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## GLOBAL

### Sudeste asiático será clave en el incremento de la demanda mundial de carnes

30 July 2020

Key points:

Growth in middle class income across Asia, particularly Vietnam and Indonesia, will fuel meat consumption over the next decade

African Swine Fever induced pork production shortfall will supplement import demand and provide support to export prices in the short-term

There is growing interest in high quality protein sources among affluent consumers

Earlier this month, the Organisation for Economic Co-operation and Development (OECD) and the Food and Agriculture Organisation (FAO) released their collaborative global agricultural outlook. This outlook contains key insights and forecasts across production, consumption and trade, providing an indication of the global trading environment for Australian red meat in the next decade.

Demand considerations

A number of major uncertainties continue to face world agricultural markets such as the spread of African Swine Fever (ASF), the fallout from COVID-19, shifting consumer diets and climatic events. While these influences will certainly impact supply and demand, global demand for beef will continue to be underpinned by a number of key economic fundamentals such as population growth and a rising number of middle-class income households.

Growth-household-income-300720.png

Household income growth remains a major growth factor driving increasing global meat consumption, which is projected to grow at an average rate of 1.2% annually over the next ten years. Trends and consumption profiles will continue to influence meat consumption levels which typically depend on the stage of economic development for the country in question. For instance, many high income countries are reaching saturation levels in terms of per capita meat consumption, with fluctuating consumer preferences leading to a diversification of protein sources. Quality is a key factor which will become increasingly important for consumers in high income countries, as consumers seek flavour and experience over volume.

Meanwhile, income growth in developing countries is expected to drive further demand for meat, as increasing disposable incomes opens up a range of dining opportunities for consumers. This growth means that beef consumption across Asia is expected to grow by 2.7 million tonnes carcass weight equivalent (cwe) over the next ten years – the largest gain across any global region. Within Asia, Vietnam and Indonesia stand out as key import markets, with beef import volumes predicted to grow 24% and 34% respectively. China remains a huge market for beef, however, as the pork industry recovers from ASF, this will likely limit any further growth for meat imports as locally sourced meat becomes more readily available later in the decade.

Global-meat-consumption-300720.png

Global meat prices were 6% higher on average higher in 2019 relative to 2018. Beef export prices have been buoyed by strong ASF-fuelled demand, while globally limited supplies of sheepmeat continue to support lamb and mutton prices. During the next few years, prices will be supported by ongoing supply constraints within major Asian meat-producing nations.

Supply considerations

Global meat production fell 2% in 2019, primarily due to a 21% decline in Chinese pork production resulting from ASF. Outbreaks of ASF across Asia through 2020 will likely continue to limit meat production growth in the short-term. However, if further spread of the virus can be contained, long-term pork production appears fairly positive. The outlook assumes a return to typical production levels within the next five years.

Looking ahead to 2029, global meat production will benefit from growth driven predominantly by countries classified as 'developing nations', which are expected to account for 87% of global meat production growth relative to 2019. Pork production in China and Vietnam are key contributors to the growth, as their industries return to typical production levels following the impact of ASF. Additionally, poultry production in India, Brazil and Indonesia will also account for a large proportion of total meat production growth.

Global-meat-production-growth-300720.png

Regarding beef production, global heavyweights Brazil and the United States are both expected to increase production volumes by just over half a million tonnes cwe each by 2029. However, their share of global beef production is not expected to change, as a number of smaller nations, such as Pakistan and South Africa, are set to grow their share of the pie.

Global meat exports are expected to grow at an average annual rate of 0.7% through to 2029, which would take total global export trade volumes to 42 million tonnes cwe. This represents a significant slowdown



relative to the past three years, when annual growth averaged 3%. Latin America will continue to account for the largest share of beef exports, driven by ongoing production gains in Brazil and Argentina.

Global-meat-exports-300720.png

While Australia will continue to represent just a fraction of global production, Australian beef exports are forecast to remain steady and should contribute approximately 16% to global beef trade in 2029. This is encouraging given the large production gains expected across key competitor countries. As consumers in higher income markets look to diversify and seek quality food sources, continuing to target these key markets with a quality offering will remain a key component of success for the Australian industry.

Sheepmeat exports from Oceania are expected to continue benefiting from strong global demand. In particular, shipments to China are expected to remain high as significant growth is forecast for the duration of the ASF outbreak.

### **ONU eliminó un tweeter descalificatorio para la carne tras las críticas**

Beef Central, July 30, 2020

THE United Nations has quietly removed a tweet which claimed meat produces more greenhouse gas emissions than the world's biggest oil companies.

On July 25 the United Nations posted the following message to its twitter account:

The meat industry is responsible for more greenhouse gas emissions than the world's biggest oil companies. Meat production contributes to the depletion of water resources & drives deforestation.

See how you can #ActNow to protect our planet. <https://t.co/xN4WUQCWNL> pic.twitter.com/NouRjpRaoq

— United Nations (@UN) July 25, 2020

The tweet triggered an angry response from a range of sources including Cattle Council of Australia, which described the claim as an 'absurd simplification' and 'misleading'.

It said the message ignored the basic point that oil extraction releases carbon storages laid down millions of years ago, while livestock emissions are part of a biogenic cycle.

Australian agricultural minister David Littleproud said the message showed the UN was "becoming irrelevant": "Urging people to eat less meat based on an ideological agenda is nothing short of hypocritical and disgraceful," he said.

International air quality expert Frank Mitloehner from the University of California Davis, who a decade ago exposed incorrect information published by the United Nations on livestock emissions in its 2006 Livestock Long Shadow report, called on the UN to have a closer look at the message in its July 25 tweet:

Beef Central, July 28, 2020

CATTLE Council of Australia is calling out the United Nations for its over-simplified claims regarding the impact the meat industry has on climate change.

The UN has published the claim: "The meat industry is responsible for more greenhouse gas emissions than the world's biggest oil companies."

Cattle Council President Tony Hegarty said the claim ignored the fact the meat industry captured the vast majority of carbon it emits.

"The oil business unlocks long-term carbon storages, the meat business does not," Mr Hegarty said.

"It is reckless to say we are the same as an industry that unlocks millennia-old carbon storages. The earth's oil reserves have been locked away for more than 50-million years.

The United Nations should know meat producers absorb carbon in pasture before emitting it.

Their claim is an absurd simplification that needs to be called out for what it is – misleading.

It ignores the fact that carbon emissions from burning oil products can stay in the atmosphere for hundreds of thousands of years.

By comparison, agricultural methane is largely depleted within 12 years.

The UN should respect the intelligence of the public and have a sensible debate.

We are having the debate, with the beef industry committed to zero net emissions by 2030.

We are also using our extensive natural resources to be part of the broader solution through programs such as the Farm Biodiversity Stewardship Program.

In fact, in MLA's last Consumer Sentiment Survey, only 13% of urban Australians thought we could do more to reduce our environmental impact.

The UN should be a leader and make it clear – the oil industry is a problem, the cattle industry is part of the solution."

Campaign shows UN is becoming 'irrelevant'

The Australian Government completely rejects claims from the United Nations that the meat industry, particularly in Australia, is driving climate change, water depletion and deforestation.

Australian Minister for Agriculture David Littleproud said the UNs campaign against the meat industry shows that the UN is becoming irrelevant.



“Australian meat producers are amongst the most sustainable land managers and environmental stewards in the world and encouraging people to not eat meat are the actions of an activist group, not a responsible international body the UN is meant to be,” Mr Littleproud said.

“Rather than denigrate and insult the integrity of our meat producers, we should be celebrating the farmers who help produce the first choice protein for people globally.

“Urging people to eat less meat based on an ideological agenda is nothing short of hypocritical and disgraceful.

“Australia remains at the forefront of sustainability and our meat industry does not deserve to be continually maligned and disparaged.

“Meat continues to be an essential food item for people around the world regardless of income level, and we will need to produce even more meat if we have any hope of creating a food-secure future, not less.

“In Australia all meat sectors have committed to significantly reducing emissions and most industries are on track to achieve net zero emissions by 2030

“According to research by Meat & Livestock Australia, greenhouse gas emissions from the red meat and livestock industry have fallen by 57.6 percent since 2005. We are also producing meat with 65pc less water than 2005.

“The UN ought to stick to their knitting of promoting peace and prosperity rather than denigrating the work of our farmers, instead of pursuing political agendas on these important issues.”

30 July 2020

The Cattle Council of Australia and the National Farmers' Federation are criticising the UN for its claims regarding the meat industry's impact on climate change.

The UN has published this claim on social media: “The meat industry is responsible for more greenhouse gas emissions than the world's biggest oil companies.”

Cattle Council President Tony Hegarty said the claim ignored the fact the meat industry captured the vast majority of carbon it emits.

“Oil companies unlock long-term carbon storages, meat businesses don't,” Mr Hegarty said.

“The earth's oil reserves have been locked away for more than 50-million years.

“Their claim is an absurd simplification that needs to be called out for what it is – misleading.

“It ignores the fact that carbon from burning oil can stay in the atmosphere for hundreds of thousands of years.

“By comparison, agricultural methane is largely depleted within 12 years.

“The UN should respect the intelligence of the public and have a sensible debate.

“Australian red meat producers have affirmed a commitment to carbon neutrality by 2030.”

“We are also using our extensive natural resources to be part of the broader solution through programmes such as the Farm Biodiversity Stewardship Programme.

“In fact, in MLA's last Consumer Sentiment Survey, only 13 percent of urban Australians thought we could do more to reduce our environmental impact.

“The UN should be a leader and make it clear – the oil industry is a problem; the cattle industry is part of the solution.”

National Farmers' Federation President Fiona Simson said such statements failed to tell the whole picture.

“Oil is releasing carbon that's been locked away for millions of years, red meat production doesn't do this,” Ms Simson said.

“This is a very important distinction, and we had an expectation that an organisation as respected and well-resourced as the UN wouldn't mix it up.

Ms Simson said it was the role of the Intergovernmental Panel on Climate Change to investigate, consider and report on the climate change, including the role of industries and nations in contributing to, or mitigating climate change.

“To the contrary, it is the role of the United Nations to bring countries and communities together for good, not to single out, in this case inaccurately, sectors for condemnation.”

“It should be noted that the IPCC and Food and Agriculture Organization of the United Nations (FAO) both note that the policy, planning and incentive systems on agriculture lands and in grazing systems are sustainable and net carbon negative food production sources.”

“We call on the United Nations to immediately correct its statement.”

Ms Simson said Australian agriculture was committed to being part of the solution when it came to reducing emissions.

“The farm sector is in a unique position. While generating emissions, the production of food and fibre also has the potential to sequester carbon.”

Ms Simson said the NFF's 2030 Roadmap, included a goal for Australian agriculture to be trending towards carbon neutrality by 2030 and Australia's red meat was leading the world in its carbon reduction target.”



Beef Central, July 30, 2020

A United Nations spokesperson has told Beef Central that its tweet stating the meat industry is responsible for more greenhouse gas emissions than the world's biggest oil companies was withdrawn earlier this week, not because it contained misinformation, but because it did not come from a UN source.

As reported yesterday the United Nations on Thursday afternoon removed without explanation a tweet which had stated the meat industry is responsible for more greenhouse gas emissions than the world's biggest oil companies. "Meat production contributes to the depletion of water resources & drives deforestation," the United Nations official account tweeted.

A range of international scientists challenged the United Nations on Twitter, describing the claim as misinformation and challenging the organisation to produce evidence to support its statement or remove its tweet.

The UN also accounts regular statements on its own website warning internet users against posting misinformation and unverified statements.

Yesterday afternoon (see below) the UN quietly removed the offending post from its twitter account:

Beef Central asked the United Nations if it could indicate why it removed the tweet and whether it accepted the claim in its tweet amounted to misinformation.

In response a United Nations spokesperson overnight responded with the following statement, which denied the tweet contained misinformation:

"The material in the tweet was deleted because it did not come from a UN source," the spokesperson said. "This does not mean we regard it as misinformation; we simply take care to use UN sources for the information in our tweets and that did not happen with this tweet, so it was withdrawn."

### **Post Pandemia: mayor automatización en la industria**

Beef Central, July 31, 2020

ROBOTS working in abattoirs, sky-high vertical farms, more gene-edited foods in our supermarkets and automated farming systems could all help guarantee food supply in the next pandemic.

University of Queensland Professor Robert Henry said the technologies had all been in various stages of planning prior to COVID-19, but food producers would now be moving much faster to prepare for the next pandemic.

"Food processing facilities like meat works have had to close due to a staff member being infected with the coronavirus, and all food processing industries where you have workers in small confined spaces are similarly at risk," Professor Henry said.

Professor Henry, who is the Director of the Queensland Alliance for Agriculture and Food Innovation (QAAFI), said roboticised abattoirs and automated harvesting and production facilities would also reduce the risk of transmission of pathogens among workers but also the spread of viruses via the food itself.

"COVID does not seem to be transmissible from an infected human touching food but a future pandemic virus might be transmitted this way, so automating the food supply chain reduces this risk.

"It also minimises reliance on human workers that are not available due to migration restrictions and border closures."

Professor Henry said protected cropping, including vertical farms – or growing food in vertically stacked layers similar to a skyscraper building – would optimise plant growth and enable control over climate variations, chemical inputs and water resources.

"There will have to be policies that drive consumer acceptance of gene edited foods, which some consumers consider as GMOs.

"Advanced technologies need to be adopted globally, in each region, to deliver local food production capability that could provide secure sources of food in future pandemics

"We will need to design crops to suit automated systems – for example for fruit to grow in places where it can be harvested robotically."

Professor Henry said the ongoing COVID-19 pandemic made it difficult to fully assess the impact on agriculture and food supply.

He said despite growing stocks of foods such as cereals, it was estimated the number of people facing a food crisis will grow from 135 million to 265 million by the end of 2020.

"It may seem to those of us in Western countries that the only impact on food supply has been a rush on pasta and rice in the supermarket and home-baking but the loss of income caused by the pandemic has hit some countries in Africa hard.

"We are in a situation where we have food surpluses while there has been a doubling in the number of people who can't afford to eat – and the situation is likely to get worse."

Professor Henry said increased investment in agricultural research and development would support enhanced food security.



## CHINA

### **Instrumentan análisis de COVID 19 en mercados mayoristas**

31 July 2020

China has asked local authorities to carry out regular coronavirus tests at wholesale markets as part of a holistic strategy to control the spread of the COVID-19 pandemic.

Reuters reports that China's health authority made the announcement on 30 July.

China's National Health Commission (NHC) has urged local authorities to strengthen monitoring for the coronavirus at major wholesale markets that can cover extensive neighbouring areas, especially those with stands selling frozen and refrigerated meats and seafood, or with moist and closed spaces, according to a notice published on the commission's website.

The guideline comes after China's capital city Beijing reported in early June a cluster of coronavirus infections that centred around a major wholesale market.

Local working groups in charge of coronavirus control and prevention must collect samples from major wholesale markets, especially those selling meats and seafood, once every week for coronavirus tests. However, smaller wholesale markets can do testing once a month.

Areas and objects at the markets that should be tested for the coronavirus include knives used at major stands, workers' clothes surface, freezers, meats and seafood, sewage, restrooms, garbage trucks, and offices, according to the NHC notice.

China has already started COVID-19 testing on imported meats and seafood, and at domestic meat processors. It has also banned shipments from a list of meat processing plants overseas.

### **Permitirán inversión extranjera para cría de ganado**

31 July 2020 China's state planner has said it will encourage foreign investment in livestock and poultry breeding from 2020.

According to reporting in Reuters, the permission also extends to plant-based meat substitutes. The move by China's National Development and Reform Commission comes as the country, the world's foremost meat consumer, attempts to boost supplies of meat and alternative protein to overcome a major pork shortage after outbreaks of African swine fever decimated its pig herd. China's pig producers have ramped up imports of foreign breeding pigs to rebuild a sow herd that had fallen as much as 60 percent due to the deadly disease.

Major international players and local firms alike are already moving to develop and sell plant-based protein products to the China market.

### **China compra 1 millón de toneladas de carnes bovinas en el primer semestre**

Por: ESTADÃO CONTEÚDO 27/07/2020

Somente em junho, o país asiático importou 180 mil toneladas de carne do exterior - alta de 32,1% na comparação anual

As importações chinesas de carnes e miúdos totalizaram 900 mil toneladas em junho deste ano, volume 74,4% maior do que o adquirido em igual mês do ano anterior, informou o Departamento de Alfândegas da China (GAAC, na sigla em inglês). A despesa com a importação do produto também aumentou 74%, atingindo US\$ 2,68 bilhões no mês.

Em relação a maio, as compras do produto avançaram 9,75% em volume. No primeiro semestre deste ano, o país asiático importou 4,75 milhões de toneladas de carnes e miúdos.

As importações de carne suína somaram 400 mil toneladas em junho, volume 128,4% superior ao comprado em igual mês do ano passado. Em valor, o aumento foi de 191,1%, para US\$ 1,068 bilhão. No acumulado do ano, o país asiático comprou 2,12 milhões de toneladas de carne suína.

De carne bovina, o país asiático importou 180 mil toneladas em junho, alta de 32,1% na comparação anual. O valor desembolsado com o produto foi 30,3% maior, de US\$ 830,21 milhões. De janeiro a junho deste ano, a China comprou 1 milhão de toneladas de carne bovina do exterior.

O aumento das importações chinesas de carnes ocorre em meio à crise que o país enfrenta na procura de alternativas para o suprimento de proteína animal, como consequência da peste suína africana (ASF, na sigla em inglês) que dizimou o seu rebanho nos últimos dois anos.

O Departamento de Agricultura dos Estados Unidos (USDA) estima que as importações de carne suína pela China devem aumentar 57% neste ano para o recorde de 3,9 milhões de toneladas. De carne bovina, o USDA projeta que o país asiático importe 2,5 milhões de toneladas até o fim deste ano - 15% a mais que no ano passado.

### **China suspende establecimientos por casos de COVID**

29/07/2020



Além desta fábrica da companhia, oficialmente, outros cinco frigoríficos brasileiros continuam com vendas suspensas para o país asiático

A unidade da BRF S.A. de Dourados (MS/SIF 18) teve suspensa 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 nesta quarta-feira, 29 de julho, informa a suspensão das importações de produtos de aves da planta desde 23 de julho. O documento não informa o nome da empresa, mas sim seu número de registros no Serviço de Inspeção Federal (SIF), do Ministério da Agricultura.

O Gaac também não especifica o motivo do veto. 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, em meio ao aumento de casos da doença nos abatedouros.

Além desta fábrica da BRF S.A, oficialmente, outros cinco frigoríficos brasileiros continuam com vendas suspensas para a China. As unidades da JBS em Três Passos (RS), da BRF S/A em Lajeado (RS), da Marfrig em Várzea Grande (MT) e a da Minuano em Lajeado (RS) foram vetadas pela China, enquanto a planta da JBS em Passo Fundo (RS) teve comercialização suspensa preventivamente pelo Ministério da Agricultura.

Há dez dias, o departamento liberou a retomada das exportações de carne bovina da Agra Agroindustrial de Alimentos S/A, de Rondonópolis (MT/SIF 3941) para lotes embarcados desde 17 de julho.

No comunicado, o Gaac também informou que três empresas uruguaias de carnes suspenderam voluntariamente as exportações para o país. Na mesma data, a agência autorizou a retomada das exportações de duas plantas de carne bovina e carne de aves da Argentina.

## **BRASIL**

### **Precios sostenidos y oferta reducida**

Sexta-feira, 31 de julho de 2020 - Os preços da arroba do boi gordo estão firmes e subindo. As indústrias estão com dificuldade para comporem as escalas de abate.

No Sudeste de Rondônia, por exemplo, com as escalas entre um e dois dias úteis, as indústrias abriram as compras na última quinta-feira (30/7) ofertando preços maiores.

Segundo levantamento da Scot Consultoria, a cotação do boi gordo subiu 1,0% ou R\$2,00/@ frente ao fechamento de 29/7 e ficou em R\$198,00/@, bruto, R\$197,50/@, descontado o Senar, e em R\$195,00/@, livre de Senar e Funrural, considerando o pagamento a prazo.

Algumas ofertas de compra acima da referência acontecem, e diante da pouca oferta de gado gordo, é possível ajustes positivos nos próximos dias.

Em São Paulo, as cotações ficaram estáveis frente ao fechamento do dia anterior, com o boi gordo cotado em R\$225,00/@, bruto e a prazo, R\$224,50/@, descontado o Senar e em R\$221,50/@, livre de impostos (Senar e Funrural) e na mesma condição de pagamento. Para os bovinos jovens, que atendem à demanda chinesa, os negócios estão firmes em R\$230,00/@, bruto e à vista.

Com as altas de preços nos últimos dias, as escalas até melhoraram, mas sem força. Em média, as programações de abate atendem cinco dias úteis frente aos três dias que predominaram na semana anterior, mas incompletas.

### **Cepea: precio del novillo alcanzó nivel máximo de la serie histórica**

30/07/2020

Os preços não param de subir, enquanto algumas indústrias começam a amargar prejuízos por conta das margens negativas de compra e venda da proteína

O Indicador do boi gordo CEPEA/B3 (mercado paulista, à vista) registra média de R\$ 220,76 na parcial do mês (até o dia 29), o que representa avanço de 5,2% na comparação com a média de junho, e recorde real da série histórica do Cepea, iniciada em 1994, considerando-se apenas os meses de julho.

Segundo pesquisadores do Centro de Estudos Avançados em Economia Aplicada, o avanço da arroba no mercado nacional é explicado pela combinação de “exportações brasileiras aquecidas, beneficiadas pela intensa demanda chinesa, e pela oferta restrita de animais no pasto, evidenciada pelo menor número de boi gordo abatido no início deste ano desde 2011”.

Nesta quinta-feira, os preços da arroba permaneceram firmes nas principais praças pecuárias, com destaque para as valorizações do boi gordo e da vaca gorda registradas no Mato Grosso, o Estado responsável pelo maior rebanho de corte do País.

Segundo dados da IHS Markit, nas praças mato-grossenses, alguns pecuaristas optam por segurar a boiada, especulando ajustes positivos ainda maiores na próxima semana. “Na praça de Cuiabá, houve relatos de negócios isolados acima das máximas vigentes, dependendo do volume, da proximidade do



frigorífico e do prazo para pagar”, relata a consultoria. No Cuiabá, o boi gordo à vista vale R\$ 203, de acordo com a IHS Markit.

Em Goiás, a escassez de oferta de gado para abater tem emplacado forte pressão altista na cotação da boiada gorda, informa a consultoria. “Algumas indústrias pesquisadas se posicionaram mais firmes nas compras de gado, na tentativa de preencher as escalas de abate ainda desta quinta-feira”, informa a IHS. Na praça de Goiânia, o animal terminado saltou para R\$ 217/@, a prazo.

Nas regiões pecuárias do Pará, as indústrias frigoríficas relatam dificuldades para realizar novas aquisições, devido à oferta restrita de animais, tanto no mercado físico do boi gordo como no mercado de reposição. “Os preços das duas categorias seguem extremamente valorizados e, neste cenário de falta de gado, alguns frigoríficos começaram a intercalar os abates”, destaca a IHS Markit. Nesta quinta-feira, a praça de Paragominas registrou elevação no valor da boiada pronta, para R\$ 210/@, a prazo.

Segundo a IHS Markit, a escassez de oferta de gado é o principal direcionador dos reajustes positivos no mercado do boi gordo, uma vez que o escoamento dos cortes bovinos para os atacados segue bastante lento.

Além da menor oferta de boiada terminada a pasto, os animais produzidos em confinamentos ainda não estão prontos para abater, observa a consultoria. Os poucos pecuaristas que dispõem de maiores lotes de gado, diz a IHS Markit, optam por segurar esses animais, na expectativa de conseguir preços ainda mais altos na próxima semana, devido à virada do mês e à entrada dos salários para parte da população, o que pode estimular o consumo interno de carne bovina.

Na avaliação dos analistas da IHS Markit, o atual movimento de alta do boi gordo traz certa preocupação ao setor industrial. “Tendo que pagar mais caro na compra de matéria prima e com a grande dificuldade para escoar os cortes bovinos aos atacados, algumas indústrias já operam com prejuízos no País, alerta consultoria.

No atacado, os preços dos principais cortes bovinos subiram nesta quinta-feira. As valorizações têm suporte principalmente na oferta menor de carne, resultado da redução dos abates diários e, conseqüentemente, menor produção nos frigoríficos. Além disso, com a aproximação da virada do mês, houve registro de leve melhora no consumo de proteínas, abrindo certa margem para os ajustes positivos nos preços, destaca a IHS.

### **Nuevo record en las exportaciones de carnes en julio**

28/07/2020

Total embarcado somou 136,42 mil toneladas nos primeiros 18 dias, o maior volume da história para o mês

O ritmo de exportações brasileiras de carne bovina in natura continua acelerado. “Sem espaço para folga. É assim que estão os embarques de carne in natura”, destaca o economista Yago Travagin, consultor da Agrifatto. De acordo com Travagini, o avanço foi de 3% na média diária na última semana, no comparativo da semana anterior, chegando agora a 7,58 mil toneladas embarcadas diariamente.

Com isso, o total exportado nos primeiros 18 dias úteis do mês de julho já soma 136,42 mil toneladas, o maior volume da história para o período, de acordo com dados da Secretaria de Comércio Exterior (Secex). A receita também é recorde, com US\$ 557,14 milhões. A média diária atingiu US\$ 30,95 milhões, com preços da proteína bovina estabelecidos em US\$ 4.083 por tonelada.

Na comparação, durante todo o mês de julho de 2019, as exportações de carne bovina in natura somaram 133,2 mil toneladas, por US\$ 530,6 milhões. O total, incluindo carne industrializada e miúdos, foi de 160,3 mil toneladas por US\$ 631,2 milhões.

Segundo Travagini, agora, fica a expectativa para saber se as exportações deste mês de julho irão superar o recorde mensal histórico. Ele foi registrado em outubro de 2019, quando saíram 170,5 mil toneladas.

Exportação de carne in natura, no mês de julho  
(em mil toneladas)

2019 – 133,2

2018 – 130,9

2017 – 105,2

2016 – 82,2

2015 – 90,5

Fonte: Secex

### **Mapa proyecta una mayor incremento en la producción de carnes para la próxima década**

28/07/2020

Setor de proteína vermelha será cada vez mais relevante nos próximos 10 anos, puxado pela exportação



Em 2021, o Brasil deve processar 10,04 milhões de toneladas de carne bovina, passando pela primeira vez a marca histórica de 10 milhões de toneladas, de acordo com o estudo “Projeções do Agronegócio – Brasil 2019/2020 a 2029/2030”.

Todos os anos, a Secretaria de Política Agrícola do Ministério da Agricultura e Pecuária (Mapa), e a Embrapa, coordenam a revisão de projeções sobre as diversas cadeias do agronegócio no longo prazo, realizada há 11 anos. Além das carnes bovina, suína e frango, a série “Projeções do Agronegócio” analisa as cadeias de grãos, arroz e feijão, algodão em pluma, milho, soja em grão, café, leite, açúcar, laranja e suco de laranja, celulose e papel, frutas, cacau.

No caso da carne bovina, a novidade é que o documento do ano passado trazia que a marca de 10 milhões de toneladas de carne bovina somente seria ultrapassada em 2023. Mas é preciso entender o documento. Os analistas do Mapa fazem uma projeção e uma segunda possibilidade de aumento dessa projeção, em uma linha superior dessa previsão.

Explicando, neste ano, por exemplo, a previsão é de 9,88 milhões de toneladas, podendo chegar a 10,9 milhões. Para 2022, a projeção é de 10,2 milhões de toneladas, podendo chegar a 12 milhões. E assim sucessivamente. Olhando o mercado hoje, em 2030, a previsão é de que a produção de carne bovina chegue a 11,4 milhões de toneladas, podendo chegar a 14,2 milhões.

O grande salto, como era de se prever, será dado nas exportações brasileiras de carne. Para este ano, a projeção é de 2,5 milhões de toneladas vendidas ao Exterior, sendo que o máximo pode chegar a 2,9 milhões de toneladas. O documento aponta que a partir de 2026, o País passe para a casa de 3 milhões de toneladas, com a projeção máxima para este ano de 4,4 milhões.

O ano de 2030, a mais avançada projeção, é de 3,4 milhões de toneladas exportadas, podendo avançar para 5,2 milhões. Segundo o documento, “os grandes mercados para a carne bovina são representados por China, Estados Unidos, Japão e Coreia do Sul. A China deve importar 31,7% da carne exportada em 2029”.

As projeções do Mapa vão ao encontro do que dizem os Estados Unidos. De acordo com o documento “o Departamento de Agricultura dos Estados Unidos (USDA, 2020) classifica o Brasil em 2029 como primeiro exportador de carne bovina, com 28,7% das exportações totais, sendo a Índia o segundo, seguida por Estados Unidos e Austrália”

O crescimento da produção só não deve ser maior, por conta de um mercado consumidor interno mais tímido. Mas, mais que isso, por conta da concorrência das carnes de aves e de suínos. Até 2029/2030, o consumo doméstico de frango deve aumentar 2,5% e de suínos, 2,2%.

Para a carne bovina, a projeção é que o aumento do consumo interno fique em 0,8%. Para este ano, a previsão é de que os brasileiros consumam 7,4 milhões de toneladas, sendo que a projeção máxima aponta 8,2 milhões de toneladas. O salto até 2030 está calculado para 8,2 milhões de toneladas, podendo chegar a 9,9 milhões.

### **AFTOSA: auditoria para avaliar deixar de vacunar em RS se fará em agosto**

Por: Portal DBO 27/07/2020

Mapa deverá avaliar o cumprimento de 18 apontamentos levantados durante a auditoria realizada no ano passado

A Secretaria da Agricultura, Pecuária e Desenvolvimento Rural do Rio Grande do Sul informou nesta segunda-feira, 27 de julho, que irá receber auditores do Ministério da Agricultura entre os dias 4 e 5 de agosto para que o Estado consiga o status de zona livre de febre aftosa sem vacinação.

Nestas datas, o ministério deverá avaliar o cumprimento dos 18 apontamentos levantados durante a auditoria realizada no ano passado.

“Das 18 recomendações do ministério, faltam atender apenas duas, que já estão em fase final de cumprimento. A montadora vencedora da licitação de 72 veículos para o Estado já está enviando o cronograma de entrega, e o pregão para contratação de 150 auxiliares administrativos deve começar a receber propostas a partir de 4 de agosto. Então, mesmo que a auditoria acontecesse hoje, seríamos bem avaliados porque o ministério vai comprovar que o governo estadual fez todos os movimentos necessários para a conquista da retirada da vacinação contra a aftosa”, afirma Covatti Filho, secretário de agricultura do Estado.

O auditor Gilson Renato Evangelista de Souza contou que, no início de julho, foi realizada uma pré-avaliação do ministério na secretaria.

“Verificamos que os 18 itens estão com andamento bastante adequado e em fase final de atendimento. A auditoria de agosto vai averiguar o andamento das metas da secretaria, considerando o pleito para evolução de status sanitário junto à Organização Mundial de Saúde Animal, a OIE”, disse.

O presidente do Fundesa, Rogério Kerber, ressaltou as vantagens que a retirada da vacinação contra a febre aftosa trará para os produtores rurais do Estado.



“Canadá já começa a sinalizar negociação de carne bovina com o Brasil, e quem sabe o Rio Grande do Sul poderá se sentar à mesa e negociar com este importante mercado e outros mais. Será uma nova perspectiva para todo o Estado”, afirma.

## URUGUAY

### **Mercado del gordo firme con aumento moderado de oferta**

por Cecilia Pattarino julio 29, 2020

Con aumento de la faena impulsada por una mayor oferta de ganados de verdeos el mercado del gordo mantiene la firmeza. Con subas destacadas para los mejores novillos que llegan a US\$ 3,50 por kilo de carcasa y más cautelosas en hembras.

Los negocios por los mejores novillos alcanzan los US\$ 3,50 por kilo en cuarta balanza y algún centavo más, mientras que las vacas cotizan entre US\$ 3,20 y US\$ 3,30 dependiendo de la calidad y peso. En el caso de la vaquillona, el mercado está un poco más frío pero sigue sólido con negocios en el eje de US\$ 3,35 para ganados de buena terminación. Las cargas en todos los casos son ágiles de aproximadamente una semana máximo 10 días.

Los precios pueden estar cerca de una etapa de estabilización. Empiezan a salir ganados de verdeos y corrales. El repunte de la faena muestra que vienen semanas de actividad de faena originada en corrales y el veranillo de la primera semana de agosto puede acelerar la producción forrajera y luego la terminación de ganados.

“Hay un aumento de oferta –aunque no disparatado- y la industria está mejor posicionada y empezando en la primera semana de agosto la faena de ganados para la Cuota 481 y algunos frigoríficos retirándose del mercado”, dijo Santiago Sánchez de Victorica y Asociados.

La faena de vacunos repuntó la semana pasada y sumó 37.487 cabezas, 20% arriba de la semana previa y 10% más de los 34.054 registradas en igual semana del año pasado.

Hubo un aumento de 17% en el volumen semanal de novillos, con 19.364 cabezas frente a 16.543 la semana anterior.

La faena de vacas también se recuperó, con 12.664 cabezas, frente a las 9.769 industrializadas la semana anterior con el volumen más bajo para esta categoría desde la semana de Pascuas.

### **Uruguay es el único país de América del Sur que bajó las ventas de carne a China en el primer semestre**

por Cecilia Pattarino julio 29, 2020

Las importaciones chinas de carne vacuna en el primer semestre aumentaron 60% interanual en el primer semestre: US\$ 5.199 millones contra los US\$ 3.254 millones del mismo período de 2019. Todos los países, con excepción de Uruguay y Canadá, aumentaron los envíos al gigante asiático.

Brasil y Argentina se consolidaron, en ese orden, como los principales vendedores de carne vacuna con US\$ 1.901 millones y US\$ 1.056 millones respectivamente, un incremento de 170% interanual en el caso de Brasil y de 60% en el caso de Argentina.

El tercer y cuarto puesto lo ocupan los países de Oceanía. Australia con US\$ 958 millones y Nueva Zelanda con US\$ 512 millones, un aumento interanual de 33% y 3% respectivamente.

Aunque la brecha se hace cada vez más corta, Uruguay baja su participación y fue el único país de América del Sur que bajó los envíos en el primer semestre del año ubicándose como quinto como proveedor con una participación del 9% del total importado.

Según indicó Lautaro Pérez Rocha, gerente de marketing de INAC, en su cuenta de Twitter: en volumen, las importaciones de China de carne vacuna alcanzaron 997 mil toneladas en el primer semestre de 2020, 43% más que en el mismo período de 2019. En volumen, Uruguay se ubicó cuarto como proveedor, con el 11,6% de participación en las importaciones de carne vacuna de China.

### **Escenario actual: Entre cuotas y especulaciones**

26/07/2020 Próximo a iniciar una nueva ventana de Cuota 481, Europa muestra señales de recuperación. Sin embargo, se enfría la posibilidad de solicitar una modificación del protocolo Hilton, mientras el mercado ganadero manifiesta una escasez de oferta de animales de pasturas.

La dinámica en el negocio de la carne continúa. A nivel local se encendieron las alarmas con un caso positivo de Covid-19 en Frigorífico Carrasco, pero rápidamente se ganó tranquilidad con 17 resultados negativos de hisopados a trabajadores de la planta.

Algunas industrias, como todos los años, evalúan su cese de actividad, otras lo están realizando, en un momento que la oferta de ganado de pasturas es escasa y las cotizaciones mantienen una tendencia alcista, leve pero constante. A esto se suma que en pocos días se abre una nueva ventana para la faena de ganado Cuota 481, mientras el mercado europeo demuestra semana a semana una recuperación.



La faena anual de vacunos continúa siendo más de un 20% inferior a la actividad del mismo periodo del año pasado, y los frigoríficos proyectan cerrar el año sin superar las 1,8 millones de cabezas procesadas. Al mismo tiempo, varios operadores han manifestado su preocupación por el corrimiento de los pagos de algunas empresas exportadores de ganado en pie que trabajan con el mercado de Turquía.

Además, la firma Saquery concretó la importación de carne con hueso del frigorífico argentino Carnes Pampeanas. Es el primer camión de asados que ingresa al país, tras haberse registrado un semestre récord de importación de carne sin hueso, más de 15 mil toneladas. Se trata de un asado premium con un valor comercial superior a la media del mercado uruguayo. También hay interés de empezar a comprar asados desde Brasil, que allí sí existiría una diferencia de valores más interesante para el negocio. Brasil es hoy el principal proveedor de la carne importada.

Agosto. A pocos días de encarar el octavo mes del año, el bajo stock de machos en edad de faena y la retención de vientres han marcado una escasez de hacienda en pos zafra y las plantas, con compromisos por cumplir, salen al mercado a pelear centavo a centavo por los ganados.

El novillo cerró la semana con otra suba en su cotización, se ubica en US\$ 3,45 por kilo carcasa, mientras la vaca se valora en US\$ 3,25 y la vaquillona en US\$ 3,40 a la carne.

Ante esta situación algunas empresas han optado por otorgar licencia al personal y cerrar temporalmente los frigoríficos. Desde finales de junio, Marfrig está operando con dos plantas por el cierre de Cledinor en Salto e Inaler en San José; Athena Foods, que no realiza faenas en Frigorífico Canelones desde septiembre del 2019, prevé (desde antes que se conociera un caso positivo de Covid-19) suspender la actividad en Frigorífico Carrasco.

Si bien la fecha no está definida, se estima que sería entre el 5 y 10 de agosto, una vez finalicen los contratos de faena con Israel. Además, Frigorífico San Jacinto, empresa de capitales argentinos, retomó la semana pasada su faena con una actividad mínima, después de dos semanas sin procesamientos.

También hay otras empresas que no están operando o recientemente retomaron la actividad de industrialización, como FrigoCerro, Frigorífico Rosario, Frigorífico Florida y Frigorífico Schneck.

Europa. Con la actualidad del mercado ganadero, del 8 al 28 de agosto se abre una nueva ventana para la faena de ganado Cuota 481, en su mayoría animales que se encerraron sin un precio preestablecido. Aunque los precios concretados rondan los US\$ 3,60 a US\$ 3,80 en cuarta balanza, dependiendo de las características de las carcasas.

Y para adelante, las industrias frigoríficas ofrecen para la siguiente ventana de faena Cuota 481, que se estima en las últimas tres semanas de noviembre, un precio similar a los pagados en agosto.

Desde el sector industrial observan a Europa con una recuperación en la demanda y mayores facilidades para la colocación de carne bovina.

En el primer semestre del año, las exportaciones uruguayas de carne bovina a la Unión Europea (UE) sumaron 17.707 toneladas, una caída del 28,8% en comparación a los mismos meses del 2019, según los datos del Instituto Nacional de Carnes (Inac).

Hilton. Se enfría la posibilidad de lograr un consenso entre privados para modificar el protocolo de la Cuota Hilton, una opción que los industriales y ganaderos de corrales veían con entusiasmo ante los avatares del mercado y los cambios de la Cuota 481.

De acuerdo a la posición de los productores y la que tendría el Poder Ejecutivo, no sería viable un cambio en la denominación del contingente para que pase de animales alimentados exclusivamente a pasto a preferentemente a pasto.

El planteo surgió entre privados a raíz de las negociaciones que mantiene Europa con Uruguay por el Brexit y la posibilidad de que se reduzcan unas 770 toneladas de la Cuota Hilton y se conviertan en una cuota exclusiva para exportar a Gran Bretaña.

Mientras tanto continúa en carrera el interés de que en la Cuota GATT, que implica carne congelada con arancel preferencial para terceros países, se pueda incluir carne enfiada.

### **China suspendió por 14 días las importaciones de carne de Frigorífico Carrasco**

La información fue confirmada a Conexión Agropecuaria por una fuente del Ministerio de Ganadería, Agricultura y Pesca (MGAP). Primero se “autoexcluyó” el propio frigorífico, notificando a las autoridades sobre el caso.

“Se comunicó a China en tiempo y forma y China toma esos catorce días”, que comenzaron a correr desde el pasado 19 de julio, explicó la fuente. La suspensión rige sólo para esa planta y ningún otro país comprador ha impuesto medidas similares.

El jueves pasado se confirmó el primer caso en un trabajador de la industria frigorífica registrado en Uruguay. Tras confirmarse el positivo del trabajador, se realizaron 17 test a personal que mantuvo contacto estrecho con el operario. Todos resultaron negativos y desde INAC se descartó la posibilidad de un brote en la industria.



### **Se concretó la primera importación de carne con hueso desde Argentina**

27/07/2020 Es un camión de asados premium, también hay interés de iniciar las compras desde Brasil. La semana pasada se concretó la primera importación de carne con hueso desde el frigorífico argentino Carnes Pampeanas.

En total es un camión de asados que compró la empresa Saquery, informó en su cuenta de Twitter el periodista Martín Olaverry.

De acuerdo a la publicación, “es un producto de alta calidad que será vendido en puntos específico”, como cadenas de supermercados y boutique de carnes.

Además, existiría el interés de los importadores de empezar a comprar asados desde Brasil a valores “más interesantes” para el negocio, en cuanto a su diferencia de precios con el corte uruguayo.

En los primeros seis meses Uruguay importó más de 15 mil toneladas de cortes bovinos sin hueso, con Brasil como principal proveedor.

### **Paraguay Sudáfrica habilita a frigoríficos para la exportación**

25/07/2020

El Ministerio de Relaciones Exteriores y Senacsa informaron que Paraguay ya se encuentra habilitado para exportar carne de bovino y derivados a Sudáfrica.

Desde el Ministerio de Relaciones Exteriores y el Servicio Nacional de Calidad y Salud Animal (Senacsa) informaron que el Departamento de Agricultura, Silvicultura y Pesca de Sudáfrica comunicó la nómina de frigoríficos del Paraguay que se encuentran habilitados para exportar carne de bovinos y derivados a ese país.

En ese sentido, mencionaron que después de 10 años se abre nuevamente la posibilidad de exportar uno de los principales productos nacionales a un nuevo mercado.

Entre tanto, señalaron que el Gobierno nacional, a través de la Diplomacia Económica para el Desarrollo, viene desarrollando acciones que buscan contribuir con el fortalecimiento del comercio exterior paraguayo.

Esto, con el objetivo de potenciar las exportaciones de los sectores productivos, a través de la diversificación de la producción, la consolidación de los mercados existentes.

En el primer mes del año se enviaron 20.785 toneladas de carne paraguaya al mercado internacional, lo que representó un aumento del 20,6% con relación a enero del 2019. El ingreso de divisas correspondiente al rubro ascendió a USD 97 millones al cierre de enero.

## **UNIÓN EUROPEA**

### **Acuerdo UE – Vietnam entra en vigencia**

EU exports to Vietnam will be taxed less as of tomorrow, 1 August. This is the immediate effect of the entry into force of the EU-Vietnam trade agreement that will ultimately scrap duties on 99% of all goods traded between the two sides. Doing business in Vietnam will also become easier for European companies: they will now be able to invest and pitch for government contracts with equal chances to their local competitors. Under the new agreement, the economic benefits go hand in hand with guarantees of respect for labour rights, environment protection and the Paris Agreement on climate, through strong, legally binding and enforceable provisions on sustainable development.

President of the European Commission, Ursula von der Leyen, said: “The European economy needs now every opportunity to restore its strength after the crisis triggered by the coronavirus. Trade agreements, such as the one becoming effective with Vietnam today, offer our companies a chance to access new emerging markets and create jobs for Europeans. I strongly believe this agreement will also become an opportunity for people of Vietnam to enjoy a more prosperous economy and witness a positive change and stronger rights as workers and citizens in their home country.”

Commissioner for Trade, Phil Hogan, commented: “Vietnam is now part of a club of 77 countries doing trade with the EU under bilaterally agreed preferential conditions. The agreement strengthens EU economic links with the dynamic region of South-East Asia and has an important economic potential that will contribute to the recovery after the coronavirus crisis. But it also shows how trade policy can be a force for good. Vietnam has already made a lot of effort to improve its labour rights record thanks to our trade talks and, I trust, will continue its most needed reforms.”

The EU-Vietnam agreement is the most comprehensive trade agreement the EU has concluded with a developing country. It takes fully into account Vietnam's development needs by giving Vietnam a longer, 10-year period to eliminate its duties on EU imports. However, many important EU export products, such as pharmaceuticals, chemicals or machinery will already enjoy duty free import conditions as of entry into force. Agri-food products like beef or olive oil will face no tariffs in three years, while dairy, fruit and vegetables in maximum five years. Comprehensive provisions on sanitary and phytosanitary cooperation



will allow for improving market access for EU firms via more transparent and quick procedures. It also contains specific provisions to address regulatory barriers for EU car exports and grants protection from imitation for 169 traditional European food and drink products (like Roquefort cheese, Porto and Jerez wines, Irish Cream spirit or Prosciutto di Parma ham) recognised as Geographical Indications.

At the same time, the trade agreement expresses a strong commitment of both sides to environment and social rights. It sets high standards of labour, environmental and consumer protection and ensures that there is no 'race to the bottom' to promote trade or attract investment.

Under the agreement, the two parties have committed to ratify and implement the eight fundamental Conventions of International Labour Organization (ILO), and respect, promote and effectively implement the principles of the ILO concerning fundamental rights at work; implement the Paris Agreement, as well as other international environmental agreements, and act in favour of the conservation and sustainable management of wildlife, biodiversity, forestry and fisheries; and involve independent civil society in monitoring the implementation of these commitments by both sides. Vietnam has already made progress on these commitments by ratifying in June 2019 ILO Convention 98 on collective bargaining and in June 2020 ILO Convention 105 on forced labour. It also adopted a revised Labour Code in November 2019 and confirmed that it would ratify the one remaining fundamental ILO Convention on forced labour by 2023.

The trade agreement also includes an institutional and legal link to the EU-Vietnam Partnership and Cooperation Agreement, allowing appropriate action in the case of serious breaches of human rights.

The entry into force of the trade agreement has been preceded by its approval by EU Member States in the Council and its signature in June 2019, and the European Parliament's approval in February 2020.

## **REINO UNIDO lanzó nueva política agropecuaria**

28 July 2020

The UK Government has launched a new policy that aims to reduce administrative burdens for farmers while delivering on environmental commitments.

Farmers in England are set to benefit from a reduced administrative burden next year, as the government plans to end the need to comply with the EU-delivered so-called greening requirements and begin the move towards our new Environmental Land Management scheme, which will deliver greater benefits for the environment.

The European Commission's so-called greening requirements for Direct Payments have required farmers to carry out specified practices in order to qualify for additional payments. These requirements have historically delivered little for the environment, as was documented in the European Court of Auditors 2017 Special Report on greening.

Under government plans to simplify the Basic Payment Scheme (BPS) and cut red tape faced by farmers during the agricultural transition period, farmers will have a reduced administrative burden and will no longer have to comply with the so called greening requirements with effect from the 2021 scheme year.

These changes will not affect the overall payment received by each farmer as the money will instead be added to farmers' entitlements under the Basic Payment Scheme.

The agricultural transition period will last for seven years and see Direct Payments to farmers in England phased out and replaced with a new system that rewards farmers for delivering public goods, such as tree or hedge planting, river management to mitigate flooding, and creating or restoring habitats for wildlife. The new Environmental Land Management scheme, expected to be rolled out in late 2024, will introduce new ways of working together with farmers to deliver better environmental outcomes and reverse the decline of some of our most cherished species.

Environment Secretary, George Eustice, said:

"The so-called greening requirements have added little to our environmental efforts. We believe that farmers will benefit from this reduced bureaucratic burden next year as we begin the move towards our new Environmental Land Management scheme which will deliver greater benefits for the environment.

"We will be setting out more detail in the autumn on how we will ensure a smooth transition for our farmers, as they move towards our new, fairer agricultural system, which will reward them for the hard work that they do to protect our environment."

The planned phasing out of Direct Payments will take place gradually to give farmers the time to adapt to the changes. In the majority of cases, the gradual reduction in these payments will be offset by alternative support being made available to help farmers improve their productivity and aid their transition into the new Environmental Land Management scheme.

Farmers will also continue to be able to apply to Countryside Stewardship schemes until the future scheme is rolled out.

The national conversation around the future Environmental Land Management scheme is open until July 31, with farmers warmly invited to share their views on a policy discussion document available on CitizenSpace.

Further details on plans for the agricultural transition period will be set out in Autumn 2020.



## **ESTADOS UNIDOS**

### **USDA: existencias ganaderas sin cambios importantes**

Derrell Peel - Oklahoma State University July 27, 2020 10:20 AM

Last Friday USDA released the July Cattle on Feed report. Feedlot placements in June were 1.8 million head, 102.1% of last year. June marketings were 1.97 million head, up 1.3% year-over-year. Both placements and marketings were close to pre-report expectations and no major market reaction is expected.

The July 1 on-feed inventory was 11.44 million head, very close to year ago levels. The report also provided quarterly information about steer and heifer inventories in feedlots on July 1. Steers were fractionally higher than last year while heifers on feed were down 1.5% year-over-year.

The industry is looking for a couple of pieces of information from this report. The first is an indication of the current status of feedlots relative to the backlog of fed cattle that developed in April and May. The calculated estimates of cattle on feed over 120 days is still very large compared to last year but the difference has decreased by some 160,000 head since May. It appears that the backlog is decreasing but a sizable number of cattle remain to be cleaned up before feedlots will be current. In the January – April period, feedlot placements were down just over million head year-over-year

The cattle on feed report may also indicate some regional drought impacts. June placements were large year-over-year in both Texas and Colorado and both states showed an increase in placements under 700 pounds. In fact, the 8.8% year-over-year increase in placements under 700 pounds in the report is entirely accounted for by increased lightweight placements in Texas and Colorado.

USDA also released the July Cattle report providing a mid-year indication of cattle inventories and the 2020 calf crop. The report does not show any dramatic changes in the overall trajectory of the cattle industry at this point in the year.

Interpretation of the numbers is a bit challenging because the continuing backlog of fed cattle must be accounted for in the numbers. The overall cattle and calves inventory was fractionally up from last year but likely would have been down slightly in the absence of the feedlot backlog.

Both the beef cow and calf crop numbers were down less than one percent year-over-year. Beef replacement heifers was even with year earlier totals. The beef cow inventory is 32.05 million head and beef replacement heifers total 4.4 million head. The 2020 calf crop is estimated at 35.8 million head. Using the various feeder inventory estimates, the calculated feeder cattle supply is 37.4 million head, up 0.8% year-over-year.

This report was anticipated, in part, to see if it provided any indications that the industry is liquidating in the aftermath of the turmoil and market shocks of recent months. The slow decrease in beef cow numbers is consistent with the January pace and, combined with stable replacement heifer numbers does not indicate any accelerated liquidation at this point.

The second half of the year may tell the tale as cow-calf producers react to fall calf market conditions. Overall, it appears that cattle numbers continue a slow tightening of inventories going forward.

### **Producción de carnes rojas y aves totalmente recuperada**

July 31, 2020

U.S. red meat and poultry production has “fully recovered” from the disruptions earlier this spring caused by the coronavirus pandemic. That’s the conclusion of Steiner Consulting Group following an analysis of June production data showing combined beef, pork, chicken and turkey production was estimated at 9.046 billion pounds, an increase of 8.2% over June of 2019.

“Retailers have plenty of protein to fill the meat case,” Steiner wrote in the Daily Livestock Report. “There were two more production days than a year ago in June, which also helped bolster production. In July the number of production days will be the same, which should offer a better comparison base. Still, we expect July output to surpass last year’s levels as well, with pork once again leading the pack in terms of supply growth.”

Steiner notes that pork wholesale values have been under pressure, but those declines are due to a 12.8% increase in June pork production. Even adjusted for the additional marketing days, June pork production increased 2.6% from 2019.

“Competition at retail is heating up and it will get ever fiercer in the fall,” Steiner says. “It is clear that producers of the various species do not want to concede any ground to competitors.”

Specifically, Steiner expects broiler production to increase in the coming months.

“As the situation at broiler plants normalized and labor issues subsided, broiler producers have started to ramp up. On July 1, the size of the broiler type hatching flock increased by 305,000 head or 0.5%. This is about a third of the reduction in the previous two months.”



Steiner says the broiler hatching flock is now 3.4% higher than the previous year, and with a flock size running well above last year's levels, "the expectations is that chick placements and ultimately broiler slaughter will continue to run above year ago levels."

### **NCBA Lanzó el Programa 2021-2025**

NCBA July 28, 2020 02:58 PM

The Beef Industry Long Range Plan task force officially introduced its new five-year plan for 2021-2025 today at the Cattle Industry Summer Business Meeting in Denver. The task force's mission is to ensure the long-term prosperity of the U.S. beef industry by sustainably producing the most trusted, highest quality and consistently satisfying protein for consumers around the world.

"We want beef to be the protein of choice, and we want the entire U.S. beef industry to be trusted and respected for its commitment to quality, safety, and sustainability," said Kim Brackett, leader of the task force and cow/calf rancher from Idaho. "The task force invested many hours, discussing the current state of the industry and what we need to accomplish over the next five years. We feel we've established some important priorities and strategies, as well as benchmarks for success that will help keep our industry on track through 2025 and beyond."

#### **THE BEEF INDUSTRY LONG RANGE PLAN**

Updated every five years, the Beef Industry Long Range Plan is a tool designed to help the beef industry establish a common set of objectives and priorities. It communicates the industry's strategic direction and provides insight on how the industry can serve its stakeholders by growing beef demand.

Since 1995, industry leaders have gathered to develop an aligned, comprehensive plan with the goal of increasing consumer demand for beef. These leaders are brought together to study and compile major areas of opportunity facing beef over the next five years.

The 2021-2025 Beef Industry Long Range Plan includes the following key priorities and core strategies:

#### **Industry Objectives:**

1. Grow global demand for U.S. beef by promoting beef's health and nutritional benefits, satisfying flavor and unparalleled safety.
2. Improve industry-wide profitability by expanding processing capacity and developing improved value-capture models.
3. Intensify efforts in researching, improving, and communicating U.S. beef industry sustainability.
4. Make traceability a reality in the U.S. beef industry.

#### **Core Strategies:**

1. Drive growth in beef exports.
2. Grow consumer trust in beef production.
3. Develop and implement better business models to improve price discovery and value distribution across all segments.
4. Promote and capitalize on the multiple advantages of beef.
5. Improve the business and political climate for beef.
6. Safeguard and cultivate investment in beef industry research, marketing and innovation.

"We'll measure the plan's success by tracking key metrics for each Core Strategy," Brackett said. "For example, one of the measures for the Core Strategy to 'Drive growth in beef exports' will be to grow the value of U.S. beef exports as a percent of total beef value to 21% by 2025. Additionally, there are a number of other goals to help measure success specific to the other core strategies."

#### **HOW THE BEEF INDUSTRY USES THE LONG RANGE PLAN**

The Long Range Plan Task Force encourages other beef industry businesses and organizations to utilize the plan as input for their own strategic decision making processes.

For example, the Beef Checkoff, its committees, and contracting organizations, use pieces of the Long Range Plan as their guidebook. All funding decisions and focus areas of Checkoff projects and programs, by design, must follow the key areas outlined in the plan that align with Checkoff budget categories: promotion, research, consumer information, industry information, producer communication and foreign marketing. To ensure this focus, each year Checkoff committees continue to renew their alignment by identifying key plan initiatives as their priorities based on current industry needs. Checkoff contractors take this direction and develop Checkoff-funded programs that fall within the scope of the Beef Promotion and Research Act and Order and support the plan's priorities.

### **Crecen reclamos judiciales por manejo de la crisis en diferentes establecimientos**

By NC WATCHDOG REPORTING NETWORK • JUL 28, 2020

In April, a worker at Pilgrim's Pride poultry processing plant in Sanford called workplace safety regulators to complain that the plant wasn't notifying employees when other staffers tested positive for the coronavirus.



A few weeks later, a worker at a Smithfield Foods pork plant in Tar Heel called to report that the plant wouldn't allow workers to wear masks.

In early July, a worker at Tyson Farms in Monroe reported that the meatpacking company had "reinstated the point system for absences" making "employees feel that they are being forced to work, even when they feel sick."

Since the outbreak of the novel coronavirus, state and federal regulators have received dozens of calls and emails from workers in meat-packing plants across North Carolina who were concerned that these facilities were putting workers at risk.

The N.C. Department of Labor, the agency charged with investigating most workplace health and safety complaints, has found no safety violations at any of the plants and issued no citations or penalties. That's despite repeated complaints raising the same issues – lack of social distancing, insufficient personal protective equipment and workers being forced to work even when they're sick.

The department has received 75 complaints and referrals related to COVID-19 and the meat packing industry through July 15. None have prompted a site visit, according to Scott Mabry, assistant deputy commissioner at the N.C. DOL.

To some experts and advocates, that means regulators aren't doing enough to keep workers safe.

Workplace safety regulators at the federal level and in most states including North Carolina aren't doing enough to enforce COVID-19-related precautions in meat-processing facilities or set regulatory mandates, said Matthew Johnson, assistant professor of economics at the Duke University Sanford School of Public Policy.

"This inaction is remarkable given that COVID represents the largest occupational safety and health crisis of (at least) the last century," Johnson said in an email.

A site visit would be prompted if an employer failed to provide DOL with an "adequate response" to a complaint inquiry, Mabry said. Although he said follow-up complaints would prompt the agency to re-examine an employer, "so far, the responses have been adequate."

"When we get a complaint, if the answer is adequate, we take them at their word for it, and deem it to be closed unless we get further information or some lack of information in order to be able to go into a site," Mabry said. "I have to believe that you're telling me the truth."

Tyson Farms meat processing plant in Wilkesboro was temporarily closed for cleaning after workers tested positive for COVID-19.

#### Some Complaints Still Pending

Mabry said the Department of Labor deemed 32 of the 75 complaints by meat-packing workers invalid. Of 43 complaints that regulators considered valid, 38 have since been marked "closed" by the federal Occupational Safety and Health Administration.

The number of complaints about meat processing plants is higher than any other single industry in the state, making up 6.6% of all valid complaints since the start of the pandemic, despite these workers making up less than 1% of North Carolina's workforce in May 2019.

Mabry noted that as the Centers for Disease Control and Prevention has increasingly emphasized the necessity of masks and social distancing to slow the spread of COVID-19, his department's definition of a "valid" complaint has expanded. However, he said the DOL did not reopen every complaint that its regulators previously marked as invalid to reevaluate it in light of new guidance.

Five complaints from workers in meat processing plants remain open as of July 19. According to Mabry, some of these involve deaths of workers connected to COVID-19.

In response to questions about the complaint at its Tar Heel plant, a spokesperson for Smithfield said the company has spent "tens of millions of dollars" on personal protective equipment, boosted pay and expanded health and paid-leave benefits for its workers.

Tyson, in a statement for this story, said the company has encouraged its workers to stay home if they're feeling ill.

"Like most businesses, we have an attendance policy that encourages people to come to work, however, we continue to tell our team members to stay home if they have symptoms of the COVID-19 or have tested positive for the virus. They're paid for their time away," a Tyson spokesman said.

Representatives for a meatpacking trade group as well as several other companies, including Mountaire and Pilgrim's Pride, did not respond to requests for comment for this story.

Labor Commissioner Cherie Berry has said in the past that the DOL prioritizes relationships with industries and has avoided burdening them with regulations.

"You start adding (regulations) up, adding them up, and pretty soon, the pile is so high, that it's very hard to climb over them to be able to do what you want to do," Berry told The News & Observer in a 2015 interview.

As cases spiked in elderly care facilities in April, Gov. Roy Cooper took action to require nursing home employees to wear face masks, undergo screening for coronavirus symptoms at the beginning of every shift, monitor residents at least daily for symptoms, and notify health officials of any confirmed or



suspected case of COVID-19 in the facility. Even with these measures, outbreaks have continued to pop up in nursing homes across the state.

The state Department of Health and Human Services in Cooper's administration, which has broad regulatory authority over industries like nursing homes and child care centers, has said it has very little authority over meat processors, where the pandemic has also taken hold with virulence.

Cooper did, however, specifically name the industry in the statewide mask mandate ordered June 24.

#### Meat Processing Facilities Continue To Be Vectors Of Spread

Data on the cases the state has learned about, provided by DHHS on Friday, shows there have been 3,234 confirmed cases of COVID-19 in 37 "clusters" in the meat processing industry since the beginning of the pandemic. That's a nearly 150% increase in reported cases from mid-May. There were 27 known active clusters at meat processing facilities in 20 counties on Friday.

Lack of regulation leaves workers more vulnerable to infection, experts say, and food processing workers in particular have been some of those hardest hit by the coronavirus pandemic. President Donald Trump in April invoked the Defense Production Act to keep these plants open, citing the need to maintain food supply during the pandemic.

The effects of these outbreaks radiate far beyond the plants – and they are contributing to the strain on hospitals dozens of miles away.

Dr. David Wohl, an infectious disease doctor at UNC-Chapel Hill, saw a dramatic increase in recent months in patients from the counties where many meat processing plants are located. Many of the patients he sees work in the meat-packing industry.

"If they don't work in these particular industries, they work in associated industries, or they live with somebody who does," he said. "But when we're talking about communities, we're connected.

"So, if there's more community spread due to an occupational hazard and you go to a store to buy food, the person you're interacting with behind the counter now has a higher risk. So it's just a ripple effect."

#### Overlapping Jurisdictions Create Regulatory Grey Area

Several state regulatory agencies say they have limited authority to track coronavirus cases among workers or to enforce worker protections.

Although inspections by the North Carolina Department of Agriculture & Consumer Services includes animals and food products, "worker safety would most likely fall under OSHA," said Heather Overton, a spokesperson for NCDA&CS.

Natalie Bouchard, a spokesperson for the state Department of Labor, said that DHHS is responsible for tracking COVID-19 data and that DHHS has shared "limited data" with the DOL's Occupational Safety and Health office.

The state's Occupational Safety and Health office published health and safety guidelines for food-processing facilities in April. The guidelines include no mention of reporting cases to any state agency. The office has the authority to issue citations and penalties to employers that fail to comply with these guidelines.

But Bouchard wrote that, "Unless there has been a reported case of COVID-19 at a plant, a fatality from COVID-19, or a complaint specifically related to COVID-19, OSH has no authority to enter a plant to access any safety and health-related data maintained by an employer."

The federal OSHA has issued only one citation nationwide, a case in Virginia, in response to more than 4,000 coronavirus-related complaints, The Washington Post reported in June.

Deborah Berkowitz, a former senior policy adviser for OSHA and now worker safety and health program director at the National Law Employment Project, told NPR this month that OSHA on the federal level closed around 12,000 worker complaints out of 18,000 complaints to state OSHA departments.

In one case, "OSHA simply sent a letter to the employer and said, you have to investigate yourself; we don't have any real specific requirements," Berkowitz told NPR. "And then the employer would write back, you know, we're doing what we can. And OSHA closed the case."

"There are some overlapping jurisdictions and overlapping authority, and most of them could probably do more than they're doing," said Clermont Ripley, a senior staff attorney at the North Carolina Justice Center, a progressive research and advocacy organization. "To just say 'no, it's someone else's job' is just being afraid to take the necessary steps to protect workers because they fear some sort of political backlash."

In North Carolina, meat-processing is a \$9 billion industry. It's also made up of some of the largest political donors in the state. The chairman of Mountaire Farms, Ronald Cameron, donated more than \$1.2 million to political candidates and committees in North Carolina since 2003, state campaign finance records show. His first contribution, the records show, was a \$500 donation to Berry.

Now in her fifth term, Berry has used a light hand to enforce regulations while accepting generous donations with the other. Cameron donated \$10,000 to Berry's reelection campaign in 2016.

In 2008, at least half of Berry's contributions for her re-election campaign came from executives and managers of companies that had been inspected by her department, according to reporting at the time by



The Charlotte Observer. The Observer found that these contributors got larger-than-average fine reductions for workplace safety violations: Fines on companies that had contributed were cut by more than 70%, while penalties overall were cut by 42%.

Workers' rights advocates say that the NC OSH's failure to protect workers from COVID follows a consistent pattern of the agency shirking its responsibilities under Berry.

According to a report by the NC Justice Center, NCDOL issues far fewer of the most serious violations than the national average and the penalties for violations are far lower than those levied against companies in many other states.

The state's death rate per 100,000 workers reached 3.9 in 2017, the highest since 2008 and 21st worst in the nation, according to data from the Bureau of Labor Statistics. The rate declined slightly to 3.8 in 2018.

Berry is not running for re-election. Democrat Jessica Holmes, a Wake County commissioner, and Rep. Josh Dobson, R-McDowell, will compete to replace her in November.

In May, Republican state legislators proposed a bill that would give grants to meat processors to increase production by hiring more people and making facility improvements. A provision requiring worker protections as criteria for the grant was added, but the bill stalled at the end of the legislative session.

A more limited version of the legislation was passed as part of a larger CARES Act funding bill instead, but with no provision for protections.

#### Advocates: Regulators Should Do More

In a May 8 letter, the North Carolina Farmworker Advocacy Network, North Carolina AFL-CIO, NC Justice Center, El Vinculo Hispano/Hispanic Liaison, and others called on Cooper to require that meat processing plants provide workers with paid sick leave, institute sanitation and safety protocols, and shut down plants when there is confirmed COVID-19 exposure.

"Simply put, NC poultry workers are afraid to be at work now because they fear getting sick and getting members of their families and communities sick. They face an impossible choice: between losing their income or risking their lives," the groups wrote

The groups also noted that these workers – many of whom are immigrants who are in the country without legal authorization – are particularly vulnerable because of their close proximity on the production lines, infrequent breaks and lack of access to PPE.

According to the NC Justice Center, the groups have yet to receive any formal response to the letter.

One complicating factor, according to Cohen, is that the Cooper administration doesn't have authority to gradually escalate punishments for noncompliance. Instead, any order that covers meat processing facilities would automatically fall under a criminal statute.

"The tools overall from the executive order are pretty blunt. And that is challenging here," said Cohen. "So we are trying to use the kinds of authority that are afforded to us."

The legislature could have afforded the executive branch more oversight, but that seemed to be a non-starter in this past legislative session, she said.

"Most of last session, folks were trying to take away our authority, not give us more authority," said Cohen.

"I haven't seen anyone in that collaborative spirit to say, 'How do we get to executive powers that meet the moment?'" she said.

That's why she said DHHS and local health departments have tried to stay in contact with meat processing plants to stem the spread of the virus.

"How do we work with these companies? And try to do it collaboratively," she said. "Actually, us working with you is going to help keep your plants open, protect your workers; it's a win-win. Let's all kind of do this together. We'll help you with protective equipment. We'll help you with the protocols."

Some other states have implemented stricter oversight. Virginia Occupational Safety and Health, for example, passed new regulations specifically to address COVID-19 in workplaces.

Berkowitz said in an interview with NC Watchdog Reporting Network that the DOL could be doing far more to protect workers.

"The state has its own OSHA agency and that provides them the ability to publish standards and requirements that are more protective than federal OSHA," she said, noting that only half of states have their own OSHA, North Carolina being one of them.

"Federal standards are often just the minimum and states can always do better when they have their own OSHA. But North Carolina's has not done that."

This story was jointly reported and edited by Ames Alexander of The Charlotte Observer; Sophie Kasakove, Aaron Sánchez-Guerra, Lucille Sherman, Jane Elizabeth and Jordan Schrader of The News & Observer; Nick Ochsner of WBTV; Emily Featherston of WECT; Tyler Dukes of WRAL; Jason deBruyn and Mitchell Northam of WUNC; and Frank Taylor of Carolina Public Press.



## AUSTRALIA

### Actualizan proyección del Mercado ganadero – Exportaciones 2020= 1 millón de ton

Beef Central, July 28, 2020

THE Australian cattle market finds itself in a unprecedented position, with many divergent factors impacting the industry in addition to COVID-19, according to Meat & Livestock Australia's mid-year Cattle Industry Projections update released this morning.

Senior market analyst Adam Cheetham said on the back of an excellent autumn break for many southern cattle producing regions and the desire to rebuild, renewed optimism swept the domestic cattle market. However, as COVID-19 outbreaks continue to disrupt the local and global marketplace, uncertainty remains.

From a cattle supply perspective, a contraction in the availability of livestock has occurred, however robust live export shipments and an only modest contraction in processor throughput for the year-to-May has resulted in a slight revision higher for cattle turnoff since the April projections update, Mr Cheetham said.

Total adult cattle slaughter is now forecast to drop to 7 million head, down 17pc compared to 2019 levels.

On the back a sharp decline in cattle turnoff, national beef production is forecast to decline by 14pc to 2.06 million tonnes carcass weight.

"Limited supply availability, in particular throughout winter, exacerbated by intense restocker activity in the store market and heightened stock retention, is expected to see national beef production track well below 2019 levels for the remainder of the year," Mr Cheetham said.

A lift in average carcass weights, fuelled by improved seasonal conditions particularly in southern production regions, will help to offset some of the decline in slaughter.

Average adult carcass weights for 2020 are now forecast to reach 294kg, an increase of 4pc on 2019, with male and female carcass weights projected to increase by 3kg and 8kg, respectively.

"Greater feed availability, low stocking rates and historically high cattle prices should all combine to place producers in a position to feed for longer and to finish to heavier weights along with a growing portion of males in the total kill," Mr Cheetham said.

Prices starting to soften

In terms of cattle prices, a positive rainfall outlook continues to encourage producers, despite the unpredictable nature of COVID-19 in Australia's key markets, he said. However, after posting records in June, cattle prices have started to soften and once spring hits, prices will likely come under further downward pressure, albeit remaining within a historically high range.

"On the back of an excellent autumn break for many southern cattle producers, opportunities to restock paddocks have emerged and this has been reflected in the number of cattle heading south.

"While central and southeast Queensland received a break, it came at the end of the northern wet season. Some good winter rainfall will be required to support deficiencies in the region and the latest three-month outlook does provide some confidence."

It is likely a high number of females remained in feedlots during the first half of the year, underpinning the sustained high level of female turn-off. However, to some extent, the lift in the female portion of total slaughter has also been amplified by extremely low male turn-off numbers.

The limited availability of steers for finishing is highlighted in the male component of total slaughter for the year-to-May, with bulls, bullocks and steers totalling only 1.49 million head, the lowest level since 1987. A combination of drought-driven destocking, consecutive years of low branding rates and robust live export shipments have contributed to the decline in the number of male cattle on hand.

Mr Cheetham said the start of the herd rebuild is now anticipated to occur towards the end of 2020 as high female slaughter rates are expected to taper off.

"The Australian cattle herd is now expected to increase by 1.9pc in the year to 30 June 2021, climbing back to 25 million head," he said.

Despite COVID-19 causing volatility in international markets, Australian beef exports are expected to exceed one million tonnes this year. Beef exports have been revised upwards from the April projections update and are now forecast to reach 1.02mt, down 17pc on 2019.

"The key drivers of this revision are the enduring international demand for safe, quality beef, bolstered by a general lift in the sale of beef through most retail channels and forecast higher domestic turn-off," Mr Cheetham said.

"The continued protein shortage caused by African Swine Fever, especially in China and Vietnam, along with supply disruptions in the United States and a reasonably favourable Australian dollar, will also play a significant role."

### ***Oferta escasa de machos por proceso de retención ganadera***

28 July 2020

Key points:



Adult cattle slaughter and beef production set to fall, but carcass weights forecast to rise  
Herd rebuild delayed but still on the horizon fuelled by improved seasonal conditions  
Forecast Australian beef exports revised higher since April update  
The Australian cattle market finds itself in a unprecedented position, with many diverging factors impacting the industry in addition to COVID-19, according to Meat & Livestock Australia's (MLA) Cattle Industry Projections July update.

MLA Senior Market Analyst Adam Cheetham said on the back of an excellent autumn break for many southern cattle producing regions and the desire to rebuild, renewed optimism swept the domestic cattle market. However, as COVID-19 outbreaks continue to disrupt the local and global marketplace, uncertainty remains.

"From a cattle supply perspective, a contraction in the availability of livestock has occurred, however robust live export shipments and only a modest contraction in processor throughput for the year-to-May has resulted in a slight revision higher for cattle turnoff since the April projections update," Mr Cheetham said.

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Mr Cheetham said a lift in average carcass weights, fuelled by improved seasonal conditions particularly in southern production regions, will help to offset some of the decline in slaughter.

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"Greater feed availability, low stocking rates and historically high cattle prices should all combine to place producers in a position to feed for longer and to finish to heavier weights along with a growing portion of males in the total kill.

"In terms of cattle prices, a positive rainfall outlook continues to encourage producers, despite the unpredictable nature of COVID-19 in Australia's key markets. However, after posting records in June, cattle prices have started to soften and once spring hits, prices will likely come under further downward pressure, albeit remaining within a historically high range.

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### ***Precios se mantendrán firmes***

30 July 2020

Key points:

Good seasonal outlook continues to support restocker intentions

Queensland drives decline in weekly adult cattle slaughter

Tightening supply continues to underpin strong price support

Yardings

Total eastern states yardings dropped 21% on year-ago levels to 42,700 head for the week ending 24 July.

The decline was largely driven by New South Wales, which fell 39% year-on-year to 13,200 head and



Queensland which contracted 13% to 19,100 head. Yardings in Victoria dropped to the lowest level since May at 6,600 head, a 22% decline on year-ago levels.

While a supply lull is anticipated over the remainder of winter, this year has been exacerbated by intense restocker activity and heightened stock retention. However, for July, the impacts of border closures and social restrictions in southern markets have added further pressure to the supply chain. Total July yardings sit 24% below the July five-year average (212,830 head) at 162,900 head.

#### Slaughter

Eastern states cattle slaughter was reported 25% lower year-on-year at 111,500 head for the week ending 24 July. In Queensland, adult cattle slaughter contracted 32% on the same week last year to 54,700 head, the lowest level since March (excluding public holiday weeks). Much of this decline has been driven by limited availability of slaughter ready cattle, particularly steers for finishing. For the year-to-date, the National Livestock Reporting Service (NLRs) reported Queensland male slaughter at 994,000 head, 13% below the five-year average of 1,126,000 head.

Adult cattle slaughter in New South Wales followed similar trends to its northern counterpart, contracting 9% year-on-year to 31,575 head, albeit the highest level since the start of April as cattle travelled north from Victoria. Disruptions in Victoria saw a 36% decline in slaughter compared to year-ago levels to 16,200 head, back 13% on the week prior.

#### Price impacts

Despite eastern states indicators softening from the highs seen in June, they continue to track at historically high levels. The eastern states heavy steer indicator averaged 362¢/kg live weight (lwt) on Tuesday 28 July, up 15% on year-ago levels but back 6% from the June high (386¢/kg lwt). The Eastern Young Cattle Indicator has followed similar trends, up 42% on the same week last year to average 752¢/kg carcass weight (cwt) but easing 2% from the record 772¢/kg cwt reached in June.

### **AMIC declaró que COVID 19 es una cuestión de salud pública, no de la industria frigorífica**

Beef Central, July 27, 2020

The Australian Meat Industry Council has this week moved to distance the meat processing industry from Victorian media reports alleging the meat industry was a 'responsible party' in the transmission of coronavirus in the state. The comments came as Victorian Premier Daniel Andrews warned that entire industries could be shut down in the state if people continued to go to work with COVID symptoms.

"This is a public health issue and a community-transmitted virus, not a meat industry or food safety issue," AMIC chief executive Patrick Hutchinson said in a statement issued this afternoon.

"There has been an over-emphasis of COVID cases being linked to the Australian meat industry, yet the virus is being transmitted in the community, not generated from within any particular industry," he said.

The Australian meat industry had extremely controlled measures in place, and should not be viewed through the same lens as meat industries in other countries, Mr Hutchinson said.

"The actual percentage of staff that make up the total amount of cases within a "cluster" linked to a meat processing facility is small relative to total community transmissions – in some cases less than 3pc, across our red meat and smallgoods members," he said.

From as early as January 2020, AMIC had started implementing robust risk management guidelines, to incorporate COVID-19 safety plans and measures, for the industry's total supply chain and independent retail network.

"The meat industry is uniquely positioned as one of the premier industries where food safety and hygiene is part of our core business," Mr Hutchinson said.

"Our members operate to very stringent standards including HACCP, Good Manufacturing Practice, and Australian Standards, which are verified by state and federal food safety authorities. As an essential service, our industry has continued to operate across the entire supply chain during the coronavirus pandemic, knowing that the supply of food is our community's most basic need and this has been reflected in increased sales of red meat during the pandemic."

AMIC said it had noted negative reporting by media agencies recently, particularly in Victoria, and disputed any commentary alleging the meat industry as being a responsible party in the transmission of coronavirus, due to recent cases being brought into processing plants in Victoria.

"Australia's Food Standards agency (FSANZ) and well-respected international agencies including the European Food Safety Authority (EFSA), and World Health Organisation (WHO) have publicly stated that there is no evidence to suggest that coronavirus is transmitted in food, and no reported cases from human contact with food," Mr Hutchinson said.

"This is a public health issue and a community transmitted virus, not a meat industry or food safety issue."

Victorian Premier Daniel Andrews today said that if people continued to go to work with symptoms, it could shut down industries. His comment came as Victoria recorded a record 500 new COVID cases in a single day. He referred to possible 'next steps' if people continue to go to work when they are sick.



"If we were to continue to see outbreaks, if we were to continue to see people quite obviously attending work when they shouldn't be, then every option becomes on the table," the Premier said. "Next steps may well have to include closing a number of these industries if we continue to see people attending work. We have to work together to keep anyone who's got symptoms away from work. Otherwise businesses will have to close."

AMIC said it reinforced the VIC Premier's message for workers to stay away from their workplace if they display symptoms, get tested and follow the isolation instructions.

"This is a people-transmitted virus and will be solved by people implementing and abiding by COVID Safe recommendations," Mr Hutchinson said.

The primary focus of AMIC's impacted members had been on the health and safety of its workforce, ensuring functional plans are implemented to minimise the risk of spreading the virus among staff. This includes temperature screening, daily sanitation, regular sanitisation, social distancing, and staggered shifts.

"The impacts of any potential closures of processing plants has a flow through effect to our wholesalers and retail network chains, which ultimately impacts our farmers and producers," Mr Hutchinson said.

"We are an essential service feeding Victorians and Australians through independent retail and supermarket chains, and the global community, daily, and we take this very seriously. While as an industry we continue to remain supportive of our front-line health workers and health department staff working with our members daily, some information has been confusing for Victorians, with changing advice to workers regarding isolation."

"We do not want to see the shut-down of our industry due to changing rules that we have limited to no control over. As such, we are working closely with the Department of Health and Human Services and those members that have been impacted to ensure minimal interruption to business operations and communicate a clear set of expectations and response procedures."

While consumer demand for red meat has been higher recently, the independent retail channel sources its product from various processing facilities across Australia and had the ability to be agile in meeting consumer demands, AMIC said.

## **EMPRESARIAS**

### **JBS fundo de inversion se desprendió de acciones por desmanejo ambiental y falta de prevención ante COVID – Defensa de ABAG**

29 July 2020

Nordea Asset Management has dropped shares of JBS SA worth about €40 million for all of its funds in July based on the company's environmental record and response to the COVID-19 pandemic.

According to Reuters, Nordea sent out a statement on 28 July explaining the move.

Nordea said the decision to drop JBS from its portfolio was taken after a period of engagement with the company, which is the world's largest meat producer, that in the end did not produce a satisfactory outcome. "We always say that we prefer to engage with the company rather than just begin excluding everything," Eric Pedersen, head of responsible investments, told Reuters by telephone.

Nordea, which he said has roughly €215 billion of assets under management, also has small holdings in two other Brazilian meat packers, Marfrig and Minerva. While these companies would not be Nordea's preferred types of investment, its funds invest in them because they are part of the benchmark in Brazil, according to the executive.

JBS declined to comment on Nordea's decision, but said it regrets that it was not contacted by the referred fund recently so that it could present direct evidence of transparency of its relations and of the sustainability of its operations.

According to Nordea, talks with JBS ahead of the move's announcement covered issues including risk of deforestation in JBS' supply chain, corporate governance and the handling of corruption charges, and employee health and safety with regard to COVID-19.

"It is the weight of all of the issues together," Pedersen said, referring to fresh claims JBS was "laundering" cattle allegedly sourced from areas of deforestation and failing to protect the workforce amid the COVID-19 pandemic in production plants.

Another issue is a company of JBS' size lacking an independent board, Nordea's Pedersen said.

Por: ESTADÃO CONTEÚDO 28/07/2020 Companhia de carnes teve o nome retirado da lista de investimentos do fundo Nordea Asset Management após questionamentos sobre a atuação da empresa A Associação Brasileira do Agronegócio (Abag) saiu em defesa da empresa de carnes JBS, que teve o nome retirado da lista de investimentos do fundo Nordea Asset Management, com sede na Finlândia.



Ao comentar a exclusão, Marcello Brito, presidente da entidade, argumentou que é preciso ter cuidado para que “quem faz um grande trabalho” não seja penalizado.

“Se identificaram algum problema na cadeia da JBS, tenho certeza que a JBS está resolvendo o assunto, porque ela hoje tem um dos maiores sistemas de rastreamento de carne do mundo”, afirmou em coletiva de imprensa para tratar do encontro de um grupo de executivos da iniciativa privada com o presidente da Câmara dos Deputados, Rodrigo Maia. Na pauta estava o tema da sustentabilidade, com destaque para o desmatamento ilegal da Amazônia.

A decisão do Nordea foi tomada após questionamentos sobre a atuação da empresa nas áreas ambiental, social e de governança corporativa. As principais preocupações são quanto ao risco de desmatamento na cadeia de suprimento da JBS, a forma como a empresa lida com acusações de corrupção e também com as medidas de segurança dos trabalhadores adotadas durante a pandemia de Covid-19.

Britto argumenta, porém, que a rastreabilidade do gado em áreas críticas da Amazônia, uma das ferramentas usadas para coibir o desmatamento ilegal, ainda é passível de erro e que somente será completamente eficaz quando todos os agentes da cadeia forem envolvidos.

“A sustentabilidade do agro está muito bem controlada. A grande maioria da produção agrícola brasileira é feita em conformidade com as leis. A situação do Brasil está muito melhor do que a de outros países na mesma situação de desenvolvimento”, disse ele.

Já a presidente do Conselho Empresarial Brasileiro para o Desenvolvimento Sustentável (Cebds), Marina Grossi, destacou que o tema da rastreabilidade foi levado ao vice-presidente da República, Hamilton Mourão, em encontro com um grupo de empresários no início deste mês.

Ao falar da exclusão da JBS pelo fundo de investimento europeu, o presidente da Abag ainda citou problemas em sustentabilidade em outro setor industrial, o de energia. “Eu ficaria feliz se todos grandes fundos desinvestissem de tudo que fosse de energia fóssil no mundo, o que seria uma sinalização realmente de que há um movimento sustentável nos investimentos. Mas não é isso que acontece na maioria”, afirmou.

### ***JBS afirmó que invirtió R\$ 100 millones en prevención del Covid-19***

Por: ESTADÃO CONTEÚDO 30/07/2020

Segundo a companhia, entre as medidas de prevenção, está a contratação de uma consultoria médica de infectologistas e instituições de referência

A JBS divulgou nesta quarta, 29 de julho, um comunicado ao mercado informando que, entre março e junho, investiu mais de R\$ 100 milhões em “medidas, sistemas e processos de contingência em saúde e segurança para todas as suas unidades do Brasil” como forma de prevenção à Covid-19. O comunicado é assinado pelo diretor de Relações com Investidores da JBS, Guilherme Perboyre Cavalcanti.

Segundo a companhia do setor de proteína animal, para definir um protocolo de prevenção à doença e proteger seus “mais de 130 mil colaboradores”, a JBS contratou a consultoria médica de infectologistas e instituições de referência, “que validaram cada etapa do protocolo de acordo com as recomendações médicas e de saúde e as determinações da Portaria Interministerial nº 19 (Ministérios da Saúde, Agricultura e Economia), de 18 de junho de 2020”.

Além disso, a empresa informou que nesse período tem feito “auditorias periódicas” em suas 135 unidades produtivas, “verificando item a item de cada ação” ligada ao protocolo de segurança contra o coronavírus, além de monitorar diariamente 100% dos colaboradores desde o início da sua jornada até o retorno à sua casa.

“Adicionalmente a JBS contratou nesses três meses mais de 10 mil profissionais em todo o País para reposição das posições dos colaboradores preventivamente afastados e mantidos em casa por fazerem parte do grupo de risco”, diz. “Também fazem parte desse grupo os colaboradores em condições de maior vulnerabilidade, incluindo indígenas, e os que tenham indicação médica.”

A companhia informou que, no caso de colaboradores que tenham diagnóstico positivo para Covid-19, eles são “prontamente afastados”, até o seu restabelecimento.

“A equipe de saúde da empresa presta atendimento integral a todos e também realiza a busca ativa entre os colaboradores, contactantes e familiares”, diz a JBS no comunicado.

Segundo o dr. Adauto Castelo, citado pela JBS no comunicado, “os procedimentos e cuidados adotados pela JBS nas suas plantas são capazes de oferecer a máxima proteção aos seus colaboradores e podem ser comparados aos aplicados em instituições de referência na área hospitalar”.

Entre as medidas citadas no comunicado estão ampliação da frota de ônibus em 49% a fim de tornar aplicáveis as regras de distanciamento social; novos equipamentos de proteção individual (EPIs), como máscara face shield, máscaras descartáveis e de tecido (itens obrigatórios na companhia); detergentes e sanitizantes (com aquisição de 150 mil litros de álcool em gel para uso dos colaboradores); vacinação gratuita para gripe H1N1 para todos os colaboradores e contratação de profissionais de saúde, com mais de 630 profissionais, número 40% superior ao verificado antes do início da pandemia.



A JBS informou também que modificou estruturas e áreas internas das unidades produtivas, com criação de refeitórios de campanha para garantir o distanciamento entre os funcionários; ambulatórios adicionais nas áreas externas e anexos às plantas e ampliação das áreas de descanso cobertas.

“A comunicação sobre os protocolos de segurança e saúde adotados nas unidades e informações gerais sobre a covid-19 para os colaboradores também foram intensificadas”, relatou a companhia.

“Em cada planta, nos diversos pontos de passagem e de permanência, estão instalados materiais de comunicação sobre as medidas e atitudes necessárias à prevenção da doença no trabalho e esclarecimentos sobre proteção e cuidados em família, em casa e nos momentos de descanso”, informou. O comunicado cita, ainda, que a empresa doou R\$ 400 milhões para o enfrentamento da Covid-19 no Brasil, “valores que estão sendo dedicados a três frentes: saúde, social e ciência”.

Com tais medidas, a empresa se diz “confiante” de que serão eficazes para proteger da covid-19 os colaboradores nas suas unidades e “garantir o abastecimento e a oferta de produtos da mais alta qualidade a seus clientes e consumidores no País e no mundo”.

### **McDonald's registró baja de ventas en el Segundo trimestre de 2020**

July 28, 2020 McDonald's reported a 30% decline in sales during the second quarter as compared to a year ago. Total sales were \$3.77 billion and net income dropped 68% to \$433.8 million, the company said Tuesday. The figures reflect the April to June period, the first full quarter of coronavirus effects in the United States.

"In many markets around the world, most of notably in the US, the public health situation appears to be worsening," McDonald's CEO Chris Kempczinski said in its earnings call. "Nonetheless, I believe that Q2 represents the trough in our performance as McDonald's has learned to adjust our operations to this new environment."

McDonald's said some of the second quarter numbers indicated improvement as the quarter went on. U.S. same-store sales were down 19.2% in April compared to last year, but that loss improved to down 5.1% in May and 2.3% in June. Sales in July "trended up", according to Chief Financial Officer Kevin Ozan, and he expects it them to be "slightly positive" for the month.

But same-store sales outside the US fell even more and their recovery has been slower, dragging down total global same-store sales. That global figure was down 39% in April compared to last year, almost 21% in May and more than 12% in June.

McDonald's (MCD) said its drive-thru, delivery and digital options are helping to bolster its business.

The pandemic, however, has prompted McDonald's to accelerate the closure of some restaurants slated to close in coming years. The company will close 200 locations this year, with more than half of them being in "low-volume" Walmart (WMT) locations.

Kempczinski also noted internal surveys of McDonald's customers about the year ahead are gloomy.

"I'm certainly not qualified to make any predictions around whether we're going to be in recession or not, but I'd certainly say there's a lot of warning signs out there that would suggest that the consumer sentiment and consumer concerns about the economy is negative and going in the wrong direction," he said.

### **URUGUAY: Frigorífico La Trinidad a la espera de la habilitación de China**

por Cecilia Ferreira julio 29, 2020

Tras una auditoría virtual realizada a mediados de junio por parte de técnicos chinos, Frigorífico La Trinidad se encuentra a la espera de la habilitación para exportar a ese mercado.

El director de Servicios Ganaderos del MGAP, Eduardo Barre, señaló que desde el país asiático solicitaron unas muy pocas correcciones y “creemos que se puedan resolver muy rápidamente”, dijo al programa Tiempo de Cambio de radio Rural. “Mandaremos el levantamiento de esas observaciones para que la planta pueda ser habilitada”, apuntó.

Luego de enviado un informe técnico, se realiza “el aval” de la planta, firmado por el director de Servicios Ganaderos del MGAP, que se hace responsable del buen funcionamiento de la planta. Un cambio que se realizó en el último SPS (Comité Consultivo Bilateral), en Uruguay, en diciembre, entre autoridades técnicas de Uruguay y de China.

Sobre la segunda planta que fue auditada en junio, BPU, no llegó ninguna observación y sigue funcionando y exportando a China con normalidad, como ya lo venía haciendo.

Avanzan las gestiones para la apertura de Vietnam para la carne uruguaya

Las autoridades sanitarias locales contestaron un pedido de informes solicitado por Vietnam y se está a la espera de la respuesta de las autoridades de aquel país. “Está trabajando cancillería sobre el tema y creemos que tenga andamio rápido poder ingresar a ese mercado”, consideró Barre.

### **Tyson modificó estrategia para prevenir Covid-19 en EE.UU.**

Por: Portal DBO 30/07/2020



A empresa diz que já testou quase um terço de sua força de trabalho, e planeja ainda avaliar milhares de trabalhadores toda semana, em todas as suas instalações

Como parte de seu compromisso com a segurança dos membros da equipe e os esforços para proteger os trabalhadores da Covid-19, a norte-americana Tyson Foods está lançando um novo programa de monitoramento contra a doença, informa nesta quinta-feira (30/7) o portal norte-americano Feedstuffs.

A nova estratégia de monitoramento do novo coronavírus foi projetada com a assistência de especialistas médicos externos e inclui testes contínuos e orientados de trabalhadores sem sintomas, bem como daqueles que apresentam certos sintomas ou estiveram em contato próximo com alguém que possui a doença.

“Acreditamos que o lançamento de uma nova abordagem estratégica ajudará ainda mais os nossos esforços para combater o vírus”, disse Donnie King, presidente e diretor administrativo do grupo Tyson. “A adição de mais recursos e tecnologias reforça nosso compromisso de proteger os membros da nossa equipe, suas famílias e comunidades ao redor das plantas”, acrescentou.

Donnie King, presidente e diretor administrativo do grupo Tyson

A Tyson tem usado os testes como uma ferramenta para proteger os trabalhadores e acredita que provavelmente esteve envolvida em mais testes do que qualquer outra empresa nos EUA.

A empresa diz que já testou quase um terço de sua força de trabalho, e planeja ainda avaliar milhares de trabalhadores toda semana em todas as suas instalações. Atualmente, menos de 1% da força de trabalho dos 120.000 membros da equipe da Tyson nos EUA possui a Covid-19 ativo, de acordo com a companhia. A empresa está monitorando continuamente os casos ativos, envolvendo membros da equipe da empresa, bem como os níveis de casos nas comunidades onde a companhia opera.

Com apoio ao novo monitoramento estratégico, a Tyson criou um cargo de diretor médico e planeja adicionar quase 200 enfermeiros e pessoal de apoio administrativo para complementar as mais de 400 pessoas que atualmente fazem parte de sua equipe de serviços de saúde. Os enfermeiros adicionais conduzirão os testes no local e auxiliarão no gerenciamento de casos, coordenando o tratamento para os membros da equipe que contraem o vírus.

“O que estamos adotando é uma abordagem estratégica e contínua para combater a Covid-19”, disse King. “Envolve testes semanais dos membros da equipe em nossas instalações para monitorar a presença do vírus. Usando a ciência de dados para testar uma amostra estatisticamente sólida de membros da equipe, temos uma chance maior de ficar à frente de qualquer possível propagação de vírus e proteger nossas equipes e comunidades”, ressaltou.