precio corderos

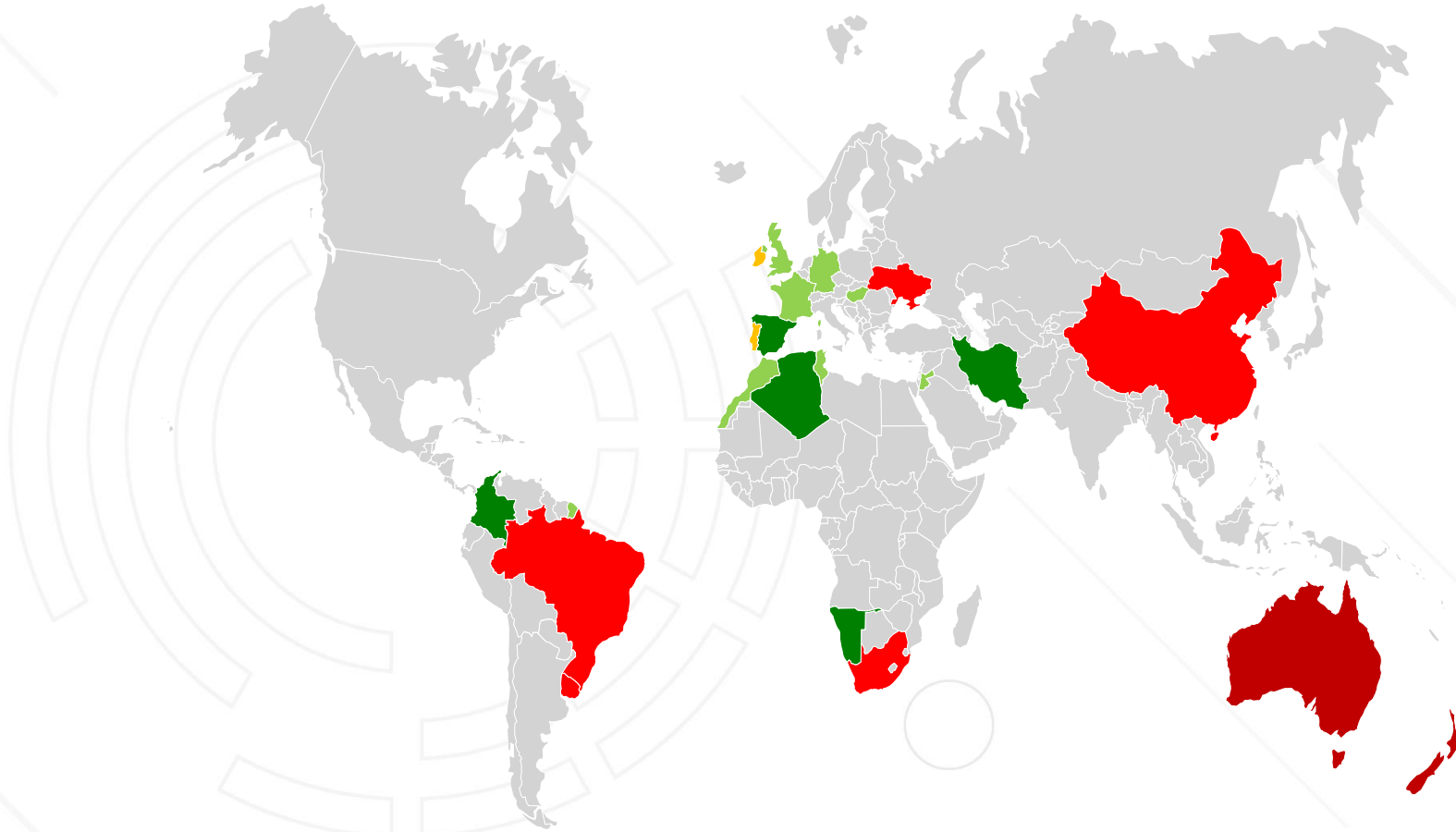


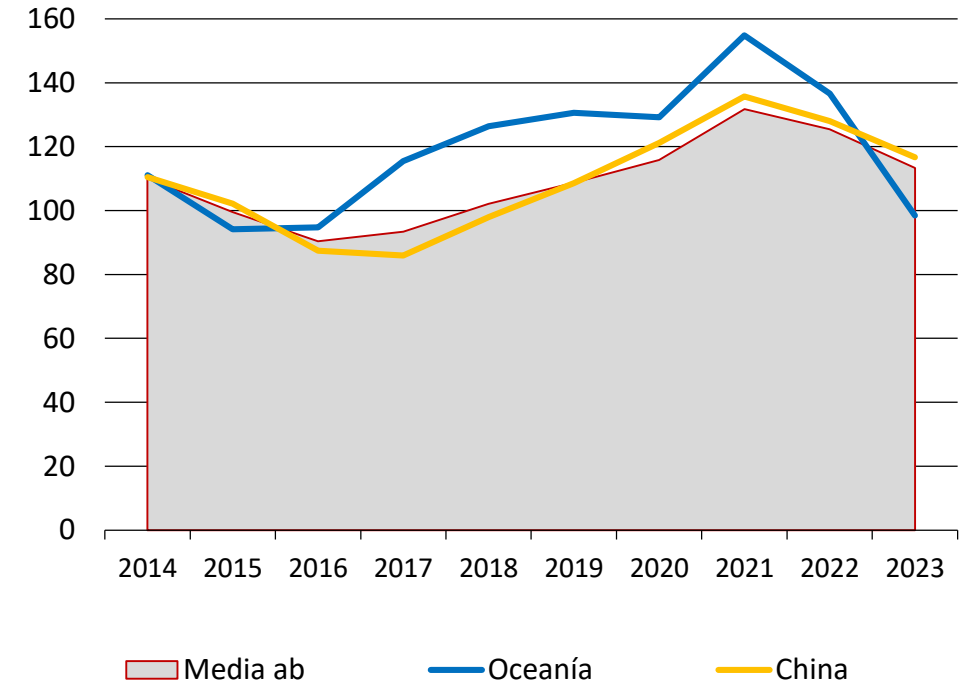
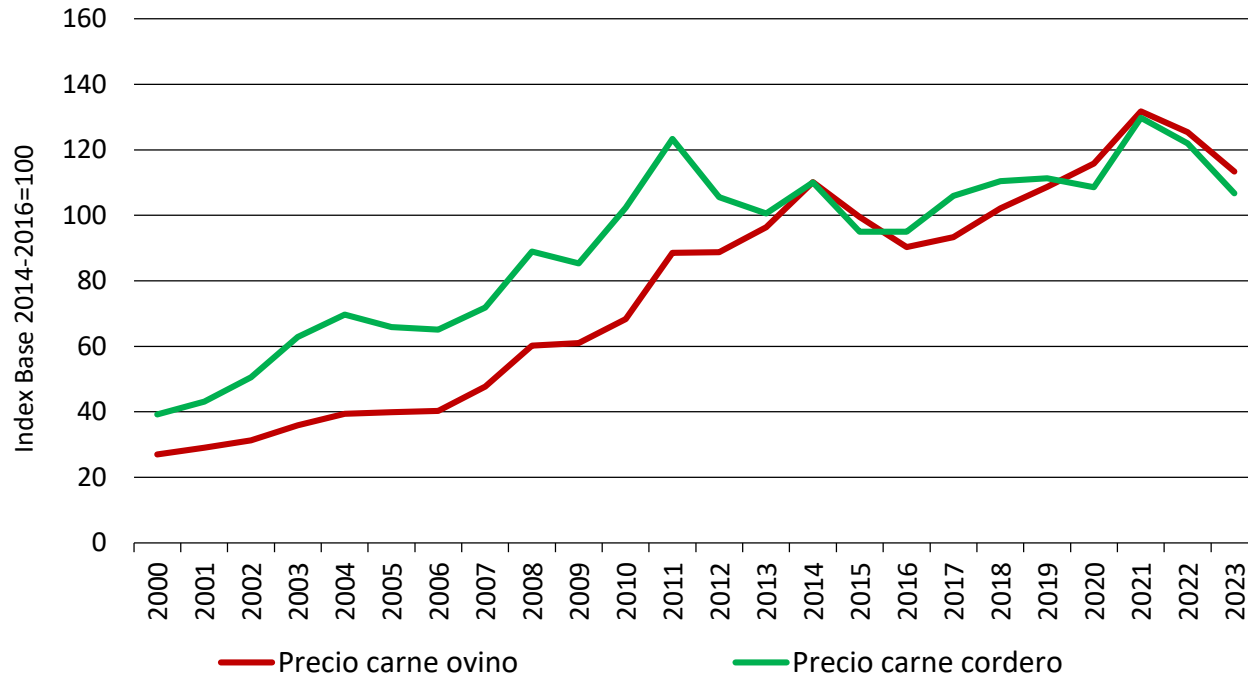
Producción e importación de la carne de ovino, toneladas

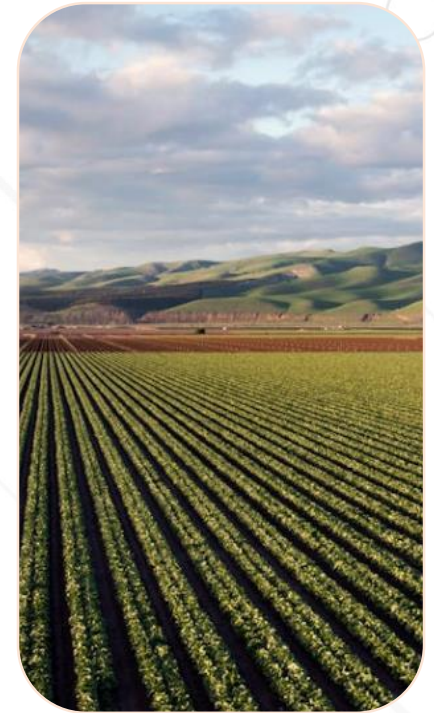
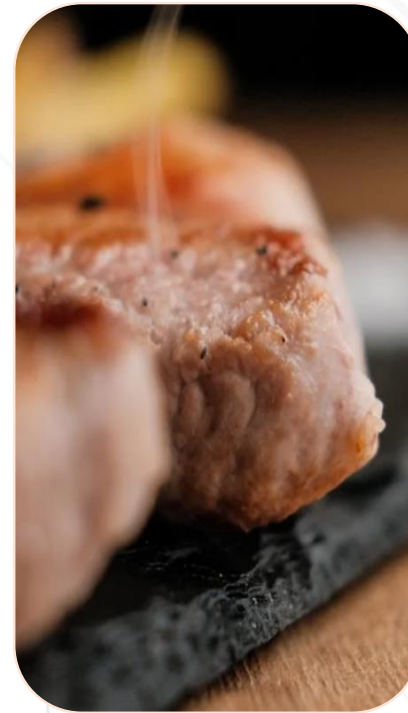












Costes de transporte

El aumento de los costes debido a los conflictos globales afecta el envío.



Mercados de Europa y América del Norte

Estos mercados se mantienen fuertes a pesar de los desafíos económicos.



Demanda china

China aumenta significativamente sus importaciones de carne de ovino.



Exportaciones del Reino Unido

Reino Unido registra un repunte en las exportaciones de carne de ovino a Francia y Alemania.



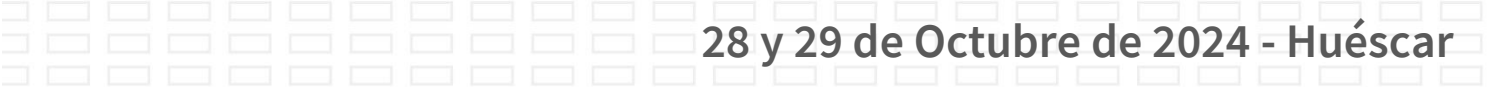
Dominio australiano

Australia gestiona más de la mitad del comercio global de carne de ovino.





REDESTECO RENGRATI COMPARATIVA INTERNACIONAL

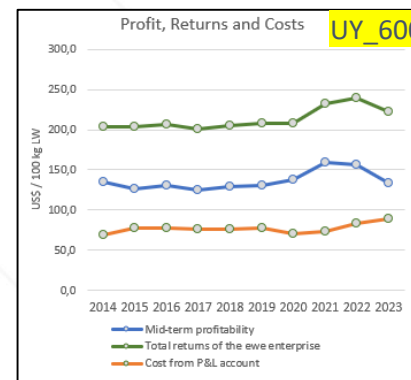
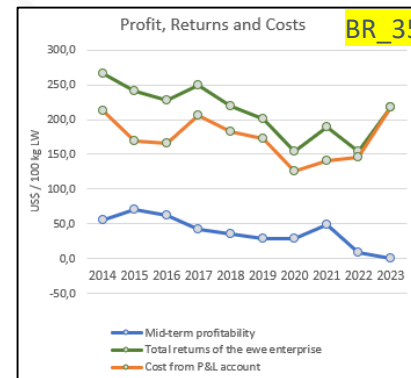


Variación por regiones de los principales indicadores, 2023 vs. 2022



South America				
Indicator	% change 2022-2021	2022	2023	% change
Mid-term profit (US\$ / 100 kg LW)				
		58,0	42,6	-26,4%
	-33,3%	156,2	133,2	
		8,2	-5,1	
		scattered 148	138	
Returns (US\$ / 100 kg LW)				
Average		173,4	202,7	
Max.Value	-8,4%	239,0	222,0	16,9%
Min.Value		127,4	168,4	
		scattered 112	54	
Costs P&L (US\$ / 100 kg LW)				
Average		115,4	160,0	
Max.Value	12,7%	145,5	217,8	38,7%
Min.Value		82,9	88,8	
		scattered 63	129	
LW sold/ewe (kg LW/ewe)				
Average		35,0	35,0	
Max.Value	0,0%	45,4	45,4	0,0%
Min.Value		25,3	25,3	
		scattered 20	20	
Weaned lambs (lamb/100 ewe/year)				
Average		99,0	99,0	
Max.Value	0,0%	122,9	122,9	0,0%
Min.Value		86,0	86,0	
		scattered 37	37	

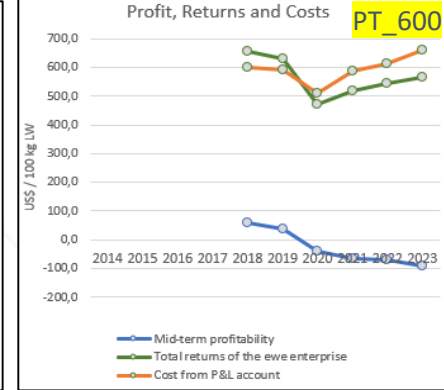
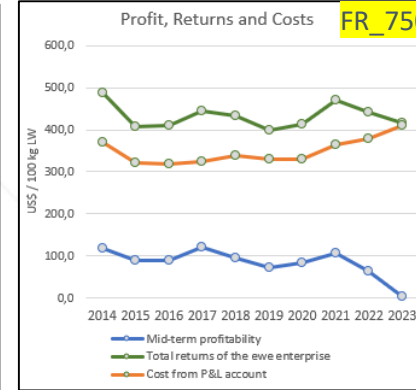
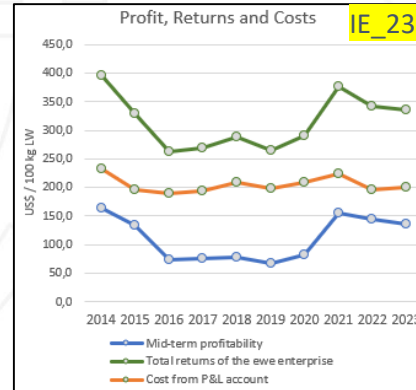
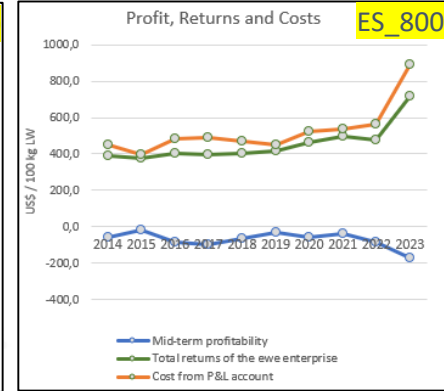
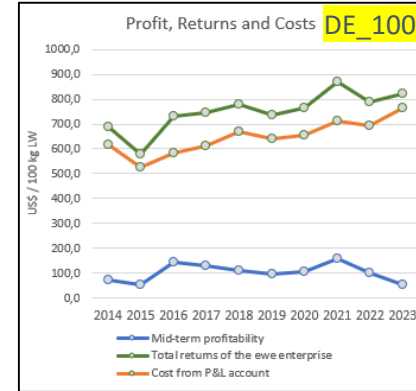
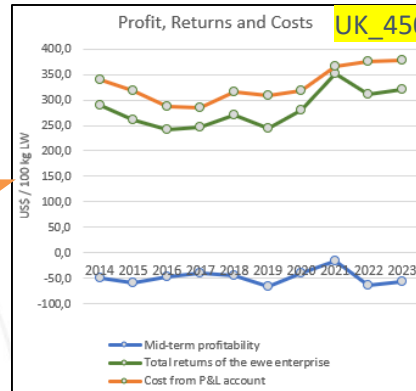
Rentabilidad a medio plazo





		Europe		
Indicator	% change 2022-2021	2022	2023	% change
Mid-term profit	US\$ / 100 kg LW			
	-71,9%	12,0	-7,5	-162,5%
		242,5	401,8	
		-326,3	-313,1	
	scattered	569	715	
Returns	US\$ / 100 kg LW			
Average		481,9	530,6	
Max.Value	-16,4%	796,4	832,5	10,1%
Min.Value		253,0	248,2	
	scattered	543	584	
Costs P&L	US\$ / 100 kg LW			
Average		469,9	538,1	
Max.Value	-5,7%	1044,2	1068,3	14,5%
Min.Value		101,5	119,1	
	scattered	943	949	
LW sold/ewe	kg LW/ewe			
Average		48,0	47,1	
Max.Value	-2,5%	69,8	69,8	-2,0%
Min.Value		26,9	21,3	
	scattered	43	48	
Weaned lambs	lamb/100 ewe/year			
Average		127,6	124,5	
Max.Value	2,3%	159,8	159,8	-2,5%
Min.Value		97,2	97,2	
	scattered	63	63	

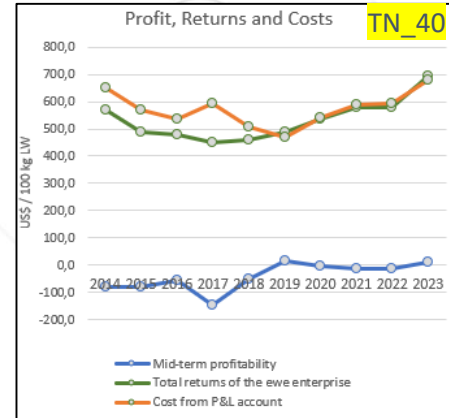
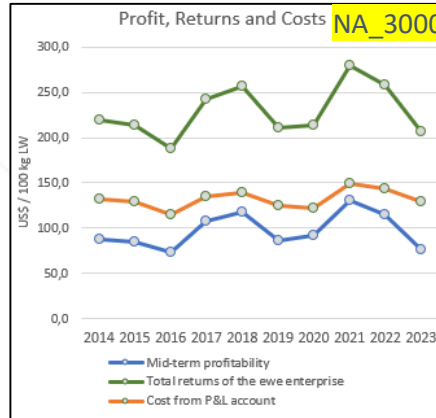
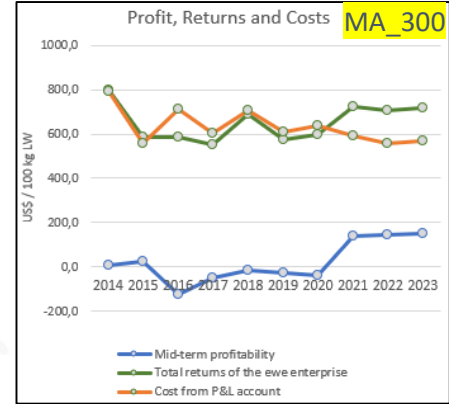
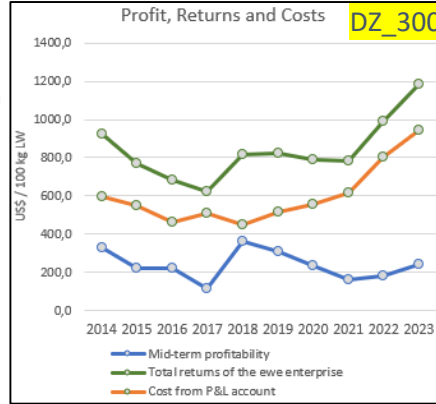
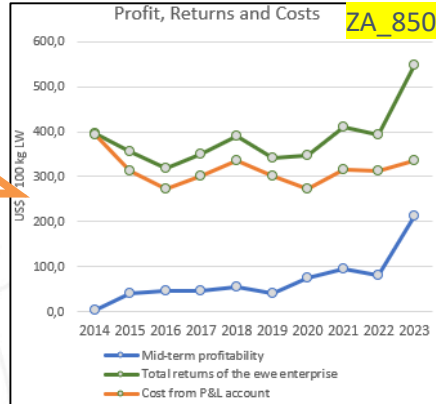
Rentabilidad a medio plazo





		Africa		
Indicator	% change 2022-2021	2022	2023	% change
Mid-term profit				
	US\$ / 100 kg LW			
		104,2	149,9	
		183,7	260,2	43,9%
		-14,4	10,8	
	scattered	198	249	
Returns				
	US\$ / 100 kg LW			
Average		529,4	604,1	
Max.Value	0,1%	987,6	1183,8	14,1%
Min.Value		224,4	205,9	
	scattered	763	978	
Costs P&L				
	US\$ / 100 kg LW			
Average		425,2	454,2	
Max.Value	4,0%	803,9	941,4	6,8%
Min.Value		72,9	70,2	
	scattered	731	871	
LW sold/ewe				
	kg LW/ewe			
Average		34,1	32,7	
Max.Value	0,9%	43,7	43,7	-4,1%
Min.Value		25,0	21,6	
	scattered	19	22	
Weaned lambs				
	lamb/100 ewe/year			
Average		103,5	101,9	
Max.Value	1,2%	133,9	133,9	-1,6%
Min.Value		64,5	64,5	
	scattered	69	69	

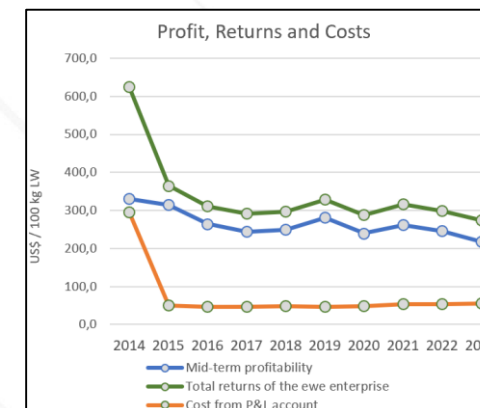
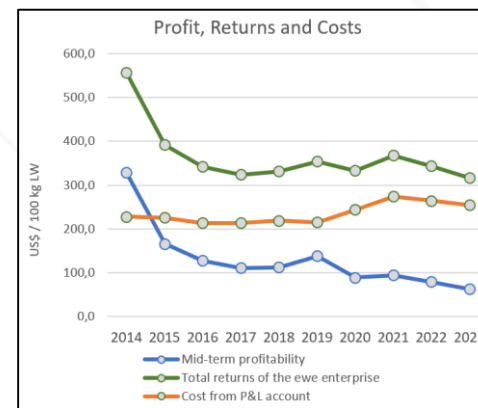
Rentabilidad a medio plazo





		Asia		
Indicator	% change 2022-2021	2022	2023	% change
Mid-term profit (US\$ / 100 kg LW)				
	34,6%	120,2	121,1	0,8%
		292,0	265,8	
		-133,3	-83,6	
		scattered	425	349
Returns (US\$ / 100 kg LW)				
Average		818,1	762,3	
Max.Value	-12,9%	1754,8	1655,4	-6,8%
Min.Value		242,2	151,2	
		scattered	1513	1504
Costs P&L (US\$ / 100 kg LW)				
Average		697,9	641,2	
Max.Value	-18,0%	1462,8	1389,7	-8,1%
Min.Value		53,1	56,0	
		scattered	1410	1334
LW sold/ewe (kg LW/ewe)				
Average		25,6	25,6	
Max.Value	0,0%	35,4	35,4	0,0%
Min.Value		17,5	17,5	
		scattered	18	18
Weaned lambs (lamb/100 ewe/year)				
Average		95,7	95,7	
Max.Value	0,0%	120,0	120,0	0,0%
Min.Value		86,4	86,4	
		scattered	34	34

Rentabilidad a medio plazo



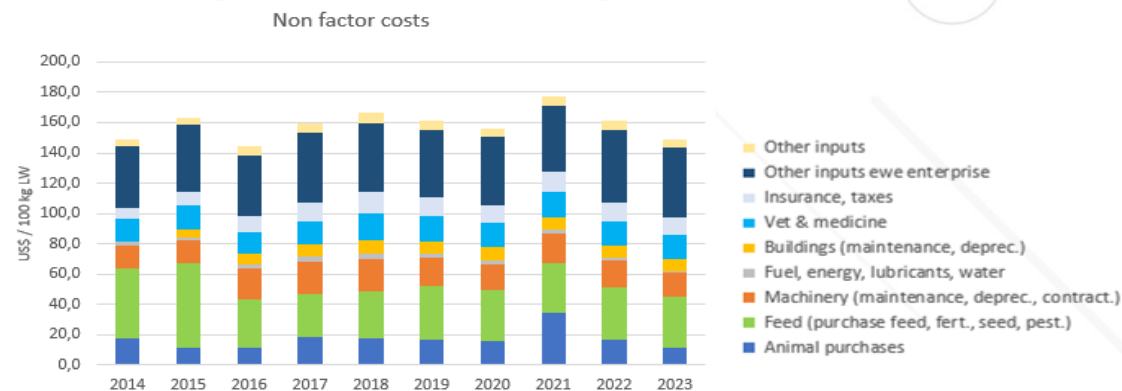
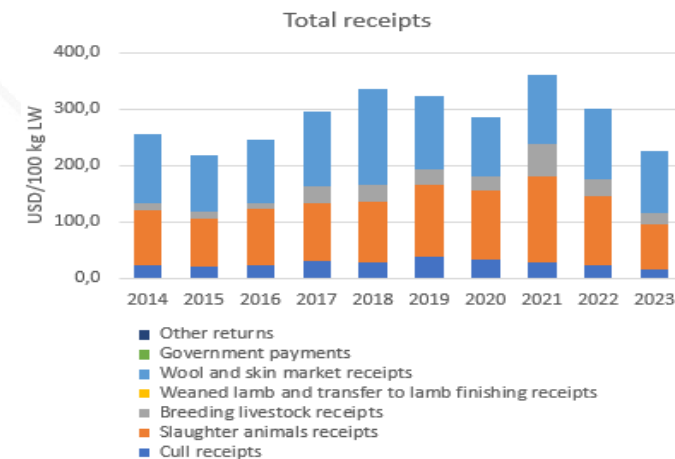
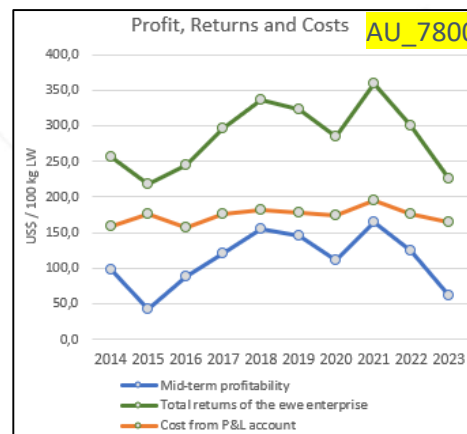
Variación por regiones de los principales indicadores, 2023 vs. 2022

Comparativa Internacional



		Oceania		
Indicator	% change 2022-2021	2022	2023	% change
Mid-term profit (US\$ / 100 kg LW)				
	-30,1%	109,8	60,7	-44,7%
		180,5	122,7	
		-2,0	-40,7	
		scattered	183	163
Returns (US\$ / 100 kg LW)				
Average		305,0	242,1	
Max.Value	-12,6%	355,6	299,8	-20,6%
Min.Value		230,1	213,6	
		scattered	126	86
Costs P&L (US\$ / 100 kg LW)				
Average		195,2	181,5	
Max.Value	1,7%	357,7	340,4	-7,1%
Min.Value		124,8	119,0	
		scattered	233	221
LW sold/ewe (kg LW/ewe)				
Average		49,5	49,4	
Max.Value	1,0%	78,6	78,6	-0,1%
Min.Value		29,2	28,3	
		scattered	49	50
Weaned lambs (lamb/100 ewe/year)				
Average		106,9	106,9	
Max.Value	4,3%	139,9	139,9	0,0%
Min.Value		86,5	86,5	
		scattered	53	53

Rentabilidad a medio plazo





Indicator	World				
	% change 2021-2020	% change 2022-2021	2022	2023	% change
Mid-term profit	US\$ / 100 kg LW				
Rentabilidad a medio plazo			55,0	47,8	
	36,2%	-35,4%	292,0	401,8	-13,0%
			-326,3	-313,1	
	scattered		618	715	
Returns	US\$ / 100 kg LW				
Average			482,2	510,5	
Max.Value	19,4%	-11,1%	1754,8	1655,4	5,9%
Min.Value			127,4	151,2	
	scattered		1627	1504	
Costs P&L	US\$ / 100 kg LW				
Average			427,2	462,7	
Max.Value	16,1%	-5,3%	1462,8	1389,7	8,3%
Min.Value			53,1	56,0	
	scattered		1410	1334	
LW sold/ewe	kg LW/ewe				
Average			42,1	41,1	
Max.Value	3,4%	-3,1%	78,6	78,6	-2,2%
Min.Value			17,5	17,5	
	scattered		61	61	
Weaned lambs	lamb/100 ewe/year				
Average			114,5	112,3	
Max.Value	0,8%	0,7%	159,8	159,8	-1,9%
Min.Value			64,3	64,3	
	scattered		95	95	



Indicator	% change		World		% change
	2021-2020	2022-2021	2022	2023	
Mid-term profit	US\$ / 100 kg LW				
Average			55,0	47,8	
Max.Value	36,2%	-35,4%	292,0	401,8	-13,0%
Min.Value			-326,3	-313,1	
	scattered		618	715	
Returns	US\$ / 100 kg LW				
Ingresos	19,4%	-11,1%	482,2	510,5	5,9%
			1754,8	1655,4	
			127,4	151,2	
	scattered		1627	1504	
Costs P&L	US\$ / 100 kg LW				
Average			427,2	462,7	
Max.Value	16,1%	-5,3%	1462,8	1389,7	8,3%
Min.Value			53,1	56,0	
	scattered		1410	1334	
LW sold/ewe	kg LW/ewe				
Average			42,1	41,1	
Max.Value	3,4%	-3,1%	78,6	78,6	-2,2%
Min.Value			17,5	17,5	
	scattered		61	61	
Weaned lambs	lamb/100 ewe/year				
Average			114,5	112,3	
Max.Value	0,8%	0,7%	159,8	159,8	-1,9%
Min.Value			64,3	64,3	
	scattered		95	95	



		World				
Indicator	% change 2021-2020	% change 2022-2021	2022	2023	% change	
Mid-term profit <small>US\$ / 100 kg LW</small>						
Average			55,0	47,8		
Max.Value	36,2%	-35,4%	292,0	401,8	-13,0%	
Min.Value			-326,3	-313,1		
			scattered	618	715	
Returns <small>US\$ / 100 kg LW</small>						
Average			482,2	510,5		
Max.Value	19,4%	-11,1%	1754,8	1655,4	5,9%	
Min.Value			127,4	151,2		
			scattered	1627	1504	
Costs P&L <small>US\$ / 100 kg LW</small>						
Costes P&L			427,2	462,7		
	16,1%	-5,3%	1462,8	1389,7	8,3%	
			scattered	1410	1334	
LW sold/ewe <small>kg LW/ewe</small>						
Average			42,1	41,1		
Max.Value	3,4%	-3,1%	78,6	78,6	-2,2%	
Min.Value			17,5	17,5		
			scattered	61	61	
Weaned lambs <small>lamb/100 ewe/year</small>						
Average			114,5	112,3		
Max.Value	0,8%	0,7%	159,8	159,8	-1,9%	
Min.Value			64,3	64,3		
			scattered	95	95	



		World				
Indicator	% change 2021-2020	% change 2022-2021	2022	2023	% change	
Mid-term profit <small>US\$ / 100 kg LW</small>						
Average			55,0	47,8		
Max.Value	36,2%	-35,4%	292,0	401,8	-13,0%	
Min.Value			-326,3	-313,1		
			scattered	618	715	
Returns <small>US\$ / 100 kg LW</small>						
Average			482,2	510,5		
Max.Value	19,4%	-11,1%	1754,8	1655,4	5,9%	
Min.Value			127,4	151,2		
			scattered	1627	1504	
Costs P&L <small>US\$ / 100 kg LW</small>						
Average			427,2	462,7		
Max.Value	16,1%	-5,3%	1462,8	1389,7	8,3%	
Min.Value			53,1	56,0		
			scattered	1410	1334	
LW sold/ewe <small>kg LW/ewe</small>						
			42,1	41,1		
	3,4%	-3,1%	78,6	78,6	-2,2%	
			17,5	17,5		
			scattered	61	61	
Weaned lambs <small>lamb/100 ewe/year</small>						
Average			114,5	112,3		
Max.Value	0,8%	0,7%	159,8	159,8	-1,9%	
Min.Value			64,3	64,3		
			scattered	95	95	

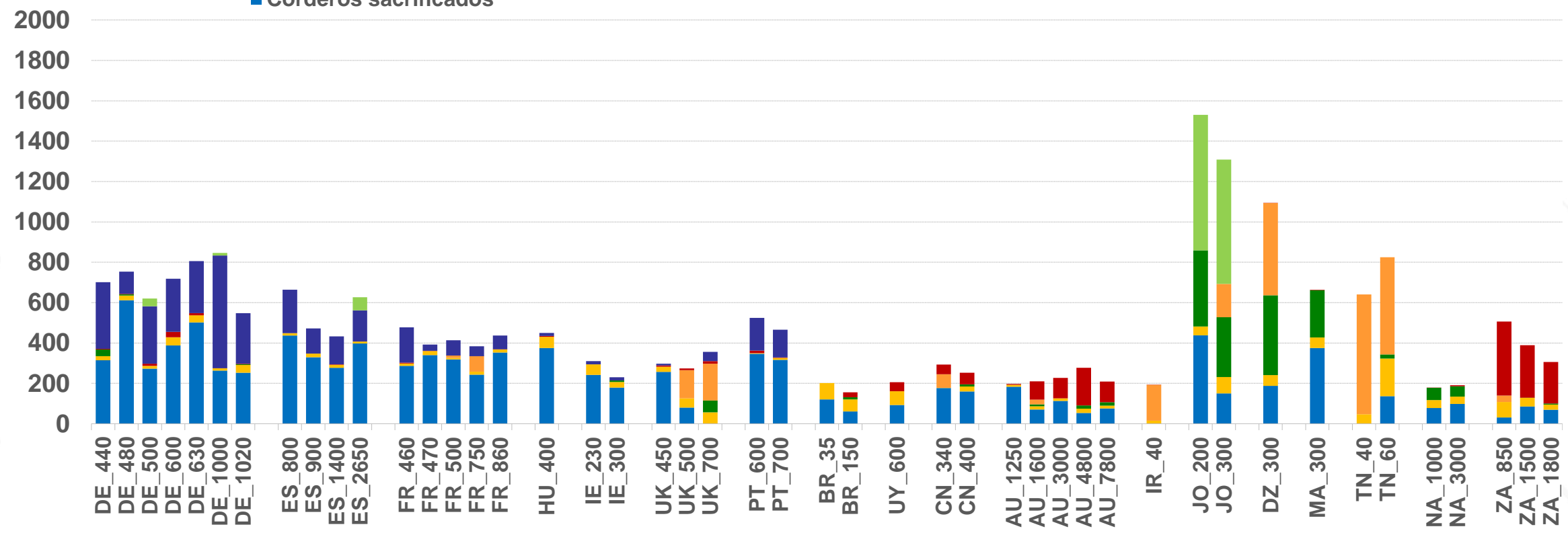
**Kg PV
vendido/
oveja**

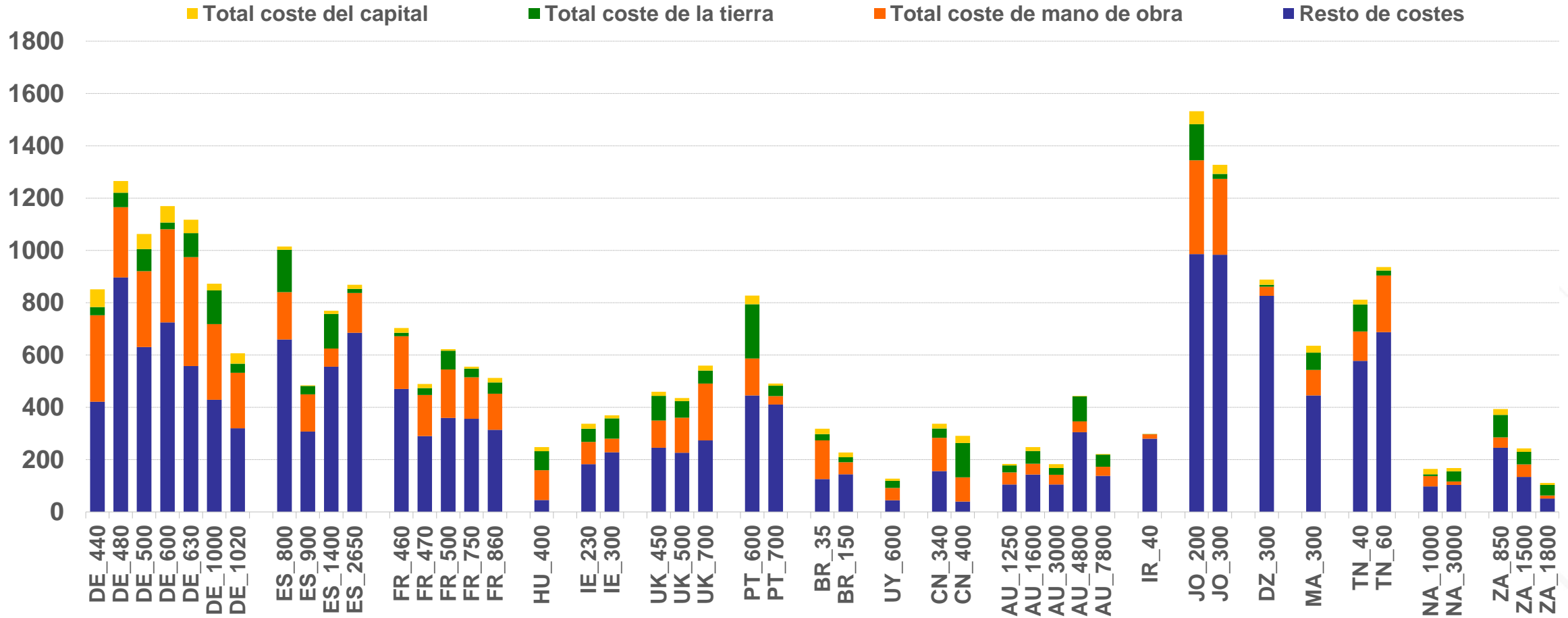


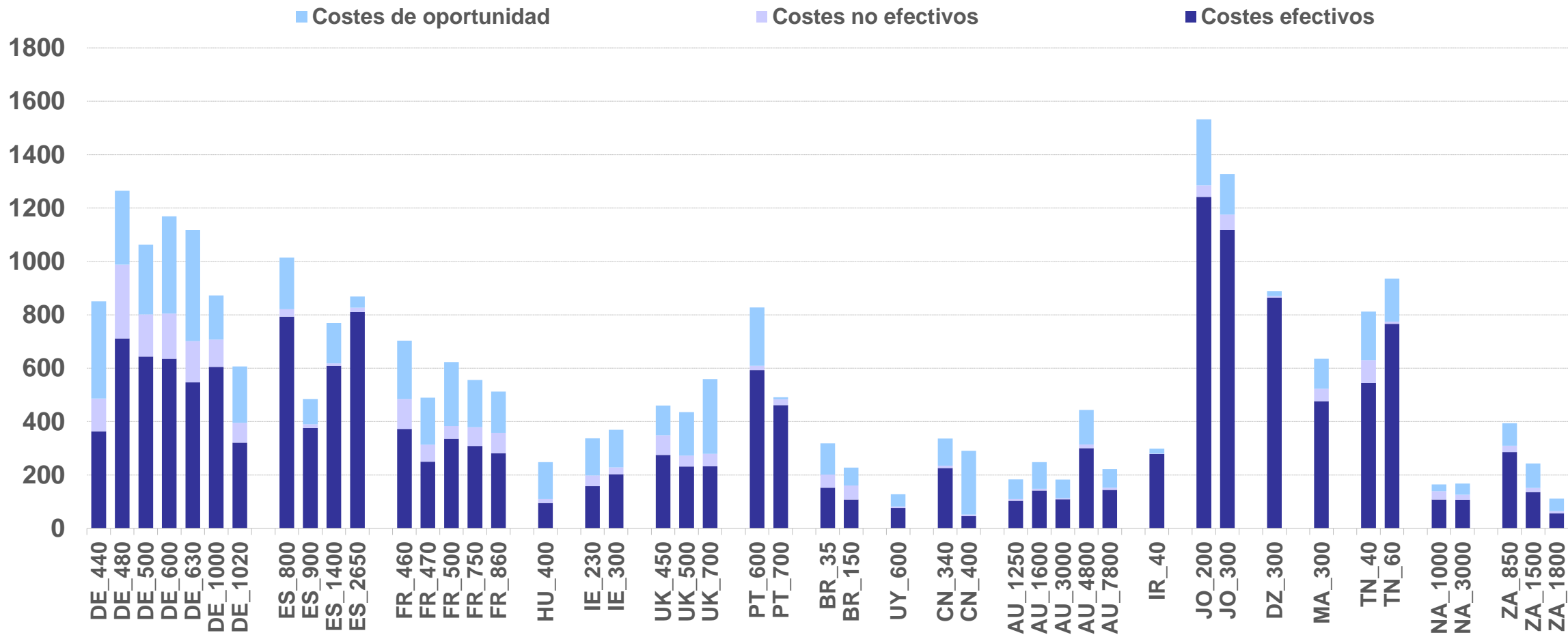
Indicator	% change		World		% change
	2021-2020	2022-2021	2022	2023	
Mid-term profit	US\$ / 100 kg LW				
Average			55,0	47,8	
Max.Value	36,2%	-35,4%	292,0	401,8	-13,0%
Min.Value			-326,3	-313,1	
	scattered		618	715	
Returns	US\$ / 100 kg LW				
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Min.Value			127,4	151,2	
	scattered		1627	1504	
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Average			427,2	462,7	
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Min.Value			53,1	56,0	
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Min.Value			17,5	17,5	
	scattered		61	61	
Weaned lambs	lamb/100 ewe/year				
			114,5	112,3	
	0,8%	0,7%	159,8	159,8	-1,9%
			64,3	64,3	
	scattered		95	95	

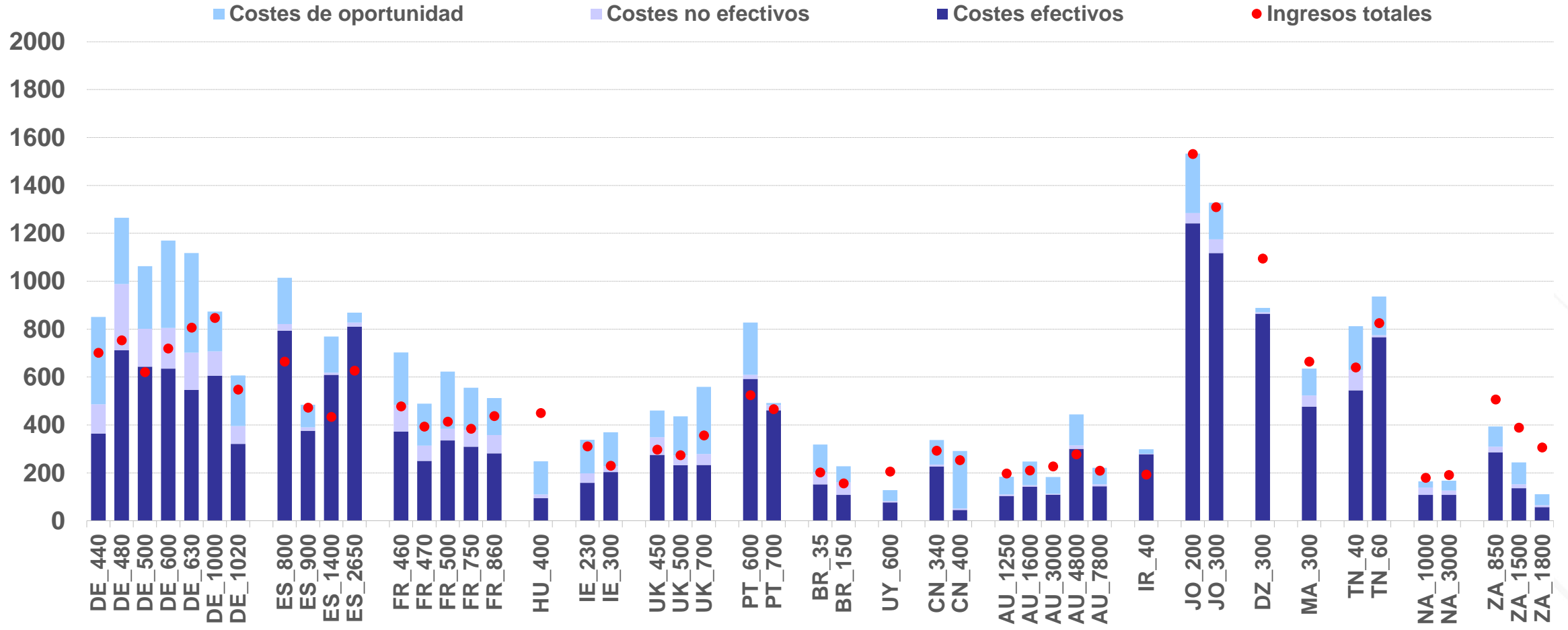
Corderos
destetados
/100 ovejas

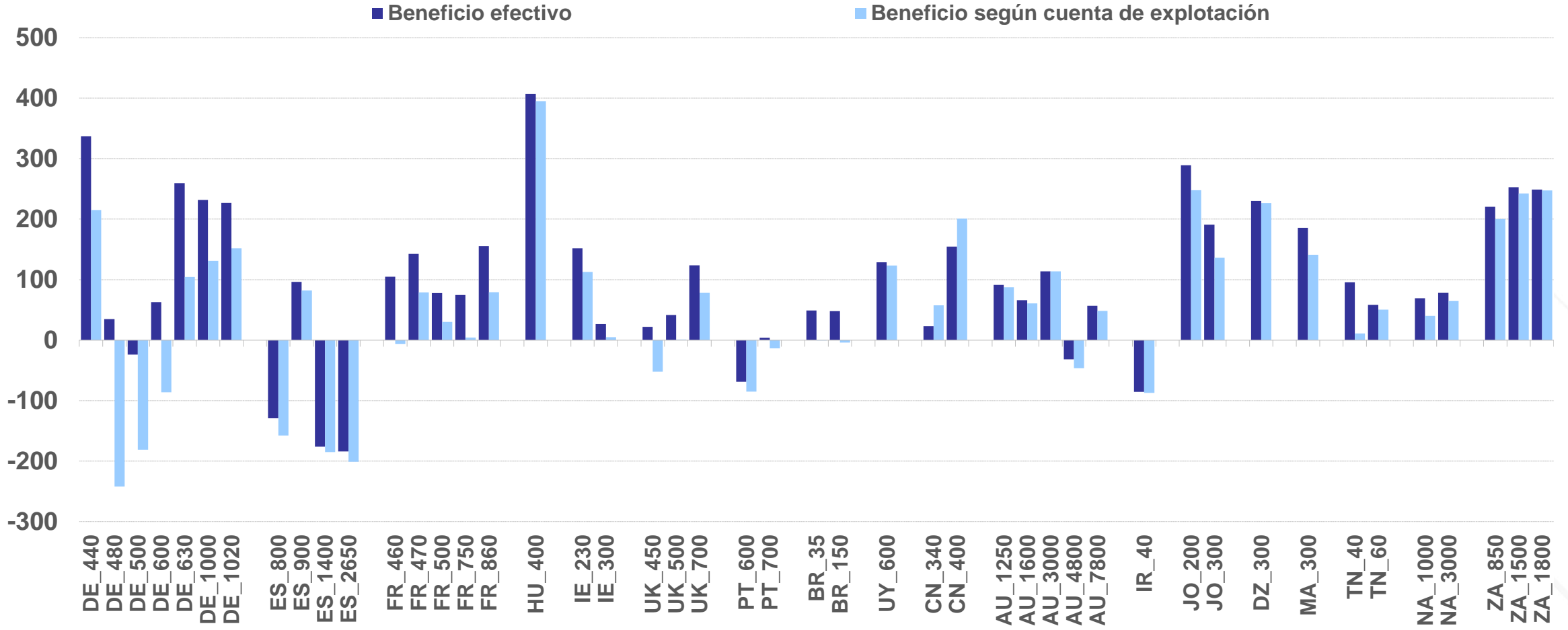
- Otros ingresos
- Ayudas y subvenciones
- Lana y pieles
- Corderos vendidos y transferidos a engorde
- Animales para vida
- Animales de desecho
- Corderos sacrificados













MUCHAS GRACIAS

