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## BRASIL

### Precios de la hacienda se mantienen firme, pero la carne baja

Dificuldade na compra de boiadas e escoamento lento mantém cotações equilibradas

Sexta-feira, 13 de julho de 2018 - Os negócios ocorrem de forma mais comedida no mercado do boi gordo. De maneira geral há irregularidade na oferta. É cada vez mais difícil encontrar animais de pasto.

Além disso, os animais de confinamento não chegam em grande volume ao mercado e, a somatória destes fatores, gera dificuldade de compra para as indústrias.

Os frigoríficos, em sua maioria, adotam a postura de pagar um pouco mais quando encontram animais com melhor acabamento.

Porém, apesar da oferta restrita, a arroba não decola, o escoamento lento da carne permite aos frigoríficos trabalharem com estoques mais enxutos.

Diante desse “equilíbrio”, tivemos poucas alterações para a arroba do boi gordo no fechamento da última quinta-feira (12/7).

No mercado atacadista de carne bovina com osso a carcaça de bovinos castrados ficou cotada em R\$9,25/kg, recuo de 0,3% frente ao levantamento anterior (11/7).

CEPEA: Preços da arroba do boi estão firmes; carne está em queda

Fonte: Cepea. 12/07/18 - por Equipe BeefPoint

Neste começo de julho, segundo informações do Cepea, enquanto os preços da arroba do boi estão firmes, os da carne estão em queda. No acumulado parcial do mês (de 29 de junho a 11 de julho), a carcaça casada bovina (negociada no atacado da Grande São Paulo) registra desvalorização de 0,94%, negociada a R\$ 9,50/kg nessa quarta-feira, 11.

De acordo com agentes consultados pelo Cepea, essa queda se deve ao fraco volume de vendas, que, por sua vez, é reflexo das baixas demandas interna e externa (vale lembrar que as exportações têm registrado desempenho ruim desde abril deste ano).

Quanto ao boi gordo, o Indicador ESALQ/BM&FBovespa (estado de São Paulo) fechou a R\$ 141,10 nessa quarta, alta de 1,22% no acumulado parcial de julho. No geral, as negociações seguem em ritmo lento.

### Carne se encareció por la huelga de camioneros

12/07/18 - por Equipe BeefPoint

A paralisação dos caminhoneiros, em maio, fez o brasileiro gastar muito mais do que o esperado para colocar carne no prato em junho.

Com entregas abaixo do normal nos frigoríficos, supermercados e açougues, o preço subiu 4,6% no mês.

O impacto da crise nas estradas ocorreu justamente em um período em que o custo para o consumidor deveria estar mais baixo devido ao final da safra, segundo o pesquisador Thiago de Carvalho, do Cepea (Centro de Estudos em Economia Aplicada), da USP.

“A greve ocorreu no momento em que a oferta iria aumentar”, diz. “Mas o consumidor ficou sem essa baixa no preço”, comenta.

Com a redução das pastagens a partir de junho, produtores esperam que a carne ainda suba até 7% neste ano, segundo a Abrafrigo (associação de frigoríficos).

Em junho, a inflação geral foi de 1,26%, a maior para o mês em 23 anos.

#### CONTA DO AÇOUGUE SOBE

> O preço da carne aumentou 4,6% em junho

> Isso ajudou a inflação do mês a atingir 1,26% no país

> É a maior alta para o período desde 1995

O que provocou o aumento

> A paralisação dos caminhoneiros, em maio, é o principal motivo da alta nos preços

> No caso da carne, a falta de transporte atrasou a entrega a frigoríficos e varejistas

> Para atender os consumidores, quem revende aceitou pagar mais caro pelo produto

Pode subir mais

> Os produtores esperam que o preço da carne avance até 7% no atacado nos próximos meses

> Um dos motivos é a entressafra (período em que a produção cai pela falta de pastos)

> A eleição também fará subir o consumo devido aos empregos gerados pelas campanhas

No ano

Em um ano, a alta acumulada da carne é de 2,20%, ainda abaixo da inflação de 4,39% para o período

Frango dispara

> O preço frango disparou 8% em junho

> O motivo também é a greve dos caminhoneiros



> Em 12 meses, no entanto, o frango tem queda de 0,91%

Fontes: IBGE (Instituto Brasileiro de Geografia e Estatística), Abrafrigo (Associação Brasileira de Frigoríficos) e Cepea (Centro de Estudos Avançados em Economia Aplicada)

### **Abrafrigo: exportación de carnes bovina cayó 47 por ciento en junio**

Portal DBO - 11/07/2018 Segundo a associação, esse é o terceiro mês consecutivo de baixa nos embarques

As exportações brasileiras de carne bovina (in natura e processada) apresentaram queda de 47% em volume e de 37% na receita cambial no mês passado. Foram exportadas 64.910 toneladas de carne bovina com receita de US\$ 317,7 milhões. Em 2017, no mesmo mês, os embarques totalizaram 122.681 toneladas e receita de US\$ 507,4 milhões. As informações são da Associação Brasileira de Frigoríficos (Abrafrigo), que compilou os dados finais de movimentação até junho divulgados pelo Ministério da Indústria, Comércio Exterior e Serviços Exterior (MDIC), por meio da Secex/Decex. Segundo a Abrafrigo, foi o terceiro mês consecutivo de baixa, prejudicado pela greve dos caminhoneiros, que não permitiu embarques, além da ausência das importações da Rússia, que não compra o produto brasileiro desde dezembro de 2017.

Conforme a Abrafrigo, o primeiro semestre de 2018 foi encerrado com um crescimento de apenas 4% em toneladas e de 3% na receita cambial. Nos primeiros seis meses do ano, as exportações atingiram 681.910 toneladas e receita de US\$ 2,71 bilhões, em comparação com 655.947 toneladas e US\$ 2,63 bilhões no primeiro semestre do ano passado.

Para a Abrafrigo, o segundo semestre de 2018 será um período de recuperação das exportações de carne bovina porque tradicionalmente os maiores clientes elevam suas compras e porque se espera o retorno da Rússia ao mercado, que representava quase 10% das vendas brasileiras do produto. Em 2017, a Rússia já havia adquirido 75.105 toneladas de carne bovina brasileira no período. Segundo a entidade, mesmo com os resultados ruins de junho será possível atingir a meta de um crescimento de 10% nas exportações do ano.

A maior parcela das exportações (43%) foi para a China, por meio da cidade Estado de Hong Kong e do continente, que adquiriu 296.428 toneladas no primeiro semestre de 2018, com receita de US\$ 1,21 bilhão. O segundo maior cliente foi o Egito, com importações de 70.943 toneladas; em terceiro lugar veio o Chile, com 51.172 toneladas; em quarto, o Irã, com 30.805 toneladas e na quinta posição a Arábia Saudita, com 16.231 toneladas. No total, 78 países aumentaram suas compras enquanto que outros 61 reduziram as compras, informou a Abrafrigo.

## **URUGUAY**

### **Precios sostenidos de la hacienda y en la exportación**

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

En la primera semana de julio el promedio de la tonelada de carne vacuna fue US\$ 3.920, con una suba de 6% en 2018

El precio de exportación de la carne vacuna rozó los US\$ 4.000 por tonelada y mantiene la brecha respecto a los valores de hace un año.

En la primera semana de julio el promedio de la tonelada de carne vacuna fue US\$ 3.920, con un aumento de 15% respecto a los US\$ 3.515 de la semana anterior, de acuerdo a datos publicados por el Instituto Nacional de Carnes (INAC).

En las últimas cuatro semanas móviles el promedio fue de US\$ 3.680 por tonelada, un 8% más que en el mismo período del año pasado.

El valor de la tonelada exportada en lo que va del año lleva una suba de 6%, con un promedio de US\$ 3.579 frente a US\$ 3.380 de un año atrás.

En este período los envíos de carne bovina al exterior totalizaron 239.682 toneladas, un 2% más que las 234.018 de igual período en 2017.

Esta recuperación responde, en parte, a una mejora en el precio pagado por los principales destinos de la carne uruguaya: China y la Unión Europea.

En el primer semestre del año el precio promedio por tonelada exportada a China –que ocupa un 48% de los envíos de carne vacuna al exterior– aumentó 12%, de US\$ 2.652 a US\$ 2.967 la tonelada.

En el caso de la Unión Europea, con una participación de mercado de 21%, el precio promedio de exportación aumentó 6%, de US\$ 5.779 a US\$ 6.129 la tonelada de peso canal.

Firmeza por las haciendas

La misma firmeza que muestra el mercado de exportación se observa en el de haciendas, que por cuarta semana consecutiva tiene al novillo gordo especial en US\$ 3,45 por kilo en cuarta balanza.



Los negocios de punta por ganados especiales, gordos, bien pesados se ubican en esa referencia. La escasa oferta de animales de verdeo y una demanda sostenida por parte de la industria son los que dan sostén a los precios.

La disparidad entre plantas se mantiene, tanto en precio como en plazo para las cargas.

En algunas ya se encuentran operando cuadrillas kosher, reflejado en un mayor interés por novillos. Otras esperan la llegada de equipos para los próximos días.

Por el momento, y dada la poca disponibilidad de ganados especiales, la mayoría de las industrias están comprando animales con terminación media, marcando una recuperación en la grilla de consignatarios para los ganados buenos y generales.

Aquellas plantas que tienen sus necesidades cubiertas presionan el mercado ofreciendo hasta US\$ 3,30 por el novillo gordo, pero siguen sin hacerse negocios por esos precios.

La vaca gorda especial de razas de carne se comercializa en un máximo de US\$ 3,20 por kilo, con una amplia escalera de precios que varía por calidad. La vaquillona sigue firme entre US\$ 3,25 y US\$ 3,30.

En la primera semana de julio la faena semanal dio un salto respecto a la semana anterior y volvió a ubicarse claramente por encima de las 40.000 cabezas. Totalizó 43.289, es decir 8,4% más que las 39.924 de la semana anterior y 2% por encima de la misma semana de 2017, cuando se faenaron 42.560.

Mientras la demanda industrial siga superando la oferta de ganados especiales, se espera estabilidad de precios y de ese modo una dinámica de mercado equilibrada.

### **Uruguay participó con el 35% de la cuota 481 de 2017/18**

09/07/18 - por Equipe BeefPoint Durante o ano de 2017/18, o Uruguai exportou 15.935 toneladas de carne bovina dentro da cota de 481 para a União Europeia, informou o diretor da Tardáguila Agromercados, Rafael Tardáguila.

Ele explicou que é um “recorde” que supera em 0,3% no final do ano passado, quando cerca de 15.892 toneladas deste produto foram comercializadas.

Tardáguila destacou o resultado final, levando em conta que “no último ano o volume da cota foi reduzido e passou de 48.200 para 45.711 toneladas”, devido a um acordo comercial assinado entre o bloco europeu e o Canadá, que eliminou a cota pertencente ao país norte-americano.

E apesar da mudança, o Uruguai manteve o volume de colocação na cota de carne. “Isso implica que passamos de ocupar de 33% para 35% da cota de 481 em um ano”, acrescentou.

Em termos de preço, o produto exportado pelo Uruguai teve um “aumento significativo” na referência média, que ficou em US \$ 9,524 por tonelada. No ano passado, o valor médio foi de US \$ 8.955 por tonelada, 6,4% a menos.

Tardáguila explicou, conforme informado por um exportador, que a mudança de preço “não se deve a uma melhora nos negócios”, mas pode estar relacionada à “composição de cortes que as indústrias de frigoríficos enviam para aquele país”. Ele disse que cortes possivelmente mais caros foram enviados este ano.

### **Stock bovino sigue volviéndose cada vez más criador**

11/07/2018 - El IPA proyecta una leve suba a 11.762.426 cabezas.

El stock bovino del Uruguay está dando señales de volverse cada vez más criador y desde el Instituto Plan Agropecuario (IPA), se está proyectando un leve crecimiento al 30 de junio, llegándose a 11.762.426 cabezas que contrastan con las 11.732.201 que había a igual mes de 2017.

El Ing. Agr. Esteban Montes, técnico del Instituto Plan Agropecuario y Coordinador del Fondo de Transferencia de Tecnología y Capacitación de la institución, sostiene que la ganadería uruguaya está saliendo del letargo que la llevó a tener faenas anuales de bovinos de 2 millones de cabezas y consideró que si bien lo estaba haciendo en base a vientres —el año pasado hubo una industrialización elevada de vientres—, hoy crece en base a otras categorías que no afectan la máquina de producción (rodeo de cría). Proyección. “Estamos yendo hacia un stock más criador, con un número importante de vacas de cría”, sostiene el experto. Inclusive proyectando el 75,6% que fue el promedio país de gestación vacuna, según mostró el XVI Taller de Diagnósticos de Gestación que organizó el INIA Treinta y Tres, y restándole el 10% de terneros que se pierden entre el nacimiento y la marcación, “se producirían 2,9 millones de terneros este año”.

Para Montes, que la ganadería de cría produzca este año 2,9 millones de terneros”, ayudaría a mantener el stock bovino en los niveles actuales”.

Según la proyección del stock que hace el IPA, “bajaría la cantidad de novillos grandes y vacas de invernada, pero crecería el volumen de terneros y novillos nuevos”, explicó el técnico del IPA.

El año pasado se obtuvieron 2.700.506 terneros y este año se proyectan 2.918.277 cabezas, según el IPA. Es una producción histórica que se sustenta con los buenos valores que recibe esta categoría y con una fluida exportación en pie.



A su vez, habría un incremento en las vaquillonas de 1 a 2 años que pasarían a 1.77.099 frente a las 1.253.756 al 30 de junio de 2017. Caerían las vaquillonas de más de dos años sin entorar a 487.151 (en 2017 eran 518.337) y subirían los novillos de 1 a 2 años a 1.058.366 (eran 987.291); Novillos de dos a tres años caerían a 662.714 (eran 787.588); Novillos de más de tres años quedarían en 541.778 (eran 568.159); Vacas de invernada bajarían a 438.419 (eran 450.566). La noticia más relevante es la apuesta a la cría, porque se daría un incremento en las vacas de cría entoradas que pasarían a ser 4.309.683 (eran 4.291.584). Los toros caerían a 168.940 desde 174.414 cabezas a junio de 2017. En ese sentido hay que marcar que el nivel de vientres entorados es históricamente alto, a pesar de mantenerse una faena elevada de vaquillonas, principalmente para abastecer la cuota 481.

Señales. El crecimiento de la exportación de ganado en pie y de la faena son señales que inciden en el criador y lo estimulan a producir más terneros. Está claro que el productor ganadero entoró la mayor cantidad de vientres que pudo para asegurarse una mayor cantidad de terneros en un año climáticamente difícil.

“En la medida que siga subiendo la extracción —por mayor faena y exportación en pie—, hoy estamos en niveles de 23%, se ayudará a que la cría se siga afirmando. Cuando la extracción se afirma, la apuesta a la cría es mayor”, estimó el analista del IPA. Más allá de ese 23%, Uruguay “debería estar en niveles de extracción mayores”, consideró Montes que puso como ejemplo a Australia, competidor de Uruguay en la exportación de carne bovina en los mercados de mayor valor, donde los niveles de extracción llegan a 30%.

### **Benech: "Me gustaría que todos los terneros nacidos se criaran, engordaran y faenaran en Uruguay"**

Julio 11, 2018 El ministro dio públicamente su posición sobre un tema que genera debate entre los industriales y las principales gremiales del agro

El ministro de Ganadería Enzo Benech se sumó públicamente este miércoles al debate que genera la política de permitir libremente la exportación de ganado en pie. En ese sentido, admitió que la "gustaría" que todos los terneros que nacen en el país se terminaran faenando en frigoríficos uruguayos, aunque también reconoció que esa línea de negocio ayuda a mantener precios equilibrados que favorecen al sector criador.

Al ser consultado este miércoles sobre el aumento sostenido que viene registrando la exportación de ganado en pie, el ministro dijo a la salida de su comparecencia ante la comisión de Hacienda integrada con Presupuesto -que analiza la Rendición de Cuentas-, que la industria frigorífica le planteó su preocupación por el crecimiento que está teniendo esa línea comercial, pero manifestó que no podía dejar de reconocer que la exportación de ganado en pie ha mantenido precios equilibrados ayudando a los productores y sobre todo a los criadores.

"No es un tema nuevo. Hay varios actores que tienen intereses. A mí la verdad me gustaría que todos los terneros que nazcan en el país se criaran, se engordaran y se faenaran en Uruguay, para venderlos procesados, pero no es sencillo. No es un país barato y no es el único rubro de producción que nos permite vender productos sin terminar. He recibido a los arroceros pidiendo poder exportar arroz cascara, por ejemplo", comentó.

Lea también: ARU defiende la exportación de ganado en pie y contradice estudio de la industria  
Preocupación por conflicto lácteo

En referencia a la situación de la industria láctea, Benech señaló que la producción de leche viene bien, pero consideró que hay un proceso de concentración de la producción y en el caso de algunas industrias existen fuertes problemas, dado que a pesar de que los precios internacionales pueden haber mejorado, hoy el sector tiene rentabilidad pero también endeudamiento.

"Aunque desde el punto de vista de los negocios la situación es mejor que antes, no puedo dejar de reconocer que hay empresas (lácteas) con serias dificultades en este momento", dijo. Twitear

Sobre la actual situación de Conaprole, Benech se mostró preocupado por el conflicto que mantiene la cooperativa con los trabajadores. Sin embargo, expresó que los problemas entre funcionarios y empresarios eran órbita del Ministerio de Trabajo y Seguridad Social.

"La preocupación la tenemos, pero somos respetuosos de los ámbitos de negociación adecuados", acotó.

Lea también: "Conaprole no puede ceder ante la imposición del gremio"

Según informaron los jefes del MGAP la cartera no tendrá aumento en los recursos en esta nueva Rendición de Cuentas. Sobre este punto, el ministro Benech dijo que ante esta situación su ministerio se va a plegar al lineamiento estratégico del gobierno e intentará avanzar en profundizar el sistema de gobierno electrónico.

De un total de 273 trámites que se pueden realizar en el Ministerio de Ganadería, solo 35 en la actualidad se puede hacer vía online, según los números presentados por los jefes. Benech dijo que para la finalización del período se espera poder ofrecer la posibilidad de realizar el 100% de esos trámites vía online.





## PARAGUAY

### **Prosiguen tratativas para vender carne a los EE.UU. Se reunieron con técnicos del SENACSA**

13 de julio de 2018 | Los trámites en busca de concretar la exportación de carne vacuna a los Estados Unidos están avanzando. Técnicos del organismo sanitario de ese país se reunieron con sus pares del Senacsa para ir definiendo detalles y exigencias a fin de concretar la apertura de ese importante mercado. Estados Unidos había dado la aprobación sanitaria correspondiente para el ingreso de carne paraguaya a su mercado, el 12 de octubre del año pasado, y el martes último en el local del Servicio Nacional de Calidad y Salud Animal (Senacsa), técnicos del sistema sanitario de esa nación se reunieron con sus colegas de nuestro país para ir finiquitando los detalles y las exigencias que están vigentes para aquella clase de operación.

**El presidente de Senacsa, Fredis Estigarribia, manifestó que el martes estuvieron reunidos por primera vez con los técnicos de Estados Unidos.** “Vamos a cumplir algunos requisitos exigidos y una vez que acepten todo, se llevará nuestra carne a los Estados Unidos”, expresó.

Sistemas que rigen Al ser preguntado sobre qué plantearon exactamente los funcionarios extranjeros, Estigarribia explicó que en los Estados Unidos rigen dos tipos de exigencias para admitir la importación de productos: el sistema sanitario y el de inocuidad. “Los del sistema sanitario vinieron. Tenemos que llenar algunos requisitos con ellos, lo que servirá como un puente para que los técnicos del sistema de inocuidad vengan a visitarnos y hacer una auditoría”, agregó el presidente del organismo nacional de control sanitario. Todo depende del sistema sanitario estadounidense, recalcó.

Noche Senacsa

Por otra parte, anoche se desarrolló la “Noche Senacsa” en el predio de la Expo en Mariano Roque Alonso. Asistieron los presidentes de la ARP y de la UIP, Luis Villasanti y Gustavo Volpe; el titular de la Cámara Paraguaya de la Carne, Juan Carlos Pettengill, entre otros.

Estigarribia refirió que asumió la dirección de dicha institución estatal en un momento muy delicado para el país: el escándalo que se produjo con la importación de carne bovina del Brasil sin la certificación de Senacsa y sin la licencia previa del MIC. “Gracias a Dios pasó la tormenta y de aquí en adelante ya estamos con otro objetivo”, mencionó.

Recordó también la reciente auditoría de Taiwán, que quiere triplicar la importación de carne nacional. “La compra de 20.000 toneladas es el objetivo. Pasamos el examen y muy pronto tendremos buenas noticias para el Paraguay”, dijo.

### **Apertura del mercado de Qatar**

9 de julio de 2018 | La Asociación Rural del Paraguay (ARP) resalta que la carne paraguaya se ha posicionado entre las mejores del mundo, fruto del trabajo y de millonarias inversiones que hicieron los ganaderos, lo que posibilitó alcanzar mercados premium. Miembros del gremio anuncian crecimiento del 15% de la tasa de procreo de bovinos en los próximos dos a tres años. También destacan la apertura de Qatar a la carne paraguaya.

El presidente de la Comisión Central de la Exposición de Ganadería, Miguel Reinau, declaró inaugurada la feria, destacando la gran calidad de los animales que están en competencia. Según lo indicado, cada fin de semana los ganaderos rinden “exámenes”, cuando se disfruta de la carne paraguaya a la parrilla, que hoy está posicionada a nivel mundial.

Luis Villasanti, presidente de la Rural, valoró el trabajo hecho por los ganaderos en inversión para mejorar la genética de los animales. Dijo que el logro de ubicar la carne paraguaya en los mercados premium, se debe a las inversiones para mejorar la genética, a la sanitación y los cuidados. Todo eso contribuye a que la carne paraguaya sea la más rica del mundo y la estrella de nuestro país, apuntó.

Reiteró igualmente sobre el llamado escándalo de la carne, refiriéndose al ingreso irregular de carne vacuna por parte de algunos frigoríficos de nuestro país desde el Brasil. “Jamás hubo escándalo de la carne”, afirmó. Sostuvo que la carne es un producto de los ganaderos, que controlan y cuidan. “Podemos sentirnos orgullosos como ARP y más que nada como ganaderos, porque hemos conseguido lo mejor que se puede tener, un país libre de aftosa con vacunación muy controlada”, apuntó.

Mercado de Qatar

Villasanti también había anunciado la apertura del mercado de Qatar a la carne paraguaya. Este, al igual que otros mercados como el de Hong Kong y Estados Unidos, son metas propuestas desde hace tiempo por el productor y el industrial de la carne paraguaya.

Por su parte, el director de admisión de la Expo 2018, Juan Domingo Rehnfeldt, sostuvo que se está trabajando para aumentar la tasa de procreo de vacunos y que en esa tarea están comprometidos todos los ganaderos.

Preguntado cómo lo harán, respondió que incentivarán más la cría de hembras.



“Vamos a incentivar más la cría de las hembras y estamos viendo también algunas enfermedades que podrían haber afectado, como la brucelosis y otras enfermedades. Creo que nuestra tasa de procreo va a aumentar en los próximos dos o tres años considerablemente”, manifestó. Cree que el crecimiento será entre 10% y 15%.

### **Finaliza la auditoría de Taiwán sobre la carne**

11 de julio de 2018 SAN LORENZO (Antonia Delvalle C., corresponsal). El presidente del Senacsa, Fredis Estigarribia, informó que hay optimismo tras finalizar ayer la auditoría de técnicos sanitarios de Taiwán, país que podría aumentar de 6.000 a 20.000 toneladas al año la importación de carne vacuna paraguaya. Aclaró que existen algunas recomendaciones a fin de adecuarse a las peticiones taiwanesas antes de tener una decisión final, como un mejor control de parte de Senacsa en griforíficos, establecimientos ganaderos y, sobre todo, en las fronteras, por el reciente escándalo por ingreso de carne brasileña.

Agregó que para cumplir con los requerimientos, Senacsa contratará, vía excepción, a 20 veterinarios, aunque la necesidad es de unos 100. No obstante, destacó que los taiwaneses se llevan una buena impresión y se confía en que la respuesta que darán, en unos 90 días, será positiva.

“Dejaron algunos requisitos que debemos responder o poner en orden en la brevedad posible, y también para los frigoríficos. Ellos (los taiwaneses) se estarían expidiendo también en la brevedad posible”, resaltó.

Ayer, además, hubo reunión con una comitiva de Estados Unidos, de la que no dieron detalles.

### **Carne paraguaya juega en las primeras ligas, dice industrial**

11 de julio de 2018 | esperan apertura del mercado de Estados Unidos

La carne paraguaya está en niveles importantes en el mundo; juega en las primeras ligas, afirmó Patricio Silveira, presidente de la industria cárnica Minerva. Paraguay debe trabajar en la eficiencia de la cría para aumentar el hato ganadero, dice directivo de la ARP.

El ejecutivo de la industria cárnica fue consultado respecto a la participación de Minerva en la Expo 2018. Silveira sostuvo que Minerva no podía estar ajena ni fuera de este importante evento, donde se congregan todas las razas, toda la genética y la producción.

Preguntado respecto a las perspectivas de la carne paraguaya en el mercado internacional, dijo que hay cosas por mejorar, pero en general hay un balance positivo, aunque siempre hay obstáculos que se presentan pero que hay que ir sobrellevando.

“Creo que hoy los mercados están firmes. La carne paraguaya está en niveles muy importantes en el mundo. Hoy Paraguay juega, podemos decir a nivel de carne, en las primeras ligas. Nosotros (Minerva), desde acá estamos acompañando sin dudas el buen posicionamiento del país”, expresó.

Preguntado cuántas cabezas faena en la actualidad Minerva, dijo que en promedio están faenando entre 15.000 y 20.000 reses semanales en los cinco frigoríficos que esta empresa posee en nuestro país.

El ejecutivo de la carne dijo también que están intentando abrir nuevos mercados a la carne paraguaya en el mundo. Mencionó el caso de Estados Unidos. “Ya está habilitado el país, pero falta la parte protocolar y hacer los pasos necesarios para empezar. Pensando en forma optimista, creo que a fin de año podríamos llegar con carne de Paraguay a ese destino”, apuntó el industrial.

#### **Hato ganadero**

Por otra parte, en la charla de Mario Balmelli sobre perspectivas del mercado local y mundial de la carne, que se hizo en la ARP como parte de la Expo 2018, este se refirió al hato ganadero de nuestro país.

Indicó que hubo una pequeña retracción y que existen medidas que deben ser tomadas para corregir esos aspectos. Balmelli sostuvo que la disminución del hato ganadero tiene que ver con la eficiencia de la cría.

“Para corregir eso, ahora es momento de trabajar todos juntos”, apuntó. Por otro lado, refirió asimismo que los fenómenos climáticos también influyen y distorsionan el ciclo reproductivo normal.

### **Crecimiento ganadero**

13 de julio de 2018 El sistema de producción ganadera del Paraguay registró un crecimiento y, al mismo tiempo, mejoramiento extraordinario, destacó el experto argentino Christian Bianchi, en el marco de la conferencia organizada por la firma Invet, en el salón de la Asociación de Criadores de Brangus del Paraguay.

“Paraguay tiene la mejor relación de ganado por habitantes de la región, posee un rodeo que ha crecido 17 veces, ha mejorado su genética y también su sistema de producción, tiene una sanidad excelente, y es un proveedor mundial de carne de calidad”, expresó el especialista.

Enfatizó que las condiciones de clima y suelo, entre otros factores, con una gran producción de biomasa, hacen que la actividad de producción ganadera en el Paraguay sea muy competitiva con relación a otras zonas del mundo.



## **Escándalo fue de frigoríficos y no de la carne, dice la ARP**

08/07/18 El Presidente del gremio ganadero, Luis Villasanti, dijo estar muy optimista respecto al crecimiento de la ganadería y que la crisis que se vivió semanas atrás respecto al ingreso de carne vacuna del Brasil sin las licencias respectivas, más bien fue un escándalo de los frigoríficos y no de la carne. “La carne no tuvo escándalo”, respondió a una consulta periodística a poco de habilitarse oficialmente ayer la Expo 2018.

Recordó que en el 2011 sí hubo un escándalo al detectarse fiebre aftosa, pero de ahí “nunca más hubo ningún escándalo de la carne”.

Dijo estar muy optimista respecto a la ganadería en nuestro país. “Estamos muy fuertes y tenemos una muy buena proyección genética y estamos siendo admirados por el sistema de vacunación que tenemos, por la genética que tenemos. Estamos exportando, así que estamos felices nosotros”, apuntó.

En tanto que el viceministro de Comercio, Óscar Stark, presente en la habilitación de la Expo 2018, fue consultado cómo se encuentra hoy el mercado de la carne, tras el ingreso de cargamentos sin licencias por parte de varios frigoríficos (Concepción, Guaraní, All Food y Frigonorte), e incluso sanciones de Rusia a algunas firmas porque sus productos contenían antibióticos (Frigonorte y Frigochaco), señaló que no tuvo gran impacto para el mercado en general.

“Todos los mercados siguieron abiertos para la industria en general y solo se restringió para los frigoríficos que tuvieron problemas. Eso muestra la solidez de la industria de la carne en nuestro país y eso es fruto del trabajo conjunto de los sectores privado y público, que consolidó las instituciones por un lado y que hizo que la carne pase a exportar de 50 millones de dólares a 1.500 millones de dólares, en pocas décadas”, dijo. Lo ocurrido últimamente fue por “debilidades de algunas instituciones”, dijo.

## **UNIÓN EUROPEA**

### **BREXIT**

#### ***Brexit White Paper Reino Unido difundió su plan para llevarlo a la práctica***

Thu 12 Jul 2018 Last modified on Thu 12 Jul 2018 The long-awaited document setting out the UK's plan outlines five key objectives

The government has published its long-awaited Brexit white paper, the longest and most detailed explanation yet of its proposals for the UK's future relationship with the EU. The 104-page document lays out many of the same plans detailed after the cabinet's meeting at Chequers last week, but goes into much more detail. Here are the key elements:

#### **Main principles**

The white paper says the government seeks “a principled and practical Brexit”. It says its proposals follow on from Theresa May's set-piece speeches at Lancaster House, in Florence, at Mansion House and in Munich, “and in doing so [address] questions raised by the EU in the intervening months”.

It says the hope is that its publication will lead to “a redoubling of efforts in the negotiations”. The main purpose, it argues, is “respecting the result of the referendum and the decision of the UK public to take back control of the UK's laws, borders and money.”

The new relationship with the EU should be “broader in scope than any other that exists between the EU and a third country”, it says.

The aim would be “a practical Brexit” with both sides “confident they can trust and rely on the commitments made to each other”. This would involve regular dialogue, joint institutions and “robust and appropriate” means to resolve disputes, involving binding arbitration that would refer to the European court of justice.

#### **Five key objectives**

The white paper lays out five main areas of focus:

**The economy:** “developing a broad and deep economic relationship with the EU that maximises future prosperity ... and minimises disruption to trade between the UK and the EU, protecting jobs and livelihoods – at the same time making the most of trading opportunities around the world.”

**Communities:** ending free movement with a new immigration system, support for farming and fisheries, and what is called a “shared prosperity fund”.

**The union:** protecting the Northern Ireland peace process, avoiding a hard Irish border, safeguarding the constitutional integrity of the UK and devolving appropriate powers.

**Democracy:** leaving EU institutions and reclaiming UK sovereignty, ensuring laws are made in UK.

**The UK's place in the world:** promoting general principles such as openness and liberty.

#### **Economic partnership**

The white paper says the aim is for a free trade area for goods, giving frictionless border access. This would “protect the uniquely integrated supply chains and ‘just in time’ processes” with no “costly customs declarations”.





The plan would “enable products to only undergo one set of approvals and authorisations in either market, before being sold in both”. There would be separate arrangements for services, giving the UK freedom “to chart its own path in the areas that matter most for its economy”.

This section acknowledges that the UK “cannot have all the benefits of membership of the single market without its obligations”, and says it is thus necessary to create a bespoke new arrangement.

On services, there would be new arrangements on digital commerce, allowing the UK and EU “to respond nimbly to the new opportunities and challenges presented by emerging technologies”.

Details of the new service arrangements remain vague, but they would be based on “the principles of international trade and the precedents of existing EU trade agreements”, the document says, as well as elements such as the continued mutual recognition of professional qualifications.

This section also calls for a new and comprehensive deal on financial services, beginning with a position of “identical rules and entwined supervisory frameworks”.

**Facilitated customs arrangement (FCA)**

A key part of the new economic arrangements would be this, May’s new compromise proposal for post-Brexit customs arrangements, which would seek to minimise border friction while keeping the UK outside the EU’s single market.

The UK and EU would become a “combined customs territory” for goods, in which the UK would apply the EU’s tariffs and trade policies for goods intended for the bloc, with domestic tariffs imposed for goods heading to the UK.

According to the white paper, the FCA would “preserve frictionless trade for the majority of UK goods trade and reduce frictions for UK exporters and importers”.

In practice, the white paper says, when a product reaches the UK border and its destination “can be robustly demonstrated by a trusted trader”, the relevant UK or EU tariff will be applied. If the destination cannot be proved, the higher of the two tariffs will be applied, with repayment made as needed if the product ultimately ends up in the lower-tariff destination.

This scheme would involve discussions with the EU on areas such as a trusted trader schemes and arrangements for repaying excess tariffs.

The government would “explore options to use future advancements in technology to streamline the process”, including machine learning and artificial intelligence.

**Convergence on standards**

The white paper proposes a common rulebook to “underpin the free trade area for goods”. This would involve British BSI standards not diverting from their EU equivalents, and common tests for goods. One example given in the document would be continued mutual recognition of the same approvals for various motor vehicle categories.

The proposal would involve a common rulebook on food and agriculture, and UK participation in EU agencies for chemicals, aviation and medicines, “accepting the rules of these agencies and contributing to their costs”.

On food, this would include equivalence of elements such as labelling, mirroring agreements the EU already has with other nations, for example on common standards for products marketed as being organic.

**Movement of people**

Free movement of people from the EU to the UK will end, the white paper says. While details of future migration policy will be decided in the months to come, the UK will seek to still attract the “best and brightest” from the EU.

The new arrangements will seek to help businesses get the right staff, allow citizens to travel visa-free for tourism or temporary business trips, and help students study abroad.

**Environment**

This section reiterates a desire to maintain “high environmental standards” with a new statutory body to monitor this, but contains no details of what this would mean in practice.

**Security partnership**

This would mean continued sharing of data and information to protect citizens, and UK participation in agencies such as Europol. It would also involve coordination on foreign policy and defence issues.

**Next steps**

The final section of the white paper calls for negotiations to accelerate, saying that once a deal is reached it will be considered by parliament. It adds: “The UK and the EU have a shared ambition to agree both documents by October in order to give sufficient time for their respective parliaments to give their approval before the UK leaves the EU on 29 March 2019.”

### ***Construyen una herramienta para medir el impacto sobre los productores agropecuarios***

AHDB 09 July 2018 UK - A new online calculator has been launched this week which will allow farmers and growers to see for the first time how they may be affected by potential Brexit scenarios.



It's part of a wider suite of practical business tools unveiled by the Agriculture and Horticulture Development Board (AHDB) to help farmers and growers review their business performance and remain fit for the future.

The Brexit Impact Calculator allows individuals to input their own data and see what effects the different Brexit scenarios might have on their business.

"Tremendous uncertainty still surrounds the outcome of Brexit negotiations," said AHDB Chief Strategy Officer Tom Hind. "Nonetheless, we believe it's important that businesses make conscious, proactive and strategic decisions to be fit for the future.

"Last year, we analysed how a range of Brexit scenarios could impact on different farming sectors. Feedback from farmers and growers has indicated that many are unsure how the different scenarios might affect them, so we have now produced a tool to help them better understand what Brexit could mean for their bottom line."

The calculator is just part of a wider tool list which looks at five key areas of the business covering topics, from being efficient with resources to financial management and planning for the future.

The five areas are:

Review of farm business

Profit and performance

Brexit scenario planning

Individual farm performance – technical change

Getting the most from the marketplace.

The online toolkit also features a resilience check list which uses questions to identify areas of the business that may benefit from additional attention to ensure it is sustainable after Brexit.

### ***Advertencia de la UE ante la difusión del programa***

Thu 12 Jul 2018 15.32 BST Last modified on Thu 12 Jul 2018 17.28 BST

The EU has issued a veiled warning that it will not budge on its red lines after Theresa May unveiled her long-awaited Brexit plan.

Michel Barnier, the EU's chief Brexit negotiator, said he would analyse the UK's proposals with EU member states and the European parliament "in light of guidelines" drawn up by EU leaders.

This reference to guidelines was a heavy hint of the conflict to come in Brexit negotiations. The European council guidelines lay down the EU's red lines, including the insistence that the UK cannot benefit from "cherry-picking" its favourite parts of the EU rulebook.

In a terse message on Twitter, Barnier said the EU had offered the UK an "ambitious" free-trade agreement and cooperation on a wide range of issues, including a "strong security partnership".

The offer of a free-trade agreement falls far short of British hopes that were finally spelt out in detail, more than two years after the EU referendum result.

Barnier said he was looking forward to further Brexit negotiations with the UK, which are due to resume on Monday. Following those talks, Barnier is due to meet ministers from the 27 EU member states on 20 July, where they will debate how to respond to the British plan.

EU diplomats had already warned that the white paper proposals would probably not be good enough, while a source who had seen an earlier draft described the UK approach as "cake", a reference to the former foreign secretary Boris Johnson's one-liner about being "pro having [cake] and pro eating it", meaning that it could not be accepted.

The UK proposal to create a single market in goods is likely to meet resistance in the face of the EU's longstanding demand that there can be no cherry picking of its internal market, nor division of its "four freedoms" – goods, services, people and capital. "If we allow this flexibility on the single market, the whole building might crumble," one EU source told the Guardian.

The British proposals on customs, which are complex and untested, are also likely to run into trouble in Brussels. As part of an attempt to avoid a hard border on Ireland, the UK is proposing to apply EU tariffs to EU goods passing through the UK, while having the freedom to set different tariffs on goods entering the UK.

In carefully chosen language, the UK is describing this unprecedented arrangement as "as if in a combined customs territory with the EU". But EU diplomats who heard early outlines of the plan said it sounded too close to earlier proposals that were rejected last year.

British officials hope the 98-page document will prompt the EU to soften its approach and put the UK into a different category to other non-EU countries such as Norway or Canada. Now the UK has diluted some of its red lines, it hopes the EU will respond in kind.

The EU maintains that existing British red lines – no jurisdiction of the European court of justice, no free movement of people – mean the only option is a free-trade agreement, similar to those Brussels negotiated with Canada or Korea – a point of conflict with the UK that is subtly restated in Barnier's tweet.



So far there is no sign that the EU is ready to change its approach, but officials say they want to read the paper carefully before drawing conclusions.

The European parliament also restated its opposition to any attempt to water down the EU's internal market. In a statement, the Brexit steering group, led by the Liberal leader Guy Verhofstadt, vowed to stand up for the "integrity of the single market" while firing a warning shot against the UK customs plan. "There will be ... no space for outsourcing [the] EU's customs competences."

The British government was urged to clarify its positions on a fallback plan for preventing a hard border with Ireland, the so-called backstop, so that the Brexit withdrawal agreement "can be finalised as quickly as possible".

However, MEPs welcomed the UK government's hint that it was seeking a Ukraine-style "association agreement" with the EU – a wide-ranging legal arrangement covering economy, security and foreign policy, which is the European parliament's preferred option.

### ***Entidades rurales reaccionan ante el proyecto de la futura vinculación con UE***

13 July 2018 UK - NFU Scotland, NFU, NFU Cymru and Ulster Farmers' Union have issued a statement following the publication of today's Brexit white paper on the future relationship between the UK and the EU.

In response to the white paper, the four unions state: "We are pleased to see the proposals agreed by the Cabinet last week included in this white paper, particularly given that the four UK farming unions have long-maintained that free and frictionless trade between the EU and UK is crucial for food and farming.

"If British farmers are to continue playing their part in providing high-quality and affordable food to the British public, as well as delivering for the environment, the principle of a free trade area for goods, including agri-food, is vital for our sector.

"British farmers produce food to some of the highest production and animal welfare standards in the world and we are pleased to see the government intend to maintain these standards as part of a deal.

"It is imperative that the UK's independent trade policy does not seek to undermine those standards and establishing a close relationship with Europe will enable those standards to be continued.

"Although the details are yet to be agreed, farmers will welcome this additional clarity on what the government's plan for our future trading relationship will be.

"It is our sector's hope that we maintain the high levels of trade in agricultural goods between the UK and the EU, our largest market for agri-food products.

"While the government has committed to ending free movement of people, there must be recognition of the importance of both seasonal and permanent workers from outside of the UK that help farms to continue producing food for the nation.

"The food and farming industry continue to urge government to proceed with an immigration policy that is based on fact and business need, reflecting the importance of these workers to our food and farming sector.

"We call on the UK government and the European Commission to work urgently to achieve an agreement on trade and we look forward to working with both in the ongoing negotiations."

### **Acuerdo entre UE y Japón va avanzando**

09/07/2018 - El Consejo de la Unión Europea decidió firmar el Acuerdo de Asociación Económica con Japón (EPA) dando el visto bueno a la firma así como a solicitar el consentimiento del Parlamento Europeo para la celebración del acuerdo. Se espera que la Unión Europea y Japón firmen ambos acuerdos en una cumbre el 11 de julio de 2018 en Bruselas, según publicó el portal Eurocarnes.

La EPA es un acuerdo comercial muy ambicioso e integral. Cuando se implemente por completo, se eliminará el 99% de las tarifas aplicadas a las exportaciones del viejo continente a Japón, que en la actualidad ascienden a aproximadamente mil millones de euros.

El acuerdo creará nuevas oportunidades considerables para las exportaciones agrícolas de la UE, eliminando los aranceles japoneses existentes sobre el 85% de los productos agroalimentarios europeos, entre ellos la carne de cerdo y los productos elaborados. Además se espera que los aranceles para la carne vacuna se reduzcan del 38,5% al 9% en un periodo de 15 años.

## **ESTADOS UNIDOS**

### **Exportaciones de carnes bovinas alcanzaron un valor récord en mayo**

10 July 2018 US - US beef exports set a new value record in May while also increasing significantly year-over-year in volume, according to data released by USDA and compiled by USMEF.

Beef export volume was 117,871 metric tons (mt) in May, the sixth-largest on record, valued at a remarkable \$722.1 million, which surpassed the previous monthly high (March 2018) by a healthy 4 per cent and was 24 per cent higher than a year ago. Through the first five months of 2018, beef exports were



up 10 per cent in volume to 547,157 mt while export value was \$3.32 billion, 21 per cent above last year's record pace.

Exports accounted for 13.6 per cent of total beef production in May, up from 13 per cent a year ago. For muscle cuts only, the percentage exported was 11.1 per cent, up from 10 per cent last year. For January through May, exports accounted for 13.5 per cent of total beef production and 10.9 per cent for muscle cuts – up from 12.8 per cent and 10 per cent, respectively, last year.

Beef export value averaged \$313.39 per head of fed slaughter in May, up 18 per cent from a year ago. The January-May average was \$317.69 per head, also up 18 per cent.

Japan, Korea lead the way as global demand for US beef continues to climb

Japan and South Korea continue to be the pacesetters for US beef export growth. In May, export volume to Japan totaled 30,117 mt (up 19 per cent from a year ago) valued at \$196.8 million (up 22 per cent and the highest since August 2017). Through May, exports to Japan were up 4 per cent from a year ago in volume at 128,207 mt while value increased 13 per cent to \$822.9 million. This included a 6 per cent increase in chilled beef volume to 61,178 mt, valued at \$488 million (up 18 per cent).

May exports to Korea were up 46 per cent from a year ago in volume (20,781 mt) and jumped 64 per cent in value to a record \$146.2 million. For January through May, exports to Korea climbed 34 per cent to 91,875 mt, valued at \$647.3 million – 49 per cent above last year's record pace. Chilled beef exports to Korea totaled 20,365 mt (up 30 per cent) valued at \$196 million (up 41 per cent).

"Despite the intense competition US beef faces in Japan and Korea, these markets continue to display a terrific appetite for a growing range of cuts," said USMEF President and CEO Dan Halstrom. "Beef items that are traditionally popular in Asia continue to perform and other items more suitable for thick-cut steaks and barbecue concepts are gaining more traction, resulting in exceptional growth opportunities. But the enthusiasm for US beef extends well beyond these two leading markets, and that's how exports have reached this record-breaking pace."

For January through May, other highlights for US beef include:

In Mexico, exports were up 4 per cent in volume (98,900 mt) and 13 per cent higher in value (\$427.9 million). Mexico is a critical market for US rounds, shoulder clods and other muscle cuts which are typically undervalued in the US market. It is also the leading destination for US beef variety meat exports, which increased 15 per cent from a year ago in value (\$98.9 million) despite a 2 per cent decline in volume (43,479 mt).

Exports to China/Hong Kong increased 20 per cent in volume (57,186 mt) and 47 per cent in value to \$442.2 million. May exports to China were the largest (834 mt) since the market opened in June of last year, pushing the January-May total to 3,133 mt valued at \$28.7 million. However, effective 6 July, China's import duty rate on US beef increased from 12 per cent to 37 per cent. The higher tariff will make it difficult for end-users to profitably utilize US beef, especially with US beef already priced at a premium compared to imports from other suppliers and with Australian beef subject to a duty of just 7.2 per cent through the China-Australia Free Trade Agreement.

Coming off a record performance in 2017, beef exports to Taiwan continue to gain momentum. Exports were up 31 per cent from a year ago in volume (22,127 mt) and 43 per cent higher in value (\$209.9 million). Chilled exports increased 39 per cent in volume (9,272 mt) and 52 per cent in value (\$116 million), as US beef captured 74 per cent of Taiwan's chilled beef market.

More reliable access to Indonesia has helped bolster beef exports to this promising market, with volume increasing 52 per cent from a year ago to 6,247 mt and value nearly doubling to \$28.7 million. Due in part to the United States successfully challenging Indonesia's import restrictions at the World Trade Organization, US beef now faces fewer obstacles and a more consistent regulatory environment. Indonesia's strong performance and solid growth in the Philippines helped push exports to the ASEAN region 17 per cent higher in volume (18,472 mt) and 28 per cent higher in value (\$102.4 million).

Led by strong growth in Guatemala, Costa Rica and Panama, exports to Central America jumped 21 per cent in volume (5,436 mt) from a year ago and 22 per cent in value (\$30.6 million).

### **Federal Reserve prevé impacto por el alza de aranceles de CHINA**

09 July 2018 - While the Federal Reserve in its June meeting minutes did note a strong US stock market and low unemployment, the central bank's districts voiced some concerns about trade and tariffs.

The US and China plan to impose reciprocal tariffs on \$34 billion worth of goods on Friday.

Agriculture was one of the sectors that was mentioned, as China's planned retaliatory tariffs on soybeans could place a burden on that industry's farmers.

China's tariffs covering agricultural products include soy, corn, wheat, cotton, rice, sorghum, beef, pork, poultry, fish, dairy products, nuts and vegetables are scheduled to go into effect on Friday.

"Conditions in the agricultural sector reportedly improved somewhat, but contacts were concerned about the effect of potentially higher tariffs on their exports," the Fed said.

The long-term effects of trade policy have raised some doubts about future economic activity.





"Most participants noted that uncertainty and risks associated with trade policy had intensified and were concerned that such uncertainty and risks eventually could have negative effects on business sentiment and investment spending," the minutes said. "Many participants cited developments related to trade policy as posing downside risks to their growth forecasts."

Wall Street's major stock market indexes rose on Thursday as reports that the US and the European Union may agree to withdraw auto tariffs provided some optimism on international trade relations.

The Dow Jones Industrial Average rose 181.92 points, or 0.75 per cent, to 24,356.74; the S&P 500 gained 23.39 points, or 0.86 per cent, to 2,736.61; and the Nasdaq Composite added 83.75 points, or 1.12 per cent, to 7,586.43.

The Shanghai Stock Exchange Composite Index closed down by 0.9 per cent on Thursday, while the Shenzhen Stock Exchange Index fell 2.2 per cent.

On Friday, Japan's Nikkei index was up 1.10 per cent.

German Chancellor Angela Merkel said she would support reducing EU tariffs on imported US autos. An industry source told Reuters that the US ambassador to Germany, Richard Grenell, had mentioned to German auto executives that US President Donald Trump could abandon threatened tariffs on imported European cars if the European Union scrapped duties on US cars.

"The fact that EU and US officials are discussing proposals to eliminate certain tariffs on auto imports, that's helping sentiment today and calming fears of an escalating trade war," said Ryan Larson, head of US equity trading at RBC Global Asset Management in Chicago.

There was no evidence of any last-minute negotiations between US and Chinese officials, business sources in Washington and Beijing said.

"There's a lot of uncertainty, but the markets have reacted fairly calmly and rationally," said Oliver Pursche, chief market strategist at Bruderman Asset Management in New York. "There's been a lot of rhetoric but not a lot of actual action in terms of a trade war."

### Aumentaron las importaciones de carnes bovinas en el primer semestre de 2018

09 July 2018 US - US beef imports were higher in the first six months of the year despite the ban on Brazilian beef that went into effect last spring. At this point there is no clear path for the resumption of those imports and it serves no purpose to speculate about timing, reports Steiner Consulting Group, DLR Division, Inc.

YTD Imported Fresh/Frz Beef Passed for Entry in the US

week 25	6/24/2017	6/23/2018		
Australia	100,868	101,794	926	0.9%
Brazil	8,193	-	(8,193)	-100.0%
Canada	116,286	127,186	10,900	9.4%
Chile	202	-	(202)	-100.0%
Costa Rica	4,240	4,092	(148)	-3.5%
France	-	-	-	
Honduras	-	944	944	
Ireland	941	1,156	215	22.8%
Japan	202	246	44	21.8%
Mexico	88,852	94,054	5,202	5.9%
Netherlands	-	-	-	
New Zealand	102,208	113,298	11,090	10.9%
Nicaragua	22,530	25,789	3,259	14.5%
Spain	-	-	-	
Uruguay	17,810	16,392	(1,418)	-8.0%
<b>Total</b>	<b>462,485</b>	<b>484,952</b>	<b>22,467</b>	<b>4.9%</b>

Source: AMS - USDA

Beef imports from Argentina, which were poised to enter the US earlier this year, also appear to be in limbo at this time. There is no clear timeline for resumption of fresh beef trade with Argentina at this time.

Beef imports from NAFTA countries were higher in the first six months. The strong US dollar and robust US beef prices continue to encourage more Canadian and Mexican beef to come into the US. Keep in mind, however, that we also export a fair amount of beef into these markets.

Over the last two decades the industry has become very well integrated and product flows are impacted by regional demand, transportation costs and exchange rates. Through 23 June US beef imports from Mexico were 94,054 MT, 6 per cent higher than a year ago and just a few thousand metric ton short of the volume of beef coming from Australia.

We think by the end of this year the total import volume from Mexico will be larger than New Zealand, making it once again the third largest beef supplier to the US. Different from Australian beef, which tends to





be mostly frozen grinding beef, Mexico ships fresh beef cuts to the US that often trade at a discount to domestic product.

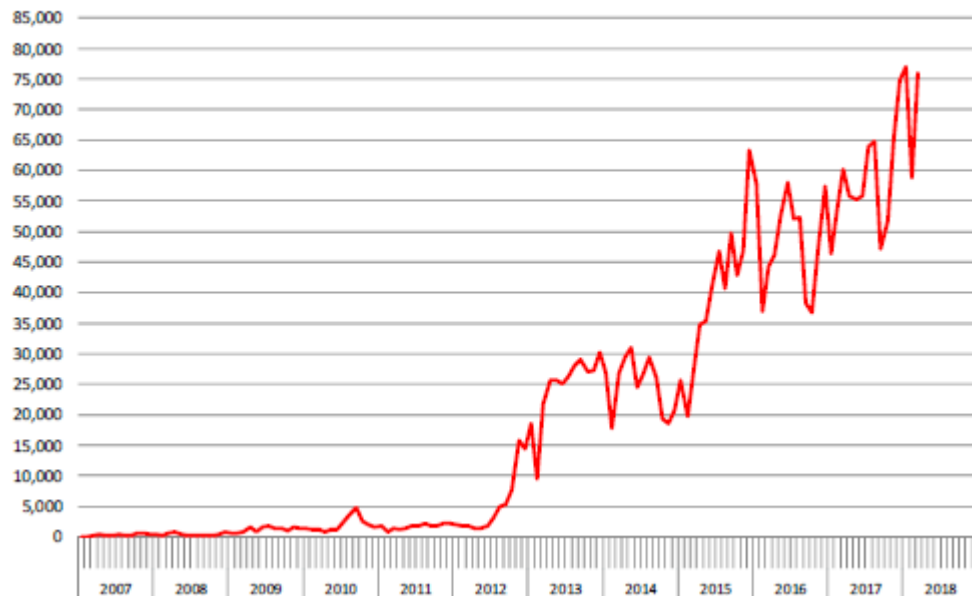
Beef imports from Canada have also increased this year. We have noted with interest that as Canada ships more beef to the US market it has also increased its purchases of beef from Australia. We do not have a breakdown of the products Canada ships to the US but noted that much of the increase in Australian 90CL boneless beef shipments in June went to the Canadian market rather than the US. It is possible that some substitution took place, with more Canadian fresh 90CL coming into the US due to the relatively high price and then replaced with cheaper frozen Australian 90s.

Beef imports from New Zealand have also increased this year, with total volume through the end of June up 11,000MT (+11 per cent) compared to a year ago. Imports from New Zealand are very seasonal, however, reflecting the rate of dairy cow slaughter in the country. New Zealand slaughter drops sharply in June, July, August and September, which tends to limit supply availability in the second half of the year.

Looming in the background of world beef trade is China. In the last three years China has emerged as the biggest beef buyer in the world and demand in that market continues to expand. At this time China and Hong Kong account for almost half of all beef shipments from South America. Much of the recent increase in Australian and New Zealand beef exports has also gone to the Chinese market.

#### China Monthly Imports of Fresh/Frozen Beef, Metric Ton, SW

Source: GTIS with data from China Customs Agency



Currently Australian grinding beef is trading at a discount to US domestic product but we have to wonder if that discount will be there in the fall when New Zealand grinding beef supplies decline. Australian slaughter is up but much of the growth in supplies is going elsewhere.

US beef imports are higher for the year but the growth in exports has been far bigger and the US at this point is a net beef exporter. An update on export flows in May and June will be published in our Monday AM report.

#### USMEF hará una sesiones de entrenamiento para cadenas de restaurantes en CHINA

09 July 2018 - Working to put US red meat at the center of Korean barbecue and hot pot menus in China, USMEF partnered with China National Cereals, Oils and Foodstuffs Corporation (COFCO) to conduct three foodservice training sessions for a pair of chain restaurants that have hundreds of locations across the country.

Funded by the Beef Checkoff Program and the National Pork Board, the trainings in Shanghai were attended by employees of Little Sheep and Pankoo restaurants.

"Hot pot is currently the most popular cuisine in China, and there are more than 350,000 hot pot restaurants operating right now," said Ming Liang, USMEF marketing director in China.

Mr Liang cited national statistics that show hot pot restaurants account for 17 per cent of total foodservice sector consumption in China. In 2017, hot pot dishes accounted for nearly one-fourth of the catering industry's production. Likewise, Korean barbecue has become a popular cuisine, especially with consumers age 20 to 40.

Engaging the two chains and sharing information about US beef and pork was a strategic move, Mr Liang explained.



"Both Little Sheep, a hot pot chain, and Pankoo, a Korean barbecue chain, have hundreds of restaurants all over the country," he said, adding that the two companies are supplied by COFCO, China's largest food processor, manufacturer and trader.

"Both chains intend to upgrade their products to meet the huge demand for high-quality meat, and we have made great efforts to convince them that US red meat is the ideal product for these dishes."

During the training sessions, USMEF provided an overview of the US red meat industry, explained the US beef grading system, demonstrated meat cutting and plating procedures and offered various application ideas for cuts. Tasting sessions also allowed participants to sample US beef and pork. USMEF included an introduction to the "meat box" concept and explained proper storage and defrosting of red meat.

Mr Liang said the meat box concept was developed to help distributors, importers, foodservice operators and retailers utilize secondary cuts of beef and pork. It is especially valuable to the Korean barbecue and hot pot sectors of the foodservice industry.

"For example, market demand for US short ribs and short plates exceeds the current level of China-eligible supply," he explained. "USMEF identifies similar muscle cuts, breaks down the cost structure of each cut, then assists customers in finding a cut that meets their needs. It is an effort to further push secondary cuts such as clod hearts, sirloin caps and outside flat.

"With the meat box concept, we may replace the short ribs with chuck short ribs, or short plates with knuckles slices. Or we may replace the whole menu with chuck short ribs, knuckles slices and chuck tender at much lower costs."

USMEF butchers and chefs performed cutting demonstrations using US beef outside round flat, knuckle, chuck roll, tenderloin, top sirloin cap, shoulder clod and mock tender, along with US pork CT butt and boneless pork loin.

In the weeks following the training sessions, Mr Liang followed up with both restaurant chains and learned that each had increased interests in US beef and pork.

"Little sheep started using Pork CT butt after the training, and the average consumption at their restaurants is around 500 kilograms per month and they plan to start using US beef soon," Mr Liang said.

"Meanwhile, Pankoo has purchased about 200 metric tons of US beef since the market reopened last year. US beef top blade muscle, short ribs and bottom sirloin butt are on their menus. They're also planning to use beef shoulder clod and pork CT butt to expand and improve their menus."

## **Disputa comercial remodela mercado de commodities agrícolas**

11/07/18 - por Equipe BeefPoint

A escalada das tensões entre Estados Unidos e seus principais parceiros comerciais começa a remodelar o mercado de commodities agrícolas. Os produtores americanos de soja correm o risco de perder bastante, enquanto fiações vietnamitas e criadores alemães de suínos podem se beneficiar.

Milho – Os temores quanto ao futuro do Acordo de Livre Comércio da América do Norte (Nafta), entre EUA, México e Canadá, já encorajaram o México a diversificar seu fornecimento de commodities agrícolas. A China colocou o milho na lista de produtos que se tornaram alvos de tarifas de importação. As atenções agora estão voltadas em descobrir para onde irão as exportações americanas de milho e como o México, maior importador do cereal do país vizinho, vai reagir. O país latino-americano não incluiu nenhuma medida contra o milho em sua reação às tarifas que os EUA impuseram sobre o aço e o alumínio.

Mas, em 2017, o México comprou pouco menos de 600 mil toneladas do grão no Brasil, dez vezes a mais do que em 2016, segundo o International Trade Centre. Embora isso seja apenas 4% das importações totais de milho do México, os esforços do país para reduzir sua dependência dos EUA devem aumentar. "Vai ser difícil substituir todas as importações dos EUA, mas até 30% podem ser comprados do Brasil, Argentina e outros países", disse Stefan Vogel, analista do Rabobank.

Carne bovina – A sobretaxa de Pequim à carne bovina dos EUA pode ajudar pecuaristas da Austrália. A carne americana não ocupa muito espaço nas gôndolas chinesas, mas é considerada de primeira qualidade. Os produtores americanos de carne bovina voltaram a ter acesso ao mercado chinês pela primeira vez em 14 anos em 2017. Assim como a carne australiana, o produto é vendido a preços mais altos. Em contraste, a carne do Brasil, maior exportador à China, é considerada "produto de volume", segundo o Departamento de Agricultura dos EUA (USDA).

Vender carne bovina a preços mais altos no mercado chinês é questão de construção da marca e confiança, segundo analistas, que destacam os prejuízos que as tarifas poderiam provocar. Os impostos "poderiam, em última análise, restringir o acesso ao mercado e enfraquecer um grande concorrente dos exportadores de carne bovina australianos", disse Mark Bennett, chefe de agronegócios da ANZ.



## **Productores de Montana prevén acuerdo con CHINA pese a las medidas de la Administración Trump**

12 July 2018 US - Montana officials are hoping that a blockbuster deal with Chinese retail giant JD.com to export local beef will be possible despite the US Government's escalating trade war with China.

"We are still talking," Jay Bodner, executive vice-president of the Montana Stockgrowers Association (MSA), said.

In an exclusive interview with Xinhua on Tuesday, Mr Bodner said the win-win deal inked last November in Beijing is not dead in the water, despite a 25-per cent tariff on \$34 billion of imports from China imposed by the Trump administration last Friday.

Beijing's expected response - an additional 25-per cent import tax on top of an existing 12-per cent hike - was hard for Montana to digest, especially in light of the pending JD.com deal.

"There is a pretty high level of concern," Mr Bodner, a rancher from eastern Montana who has been with the MSA for 16 years, said.

Comparing JD.com to America's Amazon.com, he said the Chinese internet giant's commitment to spend up to \$100 million to build Montana's largest meat processing facility was still on the table.

More significantly, JD.com's pledge to buy \$200 million worth of Montana beef in the next few years has not been canceled yet.

Mr Bodner and the MSA's 2,500 members are praying that another round of proposed US tariffs announced Tuesday by Trump administration - 10 per cent tariffs on an additional \$200 billion on Chinese goods exported to the US - will not kill the biggest beef deal in Montana's history.

Since Washington ignited the trade dispute early this year, Montana's local ranchers and residents have been expressing their concerns about Washington's trade policy.

An editorial published by Bozeman Daily Chronicle, an influential local daily, titled "Trade war with China bad for Montana", warned that steep tariffs imposed by Trump administration on China's products could inflict collateral damage on a wide range of industries, including cattle production in Montana.

"Free trade - without the imposition of onerous tariffs - is not a partisan issue. Democrats and Republicans alike have touted its benefits to national economies. And historically, trade wars ignited by tariffs have been blamed for economic downturns, including the Great Depression," the editorial reads.

"(Ranchers want to make sure) we can go through this dispute, we can conduct business as normal, and we get back on track to build up (a) new export market," Mr Bodner said.

JD.com's offer to help build a Montana slaughterhouse also represents a new, huge potential profit center for Montana's cattle industry that will eliminate the current costs to ship cattle to processing plants in Colorado and Nebraska.

"Our goal (is) a plant here in Montana, which would reduce transportation costs, allow more value here, and provide a cheaper product if we can do that all in Montana," Mr Bodner said.

But Washington's on-again, off-again, on-again trade policy, and the threats of more tariffs on Chinese products have rattled many of Montana's farmers.

"If (the trade war) ends in one or two months from now, we're back in business," Mr Bodner said, voicing the hope of his constituents. A trade war lasting for more months could "create more challenge" to the deal.

"It does not mean that the agreement (with JD.com) would never occur, maybe we would scale the agreement back or you might have to make (some) adjustment into it," he said.

According to the US Department of Agriculture, China's beef imports have expanded from just \$275 million in 2012 to \$2.5 billion in 2017. But only a trickle comes from the United States.

"Last year we only sold about \$31 million of product into China for US beef," Mr Bodner said. "By comparison, US beef exports to Japan equaled \$2 billion."

Beef producers around the United States were ecstatic in April 2017 when China agreed to allow American beef in the Chinese market after a 14-year ban.

"We generated about \$30 million ... in that short amount of time, so we're looking at an opportunity to try to regain our market share," Mr Bodner said.

## **EE.UU. comienza a notar la imposición de aranceles a su carne de cerdo en México y China**

10/07/2018 Sus ventas a China en mayo se redujeron en un 31%

Tras unas buenas cifras en el pasado mes de abril, las exportaciones de carne de cerdo de EE.UU. del mes de mayo se han ralentizado e incluso reducido, según informa el USMEF. Así, el país ha exportado un 2% menos, sumando 217.209 t, por un valor de 562,5 millones de dólares, un 3,5% menos.

Pese a este retroceso, de enero a mayo, EE.UU. suma ya 1,08 millones de t exportadas por un valor de 2.850 millones de dólares. Las exportaciones supusieron el 27,8% de la producción estadounidense en mayo frente al 29,5% que supusieron hace un año.

USMEF estima que cuando más se van a comenzar a notar los efectos de los aranceles mexicanos para la carne de cerdo estadounidense será a partir de los datos de junio pero sin embargo si que han



comenzado a notarse los problemas comerciales con China ya que las ventas a este país se han reducido en un 31% en comparación con hace un año hasta las 34.191 t con un 25% menos de valor obtenido por las ventas (79,9 millones de dólares).

Ante esta situación desde USMEF, su presidente, Dan Halstrom, considera que "la carne de cerdo ha quedado atrapada en una disputa que no tiene nada que ver con el comercio porcino. USMEF se está enfocando en los factores que podemos controlar para hacer todos los esfuerzos posibles por defender nuestra participación de mercado y proteger nuestro negocio en México y China. USMEF también enfatiza constantemente la importancia de diversificar nuestros mercados de exportación en los mercados emergentes y esos esfuerzos son más críticos que nunca".

Frente a este comportamiento en el porcino, las ventas de carne en mayo siguen creciendo fuertemente ya que en mayo el país exportó 117.871 t, un 24% más que hace un año, por un valor de 722,1 millones de dólares.

## VARIOS

### **NUEVA ZELANDA: sector se prepara ante la posible Guerra comercial entre China y EE.UU**

10 July 2018 - A short-term boost to the New Zealand dairy sector is possible as the US-China trade war escalates, but the industry is predicting long term pain.

The administration of US President Donald Trump fired the first shot on Friday, putting tariffs on \$34 billion worth of Chinese goods, provoking Beijing to do likewise.

Radio NZ reports that President Trump has threatened to impose more tariffs.

Dairy Companies Association chairman Malcolm Bailey said the fear was the trade war could easily lead to a global depression as affected countries seek to dump exports into other markets.

"In the short term it is possible New Zealand could get a boost."

"But we think the boost would be very temporary because economic activity overall will be depressed. Everyone ends up losing out of this," Mr Bailey said.

New Zealand Beef and Lamb chief executive Sam McIvor said the industry was not panicking yet.

Mr McIvor said the growing dispute put greater emphasis on free trade deals like the Comprehensive and Progressive Trans Pacific Partnership and the upcoming negotiations with the European Union. "If you have markets that are open to you, then you actually have choice, you have flexibility to deal with global changes."

### **COLOMBIA: podrá reingresar al mercado chileno**

09/07/2018 Chile ha hecho oficial el reingreso de la carne de vacuno producida en Colombia tras los brotes de fiebre aftosa registrados hace ya un año. Según el ministro de Agricultura y Desarrollo Rural, Juan Guillermo Zuluaga, este mercado generó en 2017 925.000 dólares en valor por un total de 195,9 toneladas exportadas.

La información fue confirmada por el Ministerio de Agricultura de Chile en una carta enviada a Colombia en la cual se detalla que el Servicio Agrícola y Ganadero (SAG) emitirá una resolución, con la cual Colombia "podrá reiniciar la exportación de carne bovina a Chile".

Ante esta noticia, el ministro Zuluaga instó "al Servicio Nacional de Sanidad Agraria (Senasa) de Perú para que podamos agilizar la visita para volver a tener la admisibilidad de carne colombiana a este mercado".

Finalmente, el ministro Zuluaga puntualizó que "las exportaciones de carne colombiana durante el primer trimestre sumaron 6.031 toneladas".

### **CANADA: sector bovino recibirá inversión del gobierno federal**

TheCattleSite News Desk 12 July 2018 - The Canadian beef sector is a strong economic driver, accounting for \$9 billion in farm cash receipts in 2017.

Exports of Canadian beef and cattle totalled nearly \$2.41 billion in 2017. Canadian beef producers are working hard to ensure they continue to create good, middle-class jobs while expanding markets for their safe, high-quality products.

While attending the Calgary Stampede, federal Minister of Agriculture and Agri-Food, Lawrence MacAulay, announced an investment of up to \$14 million to the Beef Cattle Research Council (BCRC), a division of the Canadian Cattlemen's Association (CCA), under the Canadian Agricultural Partnership, AgriScience Clusters. The BCRC will contribute up to an additional \$7.6 million, for a total investment of up to \$21 million.

Funding for the Sustainable Beef and Forage Science Cluster will be used for activities focussed on improving the sustainability of Canadian beef and forage production, growing beef exports and supplying high-quality Canadian beef to people around the world.





The Beef Cluster was funded under two previous agricultural policy frameworks. The previous research activities, which looked at genetics, feed efficiency, forages and animal health, have contributed to a strong and more competitive beef sector and sustained producer profitability.

Today's announcement is part of the Minister's cross country Growing Canadian Agriculture tour which started in Quebec in mid June and ends in British Columbia on 17 July.

The Minister is meeting with farmers, processors and industry leaders, and will also participate in rural agricultural events, to highlight strategic federal agricultural investments and programs - including those recently launched under the Canadian Agricultural Partnership—and how they will help to build an even stronger and more innovative sector for Canada.

Mr MacAulay said: "Canadian farmers and ranchers know the importance of innovation in maintaining their competitiveness, and that's especially true in Canada's beef sector. Investments in research deliver real results, and help to ensure our beef farmers continue to raise top quality beef that consumers have come to expect. Today's investment will help our industry capture the exciting opportunities that lie ahead around the world."

Ryan Beierbach, Chair of the Beef Cattle Research Council and rancher near Whitewood, Saskatchewan, said: "The science-based knowledge and innovations that result from this investment will work to responsibly increase production while enhancing industry competitiveness and public trust, advancing the economic, social and environmental sustainability of Canada's beef sector.

"A prosperous beef sector not only benefits farmers and ranchers across Canada, it maintains grazing lands that are important to preserve for their role in carbon sequestration, biodiversity, and wildlife habitat."

## **EMPRESARIAS**

### **Minerva Foods dio a conocer su Informe de Sustentabilidad 2017**

09/07/18 - por Equipe BeefPoint A Minerva Foods anuncia a publicação do seu Relatório de Sustentabilidade 2017. Disponível no site ([www.portal.minervafoods.com](http://www.portal.minervafoods.com)), esta edição apresenta aos seus stakeholders a trajetória da companhia ao longo do ano passado, quando completou 25 anos de história e dez anos de empresa listada no Novo Mercado da B3 (antiga BM&FBOVESPA).

Neste sentido, o seu conteúdo aborda as conquistas, desafios e avanços da Minerva e mostra, de forma transparente, o seu compromisso de prestação de contas à sociedade, com os resultados apresentados de acordo com as diretrizes da Global Reporting Initiative (GRI) e assegurados de forma independente pela Grant Thornton Brasil Ltda.

Para a Minerva, um dos destaques do ano foi a consolidação do seu plano estratégico de se tornar a mais diversificada plataforma de produção de carne bovina na América do Sul, aplicando em todas as suas atividades e operações os conceitos de valorização e foco na gestão, negócios, qualidade e segurança de alimentos, colaboradores, meio ambiente e relacionamento com todos os stakeholders.

Ano passado, a aquisição de nove unidades frigoríficas no Paraguai, Uruguai e Argentina, onde também adquiriu uma unidade de processados e um centro de distribuição, possibilitou o crescimento da capacidade de abate em 52%, além de ganhos de sinergias operacionais, comerciais, em compras de insumos e em logística.

"Com essas aquisições, nosso parque industrial passou a ter 45% de sua origem no Brasil e os outros 55% fora do país. Em relação à distribuição, crescemos no mercado brasileiro e nos países onde atuamos, além de ampliarmos a integração de gestão e operações de nossas unidades", conta Fernando Galletti de Queiroz, presidente da Minerva

Outro ponto alto é a apresentação das iniciativas socioambientais da companhia, que se pautam por uma cultura empresarial ética que considera os elevados padrões de qualidade em todos os seus processos, a qual é disseminada para todos os colaboradores.

No caso da produção de carne bovina, por exemplo, o relatório retrata os rígidos cuidados em todas as etapas, que tem como requisitos fundamentais a preservação do bem-estar animal e as normas nacionais e internacionais de qualidade e segurança alimentar. Isso vale para todas as suas 26 plantas frigoríficas (capacidade de abate de 26.380 cabeças/dia), três plantas de processamento, 14 centros de distribuição e 13 escritórios internacionais, de onde os produtos da empresa partem para mais de 100 países, em linha com a estratégia da companhia, focada na exportação e alinhada a um modelo íntegro de gestão.

### **Marfrig informou que recibió ofertas de compras por Keystone Foods**

09/07/18 - por Equipe BeefPoint A Marfrig Global Foods informou nesta sexta-feira que recebeu ofertas vinculantes de compra da Keystone Foods, avançando mais uma etapa do seu processo de venda da unidade fornecedora de alimentos processados para redes de restaurantes, que tem operações concentradas nos Estados Unidos e Ásia.





A venda da unidade é considerada pela companhia como importante para alcançar meta de endividamento medido pela relação dívida líquida sobre Ebitda de 2,5 vezes no fim do ano. No final do primeiro trimestre, a alavancagem era de 3,67 vezes.

### **BRF anuncia un programa de reestructuración de personal para una planta de Santa Catarina**

Fonte: Reuters. 11/07/18 - por Equipe BeefPoint Empregados da empresa de alimentos BRF aprovaram ontem suspensão de contratos de trabalho da maior parte da fábrica da companhia em Chapecó (SC) por cinco meses, informou o sindicato local em nota. Com o lay-off, os trabalhadores receberão bolsa-auxílio no valor de 80% do salário paga pelo Fundo de Amparo ao Trabalhador (FAT), informou o Sindicato dos Trabalhadores nas Indústrias de Carnes e Derivados de Chapecó (Sitracarnes).

A entidade não divulgou o número de trabalhadores atingidos pelo lay-off, mas a BRF informou que a medida envolve 1.400 funcionários da linha que fabrica produtos de carne de frango.

A proposta também inclui cláusula em que no caso de demissão após três meses do fim da suspensão dos contratos de trabalho, a BRF pagará multa adicional de 100% do salário nominal, além das multas rescisórias.

Em reestruturação de suas atividades, a BRF, dona das marcas Sadia e Perdigão, anunciou no fim de junho que quer vender R\$ 5 bilhões em ativos no segundo semestre deste ano. A empresa já havia informado em 20 de junho que tinha concedido férias coletivas de 30 dias aos funcionários da unidade em Chapecó, por conta do impacto da greve dos caminhoneiros.

A BRF afirmou em nota que o regime de lay-off poderá “durar até cinco meses” e entrará em vigor a partir de 29 de agosto. “A decisão visa a ajustar os estoques da companhia”, afirmou a empresa.

### **COREA DEL SUR.: Cargill’s Premium distribuirá sus productos en el mercado coreano**

13 July 2018 Cargill and Seoul-based AG Meat, a specialty import meat distributor are partnering to offer premium US beef brand, Excel®, in a new concept meat store called 'It's Meat'. At 'It's Meat', Korean consumers can now purchase high-quality, premium Excel® beef at competitive prices.

Cargill Protein is focused on making sure the food it produces is safe to eat. The Excel® beef carried at 'It's Meat' undergoes a seven-step, regulated production system, ensuring safe handling from the feeding environment to product packaging. In addition, micro-sized pathogens are accurately removed through a new scientific process offered by Cargill Protein globally to support food safety.

"The demand for safe, imported beef has increased given the price has stabilized," said Jin-Tae Ha, general manager, Cargill Korea. "Given this demand, Cargill Protein is diversifying distribution channels to provide more Korean consumers access to high-quality Excel® beef."

"Korea is an important market for us and we are excited to bring Excel beef—and food safety protocols—to more consumers in this region," said John Niemann, president of Cargill Protein ingredients and international channel. "We look forward to continuing to build bridges across global markets and are committed to expanding our offerings in Korea."

From three 'It's Meat' stores currently, AG Meat is planning to open 300 within Korea in the next three years. Direct management and franchise options will broaden contact points for consumers in Korea, and Cargill Protein will continue to supply premium, imported Excel® beef to all 300 'It's Meat' stores along with marketing and technical support to expand domestic distribution.

Excel® beef also can be purchased at various retailers in Korea including, Costco, Lotte Mart and e-Mart and is sold at convenience stores including GS25.