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## GLOBAL

### Seguridad Alimentaria Global: escasa producción animal impone un desafío

12 April 2018 - Humans face mounting challenges when it comes to finding ways to sustainably feed an exploding population. As populations become wealthier and more urbanized, the demand for animal products continues to climb.

Although supply chain efficiencies improve, livestock are considered a resource drain, requiring a large amount of feed, which could also be used by humans, to produce a relatively small amount of meat.

A new study in *Global Food Security* found that livestock place less burden on the human food supply than previously reported. Even stronger, certain production systems contribute directly to global food security because they produce more highly valuable nutrients for humans, such as proteins, than they consume.

A new study in *Global Food Security* found that livestock place less burden on the human food supply than previously reported. Even stronger, certain production systems contribute directly to global food security because they produce more highly valuable nutrients for humans, such as proteins, than they consume.

"As a Livestock Policy Officer working for the Food and Agriculture Organization (FAO) of the United Nations, I have been asked many times by the press to report on the negative environmental impacts of livestock," explained lead investigator Anne Mottet, PhD.

"Doing so, I came to realize that people are continually exposed to incorrect information that is repeated without being challenged, in particular about livestock feed. There is currently no official and complete international database on what livestock eat. This study contributes to filling this gap and to provide peer-reviewed evidence to better inform policy makers and the public."

While there have been vast improvements in food systems, people still go hungry. In 2015 alone, approximately 800 million people around the world were undernourished. Animal food sources make a vital contribution to global nutrition and are an excellent source of macro- and micronutrients.

Meat makes up 18 per cent of global calories and 25 per cent of global protein consumption and provides essential micro-nutrients, such as vitamin B12, iron, and calcium. Livestock use large areas of pastures where nothing else could be produced. Animals also add to agricultural production through manure production and drought power. Further, tending livestock provides a secure source of income for people in many in rural areas.

Despite these benefits, raising livestock is often pointed to as an inefficient system because animals consume food that could potentially be eaten by people. Some previous studies, often cited, put the consumption of grain needed to raise 1 kg of beef between 6 kg and 20 kg. Contrary to these high estimates, the current investigation found that an average of only 3 kg of cereals are needed to produce 1 kg of meat. It also shows important differences between production systems and species.

For example, because they rely on grazing and forages, cattle need only 0.6 kg of protein from human food to produce 1 kg of protein in milk and meat, which is of higher nutritional quality. In addition, this study determined that 86 per cent of livestock feed, which includes residues and by-products, is not suitable for human consumption.

If not consumed by livestock, the study points out, these "leftovers" could quickly become an environmental burden as the human population grows and consumes more and more processed food. Researchers also analyzed land use and herd management.

"The media often reports how consumers' choices can contribute to sustainable development, like through a vegetarian diet; however, erroneous information is provided regarding livestock feed requirements," noted Dr Mottet.

"We hear statements, for example, that to produce 1 kg of beef, we need large amounts of cereals. While we need to ensure that our diets are sustainable from a health and environmental point of view, the public and decision makers need accurate information to guide their choices."

Livestock production is growing fast because demand for animal products is rising, particularly in developing countries. FAO estimates that we need 70 per cent more animal products by 2050 to feed the world. Therefore, the area of land needed to raise animals will also increase if feed conversion ratios (FCR) are not further improved.

Steps have already been taken through feed formulation, genetic selection, and better veterinary services to improve FCRs over the last 30 years, but continued progress is needed to make the system more sustainable. In addition, it is essential to improve the recycling of food wastes and by-products into livestock feed as well as to increase feed crops yields.

Dr Mottet concluded: "Animal production, in its many forms, plays an integral role in the food system, making use of marginal lands, turning co-products into edible goods, contributing to crop productivity and turning edible crops into highly nutritious, protein-rich food.

"Quantifying the land and biomass resources engaged in livestock production and the food output they generate, but also improving our modelling capacity by including trends in consumer preferences, shifts in



animal species, climate change impacts, and industrial processes to improve the human edibility of certain feed materials is arguably basic information needed as part of further research into the challenge of sustainably feeding 9.6 billion people by 2050."

## **COLOMBIA confirma aftosa en ganado procedente de VENEZUELA**

### **Mantiene su status de fiebre aftosa anunció este jueves la OIE**

13/04/2018 - Padeció nuevo foco por un ganado que entró de Venezuela

La Organización Mundial de Sanidad Animal (OIE) ratificó el status sanitario de Colombia, pese al reciente foco de fiebre aftosa registrado esta semana en Arauca, por el ingreso de contrabando de 15 animales positivos a la fiebre aftosa provenientes de Venezuela. Colombia resolvió el problema y continúa siendo país libre de fiebre aftosa con vacunación.

La noticia la anunció ayer el propio presidente Juan Manuel Santos Calderón y representa mantener el comercio de carne con 15 países.

"El surgimiento de este caso en Colombia -ya padeció otros por el mismo problema- nos preocupa, producto del esfuerzo que está haciendo América para tratar de erradicar la aftosa", afirmó a El País el Dr. Jorge Bonino Morlán, delegado de Uruguay ante la OIE en representación del sector privado.

"Estamos todos dispuestos a ayudar a Venezuela y Colombia en el combate contra la enfermedad", reconoció Bonino, destacando el trabajo mancomunado que se hace en Uruguay entre el sector público y el privado para mantener la sanidad país.

### **Brasil refuerza vigilancia después del anuncio del foco en la frontera**

13/04/18 - por Equipe BeefPoint O diretor do Departamento de Saúde Animal (DSA) do Ministério da Agricultura, Pecuária e Abastecimento (Mapa), Guilherme Marques, informou que o Mapa emitiu alerta às Superintendências Federais de Agricultura do Amazonas e de Roraima para reforçar a fiscalização e vigilância na região de fronteira internacional. O reforço foi adotado devido ao foco de aftosa registrado em 15 animais já sacrificados e provenientes da Venezuela, conforme o Instituto Colombiano Agropecuario (ICA).

Marques garantiu que "a situação está sob controle e não representa risco sanitário para o Brasil. Além disso, a região já é tratada com atenção especial pelo serviço veterinário brasileiro, devido ao histórico de ocorrências da febre aftosa.

O ICA informou ainda que o confisco dos animais foi realizado em um posto de controle administrado pelo Exército, quando o gado era transportado em caminhão com destino à Tame, no departamento de Arauca, ambos localizados na Colômbia.

O ICA notificou a Organização Mundial de Saúde Animal (OIE) sobre a situação, que deve alterar o status sanitário da Colômbia em relação à febre aftosa. Até agora, a Colômbia mantinha uma zona de contenção não livre da doença, devido às ocorrências no país em 2017, e o restante do país era reconhecido pela OIE como zona livre com vacinação. O departamento de Arauca está incluído dentro da zona de contenção estabelecida pelo ICA.

Em relação ao Brasil, a ocorrência está localizada cerca de 600 Km da fronteira mais próxima, no estado do Amazonas, sendo uma região de densas florestas e sem ocupação pecuária. A parte de maior importância para a sanidade animal fica na região de Pacaraima, em Roraima, cerca de 1.200 Km da região de ocorrência da doença na Colômbia.

A fronteira do Brasil com a Venezuela também é caracterizada por presença de densas florestas e áreas acidentadas, praticamente sem ocupação pecuária. Nesta região, a ocupação pecuária é muito baixa do lado venezuelano e não há histórico de focos de febre aftosa nos últimos anos. Assim mesmo, o serviço veterinário oficial do Brasil, exercido pelo Mapa e pela Agência de Defesa Agropecuária de Roraima (ADERR) atuam de forma permanente para a prevenção de ingresso da doença.

Além das estruturas de fiscalização do Mapa, a Polícia Federal, Receita Federal e ADERR fazem vigilância permanente para evitar ingressos de animais e mercadorias que possam representar riscos de veiculação de doenças. Está implantada uma zona de proteção definida pelo Mapa que conta com medidas específicas de vigilância, como: identificação individual dos animais; vacinação oficial de todo o rebanho duas vezes ao ano; vigilância ativa de propriedades; e controle do trânsito de ingresso e egresso de animais e produtos de risco.

## **BRASIL**

### **Mercado equilibrado con oferta y demanda ajustadas**

Sexta-feira, 13 de abril de 2018 - Mercado do boi gordo travado na última quinta-feira (12/4).

Este cenário é resultado do equilíbrio entre a oferta de bovinos terminados e a demanda da indústria.



Enquanto os pecuaristas oferecem os bovinos gradativamente, já que as pastagens continuam em boas condições, os frigoríficos estão trabalhando com menor volume de animais abatidos e pulando dias de abate, no intuito de controlar os estoques.

No mercado atacadista de carne bovina sem osso já são cinco semanas de queda nos preços. Na média de todos os cortes pesquisados, a desvalorização foi de 1,3% nos últimos trinta dias. Já a arroba do boi gordo apresentou queda de 1,7% no período em São Paulo, o que permitiu que a margem de comercialização dos frigoríficos que fazem a desossa ficasse próxima da média histórica.

Entre as praças pecuárias pesquisadas, destaque para o Pará. A forte chuva dos últimos dias vem atrapalhando os embarques de bovinos e resultando em menor volume de animais abatidos.

Para os próximos dias, o cenário é de atenção a estratégia adotada pelos pecuaristas, já que a proximidade da entressafra e o maior volume de fêmeas disponíveis para o abate podem favorecer pagamentos abaixo da referência.

### **Reabertura de frigoríficos incide sobre el margen de la actividad**

11/04/18 - por Equipe BeefPoint A rápida expansão da capacidade de abate de bovinos do parque frigorífico nacional, viabilizada pela reabertura de abatedouros que estavam fechados há muitos anos, está reduzindo a rentabilidade dos frigoríficos.

Além disso, os preços baixos da carne de frango e da carne suína pressionam as cotações da carne bovina no mercado brasileiro, o que dificulta eventuais repasses de preços dos frigoríficos para recompor as margens, afirmou o analista da consultoria MB Agro, César Castro Alves.

Na exportação, a diferença entre o preço da carne bovina embarcada e o do boi gordo ficou em 4% na média dos primeiros três meses do ano, de acordo com levantamento da MB Agro. A média histórica do indicador calculado desde 1997 é de 21%. No ano passado, o indicador ficou em 11%.

No mercado doméstico, o preço da carcaça bovina representou 97% do preço do boi gordo no primeiro trimestre, também segundo a MB Agro. Normalmente, esse indicador de margem bruta é mesmo negativo porque os frigoríficos só entram no azul apenas depois de venderem os subprodutos como o couro e cortes de carne de maior valor agregado. Nesse sentido, a diferença negativa entre o preço da carne bovina e do boi não é uma novidade na indústria de carne.

O grande problema para as empresas é que o atual quadro é bastante diferente daquele que justificou o movimento de reabertura de frigoríficos. No ano passado, em meio ao encolhimento dos abates da JBS, a carcaça valia 101% do preço do boi.

“A animação com a expansão dos frigoríficos era fantasiosa”, avaliou um alto executivo de um dos maiores exportadores de carne bovina do país. A avaliação é que, mesmo que a oferta de boi tenha aumentado em razão do ciclo pecuário, a expansão de capacidade ficou além da conta.

Na Marfrig Global Foods, por exemplo, a reabertura de frigoríficos ampliou a capacidade de abates em 70%. Grupos menores como o frigorífico Frigol, do interior paulista, também expandiram os abates em mais de 50%.

A avaliação de um empresário do Centro-Oeste é que os frigoríficos concorrentes não esperavam uma reação da JBS, que restringiu expressivamente os abates no ano passado após a delação dos irmãos Batista. O problema, segundo esse empresário, é que a JBS não “morreu” e reagiu fortemente, voltando aos níveis de abates anteriores à Operação Carne Fraca – a investigação foi deflagrada em março de 2017.

Recentemente, a JBS e a Marfrig admitiram que a margem do negócio de carne bovina no Brasil está pressionada. “É de se esperar contração de margem na operação de bovinos no 1o trimestre”, afirmou em 28 de março, em teleconferência com analistas, o CEO da Marfrig, Martín Secco. Apesar disso, o executivo disse acreditar na recuperação das margens ao longo do ano. Segundo Secco, o primeiro trimestre é sazonalmente mais fraco.

Na JBS, porém, a percepção é que o cenário de margens pressionadas vai além do primeiro trimestre. “Ainda observamos um mercado com excesso de capacidade, o que vai ser desafio para recuperar as margens ao longo desse ano”, afirmou no mês passado, em teleconferência com analistas, o presidente do conselho de administração da JBS, Jerry O’Callaghan.

### **Ministro Maggi viaja a Bruselas después de la visita de Parlamentarios Europeos**

09/04/18 - por Equipe BeefPoint O ministro Blairo Maggi (Agricultura, Pecuária e Abastecimento) embarcou neste domingo (08) para Bruxelas, na Bélgica, onde terá reuniões com autoridades da União Europeia para tratar sobre questões relacionadas à proteína animal. O retorno está previsto para sexta-feira (13).

Na última terça-feira (3), Maggi recebeu parlamentares, onze membros do Parlamento Europeu, acompanhados de equipe de especialistas para falar sobre os avanços na pecuária bovina brasileira e



detalhes do funcionamento do Serviço de Inspeção Federal (SIF), relacionados a produtos de origem animal.

Os parlamentares europeus viajaram para o Mato Grosso, acompanhados de servidores do Mapa, onde visitaram propriedades rurais. Os europeus conheceram com detalhes a pecuária bovina do estado, com destaque para a integração lavoura-pecuária floresta (ILPF), um dos programas de sustentabilidade desenvolvidos pela Embrapa.

O polonês Czesław Siekierski, presidente do Comitê do Parlamento Europeu de Agricultura e Desenvolvimento Rural, que liderou a missão, elogiou a acolhida do governo e reconheceu a preocupação das autoridades brasileiras em garantir que a legislação seja cumprida no sentido de “respeitar o meio ambiente, incluindo o bioma amazônico”.

Ainda no Mato Grosso, os eurodeputados visitaram um frigorífico de carne bovina, onde acompanharam todas as etapas da produção e conversaram diretamente com a equipe do Serviço de Inspeção Federal do Ministério da Agricultura. De acordo com o deputado português Ricardo Serrão Santos, “o sistema brasileiro de controle de alimentos serve de modelo a outros países”.

Ao final da missão, o deputado francês Jacques Colombier, disse que a delegação “recebeu resposta a todas as perguntas que foram feitas” e “ficou impressionada com o alto nível técnico observado”.

### **Marfrig compra planta en EEUU y será el segundo productor mundial de carne vacuna**

Fuente: Reuters Abril 9, El grupo brasileño desembolsará casi US\$ 1.000 millones para quedarse con el 51% de National Beef Packing Company

El grupo de alimentos brasileño Marfrig Global Foods SA informó este lunes que adquirirá una participación controladora del procesador de carne vacuna National Beef Packing Company por US\$ 969 millones, en un anuncio que provocaba una fuerte alza de sus acciones.

La operación para tomar control de la firma con sede en Estados Unidos convertirá a Marfrig en el segundo mayor productor de carne del mundo, por detrás de JBS SA. En Uruguay, el grupo brasileño tiene cuatro plantas frigoríficas.

Marfrig dijo además que estaba considerando vender una unidad que posee en Estados Unidos, Keystone Food LLC, a fin de pagar con este ingreso los US\$ 1.100 millones en préstamos que tomará para concretar la adquisición de 51% de National Beef, el cuarto mayor procesador de carne en el país norteamericano.

Marfrig, cuyas acciones llegaron a subir 20% tras el anuncio de la adquisición, dijo que espera completar la venta de Keystone, que además de carne de vacuno procesa también carne de pescado y ave, en el segundo trimestre.

"Vemos pocas posibilidades de que esto no ocurra dentro del plazo estimado", dijo el jefe financiero de la compañía, Eduardo Miron, durante una conferencia telefónica con analistas. "Keystone es un activo interesante que ha tenido un buen desempeño", declaró.

Marfrig declinó revelar los nombres de posibles ofertantes ni el valor estimado de Keystone. JP Morgan gestionará la venta, indicó. La gerencia de Marfrig dijo que las dos transacciones se estaban llevando a cabo de forma paralela, aunque no aclaró si de todas formas concretará la adquisición de National Beef si no encuentra un postor apropiado para Keystone.

Rabobank financiará el 100% de la compra National Beef, sostuvo Marfrig. Las acciones de la empresa brasileña operaban con un alza de casi 16% esta tarde en la Bolsa de San Pablo.

Marfrig compra fatia da National Beef e se torna 2ª maior empresa de carne no mundo

09/04/18 - por Equipe BeefPoint Fonte: Folha de São Paulo.

A brasileira Marfrig, companhia de proteína animal, anunciou nesta segunda-feira (9) que chegou a um acordo para a aquisição de 51% das ações da National Beef, quarta maior processadora de carne bovina dos Estados Unidos.

A Marfrig pagará US\$ 969 milhões (R\$ 3,3 bi) pela participação e, concluída a transação, passará a ser a segunda maior processadora de carne bovina do mundo, com um faturamento consolidado de R\$ 43 bilhões. A primeira é a também brasileira JBS,

A transação avaliou a National Beef em US\$ 2,3 bilhões, incluindo dívidas –o valor pago pela Marfrig equivale a um múltiplo de transação EV/Ebitda UDM (valor da empresa em comparação ao Ebitda ajustado) de 4,4 vezes. A transação será integralmente financiada por um empréstimo do banco Rabobank.

A National Beef exporta para 40 países, incluindo o Japão e a Coreia do Sul, mercados atualmente fechados às exportações de carne brasileira.

“Com a transação, teremos operações nos dois maiores mercados de carne bovina do mundo, chegaremos a países consumidores extremamente sofisticados e conseguimos crescer mantendo uma rigorosa disciplina financeira”, disse Martín Secco, presidente da Marfrig, em nota.



Desde 2011, a National Beef é controlada pela holding de investimentos americana Leucadia National Corporation, que detinha 79% de participação.

Após a conclusão da operação, a Leucadia transferirá o controle acionário para a Marfrig e se manterá como acionista minoritário da empresa, com uma fatia de 31% do capital total. A US Premium Beef, associação de produtores americanos, ficará com 15% e outros acionistas com os 3% restantes.

Tanto a Leucadia quanto os demais investidores se comprometeram a manter suas ações da National Beef por um período mínimo de cinco anos.

A Marfrig passará a consolidar em seu balanço 100% dos resultados da National Beef.

Em 2017, a Marfrig apresentou um Ebitda (lucro antes de juros, impostos, depreciação e amortização) ajustado de R\$ 1,7 bilhão. Com a National Beef, estimativa passa para R\$ 3,4 bilhões.

No ano passado, a dívida total da Marfrig representava 4,55 vezes seu Ebitda. Com a aquisição, o indicador deve cair para 3,35 vezes.

Outra medida para a redução da alavancagem (dívida líquida dividida pela geração de caixa) da Marfrig é a decisão de vender a Keystone Foods. A Marfrig tem o objetivo de chegar a uma alavancagem de 2,5 vezes até o fim de 2018.

“A compra da National Beef reflete nossa estratégia de crescimento sustentável”, diz Marcos Molina, presidente do Conselho de Administração da Marfrig.

#### Capacidade

Fundada em 1992, a National Beef faturou, segundo a Marfrig, US\$ 7,3 bilhões (R\$ 24,3 bilhões) no ano passado e tem capacidade de abate de 12 mil cabeças por dia.

A empresa é sediada em Kansas City, no estado do Missouri, e tem duas unidades de processamento em Dodge City e Liberal, no Kansas, que respondem por cerca de 13% da capacidade total de abate do mercado americano, afirma a Marfrig.

Segundo a empresa, os principais executivos da National Beef permanecerão na companhia, que segue sob a gestão de Tim Klein. O Conselho de Administração da National Beef será composto por nove membros: cinco indicados pela Marfrig, dois pela Leucadia e dois por acionistas minoritários.

O Rabo Securities USA foi o consultor financeiro da Marfrig na transação de compra. O escritório de advocacia Linklaters atuou como conselheiro internacional. No Brasil, a assessoria legal foi feita pela Lefosse Advogados.

10/04/18 - por Equipe BeefPoint A compra do National Beef pela Marfrig pode ser um jogo de ganhanha para as duas companhias.

O National Beef vai ter acesso a um bom volume de carne no Brasil e a Marfrig avança sobre mercados impossíveis de serem atingidos no momento, como os do Japão e da Coreia do Sul.

As empresas têm de resolver, porém, o endividamento elevado do grupo que elas formam. A venda da Keystone Foods, como já anunciado, alivia.

A operação deve ter sido muito bem estudada antes de concretizada. Desta vez, não há a participação do BNDES (Banco Nacional de Desenvolvimento Social), incentivador da formação de gigantes brasileiros, mas a de uma instituição financeira voltada exclusivamente para o agronegócio: o Rabobank.

O sucesso do negócio daqui para a frente dá alívio também para o sistema financeiro, fornecedor de crédito para a Marfrig nos anos recentes.

A participação de 51% da Marfrig no National Beef a coloca no que ela mais sabe fazer: atuar no mercado de carne bovina.

Além disso, dá fôlego para a empresa avançar sobre mercados que remuneram melhor as carnes com matéria-prima dos Estados Unidos.

A carne brasileira é mais competitiva em preços, mas não é do tipo premium como o produto dos EUA, do Uruguai, da Austrália e da Nova Zelândia. As empresas vão ter os dois tipos de carne para atender as diversas demandas.

É a segunda vez que o National Beef vem para as mãos de brasileiros. Há dez anos, a JBS chegou a anunciar a compra da empresa pelos mesmos US\$ 970 milhões atuais. O governo norte-americano não permitiu a transação.

Desta vez, a operação também deve passar por avaliações de praxes, mas as chances de concretização são maiores do que à época da compra feita pela JBS.

Esse perfil de empresa multinacional do setor de carne bovina facilita a escolha das vendas para o mercado certo com o produto adequado.

A Marfrig ganha musculatura nos Estados Unidos e a National Beef passa a usufruir da presença mundial da Marfrig. Em 2012, as vendas da empresa brasileira somavam 2,1 milhões de toneladas de produtos processados, o que a tornava uma das líderes mundiais nesse setor.

Por problemas financeiros, a empresa teve de se desfazer de várias unidades. Nesta nova fase, tudo dependerá de como as novas operações serão administradas.

A análise é de Mauro Zafalon, para a Folha de São Paulo.



## **China cercano a concentrar la mitad de las exportaciones de proteína animal de Brasil**

Fonte: Abrafrigo 12 de abril de 2018 - Mercado chinês se aproxima cada vez mais de responder por 50% das exportações de proteína bovina do Brasil

Com mercado chinês se aproximando cada vez mais de representar 50% das exportações de carne bovina in natura e processada, o comportamento das vendas do produto brasileiro no mercado internacional vem mantendo em 2018 um ritmo de crescimento que não se verificava há anos.

Segundo informações da Associação Brasileira de Frigoríficos (Abrafrigo), que compilou os dados finais de movimentação de março divulgados pelo Ministério do Desenvolvimento, Indústria e Comércio Exterior (MDIC), mesmo sem contar com clientes tradicionais como a Rússia, o primeiro trimestre de 2018 foi encerrado com vendas de 393.083 toneladas que representaram um faturamento de US\$ 1,589 bilhão para o país, ou seja: crescimento de 19% em quantidade e de 21% na receita em relação a 2017, quando o país exportou 331.253 toneladas que renderam US\$ 1,299 bilhão.

De acordo com a Abrafrigo, o mercado chinês, através das importações diretas pelo continente somadas às que entram pela cidade estado de Hong Kong, efetuou compras de 171.249 toneladas no trimestre o que representou 46,1% das exportações brasileiras. Para se ter uma ideia, no primeiro trimestre de 2017 as vendas para aquele mercado representavam 35,8%.

O mês de março seguiu os resultados dos dois primeiros meses do ano e também foi muito bom para a carne bovina brasileira no mercado internacional. A comercialização atingiu 148.904 toneladas e a receita US\$ 590,2 milhões, crescimento respectivo de 20% e 21% sobre março de 2017.

Depois da China, o Egito, outro cliente importante, voltou às compras de maneira muito forte com movimentação de 47.842 toneladas contra apenas 15.004 toneladas em março de 2017. O Chile também ampliou suas importações de 12.592 toneladas em março de 2017 para 23.888 toneladas em março de 2018.

Segundo a Abrafrigo, os resultados no mercado internacional hoje constituem importante válvula de escape para compensar a queda nas vendas no mercado interno, que não vem apresentando recuperação desde que foi deflagrada a Operação Carne Fraca da Polícia Federal no início de 2017. A Operação da PF, por sinal, também continua refletindo até hoje em queda de vendas para os países integrantes da União Europeia. No entanto, para o mercado russo, que já chegou a ser o maior importador da carne bovina brasileira, há perspectivas de reabertura das importações ainda no primeiro semestre de 2018, o que pode melhorar ainda mais o desempenho do país nos próximos meses.

## **Exportaciones de carnes bovinas se registrarán a través del Portal Unico de Comercio Exterior**

12/04/18 - por Equipe BeefPoint A partir desta quinta-feira (12), as exportações de produtos e subprodutos de origem animal submetidas ao Serviço de Inspeção Federal (SIF), embarcados em quaisquer terminais do país, devem, obrigatoriamente, ser registradas por meio do Novo Processo de Exportações e no Portal Único de Comércio Exterior.

A medida atinge os embarques de carnes de ave, bovina e suína de 410 empresas, que em 2017 embarcaram US\$ 14,9 bilhões. O Ministério da Agricultura, Pecuária e Abastecimento (Mapa) é um dos primeiros a aderir ao Portal, por meio do Sistema de Vigilância Agropecuária Internacional (Vigiagro). Além do MDIC e da Receita Federal, que coordenam a implantação do Portal Único, outros 20 órgãos do governo participam do projeto.

Com o Portal, a troca de informações sobre o produto a ser embarcado será feita eletronicamente, sem a necessidade de emissão e conferência de papel, baseada no histórico do exportador. As exportações serão classificadas em diferentes níveis de fiscalização, obedecendo gerenciamento de risco (verde, amarelo, vermelho e cinza, com o verde gerando a liberação automática da carga e o cinza exigindo investigação e auditoria). O trâmite, que demorava vários dias, será concluído em poucos minutos, com ganho de eficiência no controle governamental e redução de custo para os exportadores.

Os exportadores terão até o dia 2 de julho para migrar completamente suas operações para o Novo Processo de Exportações do Portal Único de Comércio Exterior. Os módulos de registro atuais permanecerão disponíveis apenas para consultas e retificações dos registros feitos anteriormente. O desligamento dos antigos sistemas de exportação obedecerá a cronograma disponível no portal Siscomex.

**Redução de prazo e de custo**

O ministro da Agricultura, Pecuária e Abastecimento, Blairo Maggi, destaca que, a partir de agora, o processo para exportação de carnes será mais ágil, inteligente e eficiente, garantindo importante redução de prazos e custos para o exportador, sem prejuízo do controle fundamental exercido pelo ministério.

O secretário de Defesa Agropecuária do Mapa, Luis Rangel, prevê que até o fim do ano o Portal estará disponível para as demais cadeias exportadoras do agronegócio. "Mais de 300 mil operações de fiscalização já passam a contar com um fluxo mais célere e menos burocrático. Novas funcionalidades estão sendo desenvolvidas para atender todas as exportações do agronegócio".



## Benefícios

Entre os benefícios do novo Portal estão a eliminação de documentos; redução em 60% no preenchimento de informações; redução de 40% do prazo médio para a operação de exportação; integração com a Nota Fiscal Eletrônica (NFE); automatização da conferência de informações, entre outras melhorias.

O Portal Único de Comércio Exterior é a principal iniciativa de desburocratização e facilitação do comércio exterior brasileiro. O ministro da Indústria, Comércio Exterior e Serviços, Marcos Jorge, destaca que já foi possível reduzir em mais de 40% os prazos médios de exportação por meio do Novo Processo de Exportações.

## URUGUAY

### **Menor oferta genera negocios por novillos gordos a más de US\$ 3,20**

Abril 13, 2018 Por Blasina y Asociados, especial para El Observador

Elevada demanda por todas las categorías con perspectivas de precios que se mantendrán firmes

El mercado de la hacienda gorda mantiene su firmeza y elevada demanda por todas las categorías, lo que se ve reflejado en un aumento de precios. La oferta es escasa y, como consecuencia, hay llegadas de cuadrillas kosher postergadas en algunas industrias

Santiago Sánchez, consignatario de Victorica y Asociados, dijo que los negocios por los mejores novillos se ubican en US\$ 3,20 por kilo carcasa.

En negocios puntuales, por ganados especiales, se puede conseguir algún centavo más, hasta US\$ 3,30.

Para la vaca, que tiene una colocación más fácil que el novillo, la referencia es entre US\$ 3 y US\$ 3,05 por los mejores ganados.

En ese marco, las entradas a planta son de cuatro a siete días.

"El productor está con un poder de negociación mucho mayor, pero no hay ganados para vender porque la mayoría de los ganados que tendrían que haber salido en abril-mayo se vendieron antes", dijo Sánchez.

Faena vacuna por debajo de las 50.000 cabezas

La faena vacuna detiene la suba luego de un primer trimestre con faena récord. En la semana cerrada el 7 de abril totalizó 45.363, 13% por encima de las 40.063 de la semana anterior y 5% por debajo de las 47.866 cabezas del mismo período del año anterior.

La participación de vacas fue de 55% (24.971 cabezas), cinco puntos porcentuales más que la semana anterior y con el mismo porcentaje que en igual período del año pasado. Del total de la faena el 42% fueron novillos (19.091), en la menor presencia para esta categoría en lo que va del año.

Precio de exportación supera los US\$ 3.500 por quinta semana consecutiva

El precio de exportación de la carne vacuna sigue firme y promedió US\$ 3.736 la tonelada en la semana cerrada el 7 de abril, el valor más alto desde la última semana de febrero, logrando su quinta semana consecutiva arriba de US\$ 3.500 por tonelada.

El ingreso promedio acumulado en lo que va del año es de US\$ 3.526 por tonelada, 3,3% arriba que en mismo período de 2017. En las últimas cuatro semanas móviles el promedio por tonelada alcanzó los US\$ 3.623.

El volumen acumulado en lo que va del año es de 135.044 toneladas, 14% superior a las 118.822 del año anterior.

Para carne ovina el valor promedio por tonelada fue de US\$ 4.396, un 16% por encima que los US\$ 3.774 de la semana anterior (promedio más bajo desde julio de 2017). En lo que va del año, sin embargo, la tendencia es de suba, con un promedio de US\$ 4.529, un 11% arriba de los US\$ 4.089 en igual período un año atrás.

El volumen acumulado sin embargo es 7% menor al de ese período del año pasado (4.274 toneladas contra 4.594 toneladas).

Con un primer trimestre que atravesó la mayor faena de novillos desde que se tienen registros y un mercado de novillo gordo que aguantó esta situación por encima de los US\$ 3, la pos zafra puede ser interesante.

La menor oferta que se prevé habrá durante el resto del año asegura una firmeza de precios por las haciendas.

### **Ingresos por exportaciones de carnes crecieron 21%**

Abril 7, 2018 En el primer trimestre de este año se llegó a US\$ 533,2 millones

Considerando el total de las exportaciones del sector cárnico nacional, en lo que va de 2018 (del 1° de enero al 31 de marzo) ingresaron al país US\$ 533.273.000, lo que significa un 21% más en relación al ingreso logrado a esta altura del año pasado (US\$ 441.072.000), según datos aportados este viernes a El Observador por técnicos del Instituto Nacional de Carnes (INAC).

Carnes de bovino





En el caso de la carne bovina, las exportaciones aumentaron 21% si se mide en dólares y crecieron 16% medido en volumen (considerando en ese caso el peso canal).

Se dirigieron al exterior 87.477 toneladas (peso embarque) e ingresaron US\$ 443.445.000.

Mejores precios de exportación

Este año el precio promedio de la tonelada de carne vacuna exportada (125.508 toneladas peso canal) se ubica en US\$ 3.533, por encima de los US\$ 3.391 del año pasado a esta altura.

En el caso de la carne ovina exportada (3.993 toneladas peso canal) está en US\$ 4.584 por tonelada, superando el registro que había al 31 de marzo de 2017, ubicado en US\$ 4.125.

## PARAGUAY

### Menos exportación de carne en 2018

12 de Abril de 2018 El informe preliminar respecto a la exportación de productos y subproductos de origen animal, desde el 1 de enero al 31 de marzo de este año, señala que los envíos disminuyeron frente a lo registrado en el mismo periodo del año pasado. Rusia y Chile siguen siendo los países que encabezan la lista de países que compran carne de nuestro país.

Así se tiene que por tercer mes consecutivo de este año la exportación de productos y subproductos cárnicos sufrió merma, según el informe mensual del Servicio Nacional de Calidad y Salud Animal (Senacsa).

De acuerdo a los datos del organismo sanitario estatal, en el primer trimestre del 2018 se exportaron 104.707 toneladas de productos y subproductos de origen animal, 10,6% menos que el mismo periodo del año 2017, que fue de 116.547 toneladas.

En cuanto al ingreso de divisas, se señala que las exportaciones de este sector en los tres primeros meses de este año generaron US\$ 312.285.853, un 7,84% menos que en el mismo lapso del 2017 (US\$ 338.857.860).

Los países que más compraron carne bovina de nuestro país en lo que va del 2018 son, en orden de importancia, Rusia, Chile, Israel, Brasil, Vietnam, Kazajistán, Taiwán, Hong Kong, Kuwait, Uruguay, Líbano y Suiza.

Por su parte, los principales mercados compradores de menudencias bovina en ese periodo de tiempo fueron Rusia, Vietnam, Hong Kong, Gabón, Israel, Perú, Jordania, Congo, Colombia y Singapur.

En cuanto a la exportación de carne de ave, de enero a marzo de este año, fue de 592 toneladas, lo que produjo el ingreso de US\$ 932.387. Rusia, Vietnam y Angola son los principales compradores

La carne porcina se exportó 307 toneladas en los tres primeros meses del año, generando el ingreso de US\$ 929.343. Rusia compró el 96%, dicen los datos.

### Turquía está interesada en comprar carne paraguaya

13 de abril de 2018 | mientras, programa de procreo sigue en marcha

Turquía sería el siguiente destino de la carne paraguaya. Ese país enviará una misión para auditar las plantas frigoríficas de nuestro país próximamente. En tanto que el programa de aumento de tasa de procreo benefició hasta ahora a 55 pequeños productores; 809 vacas fueron inseminadas y esperan los primeros terneros genéticamente mejorados de pequeños productores pecuarios.

“Tenemos información vía telefónica todavía, de que el documento de Paraguay fue valorado, evaluado y ha sido satisfactorio. Queda ahora el segundo paso de que venga una auditoría a nuestro país”, dijo el Dr. Hugo Idoyaga, presidente del Servicio Nacional de Calidad y Salud Animal (Senacsa).

Próximamente estarán recibiendo la agenda de una posible visita que sería en la brevedad posible, indicó.

“De ser favorable todo el proceso será un mercado más que se va a disponer y esto permitiría presentar al ámbito exportador nuestro, o sea a las empresas exportadoras, y seguramente incorporarán dentro del posible destino de sus productos”, comentó Idoyaga.

Respecto a las observaciones que hizo el Servicio Agrícola Ganadero (SAG) de Chile, Idoyaga dijo que están finalizando las documentaciones sobre las observaciones con las correcciones respectivas, y hoy estarían remitiendo al organismo chileno. Son tres las firmas pendientes de habilitación: Frigochorti, Concepción y Frigochaco. La planta directamente inhabilitada es Frigorífico Guaraní, apuntó.

Programa de procreo

Por otra parte, el programa de aumento de tasa de procreo benefició hasta ahora a 55 familias totalizando 2.000 vientres, de los cuales 809 vacas fueron inseminadas y para los meses de junio, julio y agosto nacerán terneros genéticamente mejorados, explicó el viceministro de Ganadería, Marcelo González Ferreira.

El programa incluye tareas de diagnóstico para mejorar la situación sanitaria, manejo reproductivo, nutricional y administrativo-financiero de las fincas, con el objetivo de aumentar la cantidad de terneros nacidos y comercializados. Se busca generar sistemas de fincas modelos que sean replicadas a nivel



país, señaló. “El objetivo principal de este programa es aumentar un 5% en la tasa de procreo anual de los pequeños ganaderos favorecidos por el programa. Eso requiere de alianzas estratégicas en la ganadería”, según el viceministro.

En ese sentido, González Ferreira estima que aumentando solo el 1% de la tasa de procreo se podrá producir 25.000 toneladas más de carne para el consumo interno y la exportación.

Actualmente existen más de 95.000 tenedores de ganado dentro de la ganadería familiar que poseen unas cuatro millones de cabezas de ganado bovino.

González Ferreira sostuvo que los índices de productividad de este segmento son bajos y que eso se debe, principalmente, a la falta de conocimiento, tecnología y asistencia técnica.

Datos de las exportaciones

La exportación de carne, según informe de Senacsa de los primeros tres meses de este año, fue de 104.707 toneladas de productos y subproductos de origen animal; 10,6% menos que el mismo periodo del 2017, que fue de 116.547 toneladas.

En cuanto al ingreso de divisas, el informe señala que las exportaciones de este sector en los tres primeros meses de este año generaron US\$ 312.285.853, un 7,84% menos que en el mismo periodo del 2017 (US\$ 338.857.860). Los países que más compraron carne bovina de nuestro país en lo que va del 2018 son, en orden de importancia, Rusia, Chile, Israel, Brasil, Vietnam, Kazajistán, Taiwán, Hong Kong, Kuwait, Uruguay, Líbano y Suiza.

## UNIÓN EUROPEA

### REINO UNIDO: Scotch Beef lanzó campaña en Londres

13 April 2018 QMS - Quality Meat Scotland - Four million Londoners are currently being targeted with eye-catching Scotch Beef billboard advertising as part of a high-impact campaign being run by Quality Meat Scotland (QMS), with a focus on London and the Home Counties.

The campaign includes the use of high-impact billboard adverts which are currently appearing in carefully-selected locations across the city of London. The impressive array of advertisements aims to build awareness of Scotch Beef and trust in the brand, reinforcing the message that it is the best beef money can buy.

Digital screens are currently located in high footfall commuter areas of London such as Waterloo station, Liverpool Street station and Fenchurch Street station. The ads carry messaging on the quality of Scotch Beef PGI. Traditional and digital adverts outside retailers are also in place, targeting shoppers during the final stages of their purchase journey.

The billboard advertisements alone are estimated to reach over four million Londoners featuring various cuts of Scotch Beef including a focus on roasting joints.

The two-month long campaign, which QMS is delivering on behalf of the Scottish red meat industry, is set to improve the already strong brand awareness of Scotch Beef PGI in the key GB regions. Currently 89% of the target market in Scotland recognise the Scotch Beef PGI logo and 37% in Greater London and the Home Counties are aware of the brand.

In addition to the billboard activity throughout March and April, over 8.2 million consumers will have been targeted across GB via press, digital, broadcast and billboard advertising, to inform, educate and inspire them to use Scotch Beef when they cook.

A radio partnership with Classic FM is communicating with the target market through a trusted and loyal medium throughout Greater London, the Home Counties and Scotland, early feedback has suggested that this partnership has been incredibly successful, helping QMS reach a key target market.

There are also features in key magazines such as Good Housekeeping, The Observer Magazine, The Sunday Times and The Telegraph throughout the campaign, to ensure the target market associates Scotch Beef with quality, heritage and premium provenance.

The 2018 campaign is being complemented by a range of PR activities which focus on roasting joints as the core cut, celebrating eating occasions, and the ritual of sitting round the table with family and friends to enjoy a delicious roast dinner.

New research, commissioned by QMS as part of the campaign, shows that the British tradition of sitting down to a family meal together is in danger of becoming a thing of the past, with 57 per cent of people no longer sitting down to a daily meal with their family or housemates.

Londoners are least likely to eat with family or housemates, with only a quarter (26 per cent) sitting down to eat together on a daily basis – while at the opposite end of the scale, in Wales, 53 per cent of consumers dine as a household every day.

Working hours were named as the biggest barrier to eating together (48 per cent), while a quarter of respondents were too busy with hobbies and leisure pursuits to make time for regular meals with loved ones or friends.



Even when people do get around the table, good food and conversation often lose out to TV and mobile phones. A staggering 64 per cent of Brits regularly watch TV while eating; one fifth browse the internet on their mobile; 19 per cent use a tablet; while 15 per cent regularly text or email over dinner. Six per cent even chat via social media or use Facetime or Skype as they eat.

During this campaign, many of the activities is focusing on roasting joints. Whether it's a Sunday roast with all the trimmings or a midweek meal, a roast offers an ideal time to enjoy good food and good conversation.

Commenting on the campaign, Suzie Carlaw, Marketing Controller at Quality Meat Scotland said: "We have worked incredibly hard over the last few years to build the Scotch Beef brand and every single person involved in the process, from farm to fork, should be proud of its success to date.

"The very positive image of Scotch Beef PGI which the QMS campaign aims to further cement in London is particularly important. London consumers greatly value the quality of products they buy more than the average British consumer.

"The campaign will continue to build on Scotch Beef's reputation as the best possible beef from Scotland, increasing awareness and sales."

## **ESTADOS UNIDOS**

### **CHINA RESPONDE A MEDIDA APLICADAS**

#### ***Aumento de aranceles sobre carne bovina tendrá escaso impacto***

10 April 2018 US - The proposed higher Chinese tariffs on US beef will have a minimal immediate impact since we export very little beef into mainland China, reports Steiner Consulting Group, DLR Division, Inc.

There was a lot of hope about expanding those exports in the coming years and the higher tariffs could make that more difficult, especially considering strong competition on value from South American markets.

Additionally, at this point it does not appear that China will impose a higher tariff on US cattle hides, at least following our reading of the second list. However, should the trade "skirmish" with China expand, it is possible that hides will be included in future lists. Please click here for list (in Mandarin).

China is the largest global buyer of US cattle hides and those purchases also represent a significant portion of US hide production. USDA reports hide exports both in terms of units sold (i.e. whole hides) and the value of those sales.

The latest data available is for February and it shows total hide sales for the month were 809,895 pieces, 5 per cent less than a year ago. The value of those hide sales was reported at \$45.2 million, which puts the average price per piece at around \$56/hide, pretty close to USDA quoted prices.

Total US bovine hide exports in February were 1,245,398 pieces, 7.9 per cent less than a year ago. In the first two months of this year China has accounted for about 63 per cent of all the bovine hides that have gone into export markets. Please keep in mind this is for whole hides that meet weight specs.

There are some additional hide exports but the volume is relatively small. US bovine hide exports to China in 2017 were near 10.6 million pieces, 61.7 per cent of all US exports. But accounting for a large share of exports may not mean much if those exports are a small share of domestic production.

Leather markets are global and the US is a key supplier due to its quality and consistency. As the global economy continues to expand, demand for leather goods, be this for consumer products or automobiles, has continued to expand. The red line in the following chart shows the ratio of US hide exports to China vs. federally inspected slaughter.

In other words, how many whole hides went to exports relative to the number of feedlot cattle that were slaughtered during that month. In the last five years the ratio has been around 33 per cent while overall hide exports have accounted a little over half of FI cattle slaughtered.

The hide represented the single most valuable by-product that packers derive from animals they slaughter. USDA reports cattle by-product values (also called drop credit) every week. The chart below illustrates the breakdown of the various product relative to the contribution of each item to the overall credit.

According to USDA, for the week ending 6 April the drop credit was \$9.80/cwt live. On a 1400 pound steer this implies a total drop credit of \$137. The value of whole butt branded hides was quoted at \$58/piece, making up 44 per cent of the entire by-product value.

At this point it is speculative as to the impact of a future Chinese tariff on hides. But consider that based on current values, a 25 per cent drop in the value of hides would lower the derived value from the hide by about \$14.5/head or about \$1/cwt live basis. Current fed cattle price is about \$115/cwt live basis.

#### ***China no incrementaría aranceles para cueros y menudencias***

April 10, 2018 Beef but not cattle hides are on China's tariff list. ( . ) Possibly more important than products on the tariff lists, are what's left off of them.



After a week of volatile markets driven by fears of a trade war, Chinese President Xi Jinping soothed traders with a vow of a “new phase” of opening China’s economy. In a speech Tuesday, Xi announced plans to lower tariffs for autos and other products, and enforce the legal intellectual property of foreign firms.

Trade war saber rattling hammered most agriculture markets last week. The Trump administration released its list of imports from China worth \$50 billion on which it would impose 25% tariffs. China, in turn, threatened tariffs on \$50 billion worth of U.S. products.

Market analysts, however, say what the U.S. and China have left off their tariff lists says as much as what’s on them. For instance, the U.S. would impose tariffs on flat-screen TVs, but not on clothes. China would impose tariffs on U.S. whiskey but not on beer.

For the U.S. beef industry, China has proposed a 25% tariff hike on fresh, chilled and frozen U.S. beef products. That would be on top of the 12% tariff already in place, and comes less than a year after the U.S. and China agreed to renew U.S. beef imports after a 13-year ban.

Possibly more important for cattlemen in the short term, however, is what China left off its list – hinds and offal.

China spends about \$1 billion annually on U.S. animal hides to make shoes, car interiors and furniture upholstery. For comparison, the U.S. Meat Export Federation said beef exports to China in the second half of 2017 (when China lifted its ban) totaled 3,020 metric tons valued at \$31 million. In other words, the Chinese hide market last year was 33 times greater than the beef they purchased.

Further, the trade war rhetoric has had little impact on U.S. hide and offal prices, says Sterling Marketing president John Nalivka. Yes, those prices are lower, but they’ve been on a downward trend since last September.

“The beef drop credit last week was the lowest since March 6, 2010,” Nalivka says. “That week the beef drop credit was at \$133.75 per head.”

From 2010, the beef drop credit climbed to a peak of \$232.32 per head in August of 2014, Nalivka says. Last week the beef drop credit calculated by Sterling Marketing was \$145.78.

“Declines in the drop credit have been ongoing since last September,” Nalivka says. “The decline is a result of increasing cattle slaughter numbers, and hence, more hides available.”

Nalivka says the value of hides are roughly two-thirds of the drop credit value, and those prices are likely to see further declines as beef slaughter rates are projected to increase another 4% in 2018.

Still, the U.S. is the largest supplier of animal hides and skins to China’s \$220 billion leather industry, and it’s unlikely the hide industry would become a tariff target.

### ***Secretario Perdue: no descarta la negociacion***

Mark Weinraub, Reuters April 11, 2018 U.S. Agriculture Secretary Sonny Perdue testifies before a Senate Appropriations Agriculture, Rural Development, Food and Drug Administration, and Related Agencies Subcommittee hearing on the FY2019 budget request for the Agriculture Department, on Capitol Hill in Washington, U.S., April 11, 2018.

U.S. Agriculture Secretary Sonny Perdue on Wednesday said negotiations were the preferred method for easing trade tensions between China and the United States.

“Our first goal is to negotiate ourselves out of the saber rattling that has occurred and to make sure that these market disruptions do not have a permanent impact,” Perdue said at a hearing of the Senate Appropriations Subcommittee on Agriculture, Rural Development, Food and Drug Administration and Related Agencies.

If negotiations fail, Perdue said he would deploy funds authorized by the recently passed \$1.3 billion spending bill to mitigate pain to American farmers caused by a trade dispute, but he did not specify which programs would be used.

Perdue admitted that he would not have used the same negotiating style as U.S. President Donald Trump, who threatened to impose \$100 billion worth of tariffs on Chinese imports after Beijing announced plans to slap tariffs on 106 U.S. goods including soybeans.

He added that he was pleased that Chinese President Xi Jinping was showing some willingness to be flexible.

Xi on Tuesday promised to open the country’s economy further and lower import tariffs on products - including cars - in a speech seen as conciliatory amid rising U.S.-China trade tensions.

Following Xi’s speech U.S. President Donald Trump expressed confidence the world’s two largest economies would come through an ongoing trade spat and “make great progress together.”

### ***Escaso crecimiento de las exportaciones en el Mercado chino***

April 12, 2018 U.S. President Donald Trump on Thursday said he thinks a conversation he had with China’s President Xi Jinping has had an impact on U.S. beef exports to China, where American exporters are now selling “a lot” of beef.



The volume of U.S. beef exported to China is a small slice of the American beef export market, according to U.S. Department of Agriculture data.

Beijing lifted a 14-year ban on U.S. beef imports about 10 months ago, but the country's purchases are dwarfed by sales to Japan, Mexico and South Korea.

Sales of beef to China this year represent less than 1 percent of U.S. beef exports. About 1,100 tonnes of U.S. beef has been shipped to China this year through April 5 - while another 274 tonnes were sold but yet to ship, according to the latest USDA data. Overall, the U.S. has sold nearly 360,000 tonnes of beef for export this year, of which almost 211,000 tonnes have been shipped.

Trump, speaking at a White House meeting with legislators from top agriculture states, including Iowa Governor Kim Reynolds, said his conversation with Xi "made a big impact." Trump did not say when this conversation with Xi took place.

The lawmakers were advocating for the president to ease tariff-related strains on American farmers worried about rising tensions between the United States and China, a top agricultural export market.

"I think, Governor, that made a big impact. And they're selling a lot of beef in China. That hadn't been for 14, 15 years. They were not allowed to sell beef in China," Trump said.

China proposed tariffs last week on U.S. beef, soybeans and other agricultural goods in the deepening trade dispute.

Some U.S. beef shipped to Hong Kong is later brought into mainland China. If beef sales to Hong Kong of 43,055 tonnes year-to-date were included, the combined sales would account for about 12 percent of the U.S. beef export market.

Last year, about 3,000 tonnes of U.S. beef valued at \$31 million was shipped to China, making it the No. 18 market.

"When China lifted the ban, everyone got all whipped up," said CHS Hedging analyst Steve Wagner. "But I don't think demand is going to increase substantially. It will be incremental."

Overall U.S. beef exports were up about 10 percent so far in 2018, USDA data showed.

"Exports have been good but they have not been good because of China," Wagner said.

### **Exportaciones, principales destinos y condiciones de acceso**

April 11, 2018 Several factors influence U.S. beef trade with international supply and demand being the leaders. Factors influencing supply may include weather, subsidy programs, and expected future profitability while demand can be further decomposed into quality of product, food safety issues, international relations among countries, and tariff rates among others. This article's focus will be tariff rates the United States beef industry faces with major beef export markets and how that compares with tariff rates of other beef exporting countries to those same destinations.

In 2017, the United States exported more than 678 million pounds of beef and variety meats to Japan with a value nearing \$1.89 billion (US dollars) based on data compiled by the United States Meat Export Federation (USMEF). Japan primarily imports beef from Australia, United States, New Zealand, and Canada. However, Australia and the United States are the two main players. Based on data compiled by Meat and Livestock Australia (MLA), Australia supplied 50.2 percent of Japan's imported beef in 2017 while the United States supplied 41.8 percent on a tonnage basis, not including variety meats. The U.S. has slowly regained market share in Japan following BSE in late 2003 with the 2017 trade year being reminiscent of the volume trade distribution prior to 2003.

South Korea imported \$1.22 billion worth of beef and variety meats in 2017 accounting for nearly 406 million pounds of product (USMEF). Information from MLA reports that the United States accounted for 46.8 percent of total beef imports to South Korea by volume while Australia accounted for 45.5 percent by volume. Again, the United States has slowly been regaining beef market share in Korea since the first case of BSE. However, prior to BSE, the United States was the source of more than 68 percent of beef imports to Korea.

Canada and Mexico have consistently been top destinations for U.S. produced beef though Hong Kong has been an upstart the past few years and actually exceeded Canada in 2017. Mexico imported over 524 million pounds of beef and variety meats in 2017 worth nearly \$980 million while Canada imported nearly 257 million pounds of beef and variety meats worth nearly \$796 million. Hong Kong imported 288 million pounds of U.S. beef and variety meats worth \$884 million in 2017.

The aforementioned values are meant to provide perspective of how much beef is being exported and the value of those products to major beef export destinations. The United States beef export market is fairly strong with its primary competitor being Australia and to a smaller extent Brazil and India. Though the United States leads the way from a beef quality, food safety and quantity supplied standpoint, there is work to be done on the tariff and trade agreement side of the coin.

The United States does not currently face a tariff on beef imported into Canada and Mexico due to the North American Free Trade Agreement (NAFTA). Similarly, there is no tariff on beef exported to Hong Kong. The absence of tariffs is positive toward the domestic beef and cattle industries as it keeps the price



of our beef products relatively low for importing countries. Understanding that Canada and Mexico are major destinations for U.S. beef, it is important that the renegotiated NAFTA terms are favorable to the beef industry.

Beef exports to Japan have been a focal point since the Japan-Australia Economic Partnership started the process of lowering beef import tariffs from Australia to Japan. In 2018, Australian frozen beef will face a tariff of 27.2 percent while chilled beef will face a 29.9 percent rate. These rates will decline to 19.5 percent on frozen beef and 23.5 percent on chilled beef over an 18 and 15 year period respectively. U.S. beef headed for Japan faces a 38.5 percent duty with a safeguard level that can escalate that tariff to 50 percent. U.S. beef currently faces a 24 percent tariff rate in Korea, but this will be reduced to zero by 2026. Australia currently faces a 26.6 percent tariff.

Based on current trade agreements, the United States will be less competitive with Australia from a price standpoint in Japan unless a trade agreement can be established. The current agreement with Korea makes U.S. beef extremely competitive with Australia while NAFTA renegotiations will play a major role in the business done with our two closest neighbors. It may take a while before the market realizes all of the implications.

### **Embarques a febrero aumentaron 11 por ciento**

TheCattleSite News Desk 10 April 2018 US - February exports of US pork, beef and lamb were higher than a year ago in both volume and value, according to statistics released by USDA and compiled by USMEF. February beef export volume improved 11 per cent from a year ago to 100,593 mt, while export value increased 18 per cent to \$599.8 million. Although this was the lowest monthly value total since May 2017, it is the highest on record for the month of February. January-February volume was 206,079 mt, up 10 per cent from the first two months of 2017, while export value was 20 per cent above last year's pace at \$1.22 billion.

Exports accounted for 13.6 per cent of total beef production in February, up one full percentage point from a year ago. For muscle cuts only, the percentage exported was 10.8 per cent (up from 10.1 per cent last year). Through February, beef exports accounted for 13 per cent of total production (up from 12.4 per cent) and 10.4 per cent for muscle cuts (up from 9.8 per cent). February beef export value averaged \$322.29 per head of fed slaughter, up 16 per cent from a year ago. Through February, per-head export value averaged \$306.69, up 15 per cent.

"Red meat exports are off to a strong start in 2018 and continue to deliver excellent returns for US producers," noted USMEF President and CEO Dan Halstrom. "The outstanding level of export value per head slaughtered is especially encouraging at a time in which US meat production is high and the trade climate is somewhat volatile.

"Through all the uncertainty, international customers remain very committed to US pork and beef. This reinforces the importance of having experienced USMEF staff members located in key markets, working every day to maintain customer loyalty and reinforce the United States' reputation as a reliable supplier." Chilled beef shipments to Japan, Korea and Taiwan drive export growth; Mexico and Hong Kong also trend higher

Beef export volume to leading market Japan declined in February (20,314 mt, -15 per cent year-over-year), as the frozen beef safeguard tariff (50 per cent, up temporarily from 38.5 per cent) contributed to a slowdown in frozen shipments. However, February export value to Japan was down only slightly at \$133.4 million. Through February, total exports to Japan were 4 per cent below last year's volume pace at 44,282 mt, but still increased 9 per cent in value to \$282 million. This included an 18 per cent increase in chilled beef exports to 22,809 mt, valued at \$175 million (up 29 per cent). Japan's safeguard tariff on imports of frozen beef from the United States (and from other suppliers that do not have a free trade agreement with Japan) expired 31 March, so the tariff rate for both frozen and chilled imports from the US is now 38.5 per cent. Japan's tariffs on imports of Australian chilled and frozen beef edged slightly lower on 1 April and now stand at 29.3 per cent and 26.9 per cent, respectively, under the Japan-Australia Economic Partnership Agreement.

Beef exports to South Korea maintained a torrid pace in February, increasing 24 per cent from a year ago in volume (16,193 mt) and 31 per cent in value (\$112.4 million). Through February, exports to Korea climbed 18 per cent in volume to 33,326 mt and were 32 per cent above last year's record value pace at \$234.8 million. This included chilled beef exports of 7,231 mt (up 34 per cent year-over-year) valued at \$68 million (up 44 per cent). US beef is driving new consumption trends in Korea, where retailers and foodservice operators have intensified their focus on steak cuts and are highlighting features such as dry and wet aging. USMEF continues to educate the Korean meat trade and consumers about the quality and convenience of US steaks in this increasingly protein-centric market.

Through the first two months of 2018, other highlights for US beef include:

Exports to Mexico, which is a critical destination for beef rounds, shoulder clods and variety meat, were 10 per cent above last year's pace in volume (39,987 mt) and 19 per cent higher in value (\$175 million). This



included an 11 per cent increase in variety meat export volume (18,720 mt) and an impressive 36 per cent jump in variety meat value (\$44.4 million).

Partly driven by demand for the Chinese New Year holiday, exports to Hong Kong jumped 41 per cent in volume (22,807 mt) from a year ago and 61 per cent in value (\$168.6 million). Exports to China, which resumed in June 2017, totaled 1,187 mt valued at \$11.1 million.

In Taiwan, an outstanding destination for chilled US beef, exports increased 25 per cent from a year ago in volume (8,106 mt) and 42 per cent in value (\$78.2 million). Chilled exports to Taiwan were up 53 per cent in volume (3,800 mt) and 61 per cent in value (\$48 million) as the US holds 72 per cent of Taiwan's chilled beef market.

Exceptional growth in Chile and Colombia pushed exports to South America up 68 per cent year-over-year in volume (5,296 mt) and 62 per cent in value (\$25.2 million). Exports to Brazil, which resumed in April of last year, totaled 215 mt valued at \$2 million.

Strong performances in Indonesia and Vietnam pushed beef exports to the ASEAN region 42 per cent ahead of last year's pace in volume (6,794 mt) and 34 per cent higher in value (\$36.7 million). The region is especially strong for beef variety meat, with exports up 74 per cent in volume (2,008 mt) and 93 per cent in value (\$4.4 million).

Strong growth in Angola and steady volumes to South Africa pushed beef exports to Africa up 26 per cent year-over-year in volume (1,981 mt) and 77 per cent higher in value (\$3.1 million).

### **Proyectan caída en las importaciones en el Segundo trimestre de 2018**

06 April 2018 US - Through the first quarter US beef imports are up about 6 per cent compared to the same period a year ago. However, the pace of imports has slowed down in recent weeks and we expect only a modest increase in Q2, reports Steiner Consulting Group, DLR Division, Inc.

We also agree with the USDA forecast for only a slight increase in imports for all of 2018. So far the gains in imports have been driven by Canada, which accounted for about 2/3 of the overall increase.

Poor pasture conditions forced Canadian cow-calf operators to push more calves into feedlots last summer and fall, bolstering the supply of cattle on feed at the end of the year and fed cattle slaughter.

Canadian feedlot placements between May and September of last year increased by 32 per cent y/y and on 1 December the feedlot inventory was up 12 per cent compared to the same period a year ago.

The larger inventory contributed to the 7 per cent increase in Canadian steer/heifer slaughter YTD. Fed beef production during this period has averaged around 36 million pounds per week, 7 per cent above year ago levels.

The rapid pace of slaughter in the last three months and lower placements have reduced on feed inventories in Canada. On 1 March the total inventory in Alberta and Saskatchewan lots was estimated at 897k head, 2.8 per cent higher than a year ago.

Imports from Mexico continue to increase as production there has been steadily expanding. Through 24 March beef imports from Mexico were higher than those from Australia (see table).

In recent years Mexico has emerged as a key beef supplier to the US. While we do not have specifics on the kind of product coming into the US we think it is mostly beef cuts rather than grinding beef.

Imports from grinding beef suppliers have been lower than a year ago. Spot supplies of lean and extra lean beef are tight, causing imported grinds to trade at a premium to domestic.

New Zealand beef imports are up thanks to a surge in shipments late last year. New Zealand supplies should improve seasonally in Q2 but will likely remain near year ago levels as more of their production goes into China.

Australian total beef exports in the first quarter were 237,683 MT, 10 per cent higher than the same period a year ago.

Shipments to the US during this period were 49,830MT, 2 per cent lower than the same period a year ago. On the other hand, Australian beef exports to China in Q1 reached 31,000 MT, a 27 per cent increase from year ago levels.

Australian beef exports to Japan in Q1 were 2 per cent higher than a year ago while exports to South Korea were up 8 per cent. Australian beef faces lower tariffs in Asian markets relative to US product.

A recent USDA/FAS document nicely summarized the difference in tariffs that US and Australian beef face in Asia and we have included that USDA summary at the bottom of the page.

The signing in March of the revised Trans Pacific Agreement (TPP-11) is expected to further lower tariffs for Australian beef.

Under that agreement, the Japanese beef tariff of 38.6 per cent is expected to decline to 9 per cent over the next 15 years while Canada is expected to phase out its 26.5 per cent tariff in the next five years.



## **Ligera baja en la producción de carnes bovinas prevista para este año**

12 April 2018 US - The World Agricultural Supply and Demand Estimate (WASDE) report was published on Tuesday (10 April) by USDA. Market analysts found no surprises in the feedstuff and animal-based protein WASDE forecasts.

Regarding important feedstuffs, compared to the prior month's report, domestic corn use (feed and residual and the food, seed & industrial categories) were adjusted down for the current crop-marketing year. Those adjustments were rather small and reflected larger than expected stocks in the recent quarterly report (USDA-NASS Grain Stocks report released on 29 March).

The corn price range for the 2017-18 crop-marketing year was narrowed (national price received by farmers) to \$3.20 to \$3.50 per bushel. US soybean meal adjustments were small, but the 2017-18 projected price was increased some (range of \$340 to \$360 per ton).

US red meat production for 2018 was slightly reduced, relative to the prior monthly report beef output was lowered by 0.2 per cent and pork by 0.4 per cent. US broiler production forecast for 2018 was reduced by 0.6 per cent. Still, record-large production levels are the order of the day.

The WASDE report did not adjust forecasts of US imports of either pork or beef for this year. Expectations for US beef export tonnage also remained unchanged and record-large. The forecast for US pork exports was slightly lowered (reduced by 0.4 per cent or 25 million pounds).

Importantly, the 5.9 billion pound (carcass weight) forecast is a new high, and the year-over-year increase would be 4.8 per cent (up 268 million pounds from 2017's). WASDE analysts attributed that slight decline to some weakening in exports to China, due to the imposition of higher tariffs on US pork.

USDA's Foreign Agriculture Service (FAS), published their semi-annual updates on world livestock, meat, and poultry trade. The full publication is available here. Three special reports are included, the first is on the growing importance of Uruguay in world beef trade, the second discusses increasing world pork production and prices, and the last article is on Brazilian broiler exports.

Besides interesting special reports, some highlights from the FAS report are:

Beef: "The hardy increase in world trade will be driven by strong global demand and competitive prices."

Pork: "While US shipments will be negatively affected by higher tariffs and lower Chinese demand, the impact on overall export volume will be largely offset by increased shipments to other markets including Mexico, Japan, and the Philippines."

Broiler: "Despite increased production by major exporters Brazil and the US, barriers to trade constrain additional export growth."

Cattle Numbers: Due to drought, the 2019 Argentine herd is expected to decline by 450,000 head (0.8 per cent) year-over-year.

## **Entidades solicitan que se diferencie la carne generada en laboratorio**

12/04/18 - por Equipe BeefPoint A Associação Nacional dos Produtores de Carne Bovina (NCBA) e a União Nacional de Produtores Rurais (NFU) são as duas últimas organizações a pedir ao Departamento de Agricultura dos Estados Unidos (USDA) que estabeleça requisitos de rotulagem que informem melhor aos consumidores sobre a diferença entre produtos que vêm de animais e aqueles criados laboratório.

No início deste ano, a Associação de Criadores de Gado dos Estados Unidos (USCA) fez uma petição ao USDA sobre a questão relativa à carne bovina.

NCBA pede rotulagem e regulamento de segurança alimentar

"É fundamental que o governo federal vá em frente e garanta a rotulagem justa e precisa da carne falsa", disse Kevin Kester, presidente da NCBA, em um comunicado. "Enquanto tivermos condições de igualdade, nosso produto continuará sendo uma das principais opções de proteína para famílias nos Estados Unidos e em todo o mundo".

Em comentários solicitados pelo Serviço de Inspeção e Segurança Alimentar do USDA, a NCBA solicitou que o USDA trabalhasse com a Food and Drug Administration (FDA) para "tomar medidas apropriadas e imediatas contra produtos de imitação indevidamente rotulados".

A NCBA também pediu ao FSIS que "assegure a jurisdição sobre os alimentos que consistem em, isolados de ou produzidos a partir de culturas de células ou cultura de tecidos e aqueles derivados de animais de criação e avicultura ou suas partes".

"As carnes cultivadas em laboratório devem obedecer aos mesmos padrões rigorosos de inspeção de segurança de alimentos que todos os outros produtos à base de carne", afirmou a NCBA.

A NFU votou em sua recente convenção para apoiar a petição da USCA e procura estender o pedido de exigência de rotulagem para além da carne bovina para incluir também produtos de aves, suínos e ovinos.

"A NFU está preocupada com a recente introdução de alimentos compostos por fontes alternativas de proteína que estão sendo rotulados e comercializados como 'carne'", disse o presidente da NFU, Roger Johnson, em uma carta ao Serviço de Inspeção e Segurança Alimentar do USDA.

"A NFU abraça novas oportunidades para agricultores familiares e pecuaristas, incluindo o desenvolvimento de mercados para proteínas à base de plantas e insetos. No entanto, acreditamos que





todos os produtos alimentícios devem ser claramente rotulados de forma a ajudar os consumidores a tomar decisões informadas e permitir que os produtores diferenciem seus produtos.”

Johnson também destacou as preocupações sobre o desenvolvimento de produtos alternativos de carne cultivados em laboratórios usando células animais. “Esses produtos não são derivados de animais nascidos, criados e abatidos de maneira tradicional e não devem ser autorizados a ser comercializados como ‘carne’”, disse ele.

Johnson disse que a NFU apoia o pedido da USCA para restringir a definição mais ampla de “carne” para o tecido ou carne de animais que foram abatidos da maneira tradicional.

#### ‘Standards of Beef’ Won’t Be Enough to Stop Fake Meat

April 12, 2018 02:14 PM

Beyond trade and environmental discussions, this year fake meat, labeling and food safety were priority concerns for cattlemen. ( 44 Farms )

Cowboy boots trekked across Capitol Hill this week, as members of the National Cattlemen’s Beef Association (NCBA) visited legislative officials to share how harmful fake meat could be to the beef industry.

On Thursday, Danielle Beck, NCBA director of government affairs, joined AgriTalk host Chip Flory during the organization’s annual Cattlemen’s Legislative Conference to discuss the organization’s policy priorities. Beyond trade and environmental discussions, this year fake meat, labeling and food safety were priority concerns for cattlemen.

USDA Food Safety and Inspection Services (USDA-FSIS) Petition 1801 is a request from the United States Cattlemen’s Association asking USDA “to restrict the definition of meat to actual products raised by ranchers and farmers. And then create a new standard of identity for beef.”

NCBA originally chose not to pursue standards of identity, thinking that this would not get the job done, Beck said. Read the official statement from NCBA.

“When we talk about fake meat, we are actually talking about two very distinct products, that require distinct and different approaches,” Beck said.

Plant-based imitation meat products currently on the market fall under the Food and Drug Administration (FDA). Lab-grown synthetic meat products that are not yet on the market, however, do not have a clear regulatory path forward.

“Unfortunately, FDA has a long standing history of ignoring the law,” Beck said. “If we look at what happened with the dairy industry, and what they’ve been doing—soy milk and almond milk and their efforts to address that—that fight started back in 2000.”

18 years later, FDA has yet to enforce the law, and even if you create a standard of identity for beef under USDA-FSIS, that won’t do anything to help ensure FDA will enforce the law, Beck explained

Even several years ago as a young Congressional staffer, Beck remembers the producers that visited and who took the time to educate her about beef and cattle production.

“It’s really important that each leader knows where beef producers stand on every issue when they go in to vote,” she told Flory.

## VARIOS

### AUSTRALIA Primer trimestre con alza en exportaciones

11 April 2018 Australian beef exports in March totalled almost 90,100 tonnes shipped weight (swt) – almost identical to shipments in the same month the year prior, and a 6% lift from beef exports in February.

Through the first quarter of 2018, beef exports recorded a 10% increase compared with the same period last year, at 237,700 tonnes swt. Higher than anticipated turn-off during January and February as a result of dry conditions across northern NSW and Queensland supported the lift. Historically, exports in March surpass January and February levels – this year was no different, given trade resuming after the holiday period and the additional processing days.

Some good rainfall at the beginning of March saw adult cattle slaughter contract as producers looked for some additional weight gain as moisture conditions improved. However, during the latter part of the month, a lift in weekly slaughter levels was apparent, helping to support the March export total – with cattle producers buoyed by improved over-the-hook prices.

#### March exports

Beef exports to Japan totalled 26,100 tonnes swt – back 7% year-on-year.

Shipments to the US totalled 19,750 tonnes swt – a 10% decline year-on-year.

Exports to Korea increased 7% year-on-year, to just under 13,000 tonnes swt.

Beef exports to China lifted 8% year-on-year, to 11,500 tonnes swt.

Shipments to the EU dropped 21% year-on-year, to just under 1,300 tonnes swt.



Exports to Indonesia were recorded at 4,850 tonnes swt – 79% higher year-on-year.

#### Trade destinations

Exports to Japan and Korea trended in the opposite direction in March when compared to last year. However, both have recorded increases for the calendar year-to-March, up 2% and 8% respectively.

A variety of market challenges affected trade to Korea in 2017 and while some will continue – specifically US competition – Australian beef remains extremely popular among Korean consumers through both foodservice and retail. Also supporting beef exports to Korea has been further tariff reductions under the Korea–Australia Free Trade Agreement (KAFTA), with import tariffs moving 2.7% lower at the beginning of 2018 to 26.6%.

For Japan, as at 31 March 2018, under the Japan–Australia Economic Partnership Agreement (JAEPA), Australian chilled and frozen beef import tariffs were reduced to 29.3% and 26.9%, respectively. However, the US will see tariffs on frozen beef exports to Japan revert back to 38.5% following a 'snapback' to 50% in July 2017, as safeguard volumes were exceeded by 'non-EPA' nations (e.g. US, NZ, Canada).

Shipments to the US have edged lower year-on-year, as Asian markets have sustained robust demand for Australian product but the decline, more so influenced by increasing US production. Estimates from the US suggest that the supply of cattle that have been on feed for more than 120 days on 1 April will be around 24% higher than the same time last year. The prospect of greater domestic supplies and the price premium for imported beef has contributed to a quieter trading environment.

Beef exports to China have performed strongly during the first three months of 2018, up 27%. While China remains a very price-sensitive market and hence a challenging market for Australia, exports during the first three months provide a strong indication of the growing demand in China for high quality Australian product. Grainfed exports surpassed 3,000 tonnes swt for the first time in a month.

In other markets, beef exports into the EU in March declined 21% year-on-year to 1,300 tonnes swt. Beef exports to Indonesia totalled 4,850 tonnes swt, up 79% on the year prior.

#### **INDIA – Eliminación de exigencias para comercialización de hacienda que prohibía la destinada a faena**

TheCattleSite News Desk 10 April 2018 - In a big step taken in amending the existing cattle trade rules, the Narendra Modi-led central government scrapped the clause which asked for a certification that the 'animal brought to the market for sale is not for slaughter'.

NewsX reports that the new rules heavily stress on the prohibited practices like branding, castration and nose cutting of animals. At least four other clauses on how animals should be kept, like adequate space and other rules on penning and caging, in a market have been removed.

Bharatiya Janata Party (BJP)-led Central government changed the rules in Prevention of Cruelty to Animals by removing the term 'slaughter' from it. The new rules now deal with prevention of cruelty to animals in the market.

The previous rules issued by the government just stated a ban on the sale of cattle for slaughter. When the Centre issued the notification on May 23 2017, banning the sale of cattle for slaughter, it stirred massive political storm and protests from both traders and consumers.

According to reports, the ministry of environment, forest, and climate change removed the word slaughter from draft rules and concised the existing rules to almost half. In the new notification called Prevention of Cruelty to Animals in Animal Market Rules, only one line has been retained from the 2017's notification i.e. 'no unfit animal or young animal shall be sold in an animal market'.

In another big step taken in amending the rules, the Narendra Modi-led central government scrapped the clause which asked for a certification that the 'animal brought to the market for sale is not for slaughter'.

The new rules heavily stress on the prohibited practices like branding, castration and nose cutting of animals. At least four other clauses on how animals should be kept, like adequate space and other rules on penning and caging, in a market have been removed.

After the new rules were notified by the government, lawyer N Jayasimha, who helped in framing the previous rules, said, "Checks introduced in the 2017 rules on animal cruelty have been watered down. The ministry had to address the clauses that had been stayed by the Supreme Court. But they have completely watered down the entire set of rules. There is no mention of inter-state trade of cattle.

"One of the main reasons for framing 2017 rules was the Supreme Court order to prevent illegal trade of cattle and cruel sacrifice of animals in Gadhimai festival. But the new rules seem weak and far from achieving this objective."

The 2017 notification about the ban on cattle sale in animal market received widespread criticism from people across the country. When the rules were laid down, there was an unprecedented rise in the crimes against cattle traders by fringe groups. States like Kerala, West Bengal, and Meghalaya slammed the rules citing it meddled with people's food choices.



12 April 2018 - The Centre has finally scrapped its controversial notification on a ban on sale of animals for slaughter in livestock markets and come out with new draft rules doing away with the clause on "restrictions on sale of cattle".

According to The Times of India, this means cattle - including cows - can be sold in animal markets, even for slaughter wherever it is legal.

Last year's notification had not prohibited slaughter as such, but restrictions on sale of cattle for this purpose in animal markets had the effect of restraining it even in Kerala, Bengal and certain NE states where cow slaughter and sale of beef is not banned.

The notification attracted flak for catering to cow vigilantism and also had the effect of a rise in the number of cattle that were past their use as dairy animals as they could not be sold at fairs. The rules needed declarations by seller and buyer that the animal was not taken for slaughter.

The notification was soon followed by a realisation in the government that the rules will make even transport of cattle more difficult and end up displeasing agriculturalists and dairy farmers. But it has taken the environment ministry close to a year to finally delete the problematic clause.

The regulation on livestock market under the May 2017 rules was opposed by states where beef is not banned even as it caused discomfort elsewhere.

Though the environment ministry clarified that the notification was not about a ban on slaughter as animals could still be procured for this purpose directly from farms, the matter reached various high courts and was seen to be clearly restrictive.

The Madurai bench of the Madras High Court had stayed the notification on livestock market rules. The SC then stayed the rules in July last year. Such regulations, however, have now been removed from the new draft, which will be notified as 'rules' after analysing stakeholders' comments later this month.

Though the draft deals with cruelty aspect of animal sales and specifies 'prohibited practices', including certain 'do's and don'ts', it dilutes many provisions that were there in the May 23, 2017 rules for not only regulating livestock markets but introducing best practices to minimise cruelty and trace sources of procuring animals to weed out unhealthy ones.

Animal rights activists are disappointed with the proposed rules and have flagged many shortcomings in the diluted version of the draft.

"The draft Prevention of Cruelty to Animals in Animal Market Rules, 2018, fails to address the common cruelties animals are subject to in livestock markets across the country," said Shreya Paropkari, farm animals campaign manager of Humane Society International/India (HSI-India).

The environment ministry had last year notified the rules with the aim of regulating animal markets and addressing cross-border smuggling of cattle. HSI-India noted that the new draft, however, did not prohibit animal markets along state borders. The move, however, will send positive signals to the farm sector which has been in distress due to last year's regulations.

### **COREA DEL SUR: Reportan pérdidas en el sector agropecuario como consecuencia del Acuerdo de Libre Comercio suscrito con EE.UU.**

TheCattleSite News Desk 10 April 2018 - South Korea's agriculture, livestock, and seafood industries suffered around one trillion won (about \$1 billion) in production losses in the five years after the South Korea-US Free Trade Agreement (KORUS FTA) took effect, a report shows.

According to The Hankyoreh, an assessment report on post-FTA conditions submitted to the National Assembly by the Ministry of Trade, Industry and Energy on Apr. 9 showed US livestock product imports averaging US\$7.3 billion per year over the five years from 2012 to 2016 after the FTA went into effect.

The average was up by 14.8 per cent from US\$6.36 billion for the five years before the agreement (2007–2011). At the same time, South Korea's average agriculture and livestock product exports to the US rose 46.7 per cent from US\$400 million before the FTA to US\$590 million after it entered effect.

The numbers show a higher rate of increase for South Korea's exports, but a much larger increase for the US in actual dollar terms.

According to the report, South Korean agriculture and livestock product fell by an average of 195.1 billion won (US\$181.4 million) per year after the KORUS FTA, for a cumulative five-year total of 975.3 billion won (US\$907.0 million). Domestic agricultural production fell by an estimated 0.44 per cent per year as a result. Increased imports since the FTA were also found to have resulted in the loss of 5,407 jobs in the agriculture, livestock, and seafood industries.

Of the three industries, the livestock sector, including beef and pork, suffered the biggest hit in terms of lost production over the five years after the KORUS FTA went into effect. Lost livestock production averaged 119.5 billion won (US\$111.1 million) per year, or 61.2 per cent of all farming losses. Pork in particular suffered average annual losses of 70.8 billion won (US\$65.8 million), or 36.3 per cent of all farming losses.

"The relatively rapid lowering of tariffs on imported US pork appears to have had a large effect during the agreement's implementation period," the report concluded.



Beef losses averaged 27.4 billion won (US\$25.5 million) per year, or 14.1 per cent of all farming losses. Soybeans and other beans suffered average annual losses of 24.0 billion won (US\$22.3 million), or 12.3 per cent of all farming losses. With beans subject to tariff-rate quotas (TRQs) in exchange for lower tariffs, the losses were seen as resulting from an increase in volumes that could be imported tariff-free into the South Korean market.

While the increase in South Korea's total exports to the US was much larger than the rise in US imports over the five years after the FTA took effect, the US saw a greater rise in exports as a result of the agreement, the report concluded. South Korean exports to the US rose by an average of US\$18.399 billion a year from the five years before the FTA.

Direct increases in exports as a result of tariff abolition or lowering totaled US\$3.16–6.62 billion, or 17.2–36.0 per cent of all increased exports. Rises in exports were observed in all manufacturing areas apart from textiles/apparel/other manufacturing and electrical/electronic products. At the same time imports of US products rose by an average of US\$5.6 billion a year after the FTA took effect, with the direct increase as a result of the agreement totaling US\$2.04–2.65 billion, or 36.5–47.4 per cent. The figures show that while South Korea experienced a larger increase in exports in sheer numerical terms, the US enjoyed more an effect from the FTA in terms of increases as a direct result of the agreement.

South Korea's trade balance with the US rose 138.8 per cent from an average annual surplus to US\$9.22 billion before the FTA to US\$22.01 billion after it took effect.

"Over the same period, South Korea's surplus in trade with other countries besides the US rose 179.6 per cent from US\$13.54 billion to US\$37.86 billion," the report noted.

"In light of this, no immediate conclusions can be drawn about a connection between the FTA and the increased trade surplus with the US," it said.

In the area of services, the effects for the US were clearly greater. South Korea's service exports to the US increased 9.05 per cent from an average of US\$15.2 billion per year for 2007–2011 to US\$16.6 billion for 2012–2016, while average annual US service good imports to the South Korean market rose 17.3 per cent from US\$24.8 billion to US\$29.1 billion over the same period.

The biggest increases in service imports to the US were in copyright usage fees and communications/computers/information services. South Korea's average annual service trade deficit with the US grew from US\$9.65 billion before the agreement to US\$12.58 billion after it took effect.

### **ISRAEL: Confirmação de aftosa**

11 April 2018 - Dr Shlomo Garazi, Chief Officer for Import and Export of the Veterinary Services at the Ministry of Agriculture and Rural Development, has reported an outbreak of foot and mouth disease (FMD) affecting free ranging beef cattle in Hazafon.

The World Organisation for Animal Health (OIE) received an immediate notification on Monday, 9 April. The outbreak was initially observed on 2 April and confirmed on Sunday, 8 April, after enzyme-linked immunosorbent assay (ELISA), pathogen isolation on cell culture and real-time PCR tests were carried out at the Kimron Veterinary Institute, a foot and mouth disease laboratory.

A total of 218 animals were found susceptible to the FMD virus (serotype O), out of which 50 animals were found affected. No deaths have been reported, and none of the affected animals were killed or disposed of. According to the OIE, the affected population comprises free range beef cattle. The herd contains four different groups while only one of them has been affected. The affected group contains 80 dams, 30 calves and eight bulls.

All eight bulls, two calves and 40 dams showed clinical symptoms which are, in this case, only mouth lesions. No fever, mortality or other foot and mouth disease symptoms have been seen.

While the source of the outbreak remains inconclusive, the epidemiological investigation is ongoing.

Some of the control measures applied so as to prevent further outbreak of the disease include:

Movement control inside the country,

Vaccination in response to the outbreak(s),

Surveillance outside containment and/or protection zone,

Surveillance within containment and/or protection zone,

Quarantine and

Zoning.

None of the affected animals are to receive treatment.

### **EMPRESARIAS**

#### **Marfrig : favorable reação na Bolsa ante a compra de National Beef**

10/04/18 - por Equipe BeefPoint

As ações da Marfrig dispararam quase 20% nesta 2ª feira (9.abr.2018) após anúncio de compra pela empresa de 51% da National Beef Packing Company, a 4ª maior processadora de carne bovina dos EUA.



De acordo com o comunicado da empresa, o negócio está avaliado em US\$ 969 milhões e deve consolidar a Marfrig como a 2ª maior companhia de carne bovina no mundo. No fechamento, os papéis ordinários da empresa subiram 18,81%, liderando as altas do Ibovespa.

O analista de mercado da Ativa Investimentos Pedro Guilherme ressaltou que a aquisição anunciada é mais 1 passo da Marfrig para seu plano de expansão. Ele aponta que o principal trunfo da companhia foi conseguir entrar nos mercados japonês e sul-coreano, os 2 maiores consumidores de carne bovina do mundo.

Apesar da euforia com os investimentos, o analista resalta que a alta dos papéis Marfrig pode não refletir seu valor de mercado real. “O investidor deve sempre analisar o conjunto macro de uma companhia na hora de negociar ativos. Não se recomenda compra ou venda de ações baseado em fatos isolados como esse. É necessária uma análise mais aprofundada do papel.”

### ***En dos días acciones suben 40 por ciento***

Fonte: Valor Econômico 11/04/18 - por Equipe BeefPoint

A aquisição da National Beef pela Marfrig Global Foods e o anúncio de que a empresa brasileira pretende vender integralmente sua subsidiária Keystone neste semestre transformaram a relação da empresa com os investidores em uma lua de mel. Nos últimos dois dias, as ações da Marfrig subiram 39,8% na B3. Com o movimento, o valor de mercado da empresa de carne bovina já aumentou R\$ 1,5 bilhão, para R\$ 5,41 bilhões.

Ontem, os papéis da companhia lideraram pelo segundo dia seguido as altas do Ibovespa. As ações fecharam a sessão de terça-feira cotadas a R\$ 8,70, alta de 17,7%. No dia anterior, as ações já haviam subido 18,8%. Em todo o ano, a alta também é de 18,8%.

Na segunda-feira, a Marfrig surpreendeu o mercado ao fechar a compra de 51% da National Beef, quarta maior produtora de carne bovina dos EUA, por US\$ 1 bilhão. Com a transação, a Marfrig se tornará a segunda maior empresa de carne bovina do mundo atrás apenas da também brasileira JBS. Paralelamente à aquisição, a Marfrig também anunciou que venderá integralmente a americana Keystone, subsidiária especializada no fornecimento em produtos de carnes para redes de restaurantes, como McDonald's e Subway.

Os investidores estão animados com a expectativa de geração de caixa da Marfrig, que há anos estava no vermelho devido ao elevado endividamento. Considerando só a inclusão do resultado do frigorífico americano, o índice de alavancagem (relação entre dívida líquida e Ebitda) da Marfrig cairá de 4,55 vezes para 3,35 vezes, segundo a empresa.

Com a venda da Keystone, que pode ser avaliada em mais de R\$ 8 bilhões, a alavancagem cairia mais, calculou o BTG Pactual. De acordo com o banco, o índice ficaria em 1,8 vez, o menor entre as empresas de carnes do país.

### ***Analistas estiman que acciones aún son baratas***

12/04/18 - por Equipe BeefPoint Mesmo após uma disparada de 40% em dois dias, os analistas ainda veem potencial nas ações da Marfrig (MRFG3). A mudança de patamar veio após um movimento inesperado, no qual o frigorífico adquiriu 51% da National Beef, quarta maior processadora de carne dos EUA, por US\$ 969 milhões.

Na visão do mercado, a empresa conseguiu de uma vez se tornar a 2ª maior processadora de carne do mundo, além de abrir caminho para a redução da alavancagem. A National exporta para 40 países, incluindo o Japão e a Coreia do Sul, mercados atualmente fechados às exportações de carne brasileira.

“Quando combinados, esses dois eventos poderiam levar a Marfrig ao próximo nível em posicionamento estratégico e alavancagem, e em um setor onde o alto endividamento e a falta de clareza estratégica mantinham os investidores de capital por muito tempo”, apontam Thiago Duarte e Vito Ferreira do BTG Pactual. O preço-alvo foi elevado de R\$ 9 para R\$ 11 e a recomendação agora é de compra.

A equipe de dívida do BTG, composta por Thomas Teny, Matheus Chermouth e Beatriz Watanabe, avalia também que a companhia se tornou um player puro carne (onde realmente tem uma vantagem), com uma base de produção muito diversificada na América do Sul e nos EUA e maior acesso aos mercados de exportação.

“A administração reafirmou as intenções de manter a alavancagem em níveis muito baixos, o que vemos como primordial para uma estrutura de capital sustentável e perfil de geração do fluxo de caixa livre em todos os ciclos de carne bovina”, destacam. Eles recomendaram a compra dos títulos da dívida da companhia.

Keystone

Em linha com a promessa da administração de crescer com “uma rigorosa disciplina financeira”, o Bradesco avalia que o caminho agora está livre para a Marfrig se desfazer da Keystone. “Os investidores agora podem ter certeza de que a Marfrig manterá exposição significativa ao mercado dos EUA, mesmo



considerando a venda da Keystone e não irá enfrentar a potencial reavaliação que teria se tornasse um puro player com atuação no Brasil”, afirma João Pedro Soares.

O preço-alvo para a Marfrig foi revisado de R\$ 10 para R\$ 11, com recomendação de compra. “Mesmo após a alta recente das ações, vemos espaço adicional para valorização”, ressalta o Bradesco. Segundo os cálculos de Soares, a empresa (pós aquisição da National Beef e venda da Keystone) estaria negociando a 4,6 vezes o valor da empresa sobre o Ebitda (EV/Ebitda), versus a média do setor de 5,5 vezes.