



## NOTICIAS INTERNACIONALES AL 08/07/2020

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## GLOBAL

### Producción global fluctúa por los efectos del COVID 19

06 July 2020

Key points:

Global beef production forecast to decline 1% in 2020

Weekly US beef production has rapidly recovered, however, a large backlog of cattle now exists which will bolster beef supplies over the coming 12 months

Brazilian beef production has slowed, yet exports continue to perform well due to attractive export demand led by China

COVID-19 has already had an unprecedented and profound impact upon the global beef market, with further implications likely to carry through over the coming years. From a supply perspective, in January the USDA were forecasting no change in global beef supply in 2020. However, with meat packers around the world facing the challenge of maintaining processing capacity, this has dampened expectations for the year. Recent forecasts from Rabobank now forecast global beef production in 2020 to retract 1% on 2019.

Looking at the chart below, it is clear that key beef producing countries are at various stages of combatting the COVID-19 pandemic. While daily new cases in the US and Brazil remain high and have been rising over the last week, beef production in the US has recovered from early shocks to the supply chain and is now back to typical levels.

As witnessed in the US, as the number of new COVID-19 cases spread through workforces, maintaining a well-functioning food supply chain becomes more difficult. Leading beef exporters Brazil and India are now under much pressure, facing similar difficulties as they attempt to maintain healthy workforces and keep packing facilities operating.

US beef production back on track

US meat packers appear to have come to grips with new COVID-19 safety precautions, with processing capacity now back on track after a tumultuous few months. Leading up to and through the month of May, capacity cuts to US meat packing facilities pulled the handbrake on cattle slaughter. Volumes bottomed out at the start of May, with weekly beef production back 37% relative to volumes just five weeks earlier. This unprecedented swing in production has contributed to the globally unsettled trading environment and carries a number of implications for Australian beef exports.

US beef production

While US slaughter capacity has recovered, the pressing issue for the US is the estimated one million head of overfed cattle still on feed or those on pasture awaiting placement that should have been slaughtered over the capacity crunch. On 1 June, the estimated number of US cattle on feed for more than 150 days was 943,000 head, 41%, higher than a year ago, according to Steiner Consulting. As meat packers begin to clear the cattle backlog, beef production in the second half of 2020 and into 2021 will rebound. The USDA are forecasting beef production to lift 3.4% in 2021, with volumes predicted to reach 12.5 million tonnes cwt.

The USDA expects elevated cattle placements over the next six months, underpinning higher marketing rates next year. Heavier carcass weights will likely compound the beef production recovery in 2021.

This means that while Australia may have benefited from a short-term ease in US competition across shared markets, the US will be a prominent competitor through the back end of 2020 and into 2021, likely exporting more beef to global markets than Australia.

Brazilian export prospects remain strong despite tight slaughter levels

While COVID-19 may have closed some plants in April and May, the current slowdown in Brazilian beef production is primarily the result of a three-year herd liquidation and the subsequent reduced availability of slaughter cattle. Over the past year, Brazil has also recorded elevated levels of female cattle slaughter. Brazilian cattle slaughter in the first quarter of this year was the lowest since 2012 and was back 11% for the year-to-May. However, Brazil is currently experiencing drier than normal conditions, which will likely result in a higher number of cattle being brought forward for slaughter in the coming months.

Sao Paulo now appears to be easing COVID-19 restrictions despite case numbers continuing to rise, which may implicate processing capacity in the coming weeks. However, the Brazilian Ministries of Agriculture, Livestock and Supply announced two weeks ago that greater controls will be enforced aimed at the prevention, control and mitigation of COVID-19 transmission across the industry and in the processing of meat products.

While some Brazilian processing plants have closed due to COVID-19 outbreaks, Brazil's meat and poultry industry is not yet facing the degree of disruption seen in the US. However, things could change rapidly if the virus continues to spread, and Brazil remains on high alert. Taking into account the impact of COVID-19, Rabobank are now forecasting a 1% decrease in Brazilian beef production this year, well short of the 3.5% increase projected in December.



Despite production difficulties, Brazil maintains a strong presence in export markets. While Brazil may yet follow a similar supply pattern as seen in the US, the impact on trade may differ. For instance, the US has had robust domestic demand and a strong US dollar, making domestic retail channels more appealing than export markets. On the contrary, Brazilian domestic demand is weak, while the soft value of the Brazilian Real and strong demand from China has favoured exports.

Export figures show the rate of Brazilian beef exports are yet to slow, with volumes in May reaching 155,000 tonnes swt for the month. Growth to China has been extraordinary, up 180% relative to May last year. Over the year-to-April, Brazil has exported 28% of its beef production, the highest portion since 2007, due to strong export markets and weak domestic demand. As a result, the domestic market may bear the brunt of any short-term shortage due to any COVID-19 supply disruptions, while exports will likely remain strong.

**Indian buffalo meat supply disrupted**

COVID-19 lockdown measures resulted in supply chain disruptions across India, with animal markets and processing plants closed or running at a limited capacity. Logistical issues have also caused delays at ports, which will hamper the export of Indian Buffalo Meat.

Looking at import data across key Indian export markets, volumes were tracking 15% ahead of 2019 in the first quarter, but it is expected that volumes since then have significantly slowed. Some Indian Buffalo Meat has landed in, or is currently being transported to Indonesia, but this is primarily product processed prior to the country-wide lockdown in India.

**Australia has navigated COVID-19 but supply still an issue**

The low cases of COVID-19 in Australia has allowed the industry to carry on largely uninterrupted. However, supply will remain a major challenge for the industry to grapple with as the herd rebuild and limited availability of slaughter animals continues through the rest of the year.

MLA's April Cattle Industry Projections have cattle slaughter pegged to decline 19% year-on-year in 2020. Slaughter cattle supplies have been tracking lower since the beginning of May, with accumulative weekly eastern states slaughter since then back over one million head, or 16%, compared to 2019 levels.

## **Demanda de carnes bovinas firme pero con mayor competencia**

02 July 2020

Key points:

US beef supply recovering, while Brazilian shipments yet to falter

African Swine Fever (ASF) continues to bolster global meat demand

US 90CL imported beef prices cooling off

After falling drastically through May, US beef supplies have recovered rapidly, while Brazilian exports are yet to reflect any indication of a reduction in cattle slaughter. Although many underlying drivers of strong demand remain largely intact, competition in key export markets may increase in coming months.

At a time when Australian beef supplies are tightening, US product will likely compete strongly in Japan, Korea, Taiwan and the US domestic market to varying degrees in the coming months. Meanwhile, Brazil and Argentina will continue expanding their presence in China and increase enquiries into other major Australian export markets.

**Trade dynamics into North Asia**

Up to April, combined shipments into North Asia had notched the strongest start to the year on record, with Japan imports surpassing the previous peak in 2003 (prior to bovine spongiform encephalopathy trade disruption). However, these figures are yet to reflect the sharp contraction in US beef production in May and early June, nor may they fully reflect any ongoing disruption in the foodservice sector from COVID-19. While the economic fallout from COVID-19 shutdowns is still to be verified, cases in Japan and Korea remain low compared to other markets, while Taiwan has recorded very few cases to date.

Conditions to capitalise on the US beef shortfall in Japan were not ideal. Australian cattle on feed numbers at the start of April were back 5% year-on-year and 12% below where they opened 2020, limiting grainfed supply. Meanwhile, COVID-19 cases spiked in mid-April, spooking the Japanese trade and triggering more cautious buying behaviour in late April and May. About two-thirds of Australian beef in Japan is estimated to be consumed through foodservice channels.

In addition, Japan imported a lot of US beef over the first four months of the year due to a reduction in tariff rates, which bolstered inventories ahead of the collapse in US slaughter capacity. Japanese imports of US beef were up 13%, or 10,000 tonnes shipped weight (swt), year-on-year over the calendar year-to-April period. Meanwhile, national stocks of beef in cold storage at the beginning of April were up 9%, or almost 11,000 tonnes year-on-year. As such, Australian grainfed beef exports to Japan eased 5% year-on-year in May.

In contrast, Australian grainfed and grassfed beef shipments to Korea were strong through May. Grainfed exports to Korea were up 17% year-on-year in May (compared to 2% across all markets) while grassfed shipments were back just 4% (compared to 8% across all markets). Australian grainfed ribs and



intercostals, which account for a large part of US exports to Korea, found particularly strong support, up 53% year-on-year in May. Whole chucks, briskets and even cube rolls also found solid demand from Korea.

Australian exports to Taiwan were also robust in May, up 5% year-on-year, and grassfed shipments recorded particularly strong growth, up 17%.

June trade data, when it becomes available, may be more telling of the trade shortfall caused by a collapse in US production, given the time lag between US slaughter and product arriving in Asian markets. Weekly US beef exports (as reported by the USDA and only covering beef cuts) indicates shipments remained low up to mid-June. However, the USDA reported a 10,000 tonnes swt week-on-week spike in export volumes for the seven days ending 18 June, an 84% rally on the prior four-week average.

Weekly exports to Japan and Korea were up 66% and 90% respectively on the previous four-week average. Given it takes a couple of weeks for US export figures to translate into North Asia imports, the current recovery underway will likely be first witnessed in July import figures. In the meantime, cheaper US beef will be feeding into North Asian trading decisions and competing strongly with Australian product.

As highlighted in this separate article, US supplies are expected to remain elevated over the next 12 months as the industry works through the backlog of cattle.

China imports yet to slowdown

While COVID-19 has had a profound impact on the retail and foodservice landscape in China, the rate of beef imports are yet to slow, with May marking the 47th consecutive month of year-on-year growth.

Calendar year-to-May China imports were up 45% year-on-year, at 821,000 tonnes swt. Import growth has been led by Brazil and, to a lesser extent, Argentina, with trade increasing 131% and 51% respectively. China imports of Australian beef also recorded solid growth in the first five months of 2020, up 35% year-on-year, but figures are yet to reflect the trade slowdown from the temporary delisting of four plants.

Supported by an emerging middle class and supercharged by the spread of African Swine Fever (ASF), China has emerged as the largest imported beef market over the last few years. While COVID-19 has dislodged ASF from media headlines, it remains as critical as ever in underpinning global meat markets. While there have been some reports of integrated pig growing facilities operating successfully under increased quarantine measures, the pig herd remains severely depleted compared to pre-ASF levels. Following the seasonal post-lunar new year lull and the first wave of COVID-19 disruptions, China pork prices have been rising since late May and the national benchmark indicator was up 88% year-on-year last week.

The recent rise in COVID-19 cases out of Beijing is of some concern for meat demand in China, however, imports remained strong through the initial wave across the country and during the subsequent lockdown.

Even if COVID-19 disrupts slaughter capacity in South America, Brazil and Argentina will likely continue sending substantial volumes to an attractive China market due to weak currencies and poor domestic demand. Brazil and Argentina will remain very competitive against Australian product in the commodity end of the market.

Five months into the new year and following the signing of the US-China Phase One trade deal, only minor volumes of US beef have yet to enter the China market. Year-to-May China imports of US beef were up 62% year-on-year, at 4,700 tonnes swt, however this still accounts for less than 1% of the total imported beef market. US pork and poultry into China, on the other hand, have recorded solid starts to the year, with pork volumes up six-fold over the first five months at 333,000 tonnes swt, and poultry re-entering the market after a previous ban at 62,000 tonnes swt.

US production recovery dampens import demand but lean beef still required

Australian beef export to the US in May jumped 32% on April volumes, as end-users responded to very short supplies and unprecedented price rises over the month. However, with US beef production now recovered and wholesale prices back near pre-crisis levels, import prices have eased.

Last week, quotes on 90CL (90% chemical lean) import prices slid 5% week-on-week and were back 10% from the late-May peak at 220 US¢/lb CIF.

A range of factors will be at play over the second half of 2020 that will drive Australian lean beef exports to the US, including:

- the rate of Australia's herd rebuild and availability of cull cows
- the fat-lean mix of the overfed backlog of cattle currently coming through US slaughter plants
- the recovery of fast food burger demand
- the buying pull of China to draw product from Australia and New Zealand.

The graph below illustrates the long-term relationship between the Australian medium cow indicator and the price of US imported 90CL. Shifts in the US 90CL price provide an indication of the level of US demand. In the past 10 years, outliers in the pricing relationship have occurred due to demand forces, such as that from China in the second half of last year, or supply factors such as intense herd rebuilding and destocking in Australia and the US.



So far this year, average cow and imported 90CL prices have closely mirrored the historical relationship (indicated by the point '2020 YTD' in the chart), however, more recently strong restocker demand in Australia has pulled the relationship away from the mean (indicated by point '2020 June'). This is similar to what was seen in 2016 and 2017 when Australia's herd was recovering from drought.

If Australian cow and US imported 90CL prices continue to deviate from the historical relationship, demand from US grinders will be tested. It may even provide impetus from some to look outside Australia and New Zealand for lean beef, such as Brazil and Argentina which both now have access, albeit limited, to the US market. This risk is highlighted in this week's US imported beef market update by Steiner Consulting, which, if combined with disruption to the all-important China market, flags that the South Americans may begin to look north.

The other major unknown in the US market is the potential for a second wave of COVID-19 cases to ripple through certain states. As highlighted below, US foodservice traffic had begun to re-emerge from state-wide lockdowns, however, the recent spike in daily cases may test this recovery. For instance, California, Arizona, Texas and Florida have all re-imposed some restrictions in response to the spike in cases over the last week.

### **Perspectivas en Medio Oriente**

07 July 2020

Australia's red meat industry is anticipated to receive in excess of \$100 million in additional returns as a result of shelf life restrictions being eased for chilled meat products exported to a range of markets in the Middle East.

A number of countries in the Middle East have a legal maximum shelf life for a wide range of products. In Australia, Europe, or the United States, it is the packer's responsibility to assign a shelf life.

Through concerted efforts between MLA and the Australian Government to collect and disseminate scientific data and advocacy on behalf of the industry, shelf life restrictions are being eased for chilled, vacuum-packed beef and sheepmeat.

The easing of shelf life restrictions is a major breakthrough for the Australian red meat industry.

Longer shelf life allows more time for product to be sold after entering the country, allows more product to be sent by sea rather than air, allows product to be on the shelf more regularly, and ensures less product is unsold at the expiry date.

A few recent examples around shelf-life restrictions include:

Kuwait: has recently approved shelf-life extension from 70 days to 120 days for beef and 90 days for sheepmeat

Jordan: has approved a temporary shelf-life extension on beef from 90 to 120 days and continues to work on a permanent amendment

Qatar: is in the final stage of amending beef shelf-life to 120 days (with both beef and sheepmeat currently granted 90 days)

Saudi Arabia: has disseminated a draft regulation to take red meat shelf-life from a mandatory 70 days to being non-prescribed, meaning commercial entities can determine the expiry

Egypt: where a shelf-life trial in conjunction with the Egyptian ministry has been completed, and while there is still a way to go on this one, it is looking hopeful.

MLA is assisting the export trade to implement the changes to their product's shelf life and will continue to monitor and advocate for permanent changes in markets that have not yet made a permanent change.

Markets yet to ease shelf life restrictions include Saudi Arabia, which has disseminated a draft regulation to take red meat shelf life from a mandatory 70 days to being non-prescribed, meaning commercial entities can determine the expiry. These proposed amendments have the potential to significantly increase the chilled meat offering at retail to Saudi consumers as well as aiding in food security and decreasing food waste.

And in Egypt, the Animal Health Research Institute, responsible for government research, in collaboration with the MLA MENA office has just completed shelf life studies on Australian beef that would justify a 120-day shelf life. This has come of the back of an MOU signed between the Egyptian

General Organisation of Veterinary Services and DAWRE, allowing further listings of approved Australian export facilities and the entry of manufacturing meat into Egypt.

Qatar is also in the process of reviewing its standard after submissions from the Australian Embassy in Qatar supported by MLA.

The impact of easing shelf life restrictions is evident in the United Arab Emirates (UAE).

The changes announced by the UAE in 2017 which saw shelf life for beef extended from 70 to 120 days, and sheepmeat from 70 to 90 days, have been estimated to be worth \$13 million per annum to the industry. Listen here to MLA Managing Director, Jason Strong, discussing the benefits of easing shelf life restrictions with the ABC.





## **Pandemia provocará uma importante caída en el consumo per capita de carnes**

Bloomberg July 7, 2020 (Bloomberg) -- The pandemic is poised to usher in the biggest retreat for global meat eating in decades.

Per-capita consumption this year is set to fall to the lowest in nine years and the 3% drop from last year represents the biggest decline since at least 2000, according to data from the United Nations. Meanwhile, analysts across the globe are predicting declines not just per-capita, but also for overall demand in their regions.

That's a dramatic turnaround for an industry that's come to rely on steady growth. Notably, the shift is happening in every major market, including in the U.S., where it's predicted that per-capita meat consumption won't return to pre-pandemic levels until at least after 2025.

There's a swirl of factors contributing to the change. The coronavirus economic fallout means consumers are cutting down on grocery bills. Restaurant shutdowns have hurt demand, since people eat more meat when they dine out. In China, which accounts for about a quarter of world consumption, there's growing distrust over animal products after the government suggested a link between imported protein and an outbreak in Beijing. Disruptions to production, like the plant outbreaks that sparked an industry crisis in the U.S., also created supply problems that led to less meat eating.

Climate advocates have for years been calling for lower meat consumption. By some measures, agriculture accounts for more global greenhouse gas emissions than transport, thanks in part to livestock production. Meat and dairy alone are responsible for as much as 18% of global greenhouse gas emissions caused by humans.

What remains to be seen is to what degree the pandemic shift lasts. If consumers get used to having less meat through pandemic conditions, could that bring in a new era for global diets?

There are hints of a structural change taking place, with millions eating more plant-based proteins because of environmental concerns. Meanwhile, the explosion of coronavirus infections at slaughterhouses and processing plants -- from the U.S. to Brazil and Germany -- have highlighted the industry's toll on its employees who handle dangerous work for low pay and few benefits. It's still too early to tell, though, whether the fresh public scrutiny over worker conditions will impact demand.

At the same time, now that consumers have gotten more used to cooking at home, that habit could stick, especially as the lockdown-crippled food-service industry is predicted to shrink. About 2.2 million restaurants worldwide could close, according to consulting firm Aaron Allen & Associates. The loss of food service is a "major demand shock that will take a long time to recover from," said Altin Kalo, analyst at Steiner Consulting Group.

Before the pandemic, 50% of all meat was consumed outside of the home in the U.S., according to Boston Consulting Group.

"If restaurants structurally look different in the future, and the number of out-of-home eating occasions is permanently altered, then I think it's fair to say there may be less meat consumption" going forward, said Boston Consulting Group's agribusiness expert Decker Walker. "People are still going to consume the same amount of calories, but they will do it at home, where the meat percentage is lower."

This year's projected decline would also come after a drop in per-capita global consumption in 2019, when the African swine fever disease killed millions of hogs in China, boosting retail pork prices and curbing demand. The losses over two straight years will mean close to a 5% slump in per-capita consumption since 2018, according to data from the UN's Food & Agriculture Organization.

There's still a chance that total world consumption could rise this year. That's because population could be growing at a faster rate than meat production. Still, per-person reductions mark a turning point for the industry.

### **Europe**

In the European Union, pork consumption is expected to fall to a seven-year low in 2020, with beef and chicken also hitting troughs, the U.S. Department of Agriculture forecasts. The pandemic hit at a time when there was already signs of easing meat demand in parts of the bloc on environmental and animal-welfare concerns. Germany, home to bratwurst and schnitzel, has become a vegetarian haven, and a survey published by its agriculture ministry in May showed 26% of respondents eat meat or sausage daily, versus 34% in 2015.

## **BRASIL**

### **Precios firmes por escasez de oferta**

Primeiros três dias úteis de julho mostram exportações em ritmo acelerado e retrações são pontuais  
07/07/2020

Nesta terça-feira, 7 de julho, os preços do boi gordo registraram variações distintas nas principais regiões pecuárias do Brasil. No Centro-Oeste, prevaleceu o movimento de queda da arroba, mas em São Paulo,



assim como nas praças do Norte do País, as cotações permaneceram firmes, segundo levantamento da consultoria IHS Markit (antiga Informa Economics FNP).

Nas regiões com maior representatividade de indústrias exportadoras, principalmente nas praças de São Paulo, os preços seguiram estáveis nesta terça-feira. O boi gordo é vendido no Estado a R\$ 224/@(valor máximo, a prazo), informa a IHS Markit.

“As indústrias de grande porte conseguem distribuir melhor os seus custos entre as vendas para o mercado interno e externo, operando num cenário de preços elevados sem prejudicar suas margens”, relata a consultoria.

Nos primeiros três dias úteis de julho, as exportações brasileiras de carne bovina continuaram em ritmo elevado. Dados preliminares divulgados pela Secretaria de Comércio Exterior (Secex) mostram que os embarques brasileiros de carne bovina “in natura” durante a primeira semana de julho totalizaram 17,73 mil toneladas exportadas, com receita de US\$ 71,37 milhões. A média diária ficou registrada em 5,90 mil toneladas/dia, desaceleração de 18,6% sobre o mês anterior, mas avanço de 2,1% em comparação a julho/19.

O preço da tonelada exportada também desacelerou quando comparado a junho – a média girou em torno de US\$ 4.025,73, com baixa de 6,3% sobre o mês anterior. Se comparado ao mesmo período do ano passado, os preços ficaram praticamente estáveis, com uma alta pontual de 1%.

Do lado da oferta, muitos pecuaristas resistem em liquidar a boiada por preços mais baixos que os praticados atualmente, visando, principalmente, garantir uma boa relação de troca entre o boi gordo e gado de magro, já que os gastos com a reposição dos plantéis seguem muito altos.

Na ponta compradora, a demanda reduzida pela carne bovina nos grandes centros urbanos, consequência da crise econômica decorrente da pandemia de Covid-19, impede o repasse de custos para os preços no atacado, relata a IHS Markit. Nesta terça-feira, os preços dos principais cortes bovinos seguiram estáveis. “Ao contrário do esperado para este período de início do mês, as vendas de carne bovina no mercado varejista ainda seguem em passos lentos”, afirma a consultoria.

### **Récord exportado en el mes de junio**

Fonte: Valor Econômico. This post was published on 7 de julho de 2020

As exportações brasileiras de carne bovina (in natura e processada) somaram 172,36 mil toneladas em junho, 28% mais que há um ano e um novo recorde para o mês, segundo dados da Secretaria de Comércio Exterior (Secex) compilados pela Associação Brasileira de Frigoríficos (Abrafrigo). A receita das vendas cresceu 48% na mesma comparação, para US\$ 743 milhões.

Com esses resultados, no acumulado do primeiro semestre deste ano os embarques atingiram 909,72 mil toneladas, um crescimento de 9% em relação a igual intervalo de 2019, e renderam US\$ 3,9 bilhões, um avanço de 26%.

O destaque nas exportações, como tem ocorrido desde 2019, continua a ser a China, destino de 57% do volume de embarques de janeiro a junho – a China continental importou 365,13 mil toneladas no período, com alta de 148%, enquanto Hong Kong comprou 154,31 mil toneladas, com redução de 10,5%. No primeiro semestre de 2019, a participação chinesa total foi de 38,4%.

Na receita, o peso do país asiático foi ainda maior: de 38% no ano passado (US\$ 1,24 bilhão), aumentou para 60,5% em 2020.

### **China confirmó suspensión de establecimientos de carnes porcinas – Reabre planta suspendida**

Por: ESTADÃO CONTEÚDO 6/07/2020

Departamento de Alfândegas da China não especifica o motivo do veto mas, as plantas suspensas têm em comum o fato de já terem registrado casos do novo coronavírus entre seus funcionários

Duas unidades de produção de carne suína, da JBS e da BRF, tiveram suspensas a exportação para a China, de acordo com comunicado do Departamento de Alfândegas da China (GAAC, na sigla em inglês) – órgão do governo chinês responsável pela habilitação de estabelecimentos exportadores e que também realiza o controle de mercadorias na aduana.

O comunicado, divulgado no sábado, 4, informa a suspensão das importações de carne suína das plantas da Seara Alimentos Ltda. da JBS, de Três Passos (RS/SIF 60), e da BRF S/A, de Lajeado (RS/SIF 3975), ambas no Rio Grande do Sul. O documento não informa os nomes das empresas, mas sim seus números de registros no Serviço de Inspeção Federal (SIF), do Ministério da Agricultura.

O Gaac também não especifica o motivo do veto mas, as plantas suspensas têm em comum o fato de já terem registrado casos do novo coronavírus entre seus funcionários. A necessidade de aumentar o controle sanitário em decorrência da Covid-19 é o motivo alegado extra-oficialmente pelo governo chinês para a suspensão temporária de frigoríficos de vários países.

Na semana passada, outros quatro frigoríficos brasileiros também tiveram a comercialização suspensa pelo governo chinês. Na ocasião, unidades da JBS, Marfrig, Minuano e Agra foram as afetadas.



Além das empresas brasileiras, o comunicado do Gaac informa a suspensão de exportação de carne suína de dois frigoríficos alemães. Segundo o departamento, uma empresa de carne bovina da Inglaterra suspendeu voluntariamente a exportação de carne bovina para a China desde 2 de julho, assim como um frigorífico da Argentina tomou o mesmo procedimento a partir de 1º de julho. Uma empresa de carne suína da Itália e outra da Holanda também restringiram as vendas externas para a China de forma independente, a partir de 1º de julho e 28 de junho, respectivamente, de acordo com o Gaac.

Por: Denis Cardoso 03/07/2020

Operações de carne bovina foram suspensas, depois de casos de Covid-19

6:31 pm

Em conversa nesta sexta-feira (3/7) com a DBO, a assessoria de imprensa da Naturafrig Alimentos disse que a empresa frigorífica pretende reabrir a sua unidade de carne bovina em Rochedo, no Mato Grosso do Sul, a partir de 13 de julho (segunda-feira). Na última sexta-feira (26/6), a empresa anunciou a suspensão das atividades na planta do MS como medida de prevenção contra o avanço do novo coronavírus entre os trabalhadores da fábrica.

Com essa decisão, a companhia entrou para lista de frigoríficos brasileiros que deixaram recentemente de exportar proteínas ao mercado da China devido a problemas relacionados à Covid-19. Nas últimas semanas, o governo de Pequim tem apertado o cerco contra os países exportadores da proteína com casos de propagação da doença entre trabalhadores que atuam no chão das unidades frigoríficas.

Além da China, a unidade em Rochedo está habilitada a exportar carne bovina para diversos outros países. Segundo informações da assessoria, para voltar à ativa, a Naturafrig pretende testar 100% de colaboradores antes do retorno das atividades.

Antes da decisão de paralisação espontânea, o frigorífico de Rochedo disse que, para evitar contaminações por Covid-19, afastou quase 800 trabalhadores efetivos diretos.

Durante o período de fechamento da fábrica de Rochedo, a Naturafrig pretende realocar os animais adquiridos no mercado para suas unidades de Nova Andradina (MS) e Pirapozinho (SP).

### **Brasil gestionó la apertura del mercado japonés**

Fonte: Valor Econômico. This post was published on 7 de julho de 2020

O Brasil e vários outros países cobraram do Japão, mais uma vez, maior abertura de mercado para a entrada de produtos agropecuários importados durante exame da política comercial do país asiático realizado nesta segunda-feira na Organização Mundial do Comércio (OMC).

O Japão é o sexto maior parceiro comercial do Brasil, e as relações bilaterais em geral são consideradas muito boas. Em 2019, o comércio entre os dois países cresceu quase 10% em relação ao ano anterior, para US\$ 9,5 bilhões. Além disso, na relação conta bastante o fato de o Brasil ser o destino da maior diáspora japonesa, com mais de 2 milhões de nikkéis, enquanto a comunidade brasileira no Japão passa de 200 mil pessoas.

A delegação brasileira disse esperar que o Japão promova um novo ciclo de investimentos no Brasil nos próximos anos, com o aprofundamento das reformas econômicas delineadas por Brasília.

Mas, ao mesmo tempo, o Brasil apontou questões específicas na relação comercial, como subsídios e proteções fornecidas por Tóquio em patamares muito mais elevados do que em outros países desenvolvidos, “de uma maneira que é particularmente prejudicial aos interesses de exportadores como o Brasil”.

A delegação brasileira levantou também questões fitossanitárias (SPS, na sigla em inglês), frequentemente mais rigorosas no Japão que os padrões internacionais, que mantêm as portas fechadas em alguns segmentos ou elevam custos para os exportadores.

Além disso, persistem restrições japonesas à entrada de carne bovina termoprocessada (thermally processed beef), apesar de o produto ter entrado no país livremente antes de 2012.

O Brasil também quer exportar melão para o mercado japonês e apresentou um plano nesse sentido ao parceiro em 2016. Tóquio apresentou diversas demandas técnicas, respondidas em 2017. Mas, até agora, o Brasil não recebeu respostas das autoridades japonesas ao seu plano.

EUA, Índia e vários outros parceiros também reclamaram de barreiras na entrada de produtos agrícolas no Japão. A Índia exemplificou que os japoneses impõem sobre alguns produtos tarifas de importação de até 500% e cotas (volume limitado de importação), medidas que prejudicam o fluxo do comércio.

### **Advierten sobre validez de test rápidos de COVID 19**

Fonte: Valor Econômico. This post was published on 7 de julho de 2020

Sob escrutínio das autoridades devido à propagação da covid-19 entre funcionários, os frigoríficos brasileiros podem estar gastando dinheiro à toa com a testagem em massa dos trabalhadores e transmitindo uma falsa sensação de segurança. Os testes rápidos, feitos na maior parte das vezes para





atender a determinações da Justiça ou de vigilâncias sanitárias locais – e mesmo de políticas internas de algumas companhias -, não servem para diagnóstico e isolamento de trabalhadores, de acordo com médicos e cientistas consultados pelo Valor.

Um dos problemas é que o teste rápido (feito com uma amostra de sangue do dedo), e também o sorológico (feito a partir da coleta de sangue em laboratórios), são usados para detectar a presença de anticorpos. Eles não detectam o vírus. E como os anticorpos levam algum tempo para serem desenvolvidos, sua presença pode significar que a doença já passou e que o funcionário já pode ter transmitido o vírus. Além disso, são frágeis os resultados dos testes rápidos, que apresentam uma alta incidência de falso negativo e positivo.

“O teste de anticorpo, como olha para o passado, não serve para isolar ninguém”, afirma Natalia Pasternak, pesquisadora do Instituto de Ciências Biomédicas da Universidade de São Paulo (USP) e presidente do Instituto Questão de Ciência. Os melhores testes de anticorpos são capazes de detectar quem foi exposto ao vírus a partir do 15º dia. “Se precisa esperar duas semanas para ver se teve [anticorpo], é provável que já contaminou”, diz o presidente do Hospital Albert Einstein, Sidney Klajner.

“Como ciência, no momento há um consenso de que esses testes não têm nenhum tipo de valor de ordem prática. O resultado que dão não é suficientemente acurado. Se é um teste que não gera resultado interpretável, o fato de colocá-lo em protocolo [de testagem dos frigoríficos] deixa a coisa mais confusa”, diz Ricardo Schnekenberg, médico e doutorando em neurociência da Universidade de Oxford, do Reino Unido, e que escreve sobre os testes de diagnóstico no blog “notesoncovid”.

Em 8 de abril, a Organização Mundial de Saúde (OMS) recomendou que os testes rápidos não sejam usados para o diagnóstico de pacientes. A instituição incentivou, por outro lado, o uso desses testes para pesquisa epidemiológica e vigilância de doenças. Em estudos populacionais, como os realizados no Brasil pela Universidade Federal de Pelotas, é possível estimar o percentual de pessoas expostas ao vírus usando estatística para corrigir a taxa de erros desses exames – mas, mesmo nesse caso, há críticos na medicina, porque há pacientes que não desenvolvem anticorpos, mas apenas uma resposta celular, que é detectada em outro exame.

Para detectar a presença do vírus, só existia – até poucas semanas – um teste, o RTPCR, considerado padrão-ouro. Esse exame, que exige treinamento para ser realizado, é feito a partir de uma amostra de secreção do nariz, retirada com um desconfortável cotonete comprido. “É o que vai identificar quem está contaminado, [permitindo] rastrear os contatos, testar todos e isolá-los”, frisa Natalia Pasternak.

Em meio ao avanço da covid-19 no interior do país, grupos como a brasileira Minerva Foods, uma das maiores exportadoras de carne bovina da América do Sul, aplicaram testes rápidos em frigoríficos localizados em regiões de alta prevalência da doença. Em maio, a empresa fez testes rápidos em 730 empregados de sua unidade em Araguaína (TO).

À época, a Minerva informou que 55 pessoas tiveram diagnóstico positivo. “Uma vez que os profissionais não apresentavam sintomas, consideramos que a testagem rápida é o melhor método para preservar a saúde dos nossos funcionários, bem como garantir a segurança da operação na planta, seguindo as normas estabelecidas pelo governo local”, apontou a companhia em uma nota divulgada na ocasião.

No entanto, a interpretação do resultado do teste indica uma confusão. Mesmo que fossem confiáveis, o que tem sido fortemente questionado pelos cientistas, os resultados dos testes rápidos poderiam indicar apenas que os funcionários já foram expostos ao vírus e, ao menos no curto prazo, estariam protegidos. Por outro lado, aqueles que tiveram resultado negativo para o anticorpo poderiam estar com a doença no início e transmitindo o coronavírus.

Procurada pelo Valor para comentar as incongruências da testagem em massa aplicada, a Minerva não comentou. Mas vale lembrar que a companhia também adotou outras formas para tentar controlar a propagação da doença, como a medição de temperatura, uso de máscaras e capacete de viseira (“face shield”), além de maior distanciamento no ambiente da fábrica.

A Marfrig, segunda maior indústria de carne bovina do país, firmou um acordo com o Ministério Público do Trabalho (MPT) que prevê a testagem em massa de todos os trabalhadores. Quando anunciou esse acordo, em 1º de junho, a empresa informou que testaria todos os seus 18 mil funcionários no Brasil. O acordo, entre outras medidas de proteção, previa uma “rotina de testagem rápida sorológica, associada ao teste molecular RT-PCR conforme o caso”. Procurada pelo Valor, a Marfrig também não comentou.

A testagem de anticorpos associada ao uso do PCR parte de um pressuposto equivocado, e que foi adotado em pelo menos duas unidades da BRF em Santa Catarina. Nas cidades de Chapecó e Concórdia, a empresa informou ter feito testes rápidos em todos os funcionários. Naqueles que tiveram diagnóstico positivo – para os anticorpos -, a empresa fez PCR. O problema, mais uma vez, é que os negativos também poderiam estar com o vírus, e mesmo transmitindo.

Nos dois casos, a BRF aplicou os testes a pedido da vigilância estadual.

Procurada, a empresa disse que segue “as recomendações e modelos de testes do Ministério da Saúde e OMS, com a utilização tanto de testes rápidos quanto de RTPCR para detecção da covid-19”. A



companhia também disse que a testagem, feita por amostragem, conta com um protocolo desenvolvido por especialistas em saúde pública – como o Hospital Albert Einstein e o infectologista Éspere Kallas, professor da

USP – e pela consultoria McKinsey.

Para Adauto Castelo, ex-presidente da Sociedade Brasileira de Infectologia e professor associado da Universidade Federal de São Paulo (Unifesp), as decisões judiciais que exigiram os testes sorológicos partem de um desconhecimento médico de parte dos procuradores do trabalho. “Não é possível utilizar sorologia para decisões clínicas. Muito menos no ambiente de um frigorífico”, diz o infectologista, que presta consultoria para a JBS, assim como o Hospital Albert Einstein – a instituição também presta consultoria para a BRF.

Segundo Castelo, a testagem em massa só é indicada para os casos de surto em unidades e, mesmo assim, sempre utilizando os testes que detectam o vírus – ou seja, o RT-PCR. Desconsiderando surtos, como o que ocorreu em Dourados (MT), o protocolo padrão adotado na JBS é afastar o sintomático e submetê-lo a teste – duas vezes e num intervalo de três dias, para evitar o resultado falso negativo do PCR, comum ao teste feito entre o primeiro e terceiro dia de contaminação. Outra medida é afastar as pessoas que tiveram contato (quem ficou a até dois metros de distância, e por mais de 15 minutos, seja nas linhas de produção, no refeitório e mesmo no transporte).

Segundo Castelo, uma novidade positiva podem ser os testes que surgiram mais recentemente no país. É o caso do RT-Lamp desenvolvido pelo laboratório Mendelics. Esse teste é feito com a coleta da saliva, sendo de mais fácil aplicação do que o RT-PCR. Outro teste que agora está disponível é o desenvolvido pelo Einstein, que poderá triplicar a capacidade de processamento de testes do hospital e será oferecido às empresas por um valor de 20% a 30% menor que o RT-PCR, segundo Klajner.

## URUGUAY

### **Lentamente se afirman los precios del ganado gordo**

06/07/2020 - Industria refleja la incertidumbre del mercado al comprar.

El mercado de haciendas continúa con muy poca oferta, como desde hace dos semanas y las faenas se vienen solventando en volumen en base a los ganados de corral que se vienen entregando a frigorífico.

“La oferta de ganados de pasturas es muy poca. Eso lleva a que de poquito se vayan afirmando los valores”, afirmó a El País Carlos De Freitas, directivo de la Asociación Consignatarios de Ganado (ACG) y expresidente de la institución.

El operador descartó de plano la posibilidad de grandes subas de valores, debido a la incertidumbre que está mostrando el mercado internacional de la carne bovina.

Como referencia de valores, De Freitas dijo que el novillo gordo cotiza en el eje de US\$ 3,30 por kilo, pero se hicieron negocios puntuales a US\$ 3,35 por kilo, dependiendo de la ubicación, el volumen y el tipo de novillo. En el caso de la vaca gorda, se paga en el eje de US\$ 3,10, se llega a US\$ 3,15 por una vaca de buena calidad y hasta US\$ 3,18 en caso de terminaciones excepcionales.

En cierta medida, las faenas bajo el rito kosher, que se realizan para Israel y para Estados Unidos —en ese circuito— no movieron demasiado el mercado ganadero. Sin embargo, De Freitas reconoció que “dos semanas atrás, la diferencia de valores entre la vaca gorda y el novillo era escasisima y la vaquillona llegó a valer más que el novillo gordo. Esta última categoría se empezó a mover a partir de que se retomaron las faenas kosher”.

Expectativa. En el corto plazo, habrá que ir viendo cómo se reconstruye el mercado cárnico mundial, donde los principales compradores de la carne uruguaya continúan sintiendo los efectos de la epidemia de COVID-19. “La industria sabe perfectamente que no puede hacer presión sobre una oferta de ganados de campo que no existe”, admitió el directivo de la Asociación Consignatarios de Ganado.

A su vez, según la visión de De Freitas, no hay tanto ganado encerrado para este segundo semestre del año en comparando con el volumen que se verificó en el primer semestre, por eso insistió en que hay que ir paso a paso.

“Sin duda que estamos transcurriendo por una pos-zafra, pero en condiciones que no son las del año pasado desde el punto de vista del exterior, que le puedan dar juego a un precio ni parecido al del año pasado, porque la situación no es la misma”, remarcó.

El precio del ganado gordo “se irá reafirmando de a poco, por la escasez de la oferta”, estimó De Freitas.

Consideró que hay un mes más de falta de oferta, después se espera que vayan apareciendo los ganados de verdes. “En la medida que vayan apareciendo en el mercado esos ganados se irán afirmando los valores de las haciendas bien terminadas”, agregó el operador.



Hoy está claro que la demanda sabe que no puede presionar sobre una oferta que no está. Incluso, la señal que muestra hoy la industria frigorífica es diferente y no va en concordancia con grandes disparadas de precios en la pos-zafra.

### **Estudian protocolo para incluir ganado terminado a grano en la Cuota Hilton**

07/07/2020 - Además pretenden que en la Cuota Gat se puedan exportar cortes enfriados.

Los actores del sector privado uruguayo y el Poder Ejecutivo estudian la posibilidad de solicitar a la Unión Europea una flexibilización de la Cuota Hilton para incluir animales terminados a grano.

El tema estuvo presente ayer en la Junta del Instituto Nacional de Carnes (Inac), y el pedido para que el contingente cambie su denominación, de exclusivamente a pasto a preferentemente a pasto, se realizará mañana en una reunión virtual que mantendrá Cancillería con la Unión Europea.

El director ejecutivo de la Asociación Uruguaya de Productores de Carne Intensiva Natural (Aupcin), Álvaro Ferrés, dijo a Rurales El País que “hace tiempo entendemos oportuno que la definición del Hilton pueda tener un cambio”, es una medida que “ofrece oportunidades a los ganados que han recibido granos alguna vez en su vida, a los productores y al país en su conjunto”.

La Cuota Hilton es un cupo de carne bovina enfriada de alto valor comercial que ingresa la Unión Europea con un arancel del 20%. Uruguay cuenta con una disponibilidad anual de 6.370 toneladas, pero también participan, con otros volúmenes, el resto de los países del Mercosur, por ejemplo.

Ferrés dijo que al no poder utilizar animales que consumieron granos “quita alternativas” e “incide negativamente”, ya que “se podría recibir más valor por el producto y permitiría acelerar el proceso productivo”, “una ventaja que Uruguay, si puede, debería aprovechar”.

Brexit. La reunión que involucra a las autoridades uruguayas y las europeas tiene como discusión principal la salida de Gran Bretaña de la Unión Europea y una posible reducción del volumen Hilton. De acuerdo a información a la que accedió Rurales El País, se pretende una quita del 12% de las 6.370 toneladas habilitadas.

Afectado por la pandemia y la escasez de hacienda especial para faena, en el último año, y por primera vez en la historia del contingente, Uruguay no pudo completar la Cuota Hilton, quedando un remanente estimado de 1.700 toneladas.

Otra cuota. Además se buscará negociar que en la Cuota Gat, un cupo que ofrece la Unión Europea a terceros países de 55 mil toneladas de carne congelada con arancel del 20%, se pueda plantear el envío de cortes bovinos enfriados.

### **Federación Rural pretende mantener las condiciones de la Cuota Hilton**

08/07/2020 - En la Junta de INAC se planteó el interés de incluir animales alimentados a grano.

El lunes en la Junta del Instituto Nacional de Carnes (INAC) se planteó el interés de algunos sectores de modificar el protocolo de la Cuota Hilton e incluir a los animales terminados a grano.

La propuesta llegó conformando un listado de tópicos que se iban a analizar esta tarde entre Cancillería y las autoridades de la Unión Europea, a raíz de la salida de Gran Bretaña del bloque .

El delegado suplente de la Federación Rural en la Junta del INAC, Joaquín Martincorena, dijo a Rurales El País que la modificación del protocolo Hilton “es un tema de larga data” e indicó que la posición de la gremial “es seguir en estas condiciones”.

A pesar que marcó su posición, Martincorena comentó que el asunto “se merece un estudio profundo”, ya que “sobre la marcha no podemos dar un paso que puede afectar a los productores”.

La Hilton es una cuota de cortes bovinos de alto valor comercial con un arancel del 20% y que Uruguay participa con 6.370 toneladas de animales exclusivamente alimentados a pasto.

La modificación del protocolo pretende que los animales sean alimentados preferentemente a pasto, de esa manera se podrían incluir ganados de corrales de engorde.

Desde este momento “se abre un compás de análisis” sobre el tema, “no se va a resolver de inmediato, recién es el comienzo de las reuniones”, dijo Martincorena.

### **Importación de ganado en pie ¿qué tan viable es?**

05/07/2020 - 4:06 AM

A pesar de la decisión que pueda tomar el Gobierno, y que saldrá desde la Torre Ejecutiva, ¿cómo juega en el negocio la disponibilidad de plantas para absorber el volumen de ganado importado y la diferencia de precios entre Brasil y Uruguay? Además, se mueven el mercado de Israel y el de China.

La última palabra sobre la importación de ganado en pie se emitirá desde Presidencia, pero al momento el Ministro de Ganadería aseguró que no se tomará una decisión hasta que la pandemia dé una tregua. La alternativa se está estudiando, como hace varios meses atrás, aunque ahora el MGAP formó una comisión interna, con técnicos, para evaluar con mayor precisión las oportunidades y las amenazas.



Además, Carlos María Uriarte confirmó que, de habilitarse, la importación de ganado en pie para faena inmediata se permitiría por un periodo definido y para épocas del año muy puntuales.

Como sucede en todo, hay muchas opiniones al respecto, varias a favor y varias en contra. A tal punto que el diputado frenteamplista y expresidente del Instituto Nacional de Carnes, Alfredo Fratti, propondrá citar al ministro Uriarte a la Comisión de Ganadería de Diputados para que explique de primera mano su posición. Para Fratti, que se estudie la posibilidad de comprar ganado de la región “es una barbaridad”.

Estos animales que ingresarían al país, provenientes de Brasil dado que Argentina no cuenta con un protocolo formalizado de exportación, tendrían como destino los frigoríficos que operan en el mercado interno, plantas ciclo II que no están habilitadas para la exportación de carne. De un total de 40 industrias que trabajan en el país, unas 30 están habilitadas para enviar mercadería a los mercados del mundo; por tanto restarían no más de siete frigoríficos con capacidad de absorber la hacienda importada.

A la limitante del volumen de plantas para el mercado interno, se suma la preocupación de los frigoríficos brasileños, ubicados en el estado de Río Grande del Sur, por la escasa oferta de ganado y la incidencia que ha tenido en la composición del stock bovino de esa región la exportación de ganado en pie a los países del Oriente Medio.

Fernando Petruzzi, principal de la empresa Redéa Rural, una consignataria con más de 30 años de operaciones en Santa Vitória do Palmar y Pelotas, comentó en la semana en Valor Agregado que la sequía de principios de año incidió mucho en la disponibilidad de pasturas y en la merma de animales preparados para faena en esta época del año. En ese sentido, aseguró que “la industria frigorífica teme el impacto del mercado por la escasez de ganado”. Debido a la limitada disponibilidad de bovinos, Petruzzi dijo que la hacienda para faena se valorizó y actualmente se paga US\$ 3 kilo carcasa por el novillo y entre US\$ 2,75 y US\$ 2,80 por la vaca.

Mirando la referencia uruguaya de US\$ 3,30 para el novillo gordo a faena, la diferencia de precios con Río Grande del Sur para la compra de ganado no supera el 10%, sino que se ubica en 6,6%, un margen acotado considerando los costos de importación que se deben asumir.

El negocio, observando directamente los números, parece más atractivo para la ternera, hoy cotizando US\$ 1,35 a US\$ 1,40 en el Estado brasileño y US\$ 1,95 en Uruguay, o para la vaca preñada, con una relación de US\$ 470 a US\$ 480 en Brasil y de US\$ 680 en nuestro país. Sin embargo, la importación de terneras o vientres preñados está definida en otra fase, si es que se llega a evaluar, mucho más alejada en el tiempo, según comentaron las autoridades nacionales.

De acuerdo con el escenario actual e independientemente de la resolución que defina el Gobierno, la situación para importar ganado de Brasil estaría siendo prácticamente inviable hasta que no se solucione la pandemia, hoy la prioridad de las autoridades nacionales; y por la limitante de plantas para absorber la oferta de ganado importado y la corta distancia entre los valores de las haciendas gordas.

Israel. A pesar que en junio no se registraron exportaciones de carne bovina a ese mercado, los equipos de rabinos, dos especiales para enviar producto a Estados Unidos y uno regular para Israel que llegaron a Uruguay el pasado 8 de junio y debieron cumplir la cuarentena sanitaria, iniciaron el procesamiento de vacunos en los frigoríficos y se espera que en dos semanas pueda llegar otra cuadrilla para operar en una planta del centro del país.

En la semana arribó un avión con rabinos para trabajar en Brasil y otro equipo adicional a los que ya están operando en Paraguay. Además, y considerando la pandemia, el Gran Rabinato de Israel autorizó a los Jefes de Equipos de la región a habilitar o actualizar la habilitación, temporalmente, de plantas que estaban esperando los auditores oficiales.

En los primeros seis meses del año, teniendo en cuenta que las cuadrillas kosher se retiraron a principios de marzo, las exportaciones de carne uruguaya a Israel suman 3.044 toneladas peso embarque, a un valor promedio de US\$ 7.079 (US\$ 4.848 peso carcasa) por tonelada.

China. Después de la intensificación de controles sanitarios de los alimentos importados para confirmar su estado libre de Covid-19, el mercado chino transita “una semana bisagra” para la comercialización de carne bovina, explicó a Valor Agro el bróker Alejandro Berrutti.

Un punto que despertó el interés de los importadores asiáticos por la carne bovina nacional fue la decisión de eliminar a varios frigoríficos brasileños de la lista de plantas habilitadas a raíz de los brotes de Coronavirus; y el otro, a razón del aumento arancelario, del 4,8 al 12%, de las exportaciones australianas, esto en respuesta de las acusaciones y posteriores investigaciones del país oceánico a China sobre el origen del virus que se globalizó.

Con respecto a Australia, los importadores de China empezaron el juego de la renegociación de contratos, algo conocido en Uruguay, tanto para la carne que está en viaje como para la que está próxima a salir.

En respuesta a los recientes cambios, Berrutti señaló que los compradores de China incrementaron las consultas por distintos productos y con precios que se corrigen al alza. “Son señales, pero los precios todavía están lejos de las pretensiones de las industrias uruguayas”, indicó.





## China aparece como alternativa para la carne bovina enfiada de Uruguay

06/07/2020 - Entre abril y junio se exportaron 250 toneladas, un mercado que inicia la actividad de compra de estos productos en momentos que los destinos tradicionales bajaron la demanda afectados por la pandemia.

Las exportaciones de carne enfiada de Uruguay encuentran nuevas alternativas en el último trimestre (de abril a junio) para la colocación de cortes bovinos enfiados, después de la caída de la demanda de los mercados tradicionales.

El director de Tardáguila Agromercados, Rafael Tardáguila, señaló que los cortes de alto valor comercial experimentaron una reducción en los envíos a mercados como la Unión Europea y otros regionales como Brasil y Chile, entre estos se concentran los mayores negocios del país para este tipo de carne, a causa del impacto de la pandemia.

“La reducción del volumen de carne enfiada exportada es muy superior a la carne congelada (cortes de menor valor): en comparación con el mismo trimestre del año pasado el enfiado bajó su comercialización un 36% y el congelado un 18%”, detalló Tardáguila.

Mientras hay una merma en los compradores tradicionales, el especialista de mercados cárnicos dijo que los datos de exportación demuestran que las industrias “buscan alternativas en otros destinos” para colocar los productos de alto valor.

En tal sentido, Tardáguila comentó que China, el mayor comprador de carne congelada de Uruguay, aparece como una opción de venta para la carne enfiada en el último trimestre. “Aunque son volúmenes muy inferiores a los mercados tradicionales, en mayo y junio salieron cinco contenedores con producto enfiado en cada uno de esos meses”, indicó.

La suma total alcanza las 250 toneladas en el trimestre. “No se puede comparar con las miles de toneladas que compra de congelado, pero marca un inicio de negocio para otro producto”, explicó.

demás, dijo que Japón, que en marzo se posicionó como el mayor comprador de carne enfiada de Uruguay tras la importante reducción de compra de la Unión Europea, importó 566 toneladas entre abril y junio.

## ESTADOS UNIDOS

### Proyectan una lenta recuperación económica

Derrell Peel - Oklahoma State University

July 6, 2020 11:29 AM

The COVID-19 pandemic continues to have devastating impacts on public health and the economies of the U.S. and many other countries. There is much uncertainty about the future impacts of COVID-19 but even in the best of circumstances, the economic impacts are enormous. Table 1 shows a range of estimates for changes in U.S. Gross Domestic Product (GDP) in 2020 and 2021. All of the estimates for 2020 are significantly worse than the 2.8 percent decrease in GDP in 2008, during the last recession.

Table 1. Change in U.S. GDP (Percent).

	2019	2020*	2021*
U.S. Federal Reserve [1]	+2.3	-6.5	+5.0
OECD [2]	+2.3	-7.3 (-8.5)^	+4.1 (+1.9)^
IMF [3]	+2.3	-8.0	+4.5

\*2020 and 2021 forecast; ^Impact with second COVID-19 outbreak

OECD = Organization for Economic Cooperation and Development

IMF = International Monetary Fund

The 2020 U.S. unemployment rate is forecast at 9.3 percent, replacing pre-COVID estimates of a continuation of the 3.5 percent rate from late 2019 [1]. The Fed estimate for the 2021 unemployment rate is 6.5 percent, persisting at a 5.5 percent rate in 2022 [1]. The impact of unemployment and reduced income in the U.S. economy is likely to grow at some point as government support reduces or ends.

Like the pandemic, the economic impacts are global as well. The most recent projections from the Organization for Economic Cooperation and Development (OECD) includes the following summary:

“The global economy is now experiencing the deepest recession since the Great Depression in the 1930s, with GDP declines of more than 20% and a surge in unemployment in many countries. Even in countries where containment measures have been relatively light, early data are already making clear that the economic and social costs of the pandemic will be large. Growth prospects depend on many factors, including how COVID-19 evolves, the duration of any shutdowns, the impact on activity, and the



implementation of fiscal and monetary policy support. Uncertainty will likely prevail for an extended period.” [2]

Likewise from the International Monetary Fund (IMF):

“Global growth is projected at –4.9 percent in 2020, 1.9 percentage points below the April 2020 World Economic Outlook (WEO) forecast. The COVID-19 pandemic has had a more negative impact on activity in the first half of 2020 than anticipated, and the recovery is projected to be more gradual than previously forecast. In 2021 global growth is projected at 5.4 percent. Overall, this would leave 2021 GDP some 6½ percentage points lower than in the pre-COVID-19 projections of January 2020.” [3]

The OECD, with estimates for single-hit and double-hit (second COVID-19 outbreak) scenarios, state that, “In both scenarios, we won’t be back at 2019-Q4 level for at least two years”.

The magnitude of the impact on domestic and international beef demand is uncertain though certainly reduced from previous estimates. Beef demand will depend on a number of factors including; evolution and future impacts of COVID-19; type and duration of fiscal and monetary support; recovery of food service sector; rate of employment recovery; exchange rates; politics (including election year impacts, trade disputes, etc.) and others. There will be many challenges for many months and a continuing atmosphere of uncertainty.

### **Fuerte impacto del COVID 19 en establecimientos frigoríficos – Hispanos, negros y asiáticos 90 por ciento de los casos**

08 July 2020 - A new report published by the Centers for Disease Control and Prevention shows the heavy toll COVID-19 took on meat plant workers in April and May.

According to reporting in Reuters, the coronavirus pandemic sickened more than 17,000 workers at various meat and poultry processing facilities across the US in April and May of this year. The CDC also recorded nearly 100 deaths from COVID-19 among meat plant workers.

In rural areas of the United States, meat packing plants been the loci of coronavirus outbreaks. This is because employees must work long hours indoors and in close proximity to one another.

A CDC report released on 7 July synthesised surveillance data from health departments across 23 states through 31 May for all meat and poultry facilities affected by the novel coronavirus. It compiled 16,233 confirmed cases among the workers, with 86 related deaths.

Among cases where demographic data was recorded, 87 percent of cases occurred among racial and ethnic minority workers.

The CDC said that 12 percent of the cases were asymptomatic or pre-symptomatic. However, not all facilities performed widespread coronavirus testing. Because of this, there may have been many more cases that went unreported.

Taken together with an earlier CDC assessment of meat processing plant workers through 27 April, the totals were 17,358 coronavirus cases and 91 deaths through the end of May.

Reuters reports that most plant have implemented health and safety measures, including supplying PPE to workers, providing hand sanitiser, ensuring tools and implements are disinfected and screening workers for COVID-19 symptoms.

The researchers said that targeted, workplace-specific prevention strategies are critical to reduce COVID-19 health disparities among vulnerable populations.

“Lessons learned from investigating outbreaks of COVID-19 in meat and poultry processing facilities could inform investigations in other food production and agriculture workplaces,” the authors said.

BY JESSIE HELLMANN - 07/07/20 12:10 PM EDT 339

At least 17,000 meat and poultry processing facility workers in the U.S. have been infected with COVID-19, the vast majority being racial and ethnic minorities, the Centers for Disease Control and Prevention (CDC) revealed in a new analysis released Tuesday.

The report is the broadest look yet at the impact of the pandemic on these workers, who are disproportionately low-wage Hispanics, though it is an undercount as less than half of the states reported data to the CDC.

Overall, the CDC identified 17,358 cases of COVID-19, including 91 deaths, among workers at 264 meat and poultry processing plants through May 31. Of the 9,919 cases where race and ethnicity information were reported, 87 percent were minorities.

About 56 percent were Hispanic, 19 percent were Black, 13 percent were white and 12 percent were Asian, “suggesting Hispanic and Asian workers might be disproportionately impacted by COVID-19 in this workplace setting,” the authors of the report wrote.

The largest outbreaks in processing facilities in states that reported data to the CDC were found in Nebraska, Virginia, Illinois, Pennsylvania and South Dakota, all reporting more than 1,000 cases among workers.



The authors noted that only 37 percent of the facilities where COVID-19 infections were found offered testing to employees. Only 22 percent closed their facilities temporarily, and 21 percent reduced the rate of animal processing.

Eighty percent of the facilities screened workers for COVID-19 symptoms, but temperature checks and other measures miss people who have the disease but aren't showing symptoms, a population that plays a large role in the spread of the virus. The CDC estimates about 11 percent of poultry and meat processing workers have the virus but aren't showing symptoms.

Seventy-seven percent of the facilities required universal face coverings, while 65 percent added hand hygiene stations.

Meat and poultry processing facilities were pressured to continue operations even as COVID-19 spread in factories throughout the U.S. President Trump signed an executive order in April ordering processing plants stay open to prevent further disruptions to the food supply.

"Outbreaks of COVID-19 among workers at some processing facilities have led to the reduction in some of those facilities' production capacity," the order read.

"Such closures threaten the continued functioning of the national meat and poultry supply chain, undermining critical infrastructure during the national emergency."

The authors of the CDC report wrote that the nature of the meat processing industry is conducive to the spread of the virus. Workers are often in close contact for long periods of time and share workspaces, transportation and housing with each other.

The report did not indicate why minority workers in these plants are disproportionately getting sick. While Hispanics make up 30 percent of the processing workforce and 18 percent of the total U.S. population, they account for 56 percent of infections.

Hospitalizations up 50 percent in California amid coronavirus increase

Trump downplaying sparks new criticism of COVID-19 response

"Targeted, workplace-specific prevention strategies are critical to reducing COVID-19 associated health disparities among vulnerable populations," the authors wrote.

Latino and African American people are three times more likely than white people to be infected with COVID-19, according to data The New York Times obtained by suing the CDC.

Black and Latino people are nearly twice as likely to die from the virus as white people, according to the Times.

### **Exportaciones de carnes fueron afectadas por la caída en la producción provocadas por COVID 19**

July 6, 2020 - Production slowdowns at American meatpacking facilities caused by the coronavirus pandemic this spring produced declines in exports for both beef and pork during May.

Beef exports fell 33% during May compared to 2019, recording the lowest monthly volume in 10 years, according to data released by USDA and compiled by the U.S. Meat Export Federation. The value of beef exports fell 34% to \$480.1 million as shipments were higher than a year ago to Hong Kong and China but lower to most other markets. For January through May, beef exports fell 3% below last year's pace in volume (512,596 mt) and 5% lower in value (\$3.14 billion).

May Pork exports remained higher than a year ago but were the lowest since October 2019. Pork exports in May were 12% above a year ago, but down 13% compared to the monthly average for the first quarter of 2020. May pork exports increased year-over-year to China/Hong Kong, Taiwan and Vietnam, but trended lower to Mexico, Japan, Canada and South Korea. For January through May, pork exports were 30% ahead of last year's pace in volume (1.35 million mt) and 37% higher in value (\$3.53 billion).

"As protective measures related to COVID-19 were being implemented, plant disruptions peaked in early May with a corresponding temporary slowdown in exports," said USMEF President and CEO Dan Halstrom. "Unfortunately the impact was quite severe, especially on the beef side. Exports also faced some significant economic headwinds, especially in our Western Hemisphere markets, as stay-at-home orders were implemented in key destinations and several trading partners dealt with slumping currencies."

Halstrom noted that the recent rebound in beef and pork production will help exports regain momentum in the second half of 2020. The global economic outlook is challenging, but he looks for export volumes to recover quickly in most markets as U.S. red meat remains an important staple, not only in the United States but for many international consumers as well.

"In what has been a remarkably turbulent year, consumer demand for U.S. red meat has proven very resilient," he said. "Now that production has substantially recovered, the U.S. industry is better able to meet the needs of both domestic and international customers. While the foodservice and hospitality sectors face enormous challenges, they are on the path to recovery in some markets while retail demand remains strong. Retail sales have also been bolstered by a surge in e-commerce and innovations in home meal replacement, as convenience remains paramount."



## **Importaciones de hacienda para engorde**

July 7, 2020 Imports of feeder cattle from Mexico were 3% higher than last year through the first half of 2020. Significantly higher volumes of Mexican imported feeder cattle were noted the last two weeks of May and throughout June which offset the lower volumes recorded through the first 4.5 months of the year.

In a stark contrast to the number of Mexican imports, feeder cattle imports from Canada are 50% lower than the first six months of 2019.

“COVID-19 has undoubtedly played a role in trade flows, impacting supply, demand, currency rates, and behavior,” according to analysts at the Livestock Marketing Information Center (LMIC), Denver. Drought too has played a role, and in May the North American Drought Monitor showed dry conditions in 32% of Mexico. Northern Mexico states of Durango, Chihuahua, and Coahuila all showed significant drought coverage although the worst of the country’s drought is in the southern border areas.”

Imported cattle can go direct to feedlots, or they may go to pasture. Analysts note that imported feeder cattle do not necessarily remain in the states they are imported into.

LMIC tracks cattle from Mexico through ports of entry in Arizona, New Mexico, and Texas.

“U.S. drought conditions imply significant drought in all three states,” LMIC says. “Still, year-to-date Arizona feeder cattle imports from Mexico are up 15%, New Mexico’s are up 4% and Texas is down 10%.”

The weekly data on imported feeder cattle implies that feeder steer imports are outpacing imports of heifers. Year-to-date feeder heifers from Mexico are about even with a year ago while feeder steer volumes are up 3.9%.

LMIC noted that while cattle on feed placements were down overall in May by 1.3%, state breakdowns indicated California, Colorado, Iowa and Kansas all placed cattle at higher rates than a year ago.

“It’s impossible to tease out additions directly influenced by Mexican feeder cattle imports,” LMIC said. “State-level cattle on feed data indicates states placing more cattle last month may have had less of a backlog of cattle on feed greater than 120 days.”

As of June 1, Arizona and Iowa cattle on feed more than 120 days were down from the prior year by 13% and 20% respectively, according to LMIC analysis. California had 6% more cattle on feed 120 days plus, and Colorado had 11% more than June of last year. Kansas was the only state to place more animals in May and have significantly higher volumes of cattle over 120 days, 38% higher than last year on June 1.

Most of the higher volumes of feeder cattle imported from Mexico were in the month of June. Feedlot placement data for June will not be available until the middle of July, but there are still a lot of cattle on feed at 120 days or longer.

Other states, whose placement rates were lower, had large changes compared to a year ago in cattle on feed 120 days and longer. Idaho, and Minnesota have 10-15% more cattle on feed 120 days and longer. Nebraska, Texas and Oklahoma have 25% or more. Oklahoma has the largest volume compared to a year ago with 66% more than on June 1, 2019.

“The July Cattle Inventory (scheduled for release by USDA NASS on July 24, 2020) should see additional steers and heifers backlogged show up in the ‘Other Heifers’ and ‘Steers Over 500 lbs,’ which has the potential to skew the total number of cattle and calves above a year ago,” LMIC said.

## **AUSTRALIA**

### **Precios de la hacienda vacuna se mantienen elevados**

07 July 2020

Global markets remain shrouded with uncertainty, and Australia is no exception, with the economy shrinking for the first time in nine years during the March quarter and a recession on the horizon – the first in 29 years.

Before COVID-19, the Australian red meat industry had to navigate a range of complex market pressures. African Swine Fever creating a sizeable global protein deficit, a US-China trade spat, domestic challenges on the back of prolonged drought and a national bushfire crisis, to name a few.

Thankfully, the recent improvement in domestic conditions has instilled an element of confidence in producers looking to rebuild depleted herd and flock numbers. A positive rainfall outlook continues to encourage producers, despite the unprecedented and unpredictable nature of COVID-19 in Australia’s key markets.

Records tumble

Following two consecutive years of unrelenting drought, a significant improvement in water and feed availability would be the catalyst to propel domestic livestock prices to record levels. Across sheep and cattle, records tumbled, driven by robust competition from producers looking to restock paddocks and processors competing for a reduced pool of livestock.

A selection of saleyard indicator records to-date include:

Cattle:

The Eastern Young Cattle Indicator (EYCI): 772¢/kg carcass weight (cwt) – 17 June 2020





The National Heavy Steer Indicator: 383¢/kg live weight (lwt) – 23 June 2020

The National Feeder Steer Indicator: 410¢/kg lwt – 10 March 2020

Sheep:

The Eastern States Trade Lamb Indicator (ESTLI): 966¢/kg cwt – 11 March 2020

The National Restocker Lamb Indicator: 1,025¢/kg cwt – 10 March 2020

The National Mutton Indicator: 729¢/kg cwt – 12 March 2020

Domestic prices across all species remain at historically high levels, as supply constraints have tipped the balance in favour of support for Australian livestock prices, despite the impact of COVID-19 on overseas demand.

Supply squeeze

Winter in Australia (June to August) typically marks a low point in supply across all species, albeit more pronounced across the sheep and lamb market. This winter is shaping up to be no different, with cattle, sheep, lamb and goat slaughter all running below year-ago levels.

Cattle Market:

From a cattle supply perspective, the impact of improved conditions on producer intentions is anticipated to see cattle turnoff decline to the lowest point since the mid-90s and remain at historically low levels for the next two years. Demand for young cattle and breeding stock heading back to the paddock has risen and will remain strong should domestic conditions hold up. Processors have increased livestock grid prices to maintain the flow of cattle for processing, however, limited availability and robust competition between southern and northern abattoirs has resulted in some shortened processing weeks.

MLA supply estimates for the Australian cattle industry in 2020:

Cattle slaughter – At 6.9 million head, back 19% year-on-year

Beef production – At 2 million tonnes cwt, back 16% year-on-year

### **Panorama del Mercado global**

Throughout our key Asian markets, it has been encouraging to see customers return to dining establishments. However, apart from quick service restaurants, foodservice sales remain below average and there remains significant uncertainty driven by fears of further COVID-19 spikes and excess supplies of higher priced protein items in some markets.

Retail sales remain strong, albeit with heightened food safety concerns hastening a trend towards buying fresh food from more sophisticated retailers and online channels. Rapid change is even occurring in the most mature of markets such as Japan.

With the global economy now facing recession, what might be next for Australian red meat? It is easy to assume consumer demand will fall as people look to feed their households more economically. Certainly, like any discretionary purchase, we are not entirely recession proof, but there is some cause for optimism. Firstly, food demand tends to be less impacted during a recession than other less vital goods and services – people still need to eat! Thankfully, the diversity we have in markets and different cuts and specifications we can offer global customers means we are not exposed to any one sector of the market.

Our learnings from the past downturn in 2008-9 indicate that whilst many people 'trade down' to less expensive cuts of beef and lamb, total expenditure may even increase. For example, fresh meat sales in the US bucked the downward trend during the Global Financial Crisis in 2009, increasing by 4%.

Even those products at the premium end should not necessarily expect a drop in demand – there is strong evidence that as consumers forgo large discretionary purchases (television set, overseas holidays, new car), 'cheaper luxuries' such as a trip to the cinema or a premium cut of meat benefit. During the Global Financial Crisis Australian consumers actually increased their purchase of lamb, an item thought to be more of a 'discretionary choice' than a staple such as beef, and therefore more exposed to economic downturn.

Furthermore, underlying consumer preferences should not change during a recession, and any lost demand would increase as the economy recovers. One lesson from previous recessions is that brands must continue to actively invest in promotion to avoid coming out of the downturn in an inferior position. Research after the global financial crisis of 2009 showed brands that 'went dark' significantly underperformed those who continued their investment. And 'powerful' brands tended to recover much faster than average.

The good news for our industry is that in many markets Australian red meat is considered a 'Power brand'. MLA's research into consumer perceptions shows that in key markets our 'brand power' is extremely strong in the meat category relative to competitors.

Lastly, it has been very encouraging to be in a position to re-open the majority of MLA offices around the globe. As travel restrictions remain, I encourage you to contact our team should you require any support.