

**THE RISE OF
THE SPANISH
PIGMEAT
SECTOR:
INTEGRATION
AND
SUSTAINABILITY**



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Overview



1. Main figures of Spanish Pigmear Sector:

- Production and pig population.
- Farming structure.
- Consumption and consumer profile.
- Trade.

2. Challenges of Spanish pigmeat sector.

- ✓ Market concerns.
- ✓ Sustainability concerns.



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MAIN FIGURES AND EVOLUTION OF SPANISH PIGMEAT PRODUCTION



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MAIN FIGURES

MEAT PRODUCTION: 4.058 MT

PIG POPULATION: 29.23 M heads.

4TH WORLD PRODUCER

2ND EUROPEAN PRODUCER (MEAT), 1ST
CONSIDERING CENSUS

~ 5.965 MILLION € - 36,4% LIVESTOCK
PRODUCTION

177% SELF-SUFICCIENCY



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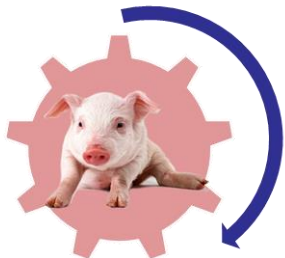


PRODUCTION

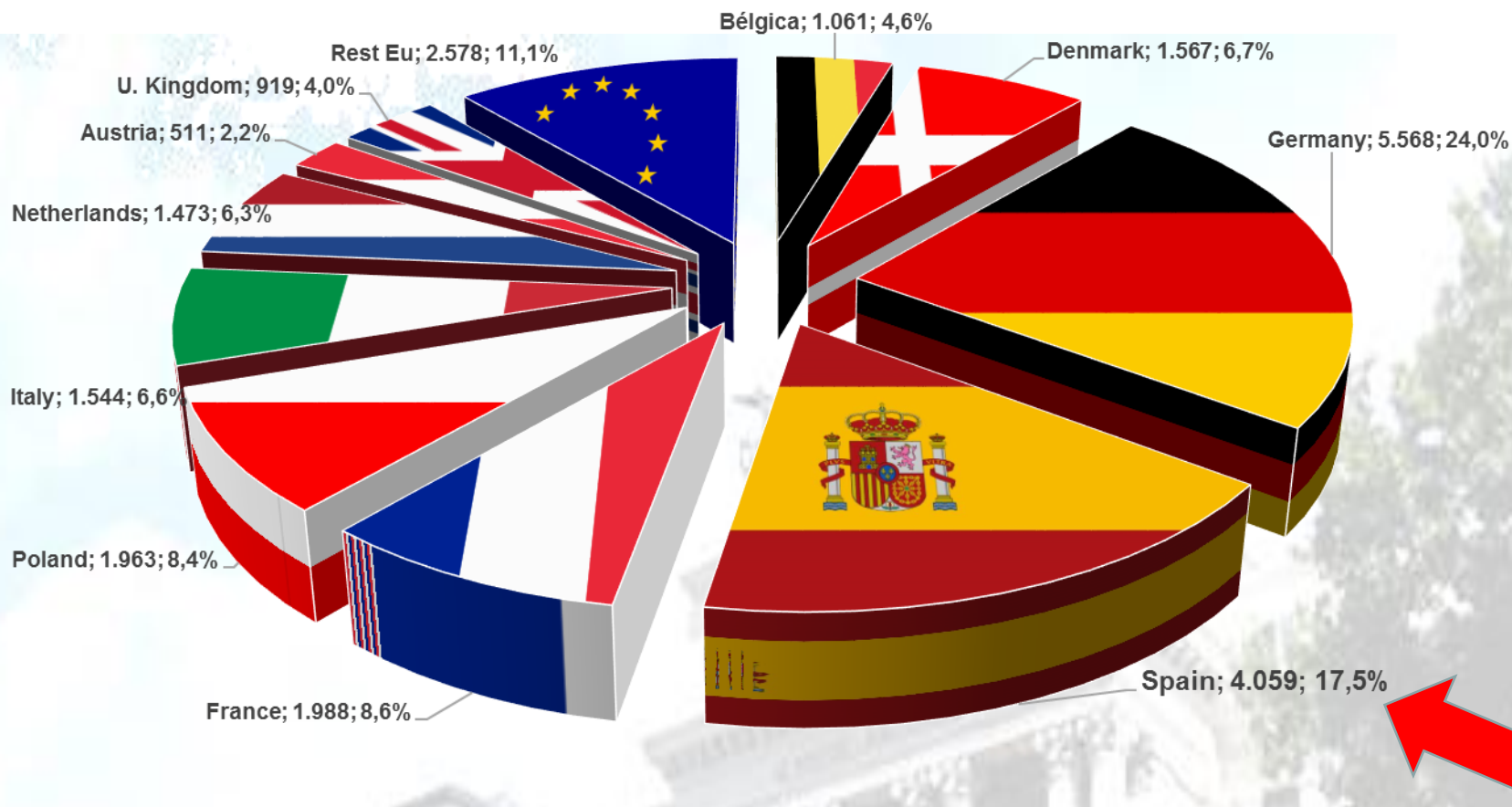


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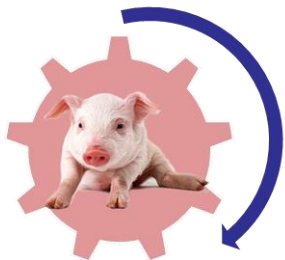
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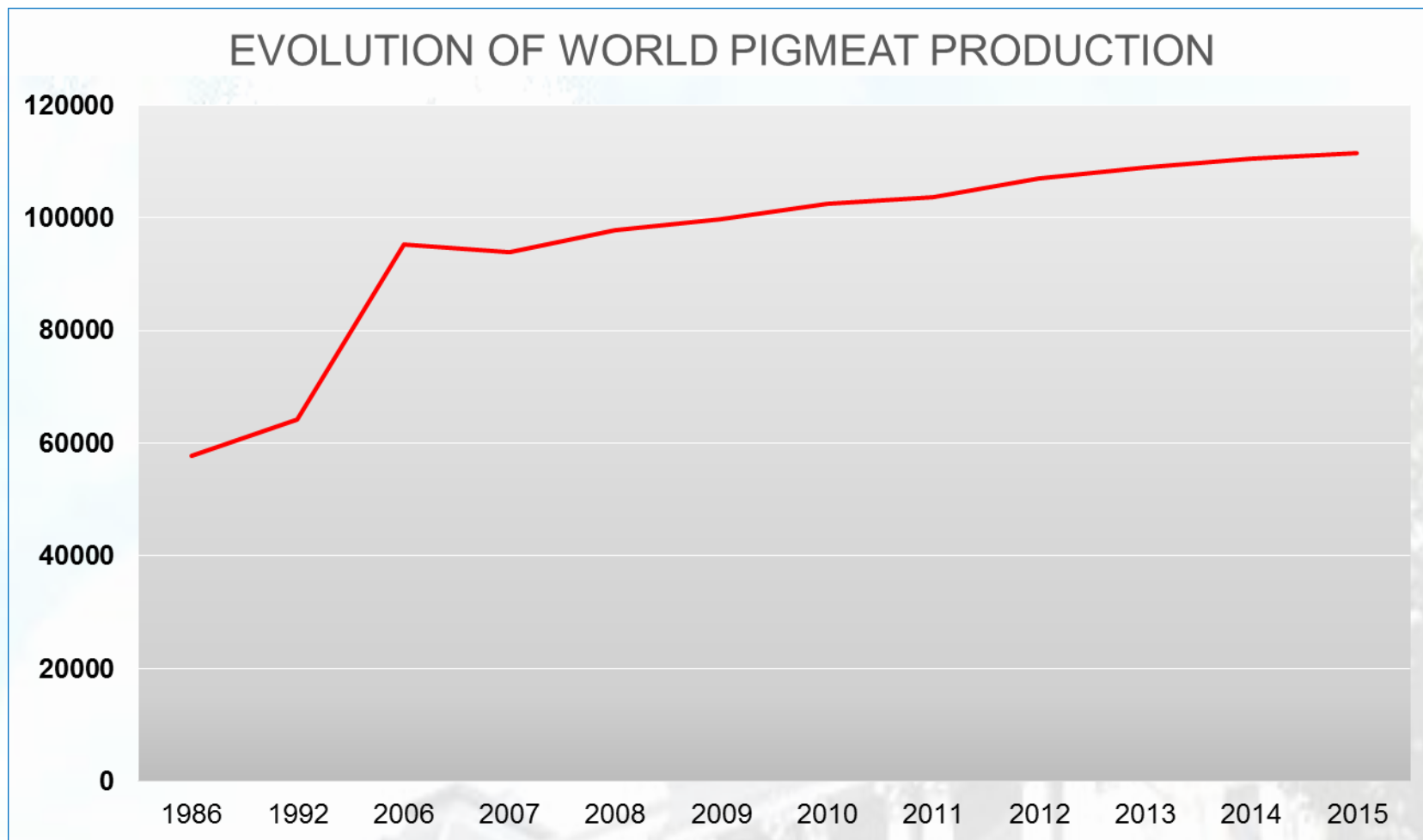
SPAIN IN THE EUROPEAN PIGMEAT PRODUCTION



Source: EUROSTAT and MAPAMA



CHANGE IN WORLD AND EU PIGMEAT PRODUCTION

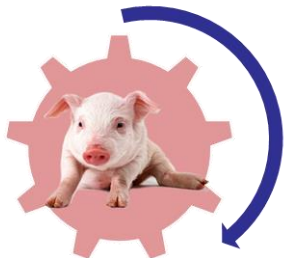


Source: USDA, EUROSTAT and MAPAMA



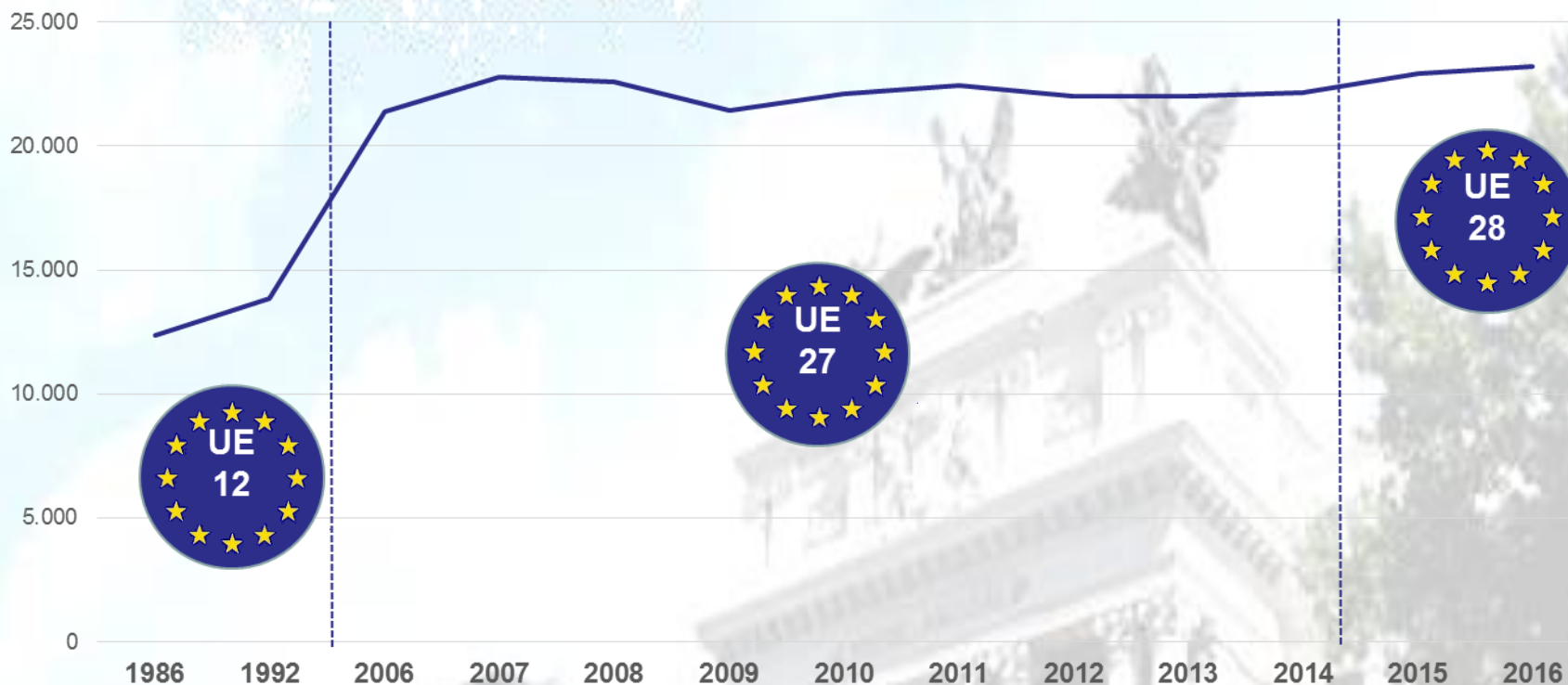
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CHANGE IN WORLD AND EU PIGMEAT PRODUCTION

EVOLUTION OF PIGMEAT PRODUCTION IN EU 1986-2015
(X 1.000 t)



Source: USDA, EUROSTAT, MAPAMA



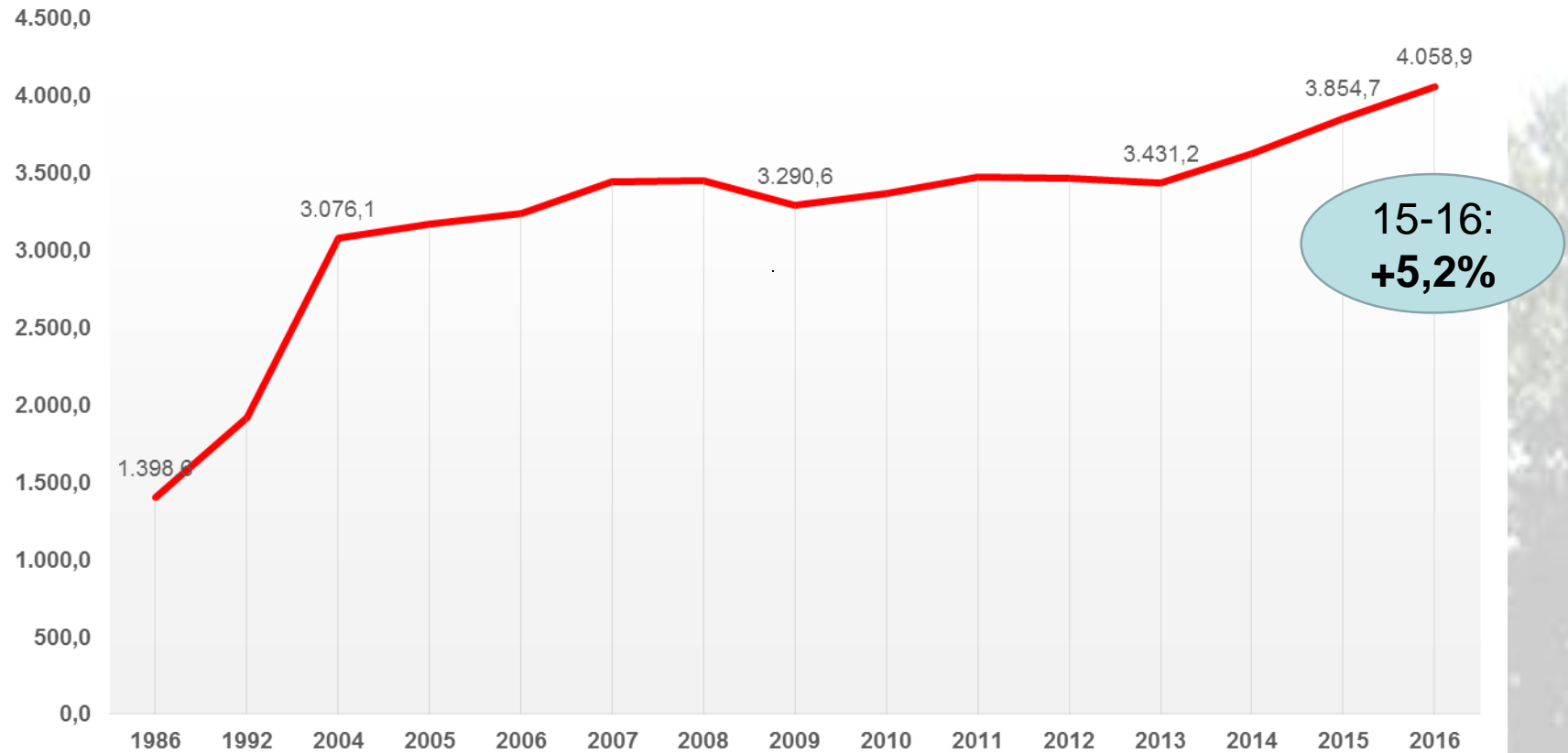
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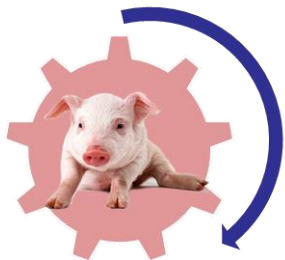


CHANGE IN SPANISH PIGMEAT PRODUCTION

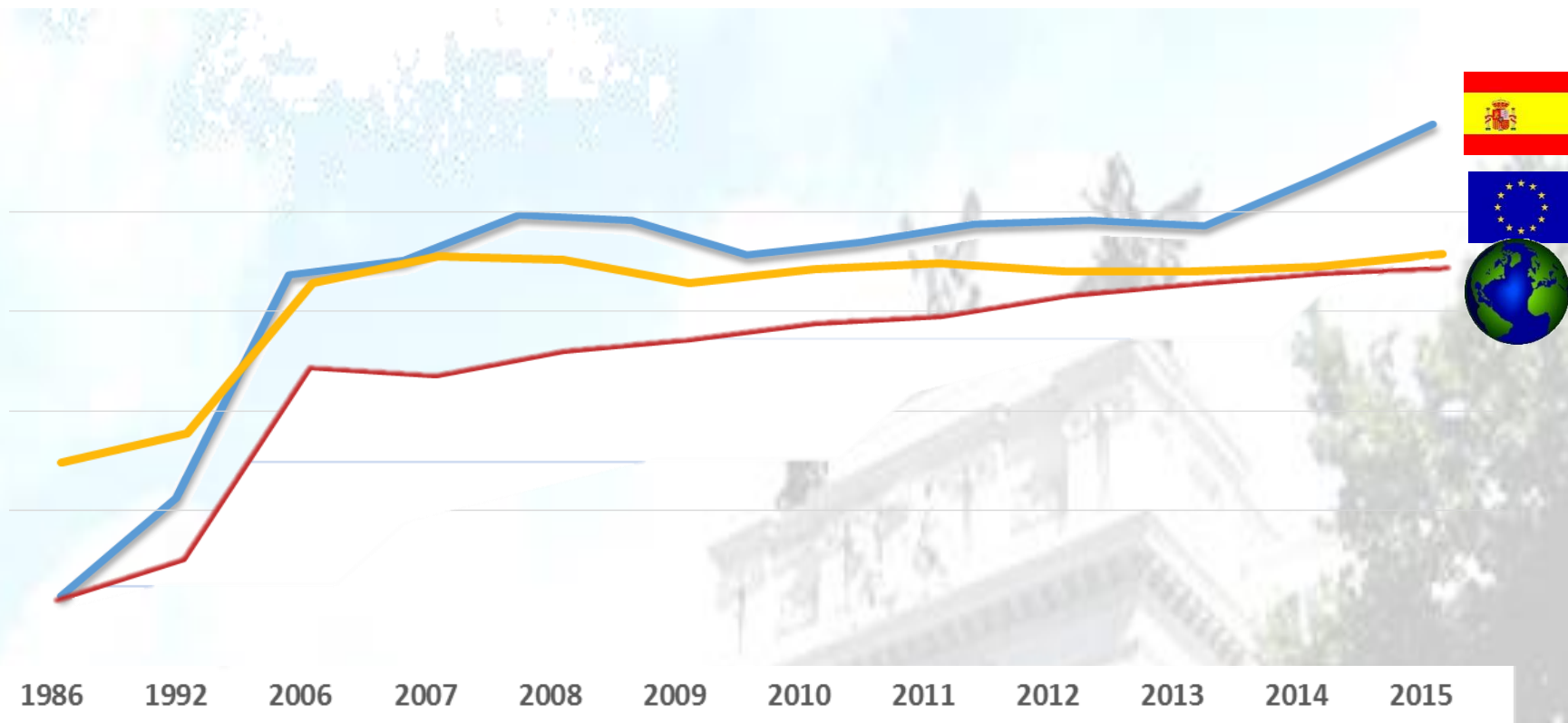
Evolution of Spanish Pigmeat production 1986-2016



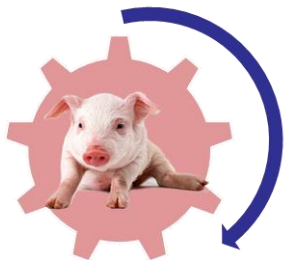
Source: MAPAMA



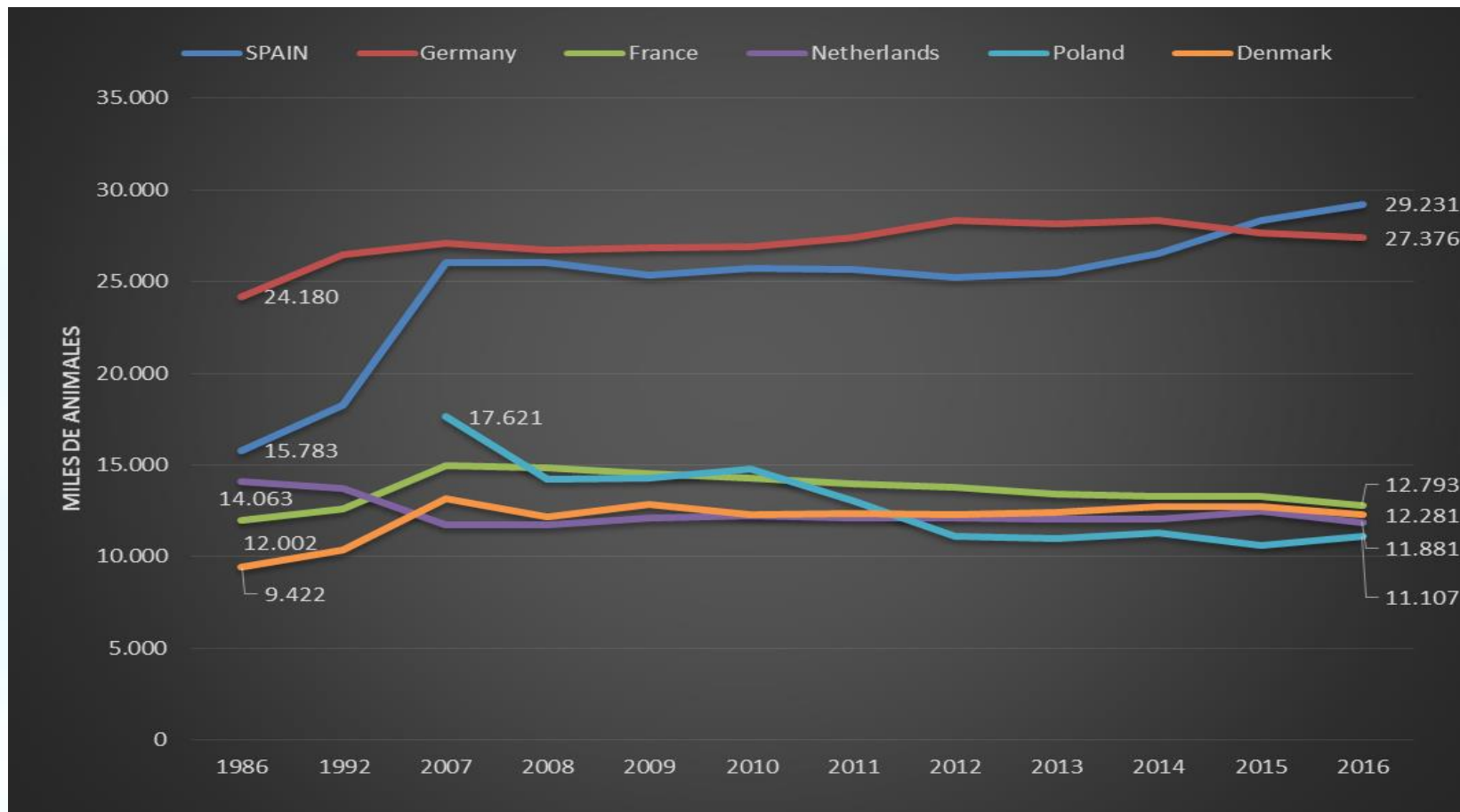
CHANGE IN SPANISH, WORLD AND EU PIGMEAT PRODUCTION



Source: USDA, EUROSTAT, MAPAMA



PIG POPULATION IN THE EU



Source: EUROSTAT / MAPAMA



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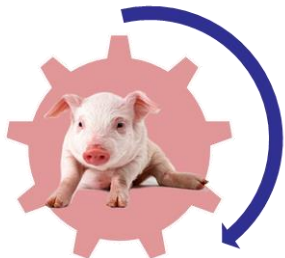


FARMING STRUCTURE



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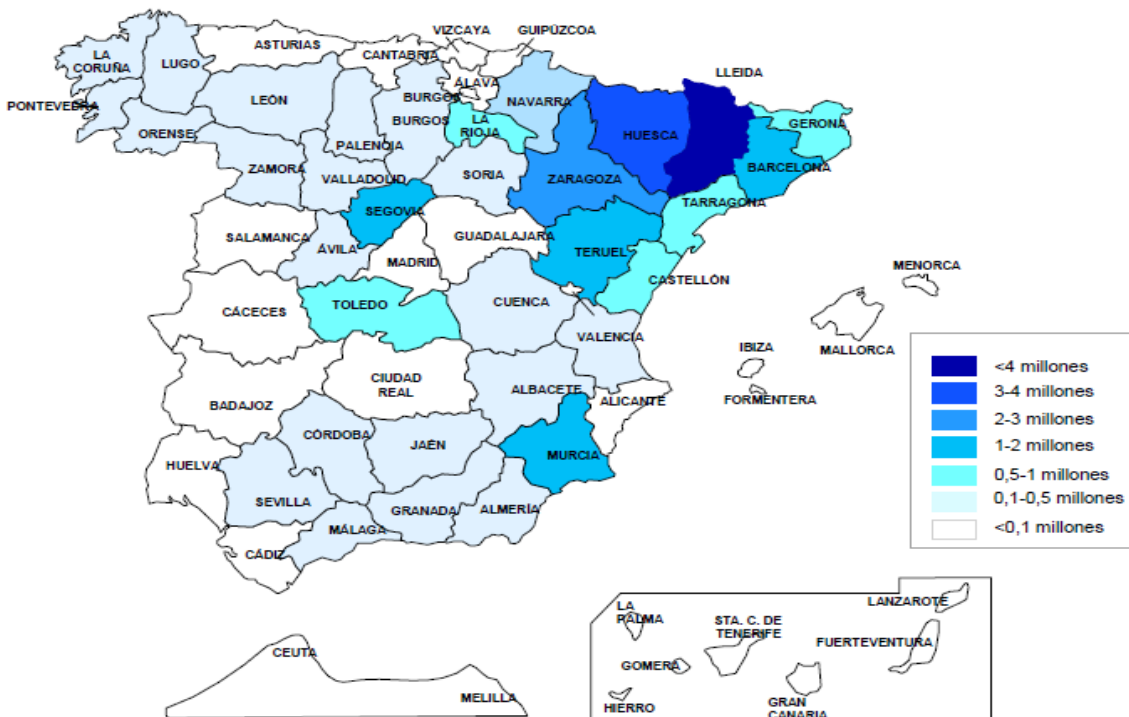


PIG POPULATION IN SPAIN (´000 heads)

REGIONAL DISTRIBUTION OF PIG POPULATION IN SPAIN

Source: MAGRAMA

Elaboration: MercoLleida



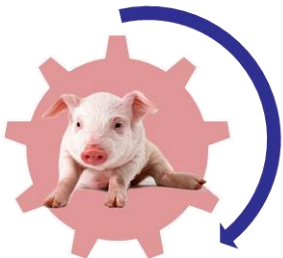
TOP-5 DE CABAÑA TOTAL (el 55%)		
Lleida	4.271.116	17% del total
Huesca	3.403.629	13% del total
Zaragoza	2.464.341	10% del total
Barcelona	1.923.492	8% del total
Murcia	1.744.862	7% del total

TOP-5 DE CERDAS (el 49%)		
Lleida	294.167	14% del total
Zaragoza	236.986	11% del total
Barcelona	206.689	10% del total
Huesca	180.595	8% del total
Murcia	134.085	6% del total



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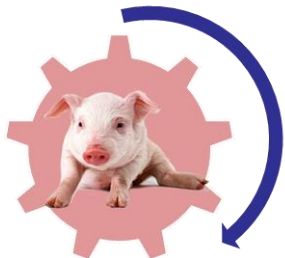


DISTRIBUTION OF HOLDINGS

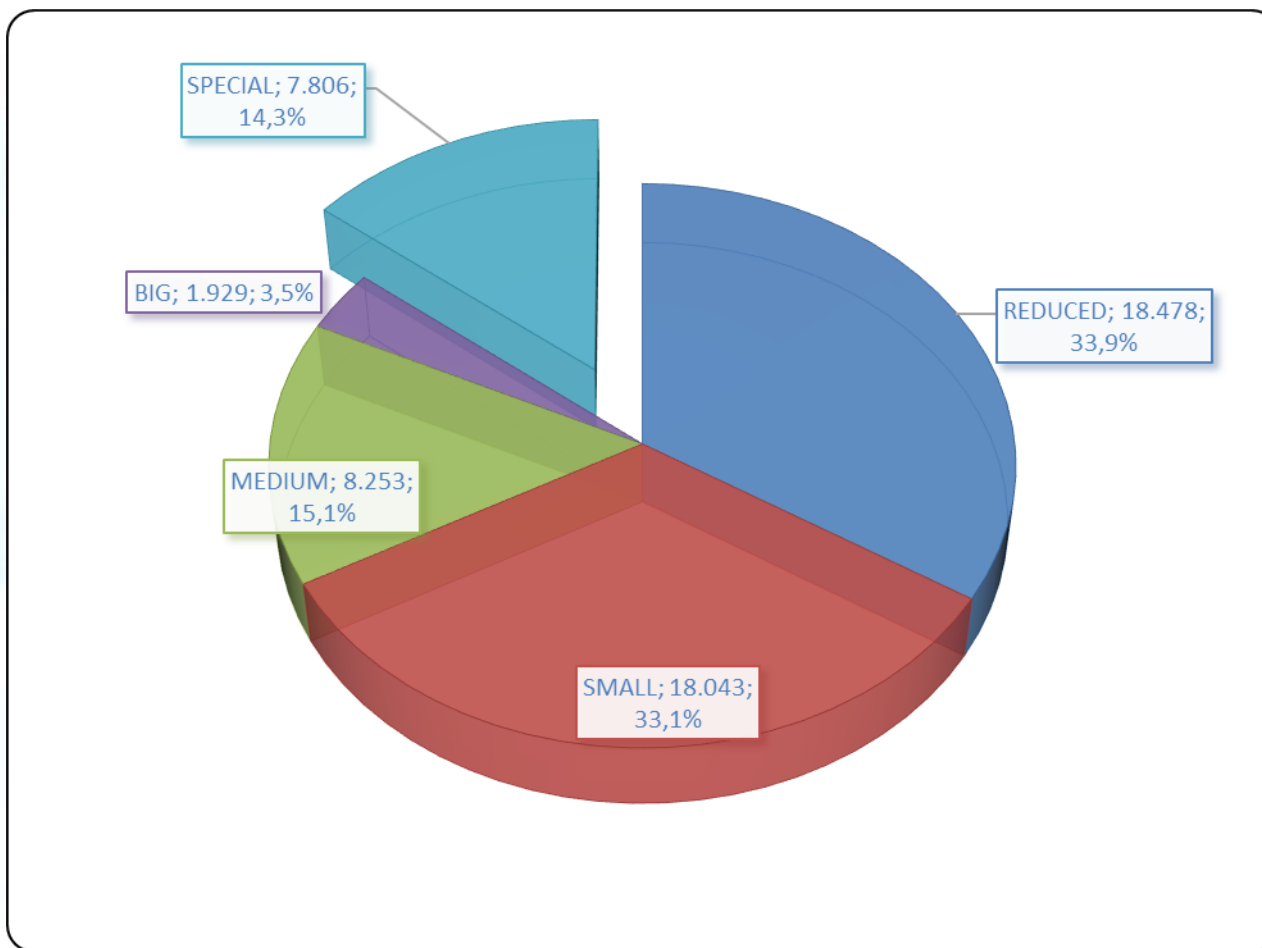
Holding distribution by regions 2015

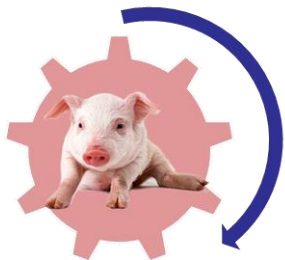


Fuente: REGA



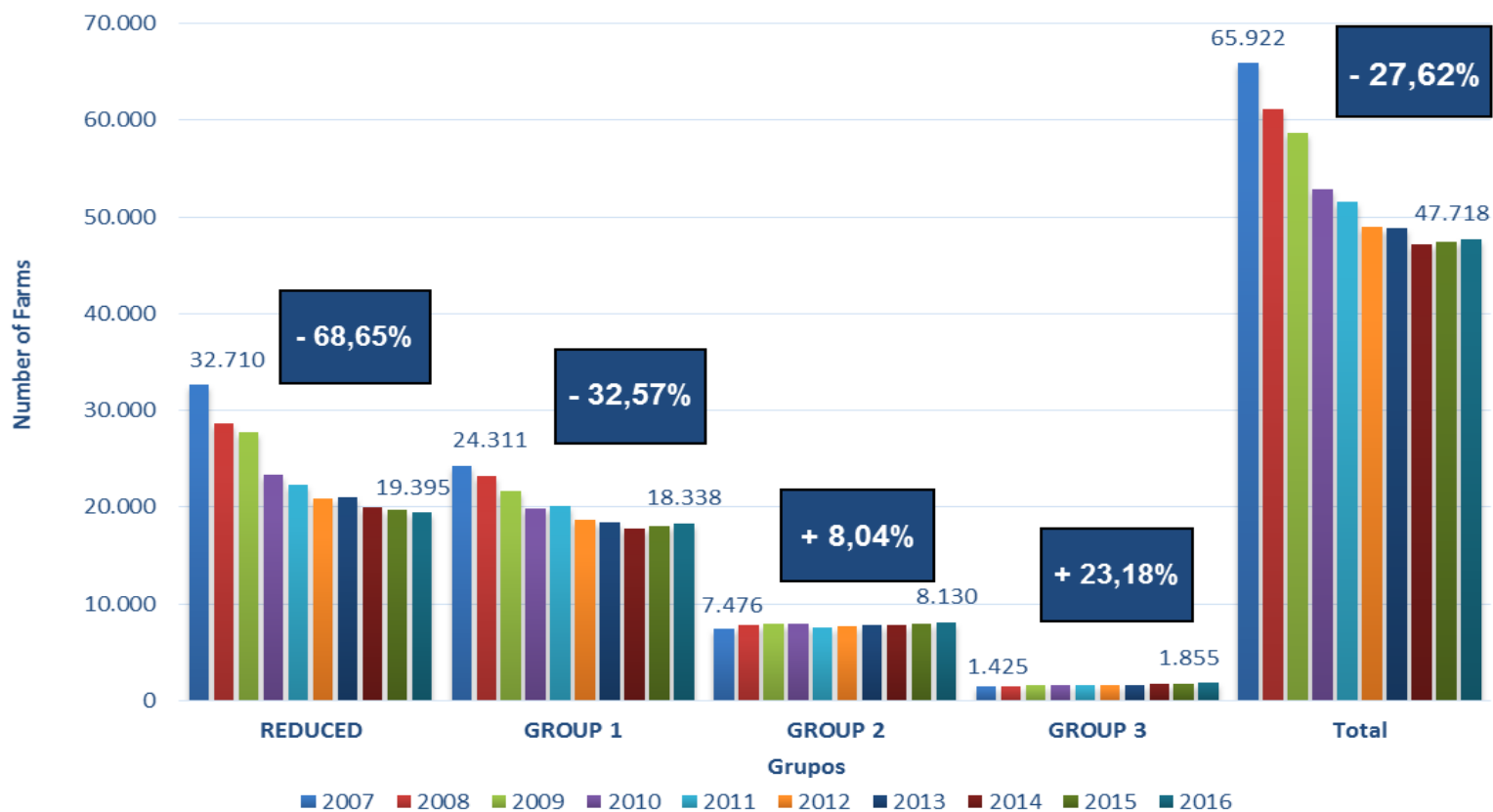
NUMBER OF FARMS BROKEN DOWN BY FARM SIZE





FARM STRUCTURE BY SIZE: EVOLUTION

NUMBER OF FARMS BROKEN DOWN BY SIZE: EVOLUTION 2007-2016



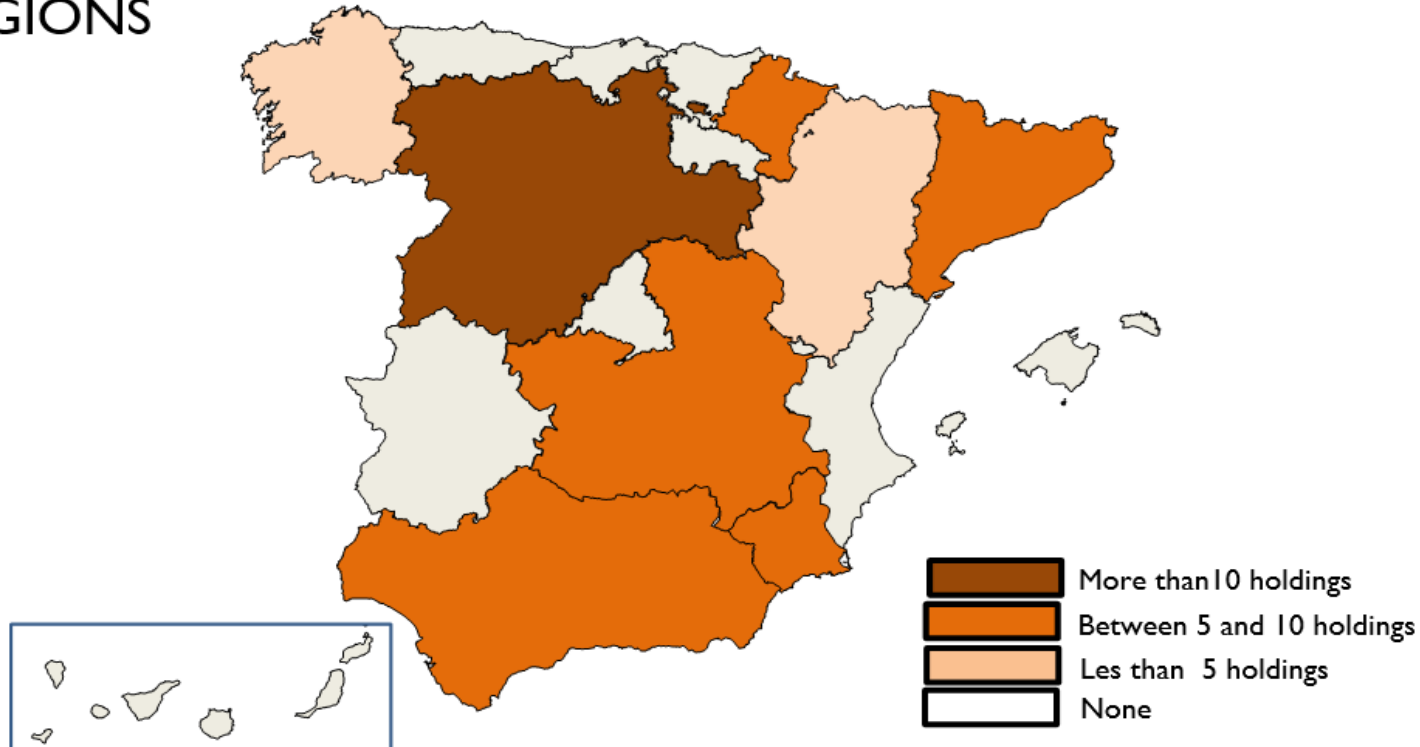
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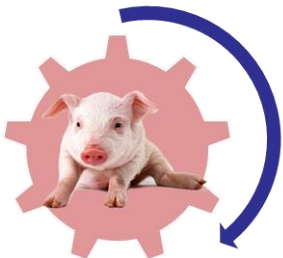
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FARM STRUCTURE BY SIZE: EVOLUTION

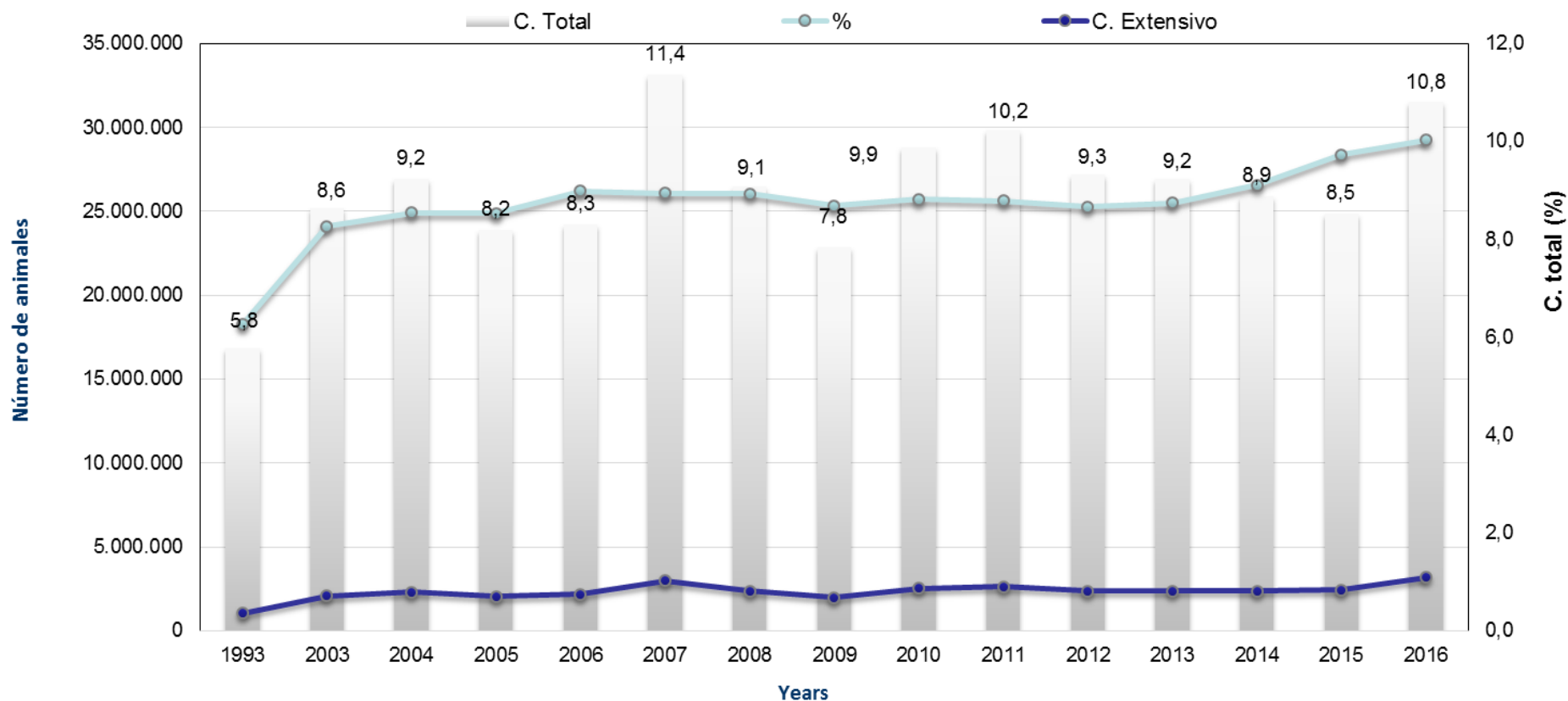
- 1.866 FARMS - 2,13% OF OVERALL FARMS / 32 % PRODUCTION.
- WIDE DISTRIBUTION: 50 BIGGEST FARMS IN 9 DIFFERENT REGIONS





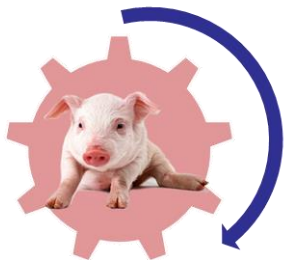
FARMING SYSTEMS IN SPAIN

TOTAL POPULATION OF PIGS / POPULATION IN EXTENSIVE FARMING (number of heads)



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FARMING SYSTEMS IN SPAIN

INTENSIVE

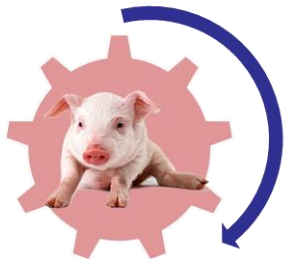


EXTENSIVE



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INTEGRATION AND CONNECTIONS IN FOOD CHAIN

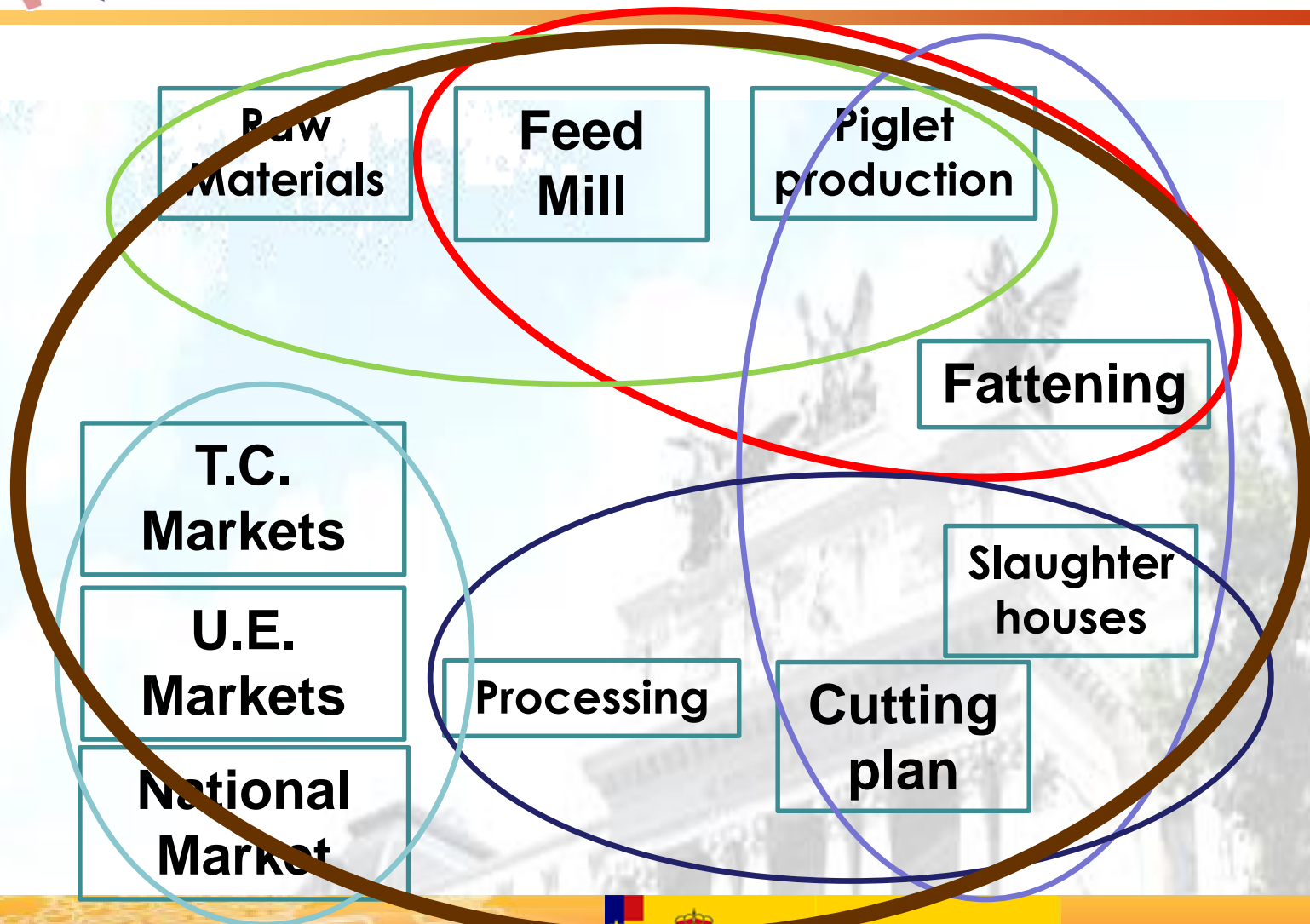


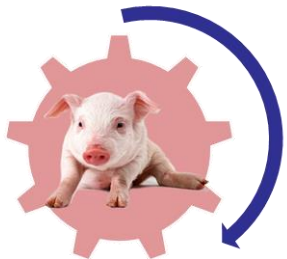
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INTEGRATION AND CONNECTIONS IN FOOD CHAIN

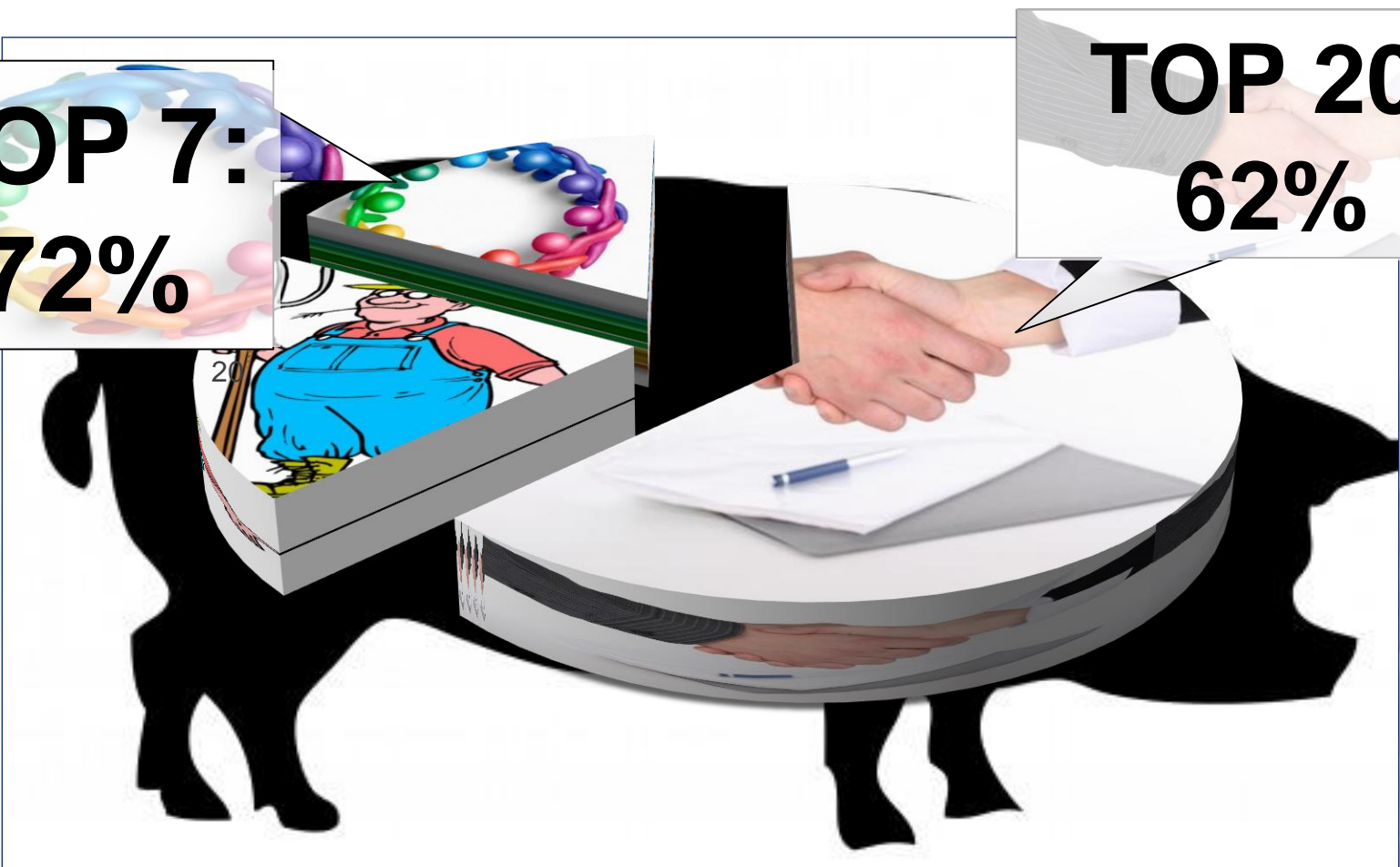




INTEGRATION IN THE FARMING CHAIN

**TOP 7:
72%**

**TOP 20:
62%**

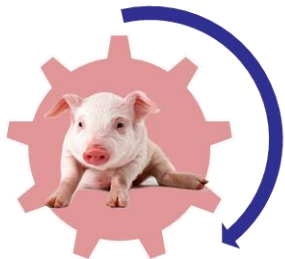


Fuente: ANPROGAPOR



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INTEGRATION IN MEAT INDUSTRY

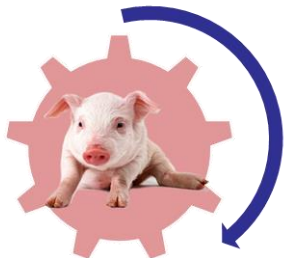


Fuente: ANPROGAPOR



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INTEGRATION OF PRIMARY SECTOR - GOOD OR BAD?



Reduces risks for producers

Increases efficiency of food chain and market access

Increases investing power and expertise

Reduces individual initiative and individual bargaining power

Increases market risks for free farmers

Less diversity and transparency.





CONSUMPTION AND CONSUMER PROFILE



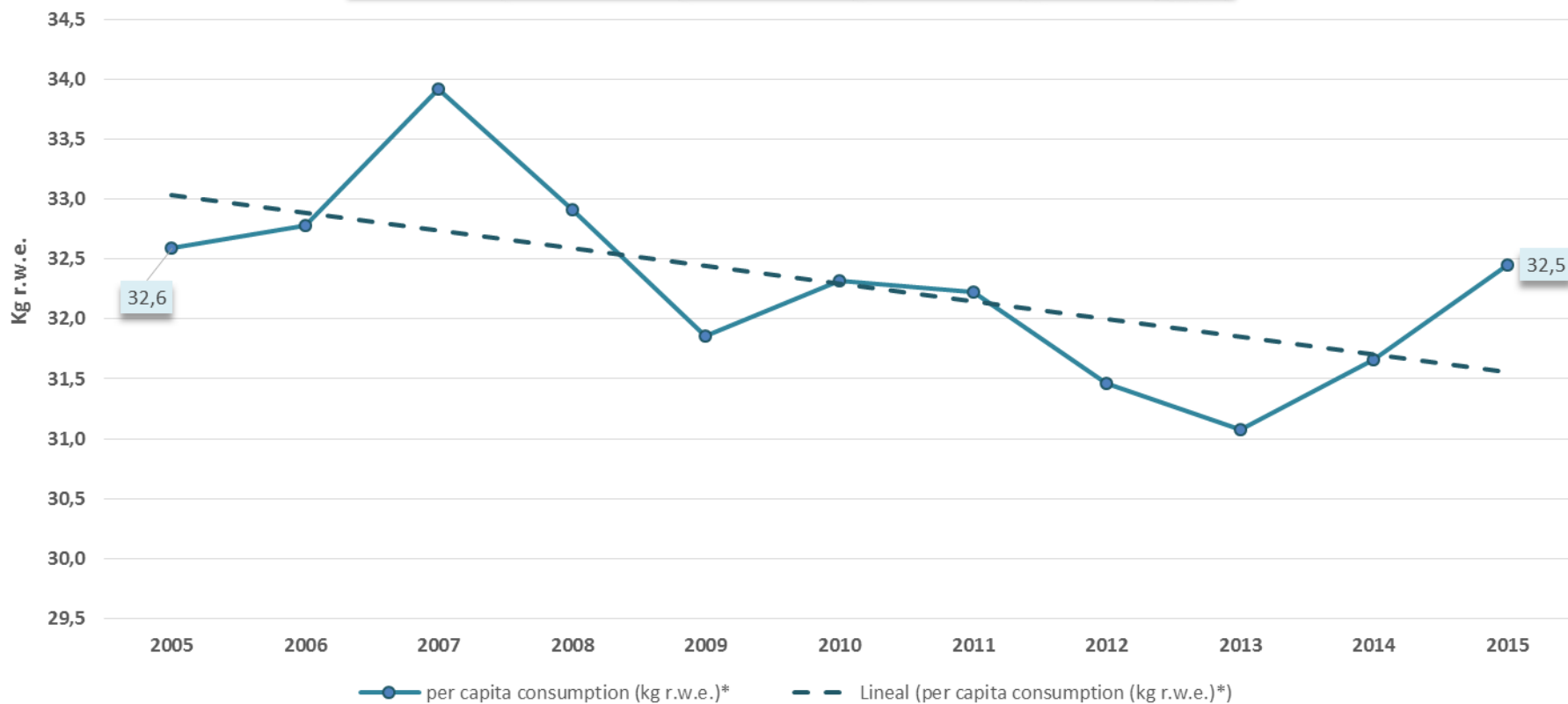
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THE EUROPEAN CONSUMER - EVOLUTION

EU PER CAPITA CONSUMPTION OF PIG MEAT 2005-2015



Fuente: EUROSTAT / Draft preliminary EU agricultural market outlook 2016-2026.



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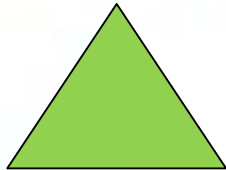
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THE SPANISH CONSUMER

22.6 kg per capita/year (2015)

**10.9 kg
Fresh meat**



**11.7 kg
Processed**



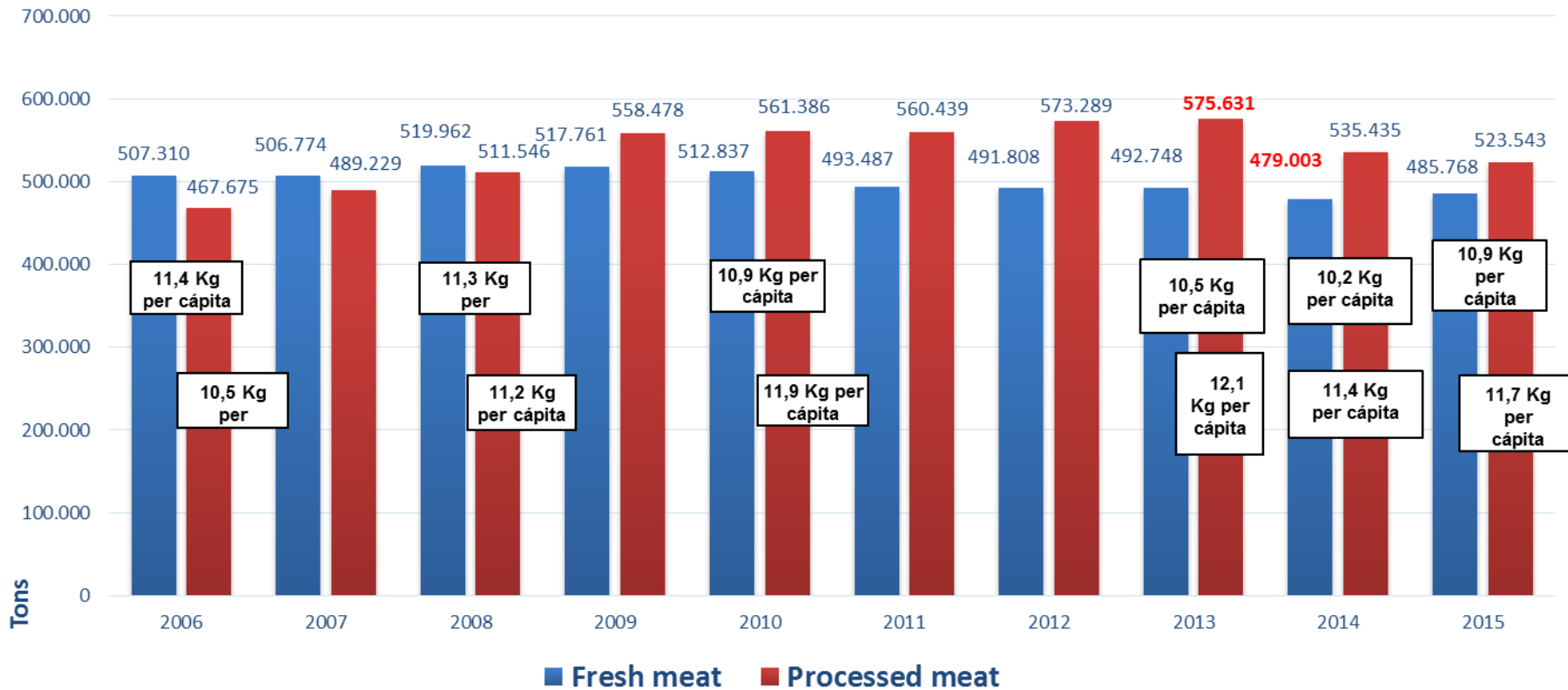
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THE SPANISH CONSUMER - TRENDS

DOMESTIC CONSUMPTION OF FRESH AND PROCESSED PIG MEAT IN SPAIN - EVOLUTION (tons)





TRADE

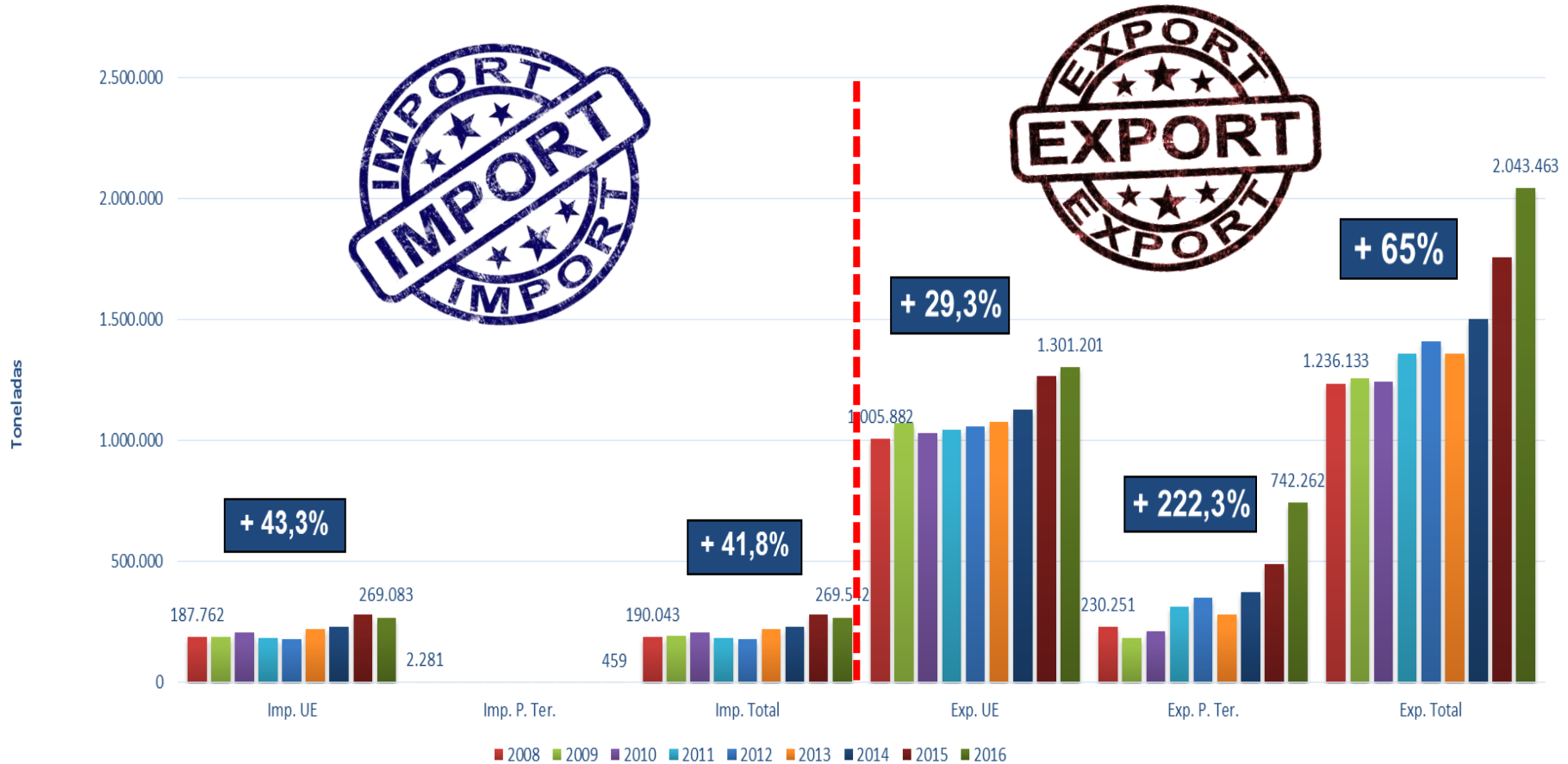


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SPANISH PIGMEAT TRADE - EVOLUTION



Source: A.E.A.T.

Elaboration: MAGRAMA



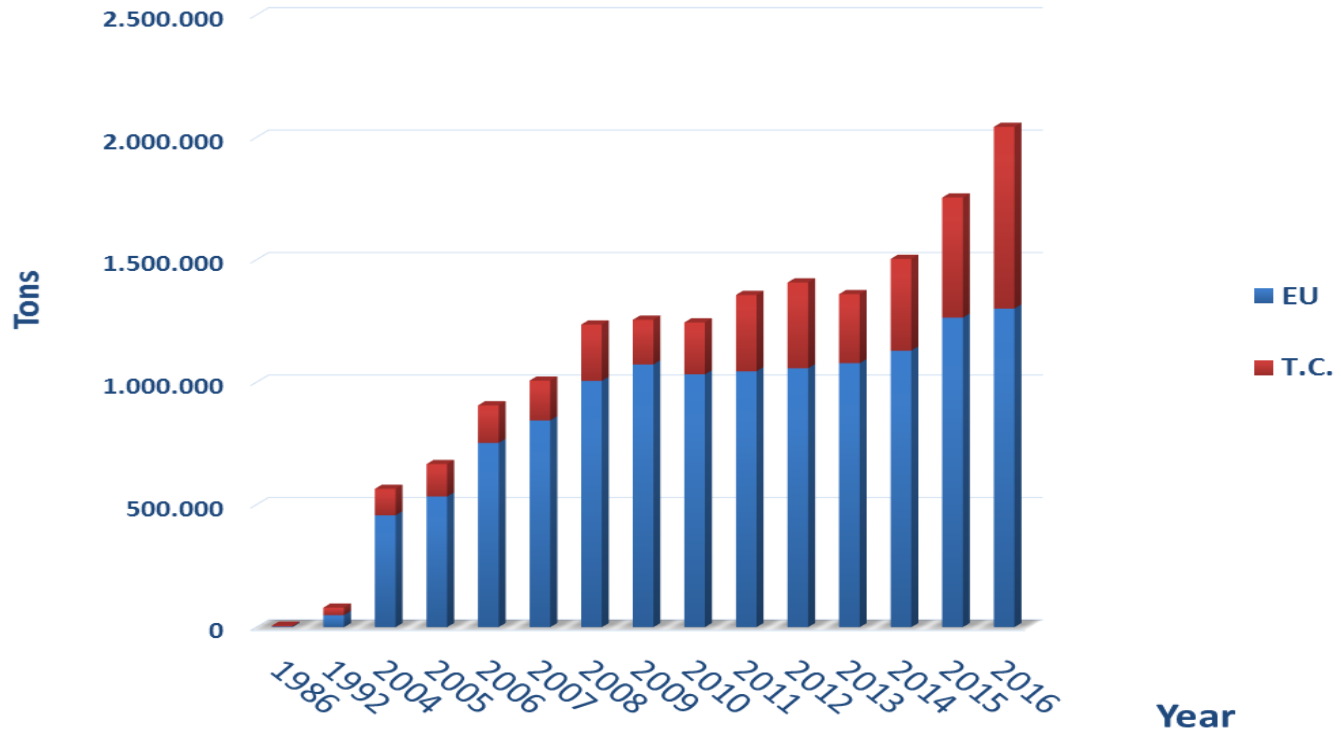
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SPANISH PIGMEAT EXPORTS - EVOLUTION

TOTAL EXPORTS OF PIGMEAT - EVOLUTION (tons)



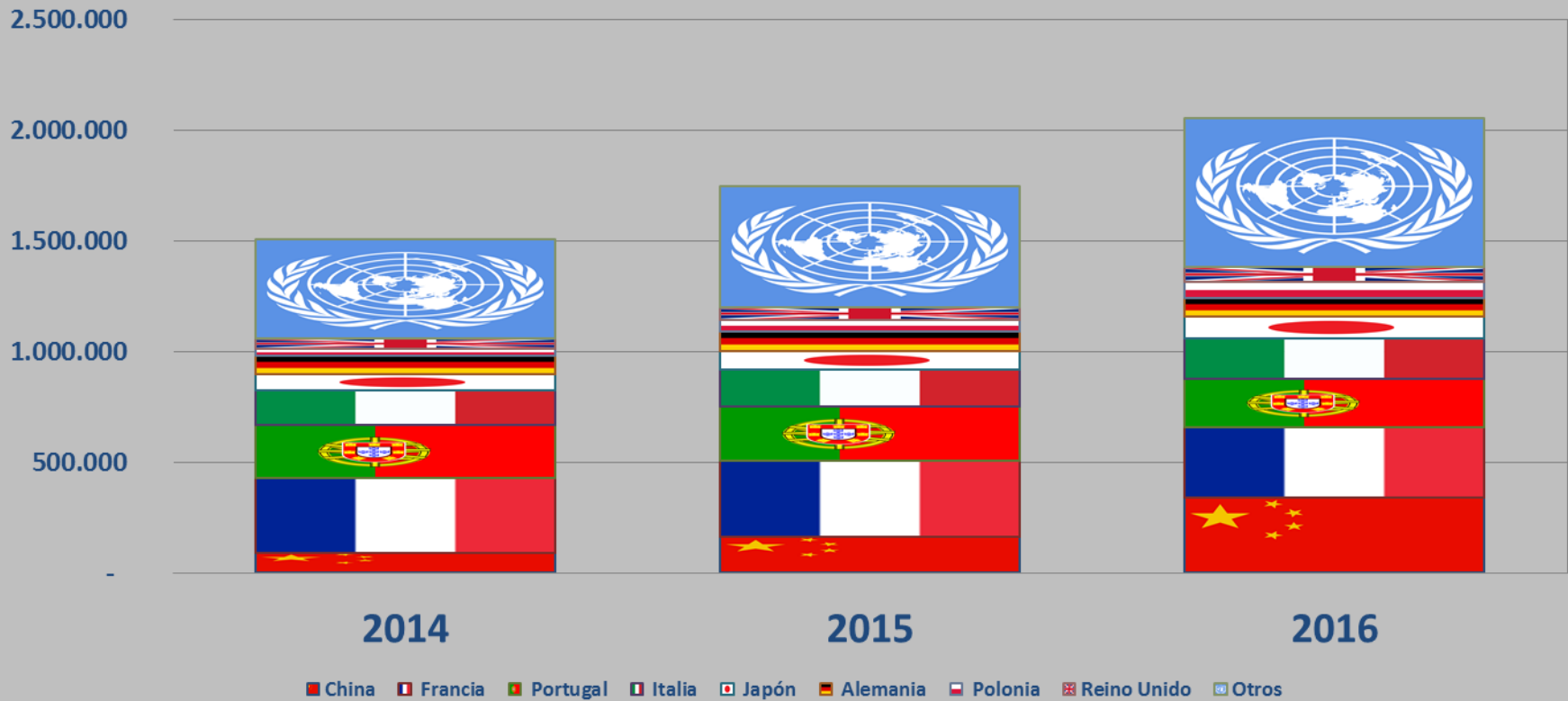
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SPANISH PIGMEAT EXPORTS - MAIN DESTINATIONS (2014-2016)

SPANISH PIGMEAT EXPORTS – MAIN DESTINATIONS
2014-2016 (TONS)



Source: A.E.A.T.

Elaboration SG Productos Ganaderos MAGRAMA



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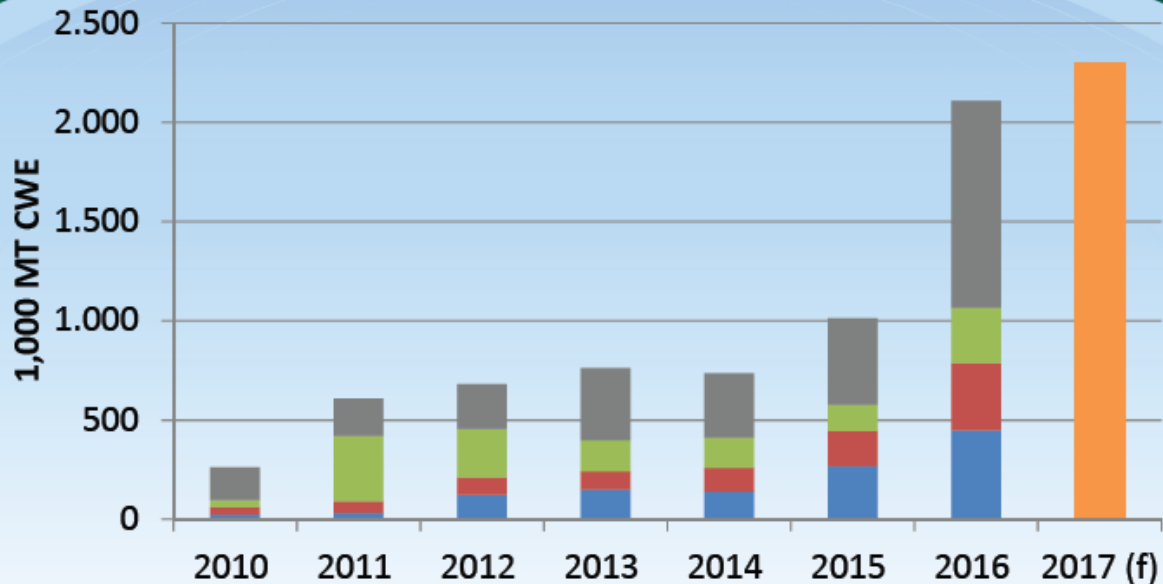
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EXPORTS DESTINATIONS: THE CHINESE FACTOR

What to Watch for 2017: China

China Pork Imports



■ Germany ■ Spain ■ United States ■ Other ■ Forecast



Source: Global Trade Atlas, USDA FAS

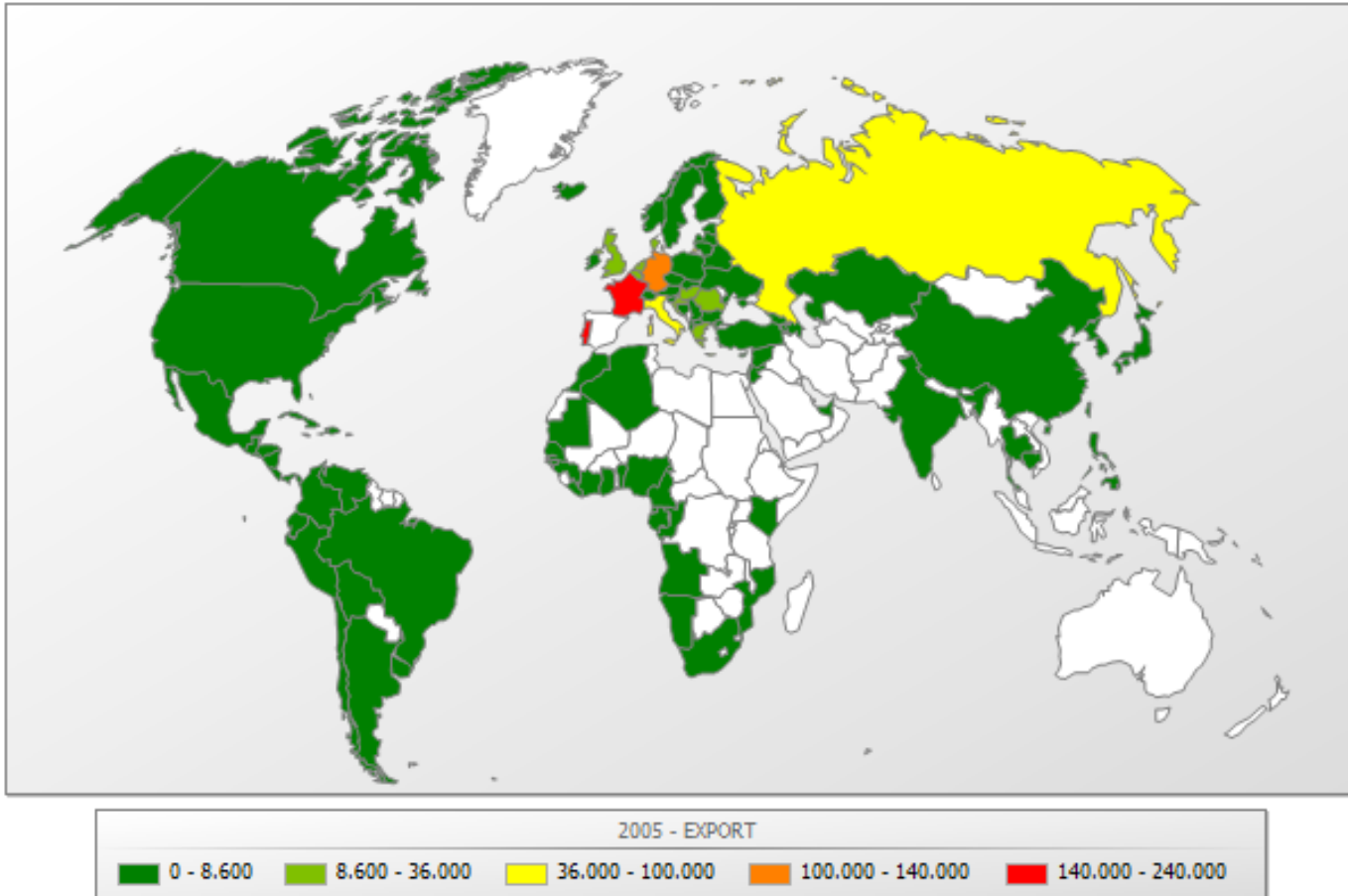


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SPANISH PIGMEAT EXPORTS - DESTINATIONS (2005)



Source: A.E.A.T.

Elaboration SG Productos Ganaderos MAGRAMA

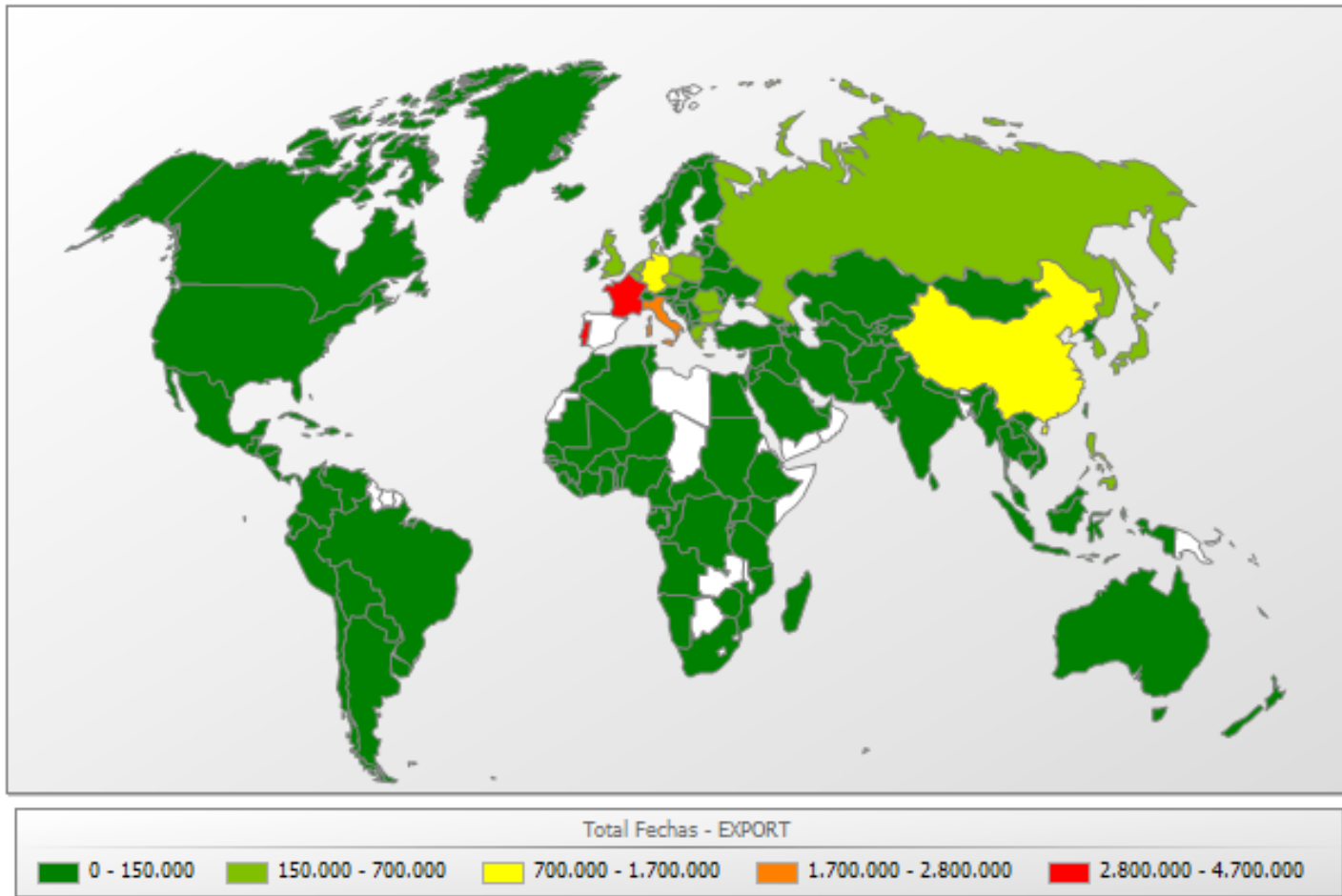


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SPANISH PIGMEAT EXPORTS - DESTINATIONS (2016)



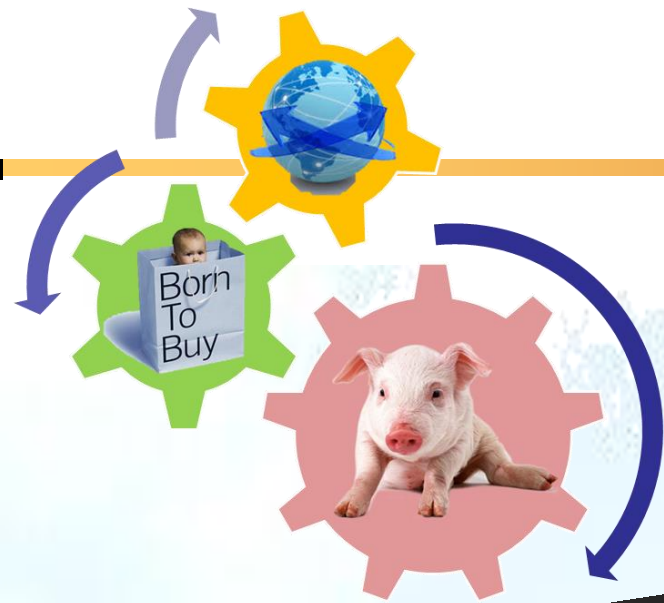
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Elaboration SG Productos Ganaderos MAGRAMA

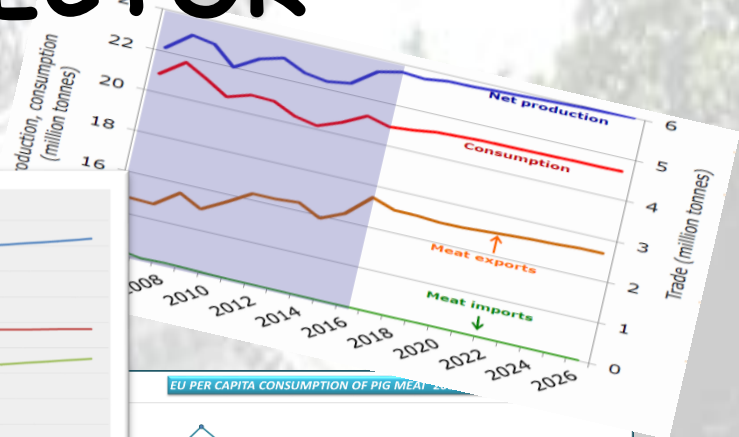
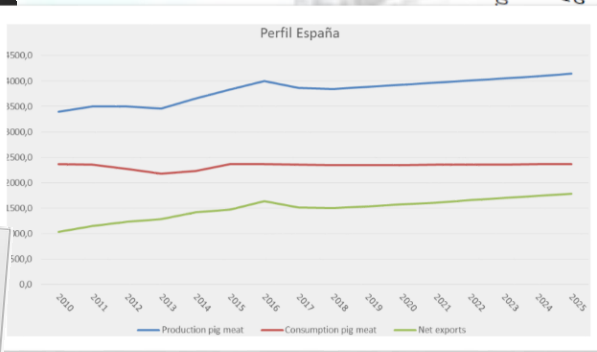
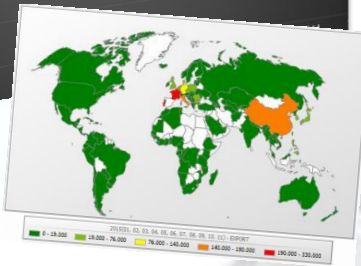
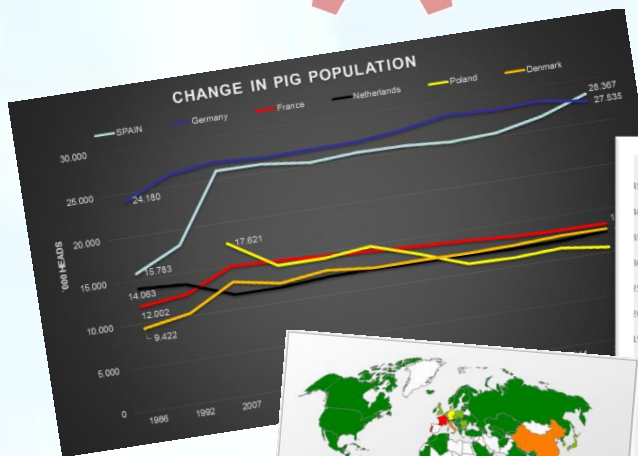


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CHALLENGES OF SPANISH PIGMEAT SECTOR

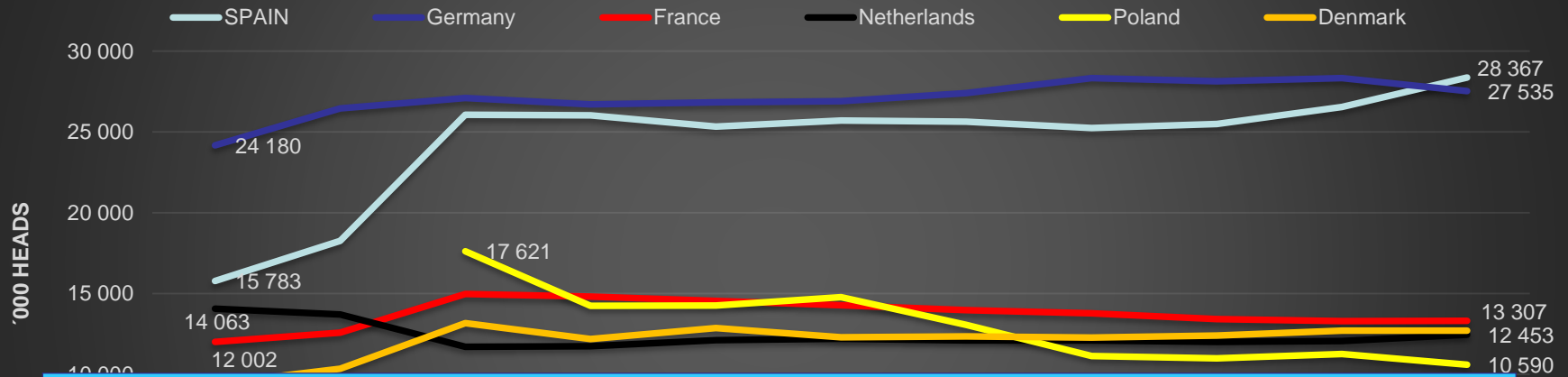




Facts and challenges of Spanish pigmeat production

SPANISH PIGMEAT SECTOR IS GROWING...

POPULATION OF PIGS IN THE EU – EVOLUTION



...COULD THAT GROWTH REMAIN FOR THE NEXT YEARS?



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The challenge of growth

GROWTH

**MARKET
CONCERNS**

**ENVIRONMENTAL
CONCERNS**



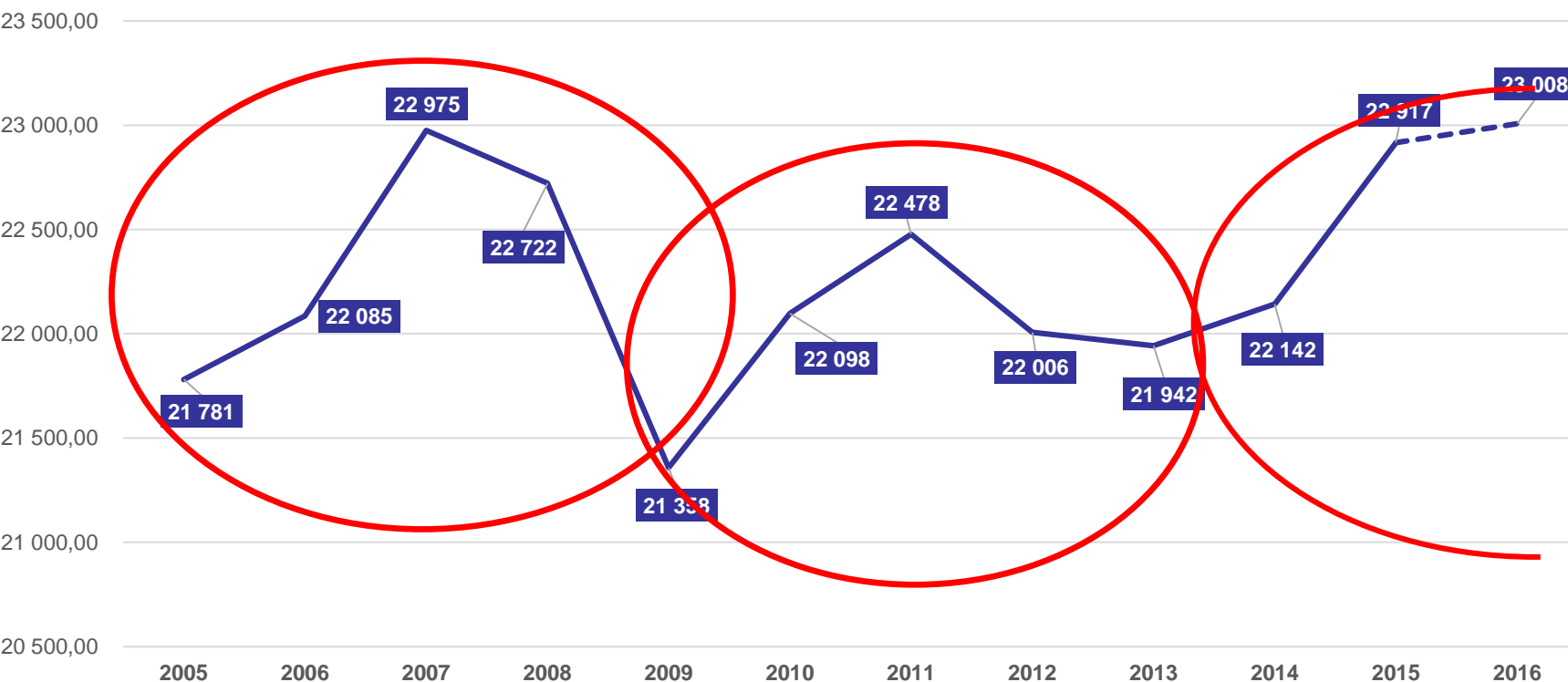
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Internal market uncertainties

EVOLUTION OF THE EU PIGMEAT PRODUCTION 2005-2016



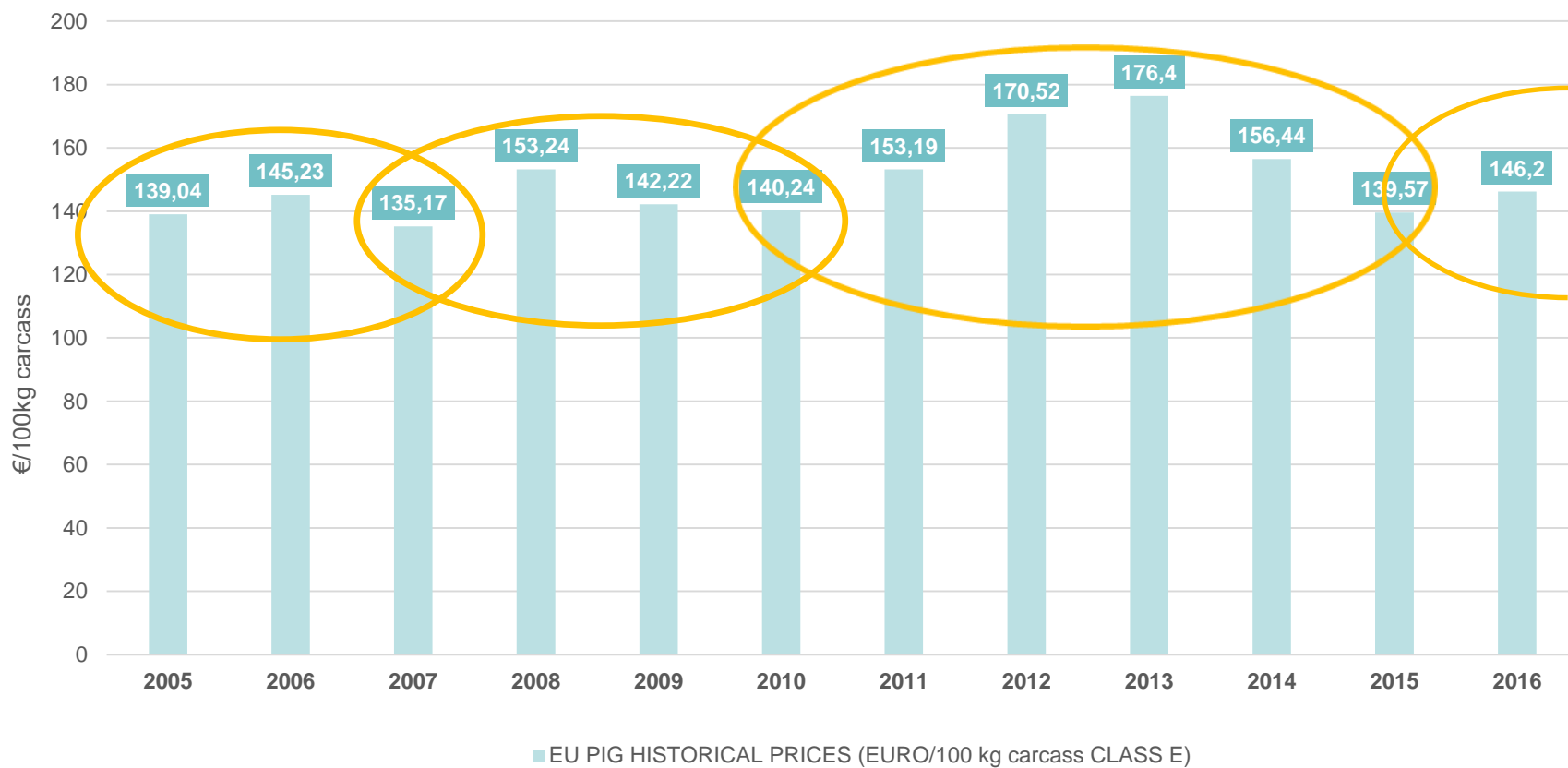
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Internal market uncertainties

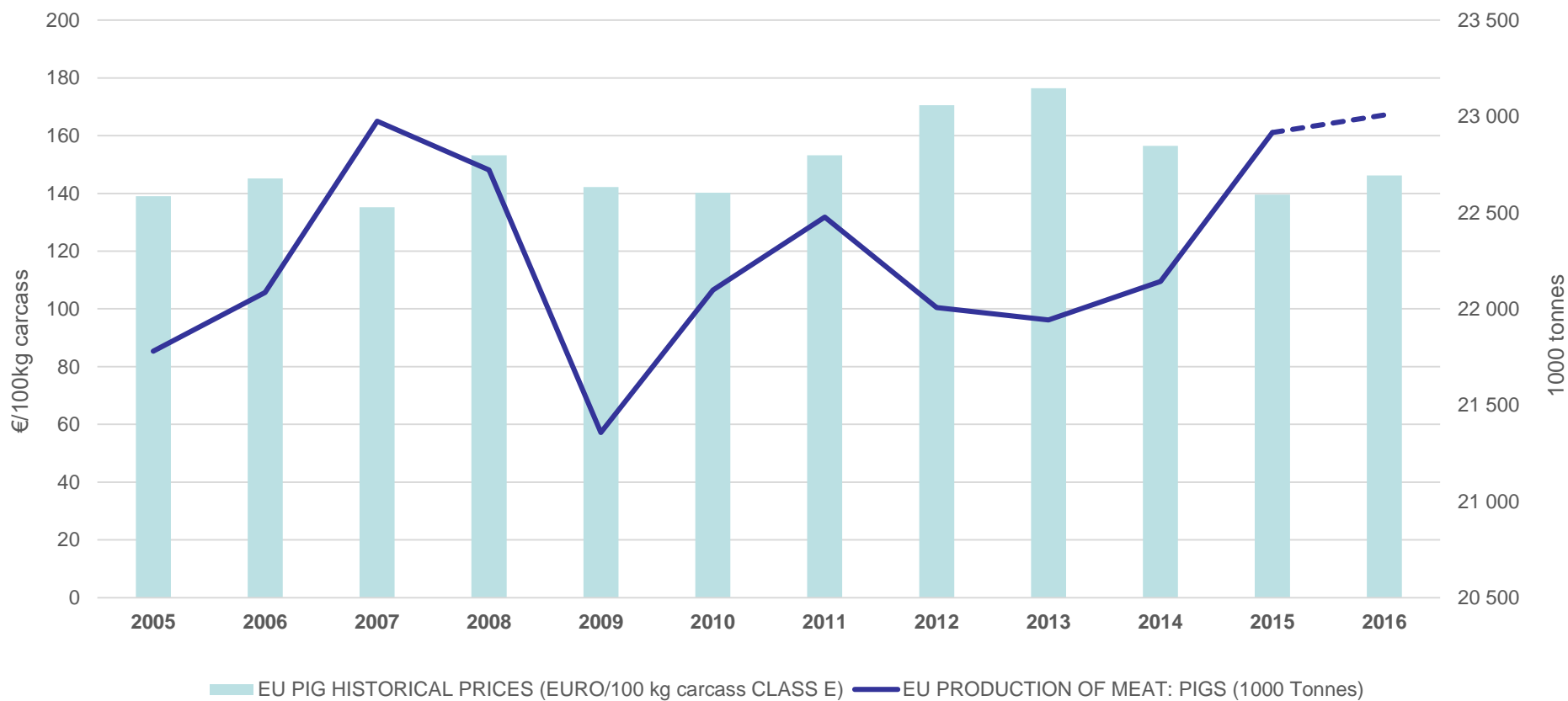
EVOLUTION OF THE EU PIGS PRICES 2005-2016





Internal market uncertainties

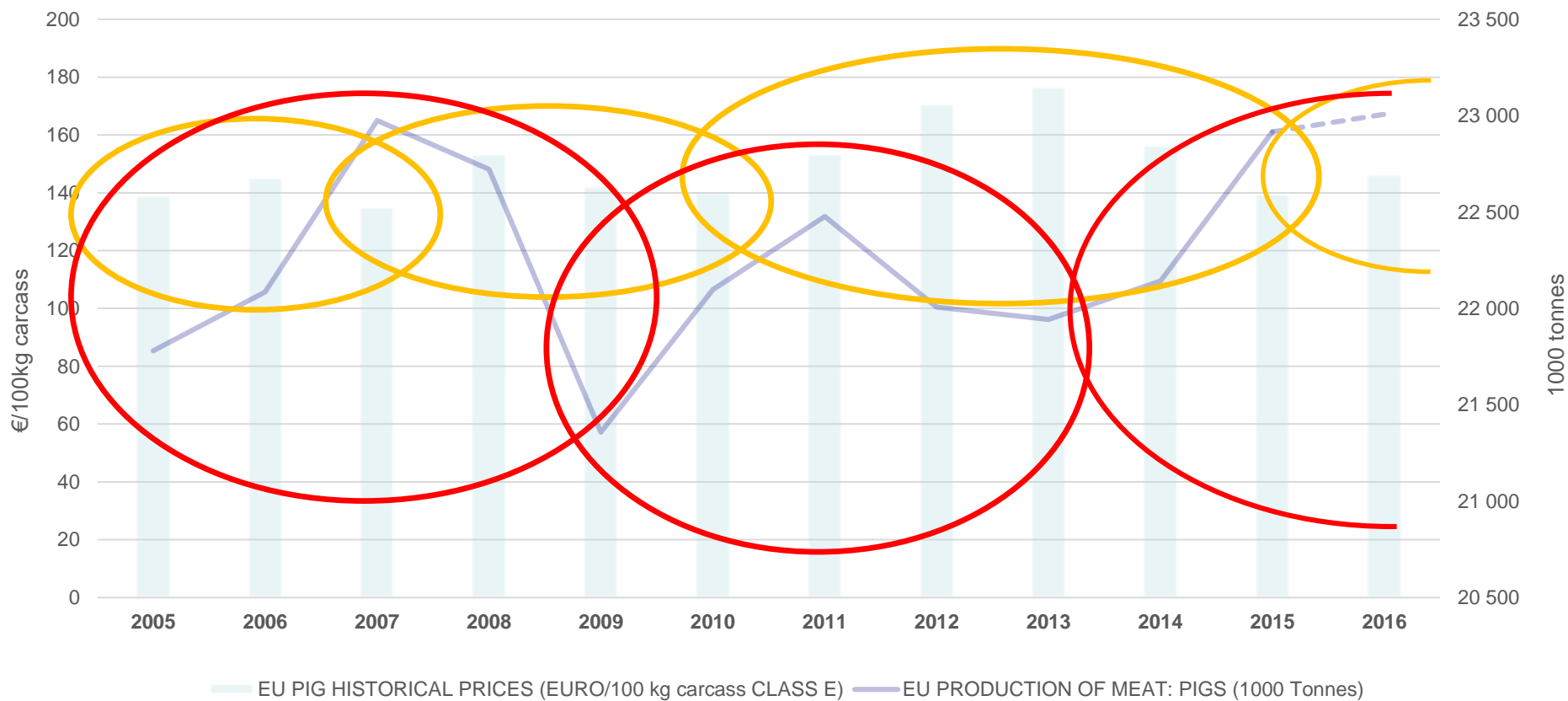
EVOLUTION OF THE EU PIGS PRICES AND PRODUCTION 2005-2016





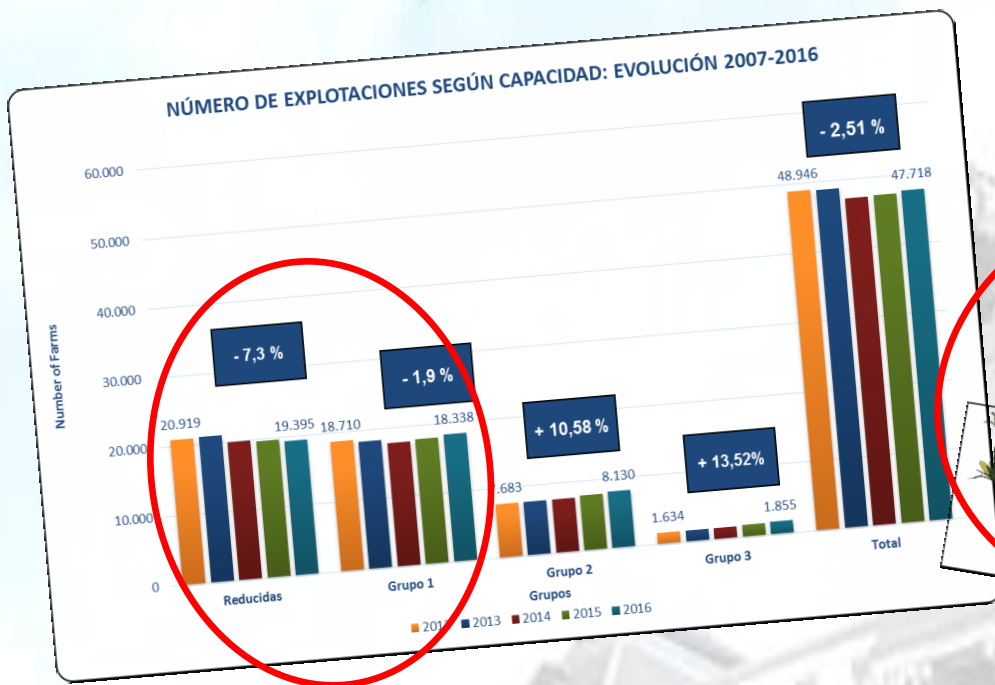
Internal market uncertainties

EVOLUTION OF THE EU PIGS PRICES AND PRODUCTION 2005-2016



Internal market uncertainties

THE GROWTH OF PIGMEAT PRODUCTION COMES WITH A RECONVERSION OF PRIMARY SECTOR



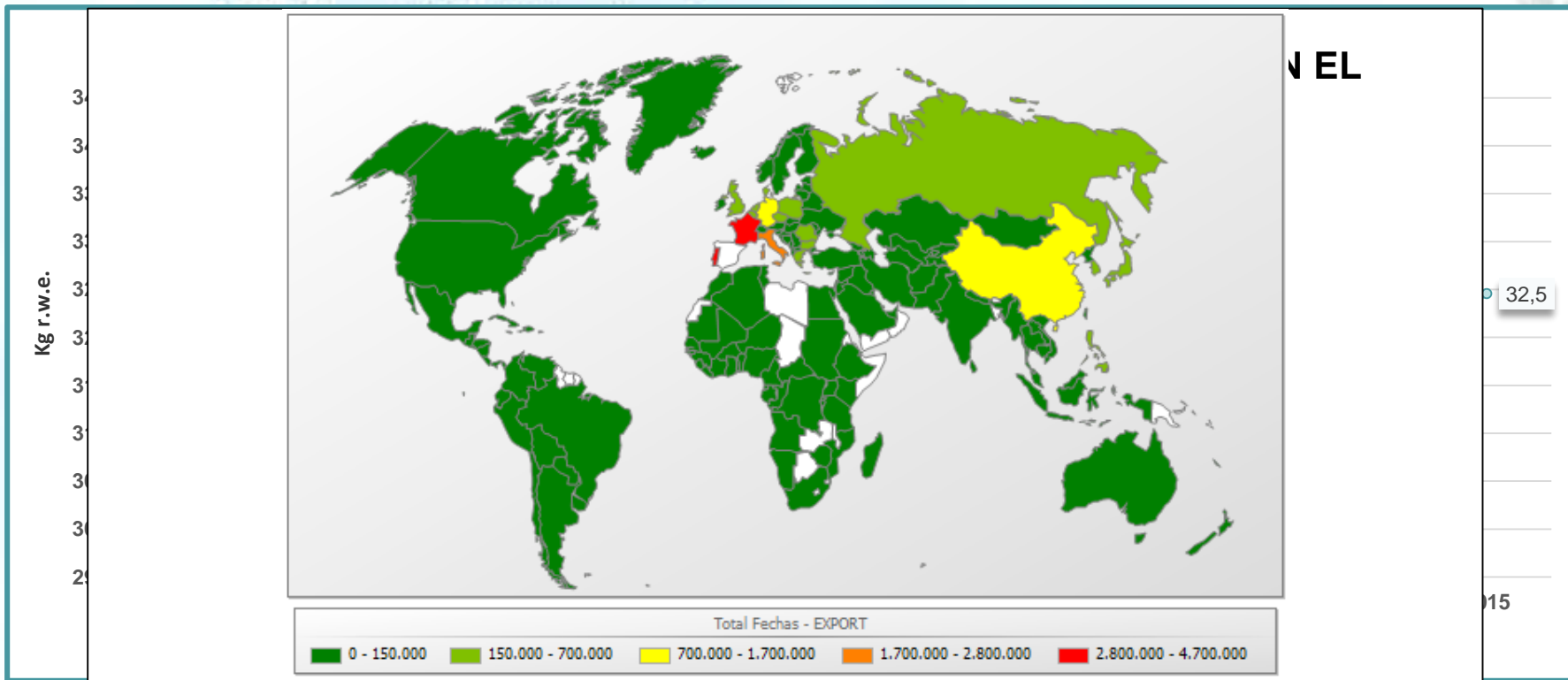
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World market uncertainties

GROWTH IS SUSTENTED BY EXPORTS





World market uncertainties

GROWTH IS SUBSTENTED BY EXPORTS

**Political
factors**

**World's
demand
evolution**

**Sanitary
status**



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World market uncertainties

GROWTH IS SUBSTENTED BY EXPORTS



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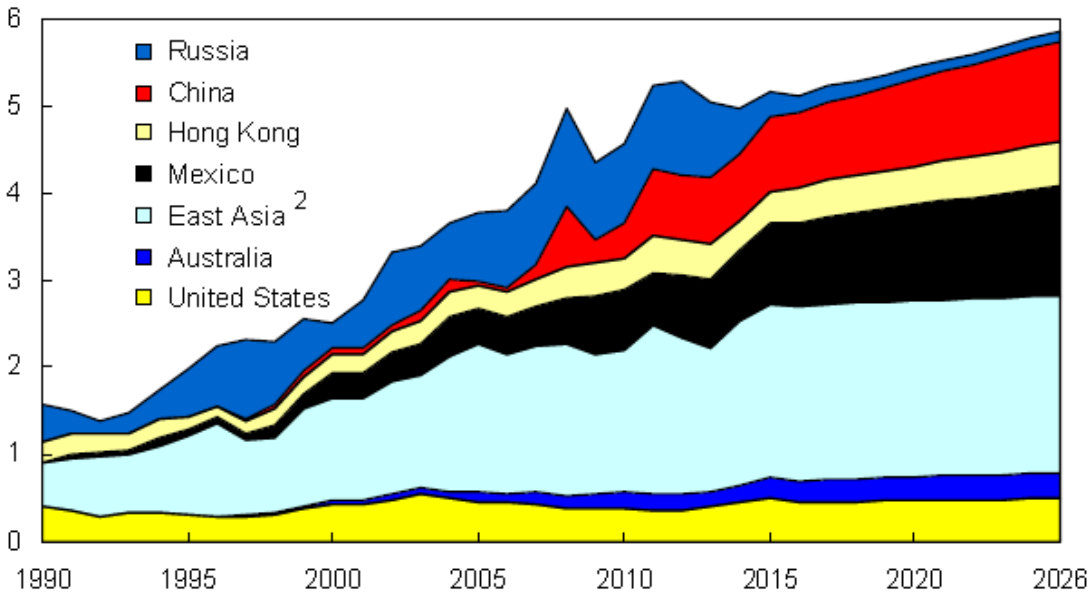
World market uncertainties

GROWTH IS SUSTENTED BY EXPORTS



Global Pork imports ¹

Million metric tons



¹ Selected importers, not world total. ² Japan, Korea, & Taiwan.

Fuente: USDA Agricultural Projections to 2026



World market uncertainties

GROWTH IS SUSTENTED BY EXPORTS



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The challenge of sustainability

GROWTH IS ONLY POSSIBLE IN RESPONSIBLE WAY

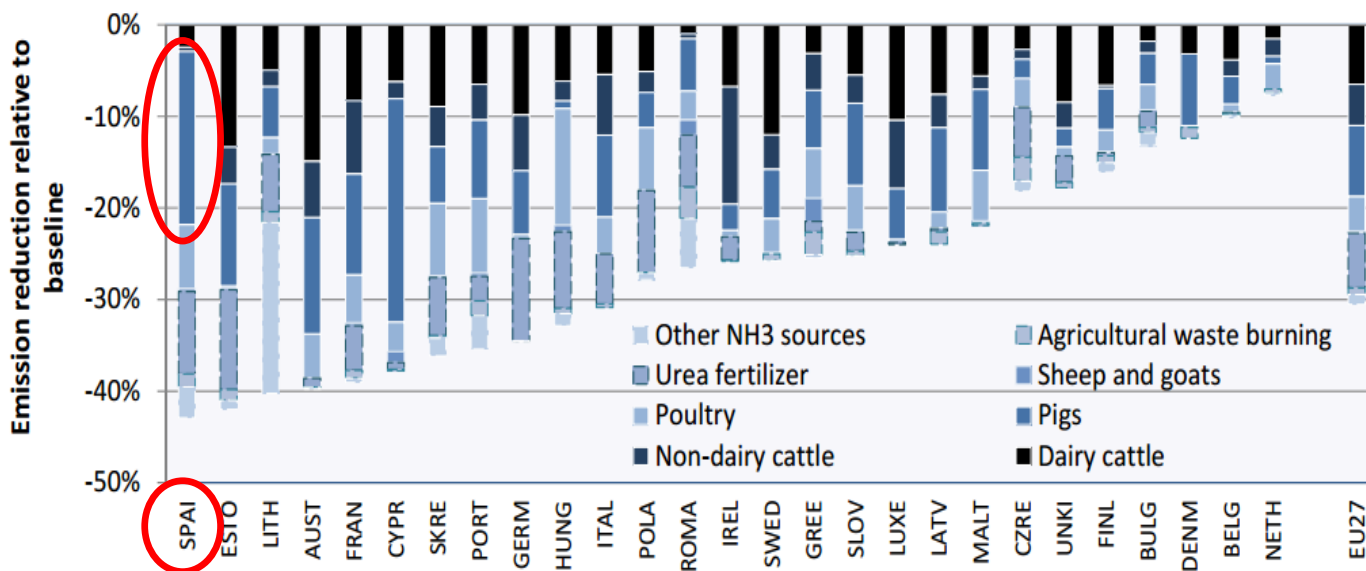


Figure 5.15: Mitigation potentials for NH₃ emissions in 2030 on top of current legislation

Source: Future emissions of air pollutants in Europe – Current legislation baseline and the scope for further reductions TSAP Report #1



Spanish pigmeat sector: medium term challenges

THE SPANISH PIGMEAT SECTOR NEEDS A STRATEGY



FOCUSED IN RESPONSIBLE GROWTH

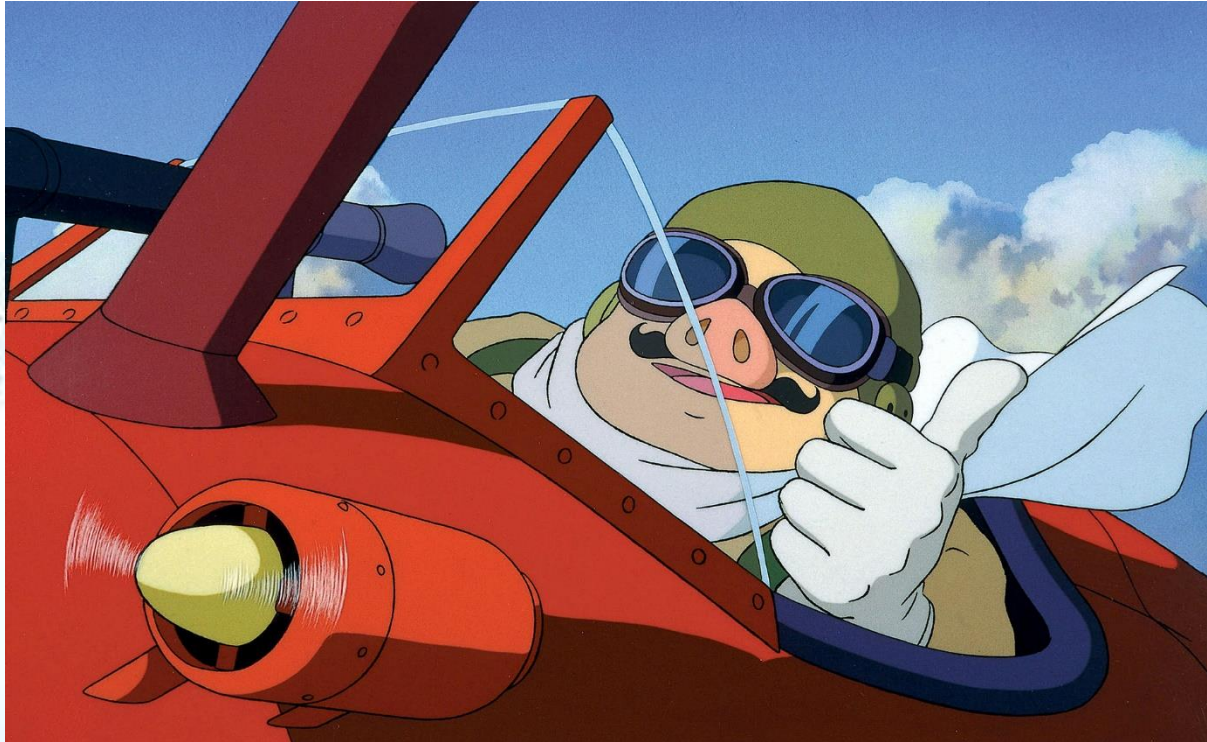
AMBITIOUS, BUT HAVING THE ECONOMY IN MIND

SET BY THE OWN SECTOR, BUT INVOLVING ALL STAKEHOLDERS AND COMPETENT AUTHORITIES



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**¡MUCHAS GRACIAS!
THANK YOU VERY MUCH!
KÖSZÖNJÜK!**



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