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## GLOBAL

### FAO: Mercado global de alimentos incertidumbre por COVID-19

14 August 2020 Food markets will face many more months of uncertainty due to COVID-19, but the agri-food sector is likely to show more resilience to the pandemic crisis than other sectors, according to a new report released today by the Food and Agriculture Organization of the United Nations (FAO).

The Food Outlook report provides the first forecasts for production and market trends in 2020-2021 for the world's most traded food commodities - cereals, oilcrops, meat, dairy, fish and sugar.

"The impacts of the COVID-19 pandemic have been felt - at varying degrees - across all food sectors assessed by FAO. Whilst COVID-19 has posed a serious threat to food security, overall, our analysis shows that from the global perspective, agricultural commodity markets are proving to be more resilient to the pandemic than many other sectors. That said, owing to the size of the challenge and the enormous uncertainties associated with it, the international community must remain vigilant and ready to react, if and when necessary," said Boubaker Ben-Belhassen, Director of the FAO Trade and Markets Division.

Key trends and prospects for major food commodities in 2020/21

#### Cereals

In spite of uncertainties posed by the pandemic, FAO's first forecasts for the 2020/21 season point to a comfortable cereal supply and demand situation. Early prospects suggest global cereal production in 2020 surpassing the previous year's record by 2.6 percent.

World cereal trade in 2020/21 is projected to stand at 433 million tonnes, up 2.2 percent (9.4 million tonnes) from 2019/20, and setting a new record high, boosted by expected expansions in trade of all major cereals.

#### Meat

World total meat production is forecast to fall by 1.7 percent in 2020, due to animal diseases, COVID-19-related market disruptions, and the lingering effects of droughts.

International meat trade is likely to register a moderate growth - but considerably slower growth than in 2019 - largely sustained by high imports from China.

International meat prices have fallen by 8.6 percent from January 2020, with the sharpest drop in ovine meat, followed by poultry, pig and bovine meats due to the impacts of COVID-19-related measures, including ensuing logistical bottlenecks, steep decline in global import demand, and substantial volumes of unsold meat products.

#### Fish

The COVID-19 pandemic will continue to heavily affect seafood markets, particularly fresh products and popular restaurant species this year. On the supply side, fishing fleets are laying idle and aquaculture producers have drastically reduced stocking targets.

The pandemic is set to severely hit, in particular, global shrimp and salmon production. The shrimp farming season in Asia, which generally begins in April, is now delayed until June/July. In India, for example, farmed shrimp production is expected to fall by 30-40 percent.

Also, worldwide demand for both fresh and frozen shrimp is declining significantly, whilst demand for salmon is expected to drop by at least by 15 percent in 2020. Retail sales, in particular, of fresh salmon and trout have fallen greatly, and this will not recover for some time.

#### Sugar

World production of sugar in 2019-2020 is forecast to drop for the second consecutive year and fall below the estimated level of global consumption - for the first time in three years.

Trade in sugar is foreseen to expand, sustained by low prices and stock rebuilding in some traditional importing countries.

So far, the expectation of a global sugar production deficit for 2019/20 season has done little to support international sugar prices, which have been falling since mid-2017, and are below estimated production costs for the vast majority of world producers.

#### Milk

Notwithstanding market disruptions caused by the COVID-19 pandemic, world milk production is showing resilience, possibly growing by 0.8 percent in 2020. However, world dairy exports are expected to contract by 4 percent, amid faltering import demand.

#### Oil crops

Despite subdued demand prospects linked, amongst other things, to the pandemic, FAO's latest 2019/20 forecasts for oilseeds and derived products point towards a tightening global supply-demand situation, triggered by a marked contraction in production.

Tentative forecasts for 2020/21 suggest that supplies could remain tight relative to demand.

COVID-19: From a global health crisis to a global food crisis?



The report has a special article that compares the current COVID-19 health crisis with the 2007-2009 crises, identifying differences and communalities across countries and food commodities, and examining the current and likely impacts of the pandemic, with a focus on international food markets.

It also provides an informative benchmark on how to return market functioning to normality, even if contagion rates remain unchecked.

The feature concludes that compared to the 2007-08 global food price crisis, the world is faring better now as global food production prospects are positive, stocks are high, international food prices are low and trade is broader-based with more importing and exporting countries. Furthermore, policy-makers are now more experienced in dealing with global crises, as well as better informed and prepared.

However, although, globally, there is enough food for everyone, the significant decline in economic growth due to the pandemic has translated into an issue of access to food, limiting people's ability to get enough or nutritiously enough food, especially in countries already hit by hunger and other crises even before COVID-19.

## CHINA

### **China informó que detectó coronavirus en pollos importados de Brasil y mariscos de Ecuador**

13/08/2020 - Autoridades chinas informaron que se detectó el coronavirus responsable del COVID-19 en un control rutinario de pollo importado de Brasil.

AFP | Las autoridades chinas anunciaron este jueves que detectaron el coronavirus responsable del COVID-19 en un control rutinario de pollo importado de Brasil, primer productor mundial, y por segunda vez en gambas o mariscos procedentes de Ecuador.

El virus estaba presente en muestras tomadas el martes de alitas de pollo congeladas brasileñas, precisó en un comunicado la alcaldía de la metrópolis de Shenzhen (sur), cerca de Hong Kong.

Las autoridades aseguran que "inmediatamente" sometieron a exámenes de diagnóstico a las personas que habían estado en contacto con los productos contaminados, y a sus familiares. Todos los tests dieron negativo, según el comunicado.

La contaminación del pollo brasileño podría provocar una nueva caída de las exportaciones brasileñas hacia China.

En febrero de 2019, Pekín impuso por cinco años aranceles antidumping al pollo brasileño que van de 17,8% a 32,4%.

Brasil, primer productor mundial de carne de pollo, era hasta 2017 el primer proveedor de China en pollo congelado, por un valor de casi 1.000 millones de dólares anuales y un volumen que representaba cerca del 85% de las importaciones del gigante asiático.

Pero en los últimos años perdió partes de mercado en favor de Tailandia, Argentina y Chile, según la consultoría especializada Zhiyan.

Más envases de gambas contaminados.

Por otro lado, en la provincia de Anhui (este), la alcaldía de la ciudad de Wuhu anunció este jueves que descubrió virus en envases de mariscos procedentes de Ecuador. Los paquetes estaban conservados en el congelador de un restaurante de la ciudad.

Es la segunda vez desde principios de julio que China informa de la presencia del virus en paquetes de gambas ecuatorianas.

El día 10 de ese mes, la Administración de Aduanas china realizó pruebas con muestras de un contenedor y de paquetes de camarones blancos del Pacífico que dieron positivo al coronavirus en los puertos chinos de Dalián (noreste) y Xiamen (este).

Según las últimas cifras disponibles de la Organización de las Naciones Unidas para la Alimentación y la Agricultura (FAO), Ecuador producía en 2018 unas 500.000 toneladas de camarón, de las cuales 98.000 fueron importadas a China, un mercado en plena expansión ya que en 2017 había exportado allí apenas 16.000 toneladas.

En junio, el inmenso mercado mayorista de Xinfadi, en Pekín, fue cerrado tras la aparición de un foco epidémico que afectaba a varios centenares de personas. Se detectaron restos del virus en una tabla de cortar salmón importado.

China, donde apareció el coronavirus a finales del año pasado, ha controlado en gran medida la epidemia, según los datos oficiales. El jueves, el país anunció un balance diario de 19 contagios. El último deceso causado por el virus se remonta a mediados de mayo.

En cambio, Brasil es el segundo país del mundo más castigado por el COVID-19 detrás de Estados Unidos con más 104.000 muertos y 3,16 millones de casos.

Ecuador, de su lado, tiene cerca de 6.000 muertos y más de 97.000 casos confirmados.



## **Plantas argentinas suspenden exportaciones hacia China**

14 August 2020 Seven Argentine meat processing plants are temporarily halting exports to China due to registered cases of COVID-19 among meat plant workers.

Reuters reports that a source from the Argentine agricultural health agency Senasa made the disclosure on 13 August. The source, who wished to remain anonymous, said three of the seven meat plants were likely to resume shipping to China in the coming days.

China is Argentina's top beef buyer. In 2019, Argentina sent China 75 percent of the total 845,900 tonnes of beef it shipped internationally.

Both countries have agreed that if a case of the novel coronavirus was registered in an Argentine meat packing plant, it would cease its shipments until Senasa and Chinese officials authorised its reinstatement. "There are seven plants temporarily suspended," the Senasa source told Reuters.

Since the beginning of the pandemic, 11 Argentine plants have of the 96 authorised to ship to China have halted supplying the commodities-hungry nation due to COVID-19 contagion. Suspensions usually last about a week.

China has intensified its sanitary controls after finding traces of the virus in frozen chicken from Brazil and in food packaging samples from Ecuador.

However, compared to Brazil and Ecuador, Argentina has registered a significantly lower number of infections and deaths from the disease due to strong quarantine measures.

In Argentina 268,574 cases of COVID-19 have been confirmed so far, of which 5,246 have been fatal, according to the health ministry. Argentina has a population of about 45 million people.

## **BRASIL**

### **Cepea: Promedio de precios batió un récord**

13/08/2020 Forte avanço da arroba reflete sobretudo grande apetite da China pela carne bovina brasileira No acumulado de agosto (até dia 12), o Indicador Cepea/B3 (São Paulo, à vista) do boi gordo registra média de R\$ 226,97/@, o que significa o maior patamar, em termos reais (descontado o efeito inflacionário), considerando-se toda a série do Cepea, iniciada em 1994 (as médias mensais foram deflacionadas pelo IGP-DI de julho/20), informa nesta quinta-feira (13/8) o Centro de Estudos Avançados em Economia Aplicada (Cepea).

Entre 5 e 12 de agosto, especificamente, o Indicador permaneceu praticamente estável (+0,02%), fechando a R\$ 226,30 ontem (dia 12). Segundo pesquisadores do Cepea, além da baixa oferta de animais prontos para abate, a aquecida demanda internacional, especialmente por parte da China, segue sustentando as cotações domésticas.

No acumulado de janeiro a julho deste ano, o país asiático respondeu por mais de 40% do total de carne bovina exportada pelo Brasil. Nos primeiros sete meses do ano, as exportações ao mercado chinês somam 451,77 mil toneladas, um forte aumento de 158% sobre o volume registrado em igual período do ano passado, de 174,98 mil toneladas. [

Porém, relata o Cepea, o preço da carne brasileira embarcada à China caiu 30% nos últimos sete meses, saindo do patamar de US\$ 4,32/kg, em janeiro, para US\$ 6,07/kg, em julho. Em 2020, a média está em US\$ 4,98/kg, 3,5% inferior à de 2019, de US\$ 5,16/kg, compara o Cepea. "No entanto, o dólar em patamar elevado acaba amenizando a queda no recebimento de frigoríficos em moeda nacional", avalia o Cepea.

### **Ministerio de Agricultura aclara que no recibió notificación oficial por parte de CHINA**

Na manhã de hoje, foi publicada nota no site do município de Shenzhen, província de Guangdong, com informações da autoridade sanitária local sobre uma suposta detecção de ácido nucleico do coronavírus na superfície de uma amostra de asa de frango congelada, oriunda de um lote importado do Brasil.

Segundo a nota, outras amostras do mesmo lote foram coletadas, analisadas e os resultados foram negativos.

O Escritório de Prevenção e Controle de Epidemiologia de Shenzhen informou que todas as pessoas que manusearam ou entraram em contato com o material testaram negativo para a COVID-19.

Ainda na noite de ontem, após notícia veiculada na imprensa chinesa, o MAPA consultou a Administração-Geral de Aduanas da China - GACC buscando as informações oficiais que esclareçam as circunstâncias da suposta contaminação.

Até o momento, o MAPA não foi notificado oficialmente pelas autoridades chinesas sobre a ocorrência.

O MAPA ressalta que, segundo a Organização das Nações Unidas para a Agricultura e a Alimentação (FAO) e a Organização Mundial da Saúde (OMS), não há comprovação científica de transmissão do vírus da COVID-19 a partir de alimentos ou embalagens de alimentos congelados.



O MAPA reitera a inocuidade dos produtos produzidos nos estabelecimentos sob SIF, visto que obedecem protocolos rígidos para garantir a saúde pública.

### **Parte oficial del MAPA**

Por: ESTADÃO CONTEÚDO 13/08/2020

Nesta quinta-feira, o governo da cidade de Shenzhen informou que uma amostra de asa de frango congelada importada do Brasil apontou presença do coronavírus

O Ministério da Agricultura, Pecuária e Abastecimento (Mapa) informou que “até o momento não foi notificado oficialmente pelas autoridades chinesas” sobre a suposta detecção de traços de coronavírus em lote de asas de frango brasileiro importado pelo país.

De acordo com a pasta, após notícia veiculada na imprensa da província chinesa, foi acionado o adido agrícola em Pequim, “que consultou a Administração Geral de Aduanas da China (GACC) buscando as informações oficiais que esclareçam as circunstâncias da suposta contaminação”. O GAAC é o órgão do governo chinês responsável pela habilitação de estabelecimentos exportadores e que também realiza o controle de mercadorias na aduana.

Na madrugada desta quinta-feira (13/8) o governo da cidade de Shenzhen, no sul da China, informou que um teste feito em uma amostra de asa de frango congelada importada do Brasil apontou presença do coronavírus.

Segundo a administração local, a descoberta foi feita após uma pequena amostra da superfície ser retirada do lote e testada por centros locais de controle de doenças. De acordo com o comunicado, por meio do número do lote identificou-se como sendo da Aurora Alimentos, de Santa Catarina.

No comunicado, o Ministério da Agricultura destacou que outras amostras do mesmo lote foram coletadas, analisadas e os resultados foram negativos, segundo informações do governo de Shenzhen, e que as pessoas que manusearam o material também testaram negativo para Covid-19.

“O Mapa ressalta que, segundo a Organização das Nações Unidas para a Agricultura e a Alimentação (FAO) e a Organização Mundial da Saúde (OMS), não há comprovação científica de transmissão do vírus da Covid-19 a partir de alimentos ou embalagens de alimentos congelados”, afirmou o Ministério.

A entidade disse, ainda, que “reitera a inocuidade dos produtos produzidos nos estabelecimentos” sob o Serviço de Inspeção Federal (SIF) – sistema de controle e credenciamento de frigoríficos. “Visto que obedecem a protocolos rígidos para garantir a saúde pública”, destaca a nota. De acordo com fontes, a ministra Tereza Cristina não irá se pronunciar sobre o assunto. Até o fechamento deste texto, a reportagem não havia obtido um posicionamento da empresa citada.

### **Buen ritmo exportador en lo que va de agosto**

Por: Denis Cardoso 11/08/2020

Expectativa é fechar o mês com vendas externas na casa de 71 mil toneladas, prevê consultor da Agrifatto

As exportações de carne bovina in natura continuam em ritmo acelerado neste mês de agosto, relata o economista Yago Travagini, consultor da Agrifatto, que cita dados parciais da Secretaria de Comércio Exterior (Secex).

“A primeira semana de agosto demonstrou que há, sim, possibilidades de avançarmos ainda mais nos embarques de carne bovina este mês”, destaca o consultor.

Continue a leitura após o anúncio

A média dos cinco primeiros dias de agosto ficou em 8,81 mil toneladas, um aumento de 43% sobre a média de agosto de 2019 e 20% a mais do que julho 2020.

“Já foram exportadas 44,06 mil toneladas de proteína bovina e, com mais 16 dias úteis restantes, a expectativa é de que o rompimento das 171 mil toneladas é possível”, prevê Travagini.

Em receita, foram obtidos US\$ 177,82 milhões com a venda de carne bovina in natura, gerando uma média diária de US\$ 35,56 milhões, 39% a mais do que em agosto de 2019.

No entanto, o preço da tonelada exportada está 3% menor do que no mesmo período do ano passado e em forte queda frente ao início do ano. “O fato do dólar ainda estar valorizado frente ao real pesa sobre os frigoríficos na hora de vender a carne, fazendo com que realizem vendas mais baratas”, justifica o consultor da Agrifatto.

### **Declaran zona libre de AFTOSA sin Vacunación a seis estados**

Por: Vera Ondeí 11/08/2020 Agora, Acre, Paraná, Rio Grande do Sul, Rondônia e parte de Mato Grosso e do Amazonas esperam o endosso da OIE

Hora de aposentar e guardar as seringas. Uma instrução normativa do Ministério da Agricultura e Pecuária (Mapa) desta terça-feira (11/8), reconhece como áreas livres de febre aftosa sem vacinação os





Estados do Acre, Paraná, Rio Grande do Sul, Rondônia e parte dos Estados de Mato Grosso e do Amazonas. A vacinação estava suspensa em toda essa área desde o início de maio.

O documento leva a assinatura da ministra Tereza Cristina, deve ser publicado no Diário Oficial de amanhã (12/8) e entra em vigência a partir do dia 1 de setembro. A medida do Mapa faz parte de um processo que agora segue para a Organização Mundial de Saúde Animal (OIE), entidade intergovernamental criada em 1920, com sede em Paris, da qual fazem parte 182 países. É a OIE que outorga a condição com reconhecimento global, depois de comprovada a ausência de transmissão viral em um território no qual não se pratica a vacinação. A próxima assembleia da OIE está prevista para maio do ano que vem.

O passo dado pelo Mapa está em conformidade com o Plano Estratégico para o Programa Nacional de Erradicação e Prevenção da Febre Aftosa (PNEFA), alinhado com o Código Sanitário para os Animais Terrestres da OIE.

Até a finalização do processo, de acordo com a instrução normativa do Mapa, o ingresso de animais e produtos no Estado de Santa Catarina, provenientes das áreas declaradas pelo Mapa como livres de aftosa sem vacinação continuam seguindo as regras estabelecidas para áreas livres com vacinação. O Estado é o único com reconhecimento da OIE.

Até 2026, o Brasil espera finalizar o processo de erradicação da febre aftosa, sem vacinação, para todo o território nacional. Os últimos focos da doença registrados no País ocorreram no Rio Grande do Sul, no ano de 2000, e em Mato Grosso do Sul e Paraná no ano de 2006.

### ***Parte oficial sobre la publicación de la Instrucción Normativa 52/2020***

Os estados e regiões atenderam requisitos como aprimoramento dos serviços veterinários oficiais e implantação de programa estruturado para manter a condição de livre da doença

O Ministério da Agricultura, Pecuária e Abastecimento (Mapa) publicou nesta sexta-feira (14), no Diário Oficial da União, a Instrução Normativa nº 52, que reconhece como livres de febre aftosa sem vacinação os estados do Acre, Paraná, Rio Grande do Sul e Rondônia. Foram reconhecidas também regiões do Amazonas (Apuí, Boca do Acre, Canutama, Eirunepé, Envira, Guajará, Humaitá, Itamarati, Ipixuna, Lábrea, Manicoré, Novo Aripuanã, Pauini e parte do município de Tapauá) e do Mato Grosso, composta pelo município de Rondolândia e partes de Aripuanã, Colniza, Comodoro e Juína.

Para realizar a transição de status sanitário, os estados e regiões atenderam requisitos básicos, como aprimoramento dos serviços veterinários oficiais e implantação de programa estruturado para manter a condição de livre da doença, entre outros, alinhados com as diretrizes do Código Terrestre da Organização Mundial da Saúde Animal (OIE).

Com o reconhecimento nacional, a ministra Tereza Cristina ressalta que os estados terão a oportunidade de ampliar a participação no mercado internacional. “Mais de 40 milhões de cabeças estarão prontas para exportação para mercados mais exigentes. O Brasil já é livre de aftosa com vacinação, mas esse bloco será livre sem vacinação. E isso deve melhorar o valor dos produtos desses locais para exportar para mercados como Japão, Coreia do Sul, que são mais exigentes e que não aceitam a carne bovina vacinada”, disse.

O processo de transição de zonas livres de febre aftosa com vacinação para livre sem vacinação está previsto no Plano Estratégico do Programa Nacional de Vigilância para a Febre Aftosa (Pnefa), conforme estabelecido pelo Sistema Unificado de Atenção à Sanidade Agropecuária (Suasa).

“O reconhecimento nacional pelo Mapa é um dos passos para alcançar o reconhecimento internacional junto à OIE [Organização Mundial de Saúde Animal]. A expectativa é de termos esse reconhecimento pela organização em maio de 2021 para esses estados”, destaca o diretor do Departamento de Saúde Animal, Geraldo Moraes. De acordo com o diretor, o Mapa encaminha nesta sexta-feira o pleito brasileiro à OIE para o reconhecimento internacional. Esses estados passarão por uma rigorosa avaliação por profissionais indicados pela organização.

Atualmente, no Brasil, apenas Santa Catarina possui a certificação internacional como zona livre de febre aftosa sem vacinação. Com isso, o ingresso de animais e produtos de risco para febre aftosa desses seis estados em Santa Catarina deve obedecer às diretrizes definidas para origem em zona livre de febre aftosa com vacinação, até o reconhecimento pela OIE como zonas livres de febre aftosa sem vacinação.

A norma entra em vigor no dia 1º de setembro.

### ***Farsul apoyó la medida***

12/08/2020 - 4La decisión fue adoptada mediante votación entre delegados rurales.

La Federación de Agricultura de Rio Grande do Sul comunicó al gobierno que apoya el retiro de la vacunación contra aftosa en su estado.

La decisión fue adoptada mediante una votación entre delegados de los sindicatos rurales del Rio Grande do Sul. El gremio aclaró que todavía existen aspectos que deberá resolver el gobierno estadual para el



cumplimiento de todo lo estipulado para que recibir el status de libre de fiebre aftosa sin vacunación de manos de la Organización Mundial de Sanidad Animal (OIE).

Los productores dicen que acompañarán la evolución de esas exigencias y dicen ser conscientes que la vigilancia recaerá sobre los productores en el campo. “Los productores somos los mayores interesados en mantener la seguridad sanitaria en el sector agropecuario. Piden que una vez concluido el proceso, tener las garantías del Poder Público de que las medidas presentadas serán puestas en práctica, para que el productor rural, ejerza su actividad, sabiendo que está respaldado jurídica y sanitariamente”, remarcó el comunicado de Farsul.

Rio Grande do Sul deberá cumplir un proceso de dos años sin focos de aftosa, luego de retirada la vacunación, demostrando así que no hay circulación viral, antes de recibir el nuevo status sanitario de manos de la Organización Mundial de Sanidad Animal (OIE).

### **Faena de bovinos se redujo en EL segundo trimestre de 2020**

Por: Portal DBO13/08/2020 De acordo com o IBGE, o País registrou o abate de 7,17 milhões de cabeças de bovinos no período

O Brasil registrou o abate de 7,17 milhões de cabeças de bovinos sob algum tipo de serviço de inspeção sanitária no segundo trimestre de 2020. O resultado representa uma queda de 9,7% na comparação com igual período de 2019. Quanto ao primeiro trimestre do ano, a redução foi de 1,2%. Os dados são da divulgação preliminar das Pesquisas Trimestrais do Abate de Animais, do Leite, do Couro e da Produção de Ovos de Galinha, divulgada nesta quinta-feira (13/8) pelo Instituto Brasileiro de Geografia e Estatística (IBGE).

De acordo com o IBGE, a produção de carcaças bovinas foi 1,85 milhão de toneladas, queda de 6,6% em relação ao mesmo trimestre do ano anterior e aumento de 0,5% em relação ao primeiro trimestre de 2020

## **URUGUAY**

### **Industria sigue presionando a la baja los precios del ganado gordo**

por Cecilia Pattarino agosto 12, 2020

El mercado de la hacienda gorda mantiene la tendencia de ajuste a la baja. Las industrias –abastecidas de ganados de corral para la Cuota 481 y kosher- presionan los precios pero la oferta no convalida esos valores.

“La concreción de negocios es muy escasa. Los productores deciden seguir metiendo kilos a sus ganados porque hay comida y no convalidan el ajuste de precios de la demanda”, dijo un consignatario consultado. Por los mejores novillos se ofrecen entre US\$ 3,35 y US\$ 3,40 por kilo carcasa cuando la semana pasada se pagaban US\$ 3,45. La vaca ya no está demandada como hace unos meses. Dependiendo de la calidad, los negocios se concretan entre US\$ 3,10 y US\$ 3,20 y entre US\$ 3,30 y US\$ 3,35 por la vaquillona.

En lanares aumentó la faena por segunda semana consecutiva y los precios ajustan a la baja. En la grilla de ACG el cordero liviano y el pesado bajaron dos centavos a US\$ 3,43 y US\$ 3,56 respectivamente, los borregos bajaron dos centavos a US\$ 3,50, los capones tres centavos a US\$ 3,09 y las ovejas se mantuvieron en US\$ 3,03.

### **En lo que va del año 21% de los novillos faenados provienen de corral**

por Cecilia Ferreira agosto 12, 2020

En lo que va del año hasta el 1 de agosto se llevan faenados 150.460 vacunos provenientes de corral, 19,5% más que los 125.898 registrados en igual periodo el año pasado, de acuerdo a datos de INAC proporcionados a Ganadería.uy.

Por categoría, 20,8 % de los novillos faenados en lo que va del 2020 son de corral y 26,9% de las vaquillonas.

Los datos de INAC incluyen solo corrales habilitados para exportar en la Cuota 481.

Gastón Silva, operador del mercado, titular de la empresa Rafelor, dijo a Ganadería.uy que el primer semestre hubo un gran volumen de ganado encerrado, de negocios concretados el año pasado. Luego, tras la explosión de coronavirus “costó salir de esos ganados y en los nuevos negocios de este segundo semestre del año la industria está muy cautelosa y haciendo muy poco volumen”, señaló.

En lo que resta del año, el operador estimó que este escenario de menor volumen encerrado se mantendrá, pero que la industria mantendrá un volumen de acopio previendo la falta de oferta que se mantendría en los próximos meses.



### **Aumentan las colocaciones de carne en la cuota Hilton y bajan en la 481**

por Cecilia Pattarino agosto 12, 2020 En julio, el primer mes del ciclo 2020/2021 de la cuota Hilton, las exportaciones de carne dentro del cupo totalizaron 1.297 toneladas peso embarque contra las 805 toneladas de igual período del año pasado. De esta manera, el porcentaje de cumplimiento de la cuota llegó al 20% contra el 12,6% de un año atrás. El precio promedio de colocaciones fue 14% inferior a julio de 2019.

En tanto, en julio las ventas dentro de la cuota 481 llegaron a 324 toneladas, menos de la mitad que las 687 toneladas de igual mes del año pasado. El precio fue 10% superior.

En los primeros siete meses de 2020 las ventas dentro de la cuota con Estados Unidos 16.663 toneladas contra 12.908 toneladas de igual período del año pasado. El cumplimiento de la cuota en el año calendario llega al 83,3% del total contra el 64,5% de igual fecha de 2019.

### **Oferta de carne en EE.UU. se equilibra y hay dificultades para enviar fuera de cuota**

13/08/2020 - Aumentó la presencia de carne norteamericana prime.

El impacto de la pandemia en la industria frigorífica de Estados Unidos en algunos meses del primer semestre del año provocó una menor oferta de carne en el mercado y el precio tendió a aumentar, lo que otorgó oportunidades a proveedores internacionales.

El director de Campo Meat, Alejandro Olivera, dijo a Rurales El País que el mercado norteamericano “fue un jugador importante” en mayo y junio para colocar carne uruguaya.

A lo que agregó: “La falta de carne disparó los precios y dio lugar a que la carne uruguaya ingresara por fuera de la cuota. Pagando arancel, igual era negocio para los importadores y mayoristas”.

Sin embargo, la recuperación de las plantas y el retorno a la actividad ha generado en julio y agosto una normalidad en la disponibilidad de carne. Además, Olivera contó que “hay un incremento de la carne prime”, una etiqueta que se otorga de acuerdo al marmoleo del bife ancho, y “afecta a las importaciones de proteína roja de calidad”.

Indicó que en este momento la exportación de carne a Estados Unidos por fuera de la cuota “no es negocio”.

Con respecto a la competencia, Olivera, que cuenta con una boutique de carne en Florida, Estados Unidos, aseguró que “a precios similares los consumidores muestran una preferencia por los cortes uruguayos por todo el plus que ofrece detrás”.

Desde Campo Meat importan exclusivamente cortes producidos a pasto, ya que “es la carne que puede competir con la americana”, dijo Olivera y agregó: “No significa que sea mejor o peor que la producida a grano, son productos diferentes para públicos distintos”.

Finalmente, el empresario comentó que “hace mucho tiempo tenemos ganas de llevar carne ovina uruguaya”, pero “por un tema de escala y volumen todavía no es negocio”.

### **Entrará más asado argentino al abasto**

11/08/2020 - Trabajan para traer otro camión con 20.000 kilos.

Llegarán más asados bovinos argentinos. Tras la aceptación de los consumidores, la empresa importadora Saquery, está trabajando en la compra de un segundo camión con otros 20.000 kilos.

Sobre fines del mes pasado se concretó la primera importación del producto (con hueso), que fue aportado por el frigorífico Carnes Pempeanas S.A., ubicada en la localidad de Santa Rosa. El frigorífico está habilitado para exportar a la Unión Europea, mercados asiáticos y Estados Unidos, cumpliendo con todos los requisitos exigidos por las autoridades sanitarias uruguayas.

“No hay marcha atrás y en nuestro caso vamos a seguir importando”, afirmó a El País el broker Diego Crosta, principal de la importadora, que la innovadora en el ingreso de asados argentinos con hueso. Con el primer embarque, se confirmó la vigencia del protocolo sanitario firmado entre Uruguay y Argentina. Incluso, años atrás, cuando los precios lo ameritaban, algunos frigoríficos uruguayos estuvieron exportando asados bovinos uruguayos para algunas provincias argentinas.

Crosta consideró que el asado bovino argentino, “se hará un lugar en el mercado local (abasto)” y descartó el ingreso de grandes partidas, pues consideró que es un negocio de nicho.

“No creo que ingrese un volumen muy grande, salvo que haya una devaluación en la Argentina o que el corte tenga una variación de precios más alta (respecto al asado uruguayo) en los próximos meses”, explicó el director de Saquery.

Según la visión del importador, el asado con hueso argentino “es un producto que llegó para quedarse. No es un asado, ni mejor, ni peor que el nacional. Es otro producto”, detalló Crosta.

Tiene características diferentes porque proviene de animales jóvenes, terminados a granos y eso hace difícil que se pueda comparar con los demás tipos de asados bovinos que se venden en el mercado, sean frescos o congelados.





El año pasado, durante la feria europea de Anuga, varios importadores de carnes dedicados al abasto y algunos frigoríficos, estuvieron sondeando precios con empresa argentinas para traer asados bovinos a Uruguay, pero luego los precios subieron y el negocio perdió fuerza.

Abasto. En lo que es oferta local, el mercado interno está bien abastecido de asados y carne bovina brasileña sin hueso, importada desde Rio Grande do Sul.

Los carniceros y expendedores esperan concretar una buena venta de asados durante el fin de semana largo que abarca el feriado del 25. Este corte tiene un precio estabilizado y su alta oferta llevó a bajar más los valores.

El asado fue el corte con mayor caída de precios durante los primeros siete meses del año en curso, según publicó Monitor Agrícola en Twitter, usando como fuente el Índice de Precios del Consumo.

El precio del asado bajó 17,3% frente a diciembre de 2019, pero su precio está 5,7% por arriba del valor que tenía en julio del año pasado.

Respecto a la carne desosada importada de Brasil, “la plaza local está bien abastecida”, confirmó el director de Abasto Santa Clara, Jorge López.

Los frigoríficos brasileños están subiendo los precios y se complica por el lado de la oferta, especialmente en Rio Grande do Sul. Falta ganado y algunos frigoríficos están bastante complicados con la presencia de Covid-19.

“No falta carne, hay un buen abastecimiento. Los frigoríficos de Rio Grande do Sul van a cumplir a regañadientes con los pedidos que se comprometieron, pero le está subiendo el precio del ganado y están complicados”, explicó López.

### **Aumentan los créditos vencidos de los frigoríficos con el sistema financiero**

13/08/2020 - Entre enero del 2019 a junio del 2020 pasaron de US\$ 33 mil a US\$ 15,7 millones.

El endeudamiento de la industria frigorífica suma US\$ 327 millones a junio, informó a Rurales El País Rafael Tardáguila de acuerdo los datos del Banco Central del Uruguay (BCU).

A pesar de que “la amplia mayoría de los créditos están vigentes” y “no hay retrasos en los pagos”, el director de la consultora Tardáguila Agromercados dijo que “hay una tendencia creciente y muy firme de créditos vencidos”.

En tal sentido, explicó que desde enero de 2019 a junio de 2020 la cifra por créditos vencidos pasó de US\$ 33 mil a US\$ 15,7 millones.

Tardáguila dijo que los créditos vencidos representan menos del 5% del endeudamiento total con el sistema financiero, pero la tendencia es de un crecimiento importante: fundamentalmente a partir del último trimestre del año pasado.

Como positivo indicó que desde abril a junio del 2020 los números por créditos vencidos han dejado de subir.

Producción. Tardáguila comentó que el endeudamiento del sector productor es el doble al industrial con unos US\$ 710 millones. “Del total hay unos US\$ 690 millones que están al día, el resto son créditos vencidos: menos del 3%”, señaló.

Al contrario de la industria, el Director de la consultora Tardáguila Agromercados explicó que el monto total por créditos vencidos está tendiendo a disminuir. “En el primer trimestre del año pasado era del 4,5%, y en el último del 2020 bajó a menos del 3%”, sumó.

Finalmente dijo que el comportamiento de los sectores frente al sistema financiero muestra una evolución contraria que manifiestan las dificultades que están pasando cada uno de ellos.

### **Brasil reconoce seis estados como libres de Aftosa sin vacunación ¿Qué implica para Uruguay?**

por Cecilia Pattarino agosto 12, 2020

El Ministerio de Agricultura Pecuaria y Abastecimiento de Brasil declaró seis nuevos estados con estatus sanitario libre de fiebre aftosa sin vacunación –superior al de Uruguay-. Entre ellos se encuentra Río Grande del Sur –límitrofe con territorio uruguayo-. Los estados brasileños reconocidos como libre de aftosa sin vacunación son: Acre, Paraná, Río Grande del Sur, Rondonia, y parte del estado de Amazonas y de Matto Grosso y próximamente serán reconocidos por la Organización Internacional de Epizootias (OIE).

Leopoldo Amorim, directivo de la Asociación Rural del Uruguay y delegado de la gremial en la Comisión Nacional Honoraria de Sanidad Animal dijo a Tiempo de Cambio de radio Rural que “hay dos riesgos para Uruguay: el sanitario y el comercial –por obtener Brasil un estatus mayor- a pesar de que mantenemos la confiabilidad a pesar de seguir vacunando. Respecto al riesgo sanitario vale aclarar que la situación regional hoy por hoy es mucho mejor que en el 2000, es decir que el riesgo es menor”.

Venezuela y Bolivia, de los países de América del Sur son los que tienen un status más comprometido con presencia del virus. “Pero es un virus que no se ha manifestado en Uruguay y no sería tan riesgoso para nosotros, es un virus exótico para nosotros”.



“En lo comercial la situación es más compleja, puede llegar a haber algunas trabas comerciales”, explicó Amorim. En este sentido, según el experto Uruguay debería dejar de vacunar contra la Aftosa en algún momento –no ahora- pero si en esta década luego de tener un diagnóstico preciso de la situación regional.

por Eduardo Blasina agosto 12, 2020 La decisión de Brasil de declarar a Rio Grande del Sur y otros estados libres de vacunación y suspender la inoculación contra el virus es una decisión relevante que obligará a otras decisiones internas.

Para Uruguay implica un doble riesgo, comercial y sanitario. En lo comercial es relevante porque Uruguay deja de tener al menos formalmente el status sanitario más elevado. Río Grande del Sur entre otros estados pasarán a libre sin vacunación.

Eso obligará a Uruguay a evaluar hasta cuando seguir vacunando. El retiro de esta medida preventiva, vacunar aunque no hay casos cercanos, marcará una época nueva en algún momento de esta década.

## UNIÓN EUROPEA

### **Científicos interpelan a Comisión Europea para que revea sus criterios sobre el rol de la producción animal en la producción de Carbono**

James Nason, August 11, 2020 THE European Commission is being urged by independent climate scientists to embrace science that shows carbon neutrality goals can be achieved without destroying animal agriculture in the process.

The European Commission is about to settle on a new policy on methane which will determine the approach Europe takes in future to reducing methane emissions from agriculture, as well as from energy (coal, oil and gas) and waste.

The policy it settles on could have profound implications for animal agriculture, scientists have warned.

The big issue for agriculture is whether the EU policy will continue to use the 100-year Global Warming Potential (GWP100) model to account for the warming effect of livestock emissions in future, or whether it will use the GWP star model that has more recently emerged in global climate policy debate.

Several independent scientists have expressed concern that the currently accepted GWP 100 approach overstates, and quite dramatically so, the effect that methane emissions from stable herds of livestock have on global temperatures.

In 2018 a team of scientists at Oxford University published a paper highlighting the flaws in the GWP 100 model and proposing a new metric be adopted that they believe more fairly accounts for the different warming impacts of different types of emissions, referred to as the GWP\* (GWP star) model.

The GWP 100 is the widely accepted convention and is the model used in the Paris Climate Agreement. Its continued use is supported by a wide range of climate scientists.

If the EC elects to use the GWP 100 model to underpin its future methane policy, pressure will increase to eliminate practices such as ruminant agriculture, scientists have warned.

Flaws in a ‘one size fits all approach’

A problem with current climate change policy, according to climate scientists such as Professor Dave Frame, head of the Climate Change Research Institute at Victoria University of Wellington, New Zealand, is that the GWP 100 model uses a ‘one size fits all’ approach to determine the warming effect of different climate gases.

That approach treats emissions from all gases as equivalent, when in reality different gases have different warming effects, as this article from the Oxford Martin school of the University of Oxford explains.

It notes there are two distinct types of emissions:

- long-lived pollutants, like carbon dioxide, which persist in the atmosphere and build up over centuries. (For example, the carbon dioxide created by burning coal in the 18th century is still affecting the climate today, as Dr Michelle Cain from the Oxford Martin Program on Climate Pollutants noted in 2018); and
- Short-lived pollutants, like methane, which disappear within about 10 years. Their effect on the climate is important, but very different from that of CO<sub>2</sub>.

Scientists including Oxford professor Myles Allen, whose team was instrumental in the development of the GWP star model, are now urging Europe to adopt global climate policy which more fairly accounts for the differences between different types of emissions.

In his feedback to the EC methane policy process which closed last week, Professor Allen states that the GWP 100 method understates the warming impact of new methane sources by a factor of four over the first 20 years after the increase, and overstates the warming impact of constant methane by a factor of four.

Having decided to aim for climate neutrality, Europe has a simple choice, Dr Allen writes: to define climate neutrality in terms of metric-equivalent emissions or in terms of warming-equivalent emissions.



“This should be an open and public discussion, because the implications, particularly for agriculture, are profound,” he wrote.

‘Achieving climate neutrality in terms of metric-equivalent emissions could mean eliminating practices, such as ruminant agriculture, that are not actually causing global warming.’

“Achieving climate neutrality in terms of metric-equivalent emissions could mean eliminating practices, such as ruminant agriculture, that are not actually causing global warming.

“Warming-equivalent emissions resolve this problem.”

In another submission, Dr Frank Mitloehner from the University of California Davis, whose field of study is animal agriculture and its relationship to climate change, has also urged European policy makers to carefully reflect on the use of the GWP100 convention for methane.

He explained that methane is a ‘flow’ gas which cycles through the atmosphere, however, the GWP 100 approach incorrectly treats it as a ‘stock’ gas, which accumulates in the atmosphere.

Furthermore, GWP 100 results in quantification of greenhouse gases as CO<sub>2</sub> equivalent units (CO<sub>2</sub>e), but not actual warming equivalent units.

Dr Mitloehner said the GWP 100 was created by scientists in the 1990s who were trying to standardise the impact of each greenhouse gas in order to allow people to draw comparisons and understand “this behemoth called global warming”.

GWP 100 has since become a well-known and ‘easily digestible convention’ that is now used to drive policy and regulations aimed at limiting warming.

However, it simply measures methane’s carbon dioxide equivalence (CO<sub>2</sub>e) and overlooks how it behaves in – and thus warms – the atmosphere, Dr Mitloehner wrote in his submission.

“Therein lies the flaw. When it comes to measuring global warming potential, I am in agreement with researchers from Oxford University, who are proponents of a revised system referred to as GWP\* (i.e. GWP Star).

“Instead of measuring one pulse emission of methane against a same-size pulse emission of carbon dioxide, Drs. Myles Allen, Michelle Cain, John Lynch, Dave Frame and other teams of researchers account for the difference between a stock gas (carbon dioxide) and a flow gas (methane), and therefore, is a more accurate system of measuring the actual warming potential of short lived climate pollutants over time.

“I believe that this distinction is critical for you as you address the European Union’s methane emissions.”

Dr Mitloehner’s full submission can be read here. A new video below further explains the latest findings from University of California, Davis research into biogenic methane and how it affects the atmosphere:

GWP 100 ‘not fit for purpose’

In a presentation to a webinar hosted by the Global Roundtable for Sustainable Beef earlier this year, Dr Allen said it was clear the current method of calculating the global warming impact of different climate gases “is not fit for purpose”, because it treated the impact of each over time as equivalent, “when they’re clearly not”.

A critical question for the agricultural sector is whether most scientists are accepting of this science and whether influential policy groups such as the Intergovernmental Panel on Climate Change (IPCC) are prepared to rethink the current policy on methane.

When asked about this during the GRSB webinar Dr Allen, who contributed to the IPCC’s 1.5 degree report in 2019, said many scientists working within the physical science group in the IPCC accepted the science that warming equivalent emissions (ie GWP star) gives a better indication of the impact of greenhouse gases on global temperature than so-called CO<sub>2</sub> equivalent emissions (GWP 100).

However, within the IPCC’s policy and economics groups that position was still considered controversial, and remained “a very live topic of debate”.

Livestock sector is a net methane emitter: CSIRO

Highlighting the challenges facing the agriculture sector, 61 research organisations from around the world recently released a report card on the global methane budget, which singled out livestock agriculture as a major problem for methane emissions.

As explained in this CSIRO article, the Global Methane Budget lists livestock agriculture as being responsible for more than 57 percent of all anthropogenic emissions of methane.

The report noted that methane, once emitted, stays in the atmosphere for about nine years – a far shorter period than carbon dioxide.

However its global warming potential is 86 times higher than carbon dioxide when averaged over 20 years and 28 times higher over 100 years.

Soils (both agriculture and non agricultural) were responsible for just 0.5 percent of the total methane sink. The CSIRO’s Pep Canadell told Beef Central there is no doubt that the livestock sector globally, and in Australia, is a net methane emitter to the atmosphere, and therefore a net contributor to human induced climate change.



However he also acknowledged methane emissions from cattle are part of a biogenic carbon cycle, and, where livestock herds are constant or decreasing, they are not adding new additional carbon to the atmosphere.

“Having constant livestock herds would no longer increase further global warming beyond the warming that is already creating now, it would just keep it constant. If the number of cattle goes down, then that overall warming contribution goes down too.”

Dr Canadell said he has worked with Dr Allen and has discussed the various indices to measure the relative importance of the various greenhouse gases (GHGs).

He said there were many different ways that the warming potential can be measured.

However, the IPCC with the United Nations Framework Convention on Climate Change had studied the issue, assessed all the pros and cons, and had settled with GWP100 for the national reporting to the Convention, he said.

“Thus, for consistency with the Convention we use GWP 100.”

“I personally feel that there is no one best way to estimate the relative potential of warming of the various gases, so it makes sense that we settled with one and we are sticking with it, until a change is discussed.

“The compromise with GWP 100 was between the long term objectives of stabilising the climate (which reduces the relevance of methane) and giving opportunities to countries to use methane reductions as one of the many options to contribute to mitigation climate change.”

### **Congresistas estadounidenses solicitaron reducir aranceles para productos procedentes de la UE**

11 August 2020 A bipartisan groups of 13 US Senators have asked the US Trade Representative to remove the 25 percent tariffs on food, wine and spirits from the EU.

According to a letter seen by Reuters, the tariffs, which were imposed in October 2019 in retaliation for EU subsidies on large aircraft, hit French wine, Italian cheese and single-malt Scotch whisky, as well as cookies, salami, yogurt, olives from France, EU-produced pork sausage and German coffee.

Seven Republican and six Democratic senators, including Robert Menendez, John Barrasso, Cory Gardner, Susan Collins, Dianne Feinstein, Pat Toomey, Kyrsten Sinema and Cory Booker said in a letter to USTR Friday 7 August that American "restaurants, retailers, grocers, importers and distributors" are experiencing "severe economic hardship due to the increased cost of goods."

The senators noted "demand for these goods has declined, leaving importers and distributors with months' worth of product, much of it perishable, in storage and in transit with no clear end date for the COVID-19 pandemic."

USTR did not immediately comment.

The United States last year won World Trade Organisation authorisation to impose tariffs on up to \$7.5 billion of EU goods.

### **JAPON removi  todas las restricciones sobre las importaciones de carnes procedentes de FRANCIA**

10 August 2020 France said on 7 August that Japan had lifted all sanitary restrictions on French beef exports.

Reuters reports that the sanitary restrictions were still weighing on the French beef industry.

Friday's announcement came in a joint statement from the French foreign ministry and French farm ministry.

In the early 2000s as the bovine spongiform encephalopathy (BSE), commonly known as mad cow disease, hit several European countries, Japan banned beef imports from some EU countries, notably France.

Since 2013, however, Japan had lifted the ban on imports of French beef from bovine aged less than 30 months. The ban is now lifted for all bovines.

## **ESTADOS UNIDOS**

### **Tendencia ascendente en el Mercado de futuros en respuesta a mejora en la actividad**

14 August 2020 CME live cattle futures continued their rally on 13 August, holding to a nearly six-month peak in prices as exports to China grew.

Reuters reports that China ramped up US beef purchases in the last week, with sales of 1,927 tonnes through 6 August. The USDA reports that this is the biggest purchasing volume since 2002.

Beef slaughter rates continue to increase, traders said, and meatpackers are paying more for cattle due to the strength of the beef market. Demand and prices normally are higher heading into Labour Day, a major US holiday for consumers to barbecue at home. Prices for choice cuts of boxed beef rose \$1.83, to \$210.92





per cwt, while select cuts increased by \$1.51, to \$197.50 per cwt, according to the US Department of Agriculture.

CME October live cattle rose 0.575 cent to settle at 110.150 cents per pound, the highest price since 4 March. September feeder cattle slipped 0.300 cent to 144.950 cents per pound.

Profit margins for beef processors continued to increase on Thursday 13 August, to \$249.55 per head of cattle from \$246.65 a day earlier, according to Denver-based livestock marketing advisory service HedgersEdge.com.

Traders said they would be closely watching for increased interest in US meat exports in the coming days, after China on Thursday identified a Brazilian processor of chicken and pork as the source of chicken wings that tested positive for the novel coronavirus.

### **COVID-19 tuvo un impacto severo sobre la producción de carnes**

By Tim Petry Aug 11, 2020 0 Sudden shock affects price system protections

The COVID-19 pandemic has caused severe disruptions throughout the entire U.S. meat industry.

A dilemma is that consumers found limited availability of some meat items on grocery store shelves, while at the same time, producers were not always able to find a market for livestock and poultry ready to harvest. And consumers saw increasing prices for preferred meat products, while if producers could find a market, prices were likely declining.

The function of the price system is to prevent shortages and surpluses. That works very well until a sudden shock such as the COVID-19 pandemic unexpectedly disrupts the system.

Normally, the meat industry is very efficient in moving large quantities of market-ready animals through processing, distribution and retail channels to the ultimate consumer. And because meat is perishable, the meat industry has a relatively short time frame to complete the task.

Approximately half of domestically consumed meat is purchased in the retail food market segment (supermarkets, convenience stores, specialty meat shops, etc.). The other half is utilized in the food service segment (restaurants, schools, sporting events, hotels, etc.).

The stay-at-home and social distancing orders meant that food service meat demand declined significantly, with restaurants and schools closing and recreation canceled. Demand in the retail market skyrocketed and panic buying further increased retail demand and fueled price increases.

In many cases, meat products that were destined for food service could not be rerouted easily to retail. Bacon, for example, may go to restaurants in 25-pound cartons, while retail customers prefer to purchase 1-pound packages.

The ability of packing plants to harvest livestock and poultry in a timely manner was impacted by the spread of COVID-19 in the workforce. Plants had to shut down to clean and disinfect premises, test employees for the virus, and implement Centers for Disease Control and Prevention and Occupational Safety and Health Administration guidelines. Closed plants reduced demand for market animals particularly in that region. And plants that reopened usually operated at lower volumes than were previously possible.

U.S. meat production was at a record high level during the first quarter of 2020. However, as COVID-19 impacted meat packing and processing, meat production declined. Livestock prices also declined with packing plant closures and slowdowns.

Each month, the U.S. Department of Agriculture's Office of the Chief Economist publishes a World Agricultural Supply and Demand Estimates report, usually referred to as the WASDE report. In the April 9 report, the USDA was projecting record U.S. beef, pork, chicken and total meat production in 2020. Beef production was projected to be up 1 percent from 2019, with pork production increasing 5 percent, chicken production advancing 3 percent and total meat production climbing 3 percent.

However, just one month later, the May 12 WASDE report estimated declines in meat production expected for 2020 due to COVID-19-related issues just discussed. Estimates were for beef production to decline 5 percent, with pork production down about 1 percent and chicken production only off slightly, with total meat production declining 1.6 percent.

The USDA Economic Research Service publishes monthly retail beef, pork and chicken prices. The latest price information for June indicated meat prices at record levels, which was no surprise to many consumers. The all-fresh retail beef price, at \$7.38 per pound, was a record high, up 26 percent from June 2019.

During the pandemic, the demand for hamburger at retail markets skyrocketed, with consumers emptying shelves. And many fast-food restaurants still were able to provide drive-through and take-out service. High-demand ground beef prices increased to a record high of \$4.74 per pound during the height of the pandemic.

Retail pork prices increased 8 percent over last year to a record \$4.25 per pound. And chicken prices rose to record levels as well, at \$1.75 per pound. Market steer, hog and chicken prices declined to lows for the year as the pandemic worsened.





Packing plant and meat distribution issues have at least partially been resolved quicker than first thought possible and restaurants have started reopening in many states.

The latest July WASDE report again revised beef, pork and chicken production upward, with total meat production back up to record levels, increasing 1.2 percent over last year. Correspondingly, meat prices are declining and consumers found ample meat supplies for celebrations on the Fourth of July holiday.

Market prices for livestock are still at depressed levels, much below pre-COVID-19 expectations, due to backlogs from reduced processing capacity during the previous several months.

These are unprecedented times with tremendous uncertainty and price volatility. No one knows how severe the pandemic will be or how long it will last.

When the hysteria surrounding COVID-19 subsides, we hope everyone will have a greater appreciation for how important an efficient meat production, processing, distribution and retailing system is.

### **Mercado ganadero con precios escasos**

Guest Author, August 14, 2020 A monthly column written for Beef Central by veteran US meat and livestock industry commentator Steve Kay, publisher of US Cattle Buyers Weekly

I READ with interest Beef Central's recent story that Australian slaughter cattle are now officially the most expensive in the world among major beef exporting nations.

As Jon Condon says, Australian prices in the past ten years have only rarely topped equivalent US prices, in Australian dollar terms.

This has occurred this year because US grainfed (live) cattle prices remain well below year ago levels, despite enjoying an unexpected rally throughout July and into the first week of August.

The last week of July saw USDA's five-area steer price averaged US\$98.66 per cwt live. This was down 13.3pc from the US\$113.82 per cwt average of the same week last year.

This reveals that while the US beef processing sector has largely recovered from the ravages of the COVID-19 pandemic, US cattle feeders are still getting far less for their cattle than last year, because of the huge feedlot backlog caused by the pandemic.

Abattoir fire, COVID closures distort market

It is no surprise, then, that cattle producers have refocused their attention on prices in the live cattle market. In fact, calls for inquiries began in the aftermath of an August 9, 2019 fire at Tyson Food's Holcomb, Kansas, beef processing plant that put the plant out of commission for most of the rest of the year. This caused a collapse in futures and cash live cattle prices.

There was a marked drop in the number and percentage of negotiated cash sales of live cattle immediately after the fire. Then the COVID-19 pandemic struck the beef complex this spring, causing unprecedented market distortions in cattle and wholesale beef prices until early June.

The two events thus led to new concerns about price discovery and transparency, and about the small percentage of cattle sold on the cash market. Negotiated cash sales fell sharply after the Tyson fire, and also at the height of the pandemic when beef plants nationally ran at only 68pc of capacity.

Investigation

The fire led to US Agriculture Secretary Sonny Perdue to direct USDA's Agricultural Marketing Service to conduct an investigation. He directed it to look for evidence of whether any regulated entities during the two events violated the US Packers and Stockyards Act by taking advantage of the situation through price manipulation, collusion, restrictions of competition or other unfair practices.

He then expanded the investigation to include the market's behaviour during the height of the pandemic.

Not unexpectedly, AMS in a report released last month said found no infringement by industry stakeholders related to either event. Much of its report instead focused on its efforts to continue to explore ways to enhance price discovery and transparency in the live cattle market.

Its first suggestion was to reduce non-reporting. A combination or reshuffling of reporting regions, a change that could be made without legislative action, could ultimately expand the market data released to the public, says AMS. But it notes that there has not been industry consensus on such a recommendation to date.

USDA is also exploring the idea of no longer referring to the daily slaughter report as an estimate to encourage the market's immediate use of the information. I can't imagine how such a move would make any difference. Ironically, the eight weeks of data from the first week of June saw 76,818 head fewer cattle in the actual weekly slaughter totals versus AMS's initial estimated totals. That is reason enough for people to ignore the estimated total even more.

AMS has also explored a 14-day slaughter scheduled delivery submission requirement through livestock mandatory reporting, a precedent currently in place for daily LMR swine reporting.

Beyond LMR, the concept of creating and compensating a pool of negotiated cash market traders has been explored by some in academia and industry, says AMS. With further development and discussion, the idea may prove an innovative and flexible approach to solving the public good problem of a lack of reliable price discovery, it says.



### Cattle producers discuss price discovery issues

US cattle producers discussed these and other price discovery issues at their summer meeting last week. After intense discussion, a committee and then the National Cattlemen's Beef Association's board of directors unanimously passed a policy that supports voluntary efforts to improve cash fed cattle trade during the next 90 days, with the potential for mandates in the future if robust regional cash trade numbers are not reached by the industry.

The policy resolution also said that if the voluntary approach does not achieve robust price discovery as determined by NCBA-funded and directed research, and meet the established triggers that increase frequent and transparent negotiated trade to a regionally sufficient level, and triggers are activated, NCBA will pursue a legislative or regulatory solution determined by its membership.

It thus seems the US industry continues to hope that cattle producers voluntarily will sell more live cattle on the negotiated cash market. Few producers, except those who strongly distrust packers, want to see mandatory measures that would inhibit producers' rights to choose how they sell cattle.

Therein lies the conundrum about price discovery in the market.

### **Precios minoristas de alimentos retroceden ante una recuperación en la oferta**

Danielle Wiener-Bronner, CNN Business August 12, 2020, Food prices overall fell a seasonally adjusted 0.4% in July, the first decrease since April of last year, the Bureau of Labor Statistics reported Wednesday. Prices of food for the home fell 1.1% in July, compared to an increase of 0.7% in June.

Grocery costs have been rising during the pandemic as demand has surged. Although there's been no shortage in food, supply chain failures have tightened the supply of items reaching stores, which has driven up prices.

Now, it seems prices are starting to stabilize. Meat prices in particular finally fell after soaring in May and June,

From June to July, beef and veal prices went down 8.2%. Uncooked beef roasts and steaks got 8.7% cheaper. Pork prices fell 3.2%. Consumers paid 5.7% less for ham and pork chops, and 2.6% less for chicken.

But there was one type of meat that got more expensive: hot dogs, which have been in high demand. Prices jumped 2.4% last month, perhaps in part because of the Fourth of July holiday.

The fall in meat prices come as producers' activity starts to return to normal. In the spring, major meat processors closed their plants because workers fell ill with Covid-19, or slowed operations to allow for new safety practices. Production slowed and prices soared.

From April to May, beef and veal prices rose 10.8%. Uncooked beef steak prices jumped 11.6%. Pork chops prices went up 8.4%. Hot dogs got 1.6% more expensive. From May to June, beef and veal prices rose 4.8%. Uncooked beef steak prices went up 5.1%, and pork chops got 4.3% more expensive. Hot dog prices spiked 4.9%.

The meat sector is still not completely back to normal. At Tyson, one of the world's largest meat processors, some plants "continue to operate at decreased production levels," said CEO Noel White during a recent analyst call discussing the company's financial results. But all plants were in operation as of early August.

Other groceries got cheaper in July, as well.

Egg prices fell 4%. Potatoes were 3.1% cheaper. Peanut butter prices went down by 2.4%. Breakfast cereal got 1.8% cheaper. Fresh cakes and cupcake prices fell 1.5%, and cheese was 1.6% lower.

But a few categories got pricier: Soup went up 1.2%, lettuce got 1.6% more expensive and margarine prices jumped 2.2%.

### **COVID-19 modificó pautas de consumo**

August 12, 2020 While it seems like much of the world has changed since the COVID-19 pandemic began, Kansas State University nutrition specialist Sandy Procter says some of American's eating habits have remained the same.

She cited an annual report called the Eating Occasions Compass from the Hartman Group, a consulting firm that studies the American food and beverage culture. This year, the group reports that while we hunkered down in our homes, we continued to have the same number of meals and snacks as we did before the pandemic began.

"The statistics of when we eat, and what meals and snacks we eat, continue to be identical," said Procter, who spoke recently on the K-State Research and Extension program, Sound Living.

Yet, while when we ate remained the same, one not-so-surprising change was where we ate.

According to the report, in-home eating accounted for 88% of all eating and drinking occasions in Spring 2020, an increase of 12% from 2019. The number of occasions in which Americans ate away from home was cut in half – 12% in 2020 compared to 24% in 2019; just 4% of meals were eaten at restaurants during



the time period studied, down from 10% one year earlier. Eating at work and on-the-job decreased dramatically.

“The study found that Americans are more likely to be purchasing foods and beverages further away from consumption,” Procter said. “Stock-up trips (to grocery stores) are now more likely to contribute to everyday eating. But they found that young adults are the ones most likely to purchase foods for immediate consumption, often by delivery or carryout.”

Supporting research tells Procter that more eating at home probably translates to eating more healthfully. In fact, one of the report’s key takeaways is that instead of purchasing ready-to-eat foods, Americans are choosing to cook more often and try new recipes.

“We have more time to cook and there’s more interest in knowing the source of our foods, or preparing foods from scratch,” she said. “This survey reveals we are more interested in knowing how everything we bring into our lives affects our health.”

The Hartman Group surveyed 2,463 American adults aged 18 to 73 between April 9-30. Other key findings include:

From morning through lunch, Americans are eating more often with others.

Boredom plays a role in Americans’ food choices. Many begin the day with healthy intentions, but their food choices become less healthful in the evening and late night.

Lunch has taken on more characteristics of dinner. Americans are more likely to prepare a “higher-stakes meal” (one that requires more cooking than just microwaving) for lunch than before.

Early-morning snacks are more likely to be consumed with others, but afternoon snacks are more often consumed alone – a finding that the Hartman Group calls the “last bastion of ‘me time.’”

Third-party delivery services have taken on increased importance, especially among Millennials. Americans are more likely to order ahead, by kiosk, or drive-through.

Procter notes that time will tell if the healthy habits indicated by this year’s Eating Occasions Compass will stick around.

“When we are able to go back to our schedules and everyone no longer is encouraged to work at home, I suspect some of these new, healthier habits might slip; in some cases, quite a bit,” she said. “But I think we can be hopeful that some of those healthful habits will become a little more permanent, or show up more often. Hopefully those who have never cooked before and have now ventured there are going to continue to find the positives in that.”

The Hartman Group’s full report on the Eating Occasions Compass is available online for download. More tips for healthy eating are also available online from K-State Research and Extension.

## **AUSTRALIA**

### **Precios del Ganado superan a los vigentes en EE.UU.**

Jon Condon, August 13, 2020 In Aussie dollar terms, US beef is 25pc cheaper than Australian at present. Will it spark renewed interest in imports?

THE changing fortunes of beef industries on either side of the Pacific has led to mounting speculation that the United States may soon seek formal approval to export beef to Australia, for the first time since a ban was imposed in 2003 after the discovery of BSE in the US beef herd.

Current cattle and meat price comparisons mount a compelling case for US beef to re-appear in Australian supermarket and butchery chilled cabinets, a recent analysis suggests.

As reported earlier, Australian cattle prices are now the highest in the world, as supply is severely restricted by two years of drought. At the same time a surplus of beef has appeared in the US industry, pushing prices sharply lower.

One large retail chain, with outlets in most Australian states, has already flagged interest in stocking competitively-priced US beef, if access issues can be resolved.

Historically, the motivation to secure access for US beef into Australia has been limited, because for lengthy periods, the sums simply did not make imported product attractive on the Australian market.

However prior to the ban being imposed on US beef imports in 2003, small opportunistic ‘windows’ would occasionally open, when the sums made such trade worthwhile. This was often for single cuts like rumps, which could run into surplus on the US market in mid-winter, at the same time as barbecue season was in full-cry in Australia in mid-summer. Additionally, Australian processors often took their annual breaks in December/January, making small consignments of US beef an attractive proposition into Australia.

The US product rarely attracted attention back then, and was often not clearly identified as US in origin. US chilled beef exports to Australia in the 1980s and 90s never exceeded 100 tonnes a year, import statistics show.

25pc price advantage, analysis shows



However the wholesale beef price surge seen on the Australian domestic market has again revived interest in prospects for importation.

An analysis conducted last week suggested USDA Choice grade rumps, typically fed around 130-150 days, could be landed in Australia for a little over A\$9/kg. In comparison, Australian domestic rumps (Angus, marbling score 2+) of similar quality were on offer in the wholesale market last week for around \$12/kg.

That's roughly 25 percent cheaper than an equivalent Australian grainfed rump, of similar specification. Comparisons between US Select grade rumps (versus Australian generic 100-day) showed a similar \$2.65/kg advantage to the US product.

On some secondary cuts, like eye-rounds and knuckles, the advantage to US product was even larger – as much as \$4.51/kg in the example of eye rounds, and \$5.36/kg for top rounds of similar quality.

That assessment was made using a domestic pricing list from a major US packer, converting the price back to Australian dollars, and adding a typical reefer freight rate landed Brisbane or Sydney. The calculation was based on an A\$ exchange rate of US71c (rates are even higher than that today), and a freight cost (container basis) of 50c/kg added on to the C&F price.

By any measure, the comparison suggests that US beef would be extremely competitive on the Australian domestic beef market if it could be sourced, under current conditions.

“Australian beef production is struggling due to the effects of two years of drought, driving prices higher. At the same time there is a surplus of US beef at present, bought at very reasonable livestock prices,” a large retail operator told Beef Central. “If the (international trading) world was on a level playing field, then it is more than likely that US beef would be showing up on the Australian market, right now – in considerable quantity,” he said.

Australian retailers have largely absorbed recent purchase price increases in their margins, but are now looking at alternatives to reduce their procurement costs.

State of play in US access process

So what is stopping trade in US beef coming into Australia right now?

First, a bit of history, set out in dot-points.

Up to 2003, the US had access to the Australian beef market, but as described earlier, trade was extremely limited, because Australian beef prices were historically much lower than those in the US, making no financial case for export.

Access was lost when the US detected its first case of BSE in 2003. Australia, along with many other markets, suspended imports of US beef.

Three countries (the US, Japan and The Netherlands) that were earlier impacted by BSE requested access to Australia's beef market in 2015, triggering a risk assessment and review process by the Australia's Department of Agriculture and Water Resources, taking into account biosecurity and food safety considerations.

In 2017, DAWR completed its risk assessment, concluding in its final report that imports of chilled and frozen beef from the US, Japan and the Netherlands should be permitted into Australia, subject to compliance with specified risk management measures. Stipulations included that listed establishments in each country establish HACCP-based QA plans, and have verified bacteriological testing programs equivalent to Australia and meeting Australian standards.

A number of checks and balances still had to be completed before trade could start, however:

The animal health systems and production and processing controls in the applicant countries had to be assessed, and imports would only commence if the risks could be safely managed to a very low level that is consistent with Australia's biosecurity policies, DAWR said.

Following finalisation of the risk advice from FSANZ, the department would propose risk management measures to manage any identified food safety risks.

Bilateral certification arrangements would then need to be agreed between Australia and the exporting country.

“Where each of these requirements is met, any trade will then be a commercial decision,” a DAWR spokesperson said at the time.

Of the three countries seeking access to the Australian market back in 2015, only Japan has executed its right to access. Japan completed its application process and received formal approval in August 2018. Today, small quantities of high-value Japanese-produced Wagyu beef is sold in Australia, from about ten approved Japanese abattoirs.

The Netherlands (interested principally in milk-fed veal, not beef) has never sought to activate its application. For whatever reason, nor has the US sought to execute its formal application for access to Australia. The lack of any pricing advantage (up until recent times) may have been part of the reason.

In a recent inquiry to the Australian Department of Agriculture, a spokesperson confirmed that government to government negotiations were ongoing concerning potential market access for US beef products to Australia, “as part of the department's standard processes.”





“The department is unable to advise when market access may be achieved, as this is subject to the US’s ongoing participation in our process,” they said.

Beef Central also approached the US Meat Exporters Federation about beef access prospects to Australia. “Our latest update was simply that the issue is still under discussion,” a USMEF spokesperson told us on Wednesday.

### **Divergen mercados de bovinos y ovinos**

13 August 2020 After a period of fluctuation, sheep and lamb prices have tumbled. However, unlike the sheep market, cattle prices are unmoved and continue to be reported at or close to record levels. Why the divergence in prices across species?

The impact of COVID-19

A holistic assessment points to the impact of COVID-19 on foodservice demand for Australian sheepmeat as the main drag on domestic lamb prices, at a time when prices would ordinarily be reaching their seasonal peak.

As to the impact of COVID-19 on foodservice demand for Australian beef, widespread restrictions and lockdowns have also been detrimental to overseas demand. However, the winter supply contraction, market diversification of product supporting stable retail demand, heightened demand for quick food service options and a favourable rainfall outlook have so far provided support to domestic cattle prices.

Market pressures

The three largest export regions for Australian sheepmeat in 2019 were the United States (US), China and the Middle East (MENA), accounting for 69% of total exports. A comparison with Australian beef exports shows that shipments to the US, China and Japan, accounted for the same percentage of total exports last year. However, Australia’s position within the global trading environment and differing exposure to retail and foodservice channels has contributed to the divergence in prices, as a myriad of COVID-19 impacts across the supply chain have had an overburdening effect on domestic sheep and lamb prices.

Australia produces a small portion of the world’s sheepmeat supply but accounts for approximately 38% of exports and is the largest supplier to the global market. Conversely, Australia accounts for around 16% of the world’s beef trade.

A full-scale return to pre-COVID-19 foodservice demand is unlikely in the short-term for high-end foodservice outlets. These outlets are usually a key channel for Australian sheepmeat due to its status as the leading supplier of prime lamb into global markets. Subsequently, the flow of Australian sheepmeat into key markets has fluctuated slightly relative to previous years.

Australian sheepmeat exports for the calendar-year-July

Lamb exports to China have performed well through 2020, lifting 1% for the year-to-July, to remain the largest export destination. Relative to total Australian lamb exports, China’s market share for the year-to-date has expanded out to 27%, up from 24% in 2019.

The US has taken a hit and its reliance on the foodservice sector has underpinned a 3% decline in lamb shipments, albeit mutton exports have performed well. US cold stores report that lamb inventories in freezers are up 16% compared to year-ago levels, as end-users struggle to find suitable buyers

Weakened demand from the Middle East has been multifaceted, as the crude oil-dependent countries battle with sharp economic pressures on the back of subdued oil prices, a downturn in the aviation industry and subsequent declines in tourism to the region. In contrast to the expansion seen in the China market, MENA’s total market share of Australian lamb exports has fallen 5% on 2019 to now sit at 20%.

Unsurprisingly, with Australia’s reliance of global markets, export prices have come under pressure, in turn pulling domestic offerings lower. The Middle East is regarded as a high-value market for Australian sheepmeat, with an established carcass trade to the region underpinned by substantial growth in air-freight in the last ten years.

Higher-value product that would normally be destined for the Middle East has seen a swing towards China, likely at a lower price point. While demand in China across all proteins remains robust as the African Swine Fever-induced deficits still remain, a continued preference for pork, forecast growth in the China flock this year and strong beef imports from South American suppliers (total China beef imports are currently up 43% on 2019 for the calendar year-to-date), has dampened average sheepmeat export prices.

While lamb is a popular protein across the Middle East and Asia, as a result of COVID-19, consumer disposable income could tighten, further supporting softening demand for lamb.

Retail support

Amid the COVID-19 pandemic, demand for beef has remained buoyant, in particular at a retail level, as consumers have increasingly pivoted towards home dining. This has been evident in Australia and in key overseas markets where restrictions and lockdowns have been implemented. In established export markets such as Japan and Korea, Australian beef has a strong retail presence, which has helped to maintain a stable level of demand. This has been coupled with the fact that sheepmeat remains a niche





protein across the world and beef continues to be the preferred protein in many of Australia's key export markets.

Retail meat sales in Japan have softened since April with a gradual recovery in the foodservice sector, however, meat sales are outperforming overall food sales. In the US, Steiner Consulting Group commented that retail remains in good shape in the build up to the Labor Day weekend in September and demand for manufacturing beef is strong.

#### Domestic market influences

The developing situation in Victoria, the largest lamb processing state, has contributed to the market volatility in recent weeks. Processor workforce capacity in Victoria has been scaled back for six weeks, creating logistical challenges across the supply chain. However, lamb prices had started to recede before any state-wide restrictions came into place. The global uncertainty had spread into domestic markets and has specifically impacted processor and producer confidence, despite domestic conditions improving.

The availability of lambs for slaughter in the domestic market should only increase from this point onwards, as the number of new season lambs should gradually climb until October/November. On the back of improved seasonal conditions, reported survival rates are higher compared to year-ago levels, which will lend support from a flock rebuild perspective. However, the influx of new season lambs is showing at a time of sustained global demand uncertainty, and domestic prices have started to reflect the seasonal decline much earlier than the previous two years.

#### Prices

According to National Livestock Reporting Service (NLRS) data, young lambs to processors are up substantially across New South Wales, Victoria and South Australia to 91,000 head since 1 July, compared to year-ago levels when fewer new season lambs had entered the market. These trends highlight a challenging situation for producers, as supply is exceeding demand, furthering the impact on saleyard and grid prices.

Across the cattle market, yardings have continued to decline this week, fuelled by good rainfall across the eastern states, and with no sharp increase in supplies anticipated, prices should continue to find support. That being said, cattle prices are not immune to the COVID-19 headwinds. Processors are increasingly stretched in securing finished cattle. Recently, a large export processor has scheduled a two week plant shutdown due to a lack of cattle supply, drawing to attention the opposing supply dynamic in the cattle market.

The National Trade Lamb Indicator on Tuesday 11 August was reported at 696¢/kg carcass weight (cwt), down 159¢/kg compared to last year. However, the indicator remains 63¢ above the five-year average, despite a sharp decline since 1 June.

The National Heavy Lamb Indicator on Tuesday 11 August was reported at 631¢/kg carcass weight cwt, down 254¢/kg compared to last year. The indicator has now moved in line with the five-year average at 637¢/kg cwt. Heavy export lambs have seen the largest decline of all categories as processors have to increasingly sort lighter specifications.

The National Feeder Steer Indicator was reported at 390.9¢/kg live weight (lwt) on Tuesday 11 August, 87¢ above year-ago levels and 77¢ higher than the five-year average. Strong competition for suitable feeder cattle and heightened demand for restocker cattle, combined with a limited availability of steers in the domestic market, has helped sustain high prices.

The National Medium Cow Indicator on Tuesday 11 August was reported at 272¢/kg lwt, 58¢ higher year-on-year and 59¢ above the five-year average. Demand for breeding stock has lifted on the back of improved conditions and solid demand for grinding beef in domestic and global markets has seen processors competing more fiercely with restockers this year.

The Eastern Young Cattle Indicator (EYCI) was reported at 758.25¢/kg cwt on Tuesday 11 August, 226¢ higher year-on-year and 193¢ above the five-year average. On the back of more good rainfall across the eastern states, a decline in store cattle yardings and the intention to restock paddocks, these factors continue to keep the indicator within touching distance of its record level.

### **Faena disminuyó en junio y existencias en feed los son las menores desde 2017**

13 August 2020

#### Key points:

Cattle slaughter continued to track below year-ago levels

The female portion of total adult slaughter remained elevated at 56%

Heavier carcass weights have not been enough to offset a decline in production

#### Cattle slaughter

For the month of June, national adult cattle slaughter eased 14% from year-ago levels to 612,000 head, taking the year-to-June total to 3.82 million head, down 7% year-on-year. Victoria reported the largest year-on-year decline, easing 17% to 123,200 head, with New South Wales and Queensland down 15% and 14% to 123,000 and 291,000 head, respectively. With continued disruptions across domestic and



international markets, as well as the contraction in availability of livestock, cattle slaughter in June fell to an eight-year low, 12% below the June five-year average of 695,200 head.

The female portion of total slaughter in June accounted for 56%, holding steady with May levels. These elevated levels have continued to slow the pace of a herd rebuild, as female slaughter rates need to taper off to below 47% of the national kill for the rebuild to commence. Queensland was the main driver, accounting for 43% of total female kill at 145,300 head. While prices encouraged larger yardings for the first half of the year, the portion of female slaughter has been exacerbated by low male turn-off. For the month of June, male slaughter totalled 272,000 head, down 8% on year-ago levels and the lowest since April 2019 (excluding December totals due to processing plant closures).

Improved pasture availability across key cattle producing regions has supported heavier weights, with average adult carcass weights up 10kg/head on year-ago levels to average 289kg/head. Male carcass weights saw a modest increase of 4kg year-on-year to average 325kg/head, while female carcass weights reported a strong 10kg/head lift to average 260kg/head.

Despite heavier carcass weights, beef production for the month declined 11% on year-ago levels to 177,000 tonnes carcass weight (cwt), a reflection of the significant slowdown in cattle slaughter. Production is likely to continue tracking below year-ago levels for the remainder of the year, driven by the limited supply of slaughter-ready cattle and heightened restocker competition for breeding stock.

13 August 2020

Key points:

Queensland cattle on feed increase with declines seen across all other states

National feedlot capacity continues to climb despite reduced numbers on feed

Record grainfed turnoff for fiscal year in South Australia and Western Australia

The results from the June quarter ALFA/MLA feedlot survey reported a 7% decline in cattle on feed from the March quarter to 1,010,192 head, the lowest level since December 2017. Despite sustained demand for high-quality grainfed product in overseas and domestic markets, the impact of improved seasonal conditions and subsequent restocker demand has pressured the lot feeding sector.

The absence of any good rainfall in Queensland since April saw pastures begin to dry out, resulting in a continued supply of feeder cattle entering the market, sustaining numbers on feed across the state. As a result, Queensland was the only state to report increased numbers on feed, up 1% for the quarter to 611,683 head. All other states recorded significant declines from the previous quarter, as favourable seasonal conditions increased restocker activity and developing uncertainty across the foodservice sector pressured feedlot placements.

While most states reported increased grainfed turnoff for the 2019-20 fiscal year, reduced turnoff in Queensland resulted in national grainfed turnoff easing 3% from record levels seen in 2018-19, to 3,044,134 head in 2019-20. Declining 8% from the record level of turnoff in 2018-19, Queensland grainfed turnoff totalled 1,758,572 head. Grainfed turnoff in South Australia and Western Australia posted records in 2019-20, totalling 121,512 and 154,224 head, respectively. While not a record, grainfed turnoff in Victoria increased 7% year-on-year to 215,592 head in 2019-20, and New South Wales remained stable with year-ago levels at 794,237 head.

For the 2019-20 fiscal year, grainfed turnoff accounted for 37% of total adult cattle slaughter, 1% below year-ago levels. The portion of grainfed turnoff of total adult slaughter peaked at 45% during the March quarter, before easing to 37% in the June 2020 quarter.

Despite a decline in the numbers on feed so far in 2020, AUS-MEAT accredited national feedlot capacity continued to increase in the June quarter, reaching a record 1,432,989 head, 3% higher than March and 4% above year-ago levels.

### **Cattle Council apreció el debate internacional sobre la mejor manera de medir el impacto de la agricultura sobre el cambio climático**

Beef Central, August 12, 2020

CATTLE Council of Australia has welcomed fresh international debate on the best method for measuring the global warming impact of animal agriculture.

As Beef Central published yesterday, the European Union is being lobbied by independent climate scientists to consider alternative models to make sure meat producers are treated fairly.

Cattle Council President Tony Hegarty said it was reassuring to see the issues Australia's beef industry faces are shared by producers around the world.

"It doesn't matter where they are, producers just want the best science to make sure the job is done well," Mr Hegarty said.

"In Europe this campaign is being led by eminent climate scientist Professor Myles Allen and his team from Oxford University.

"We're all asking our governments the same question – is the current model fair and accurate?"



“Livestock emissions break down in around 12 years, while emissions from fossil fuel industries can take thousands of years to deplete – it’s a big difference.

“If animal agriculture is lumped with an unfair burden it will impact food production when we need to feed a growing population. Beef is dense in nutrients and the only product we can sustainably mass-produce in many parts of this country.

“Governments around the world should be having a good, long look at the agreed Global Warming Potential-100 (GWP100) model, and alternatives such as Global Warming Potential star (GWP\*).

“This follows on from agricultural movements in New Zealand and the United Kingdom for their governments to consider GWP\*.

“In Australia the red meat industry has already striving for carbon neutrality by 2030.

“We’ve made great progress, having cut our emission by 56.7% since 2005,” Mr Hegarty said, as detailed in the recent Australian beef industry sustainability update.

## **EMPRESARIAS**

### **JBS ofrece 5,200 empleos en Brasil para compensar bajas por COVID**

10 August 2020

Food processing giant JBS SA is hiring an additional 5,200 workers in Brazil in a bid to boost output for its export base while contending with ongoing COVID-19 cases among workers.

Reuters reports that cases of the novel coronavirus among meat plant workers and the subsequent slow-downs and shutdowns disrupted commercial activity in the second quarter of 2020.

Most of the new positions will be “to modernise the lines and assist in production,” the company said in a statement on Friday 7 August. A minority of the new hires are in response to the COVID-19 pandemic, which forced JBS and rivals to remove high-risk workers like pregnant women to protect them during the health crisis.

JBS said the jobs are for slaughtering and de-boning beef, poultry and pork in 16 Brazilian states. Other positions also opened up at its distribution centres, stores, poultry incubators, and feed units.

Last week, JBS said it had hired more than 10,000 people between March and June in response to COVID-19. Its plants have been hit by a string of outbreaks that led to closures in at least three states for testing and enforcement of stricter health protocols.

Brazilian meatpackers recorded 24,500 net job additions between January and June even as the overall economy shed 1.2 million jobs, government data show.

JBS said most of the new jobs announced on 7 August are in Southern Brazil, where it produces pork, poultry and prepared foods. JBS also opened 700 positions in Mato Grosso and Rondônia.

### **JBS invertirá US\$ 200 millones para ampliar su negocio en Estados Unidos**

12/08/2020 - La multinacional brasileña construirá una planta de derivados cárnicos.

El grupo JBS, el mayor productor mundial de proteína animal, construirá una nueva planta de derivados cárnicos en Estados Unidos, a través de su filial Plumrose. El proyecto demanda una inversión de US\$ 200 millones, según publicó esta semana el portal Eurocarne.

“Plumrose USA está en una posición única para satisfacer la creciente demanda de los consumidores de carnes italianas de gran sabor y alta calidad, como el salami y el prosciutto”, dijo Thomas Lopez, presidente de Plumrose USA.

“El proyecto refuerza nuestro compromiso estratégico de hacer crecer nuestro negocio y ser un socio más fuerte para nuestros clientes, brindar mayores oportunidades a los miembros de nuestro equipo y aprovechar todo el potencial de las proteínas”. La empresa se fundó hace más de 85 años y se dedica a los derivados cárnicos contando con 5 plantas de producción.

### **JBS cerró dos plantas en Australia**

Jon Condon, August 12, 2020

IN a sharp reminder of how tough the Australian red meat processing environment is at present, JBS Australia has confirmed it will close two of its flagship Australian red meat processing facilities, for different reasons.

The company’s Dinmore plant west of Brisbane – easily the largest beef processing facility in Australia, with normal daily operating capacity of 3400 head – will shut for at least a fortnight from Monday 24 August, as the processing industry continues to struggle to raise viable kills in the face of a drought-impacted livestock supply.

Further south, JBS will close its Brooklyn beef and sheep plant indefinitely.



Beef Central understands that Dinmore plant will operate for just two days next week – Tuesday and Friday being the last boning shifts – before the closure is enacted. The company has provided no assurances that it will re-open Dinmore after the scheduled fortnight closure, however.

While the plant had a week-long maintenance shutdown in June due to the growing cattle supply crisis, the upcoming closure is the first extended mid-year closure at the site since 2014, when herd rebuilding was in full-flight and cattle became extremely scarce.

In a clear sign of the industry-wide struggle to secure slaughter cattle supply this year, Dinmore has been operating mostly under three-day weeks since May, delivering throughput at around 50pc of plant capacity. As a high-throughput, low-margin business, it is well known that red meat processing becomes increasingly unprofitable, as throughput levels decline.

The company told Beef Central that it had been losing money at Dinmore ‘for a long time’ this year. The closure would have a big impact on customers, it said, with some consignments inevitably delayed by the decision.

Rates of slaughter across eastern Australia have gradually deteriorated during 2020 since the March rain event, as supply has dried up after two years of drought, pushing stock prices sharply higher. At the same time, cattle prices overseas have declined. In this recent article, Beef Central pointed out that Australian slaughter cattle are now the most expensive in the world.

Australian processing is trapped in a vicious cycle at present, with near-record high cattle prices colliding with listless global beef demand, due to increasing COVID uncertainty. High rates of production out of the US and South America, combined with a sharply appreciating Australian dollar have not helped the equation.

On the revenue side, JBS, like all Australian export processors, is facing challenging trading conditions in world markets, with abundant and relatively cheap US and South American beef eroding our competitiveness.

**Jobkeeper factor**

In confirming Dinmore’s closure to Beef Central this afternoon, JBS clearly laid some of the blame for the development at the feet of the Federal Government’s COVID JobKeeper program.

Neither JBS itself, nor its staff, receive any Jobkeeper financial support, but it is well known that other meat processors and pastoral companies are operating under the Jobkeeper financial umbrella.

As Beef Central pointed out in this earlier article, with labour representing about 70pc of the \$300 cost to process a typical 300kg beast, Jobkeeper has in fact created a significant imbalance in the competitive marketplace for Australian slaughter cattle, effectively subsidising some competitors when buying next week’s kill.

**Indefinite closure at Brooklyn, VIC plant**

In a second major development in the company’s southern Australian operations, JBS has confirmed to Beef and Sheep Central the indefinite closure of its large Brooklyn beef and lamb processing facility near Melbourne.

Brooklyn has been caught up in Victoria’s COVID epidemic that has swept through a number of the state’s processing plant, boning rooms and distribution centres over the past two months, with the list of infected staff at Brooklyn now at more than 100.

Since last Saturday, Brooklyn was bound to operate under the Victorian Government’s new 66 percent manning level formula which applies to processing businesses as the state tries to rein- in its COVID epidemic.

JBS has told Beef and Sheep Central that the decision was reached following extensive consultations with the Department of Health and Human Services (DHHS) in Victoria.

“The persistence of community transmission of COVID-19 in Victoria and the directives from DHHS have meant it is impossible to operate JBS Brooklyn in the current COVID environment,” JBS Southern chief operating officer Sam McConnell said.

JBS Brooklyn’s beef and lamb processing workforce would be stood down for the period of time it takes for the Victorian Government and the Department of Health and Human Services to contain the community outbreak of coronavirus, the company said.

Employees of the company’s Brooklyn Beef and Lamb workforce who were eligible, would be entitled to the state government’s Pandemic Leave Disaster Payment following the DHHS determination for beef and lamb team members to quarantine for 14 days from their last shift.

Mr McConnell said JBS had worked tirelessly with the Australian Meat Industry Employees Union and the Victorian Department for Jobs, Precincts and Regions to ensure that the workforce would be able to access the entitlement.

“I would like to thank those partners for the collaborative nature in which these discussions were held to ensure that we arrived at the right outcome,” he said.

“The health and well-being of our employees, and the wider community in which we operate, is of paramount importance to JBS Australia. As a company, we recognise that our workforce is our greatest





asset and we hope that access to this payment goes some way in addressing any concerns around job security and pay during Brooklyn's closure."

Paul Conway, Victorian State Secretary of the Victorian AMIEU, said that securing the pandemic payment was an important win for his members who had been working hard to support Victoria's meat supply during COVID.

"JBS has been in constant communication and consultation with the AMIEU and the DJPR to ensure that workers at the Brooklyn's facility will be entitled to the Pandemic Leave Disaster Payment. Their engagement with all stakeholders through this process and the measures they have introduced at the facility to protect their workers has been of the highest industry standard," Mr Conway said.

JBS said it looked forward to continuing to work with the AMIEU, Victoria Health and DHHS to ensure JBS Brooklyn Beef and Lamb processing operations can resume as soon as possible.

Beef Central, August 13, 2020

Meatworkers working at the JBS Dinmore abattoir in southern Queensland are facing a grim and uncertain future as the plant readies itself for a two-week shutdown starting on 24 August.

In a statement issued today, the Australian Meat Industry Employees' Union says workers at the plant have endured short working week stand-downs over many weeks since mid-year, that have seen their incomes slashed by 40 percent.

"Due to the qualification requirements for the Federal Government JobKeeper scheme, these workers have been left with no financial assistance whatsoever," the AMIEU's Queensland branch secretary Matt Journeaux said.

"They cannot even receive JobSeeker (unemployment) payments because technically they still have a job."

Under the Federal Government's JobKeeper scheme conditions, JBS Australia's annual turnover in excess of \$1 billion means the company must record a 50pc loss in turnover before it becomes eligible for the subsidy.

"Through no fault of their own, these Dinmore workers are wearing the brunt of a system that should have been designed to protect them, but instead has let them down dreadfully, Mr Journeaux said.

"JBS management has cited the availability and price of suitable stock for forcing their hand in this decision to close. At the same time, numerous other meat processors are receiving JobKeeper, and unfortunately the playing field has been skewed in their favour," he said.

Some processors, which had an annual turnover of less than \$1 billion, had genuinely qualified to receive JobKeeper, due to a 30pc reduction in turnover. However some larger processors were using relationships with third-party labour hire companies to 'ort the system' and receive JobKeeper assistance by 'deception', the AMIEU claimed.

"These companies use much smaller labour hire companies, which have a turnover less than \$1 billion, to provide labour to their plants. These labour hire companies only have to show a reduction in turnover of 30pc, and they are then eligible to receive JobKeeper assistance," Mr Journeaux said.

"It does not take a genius to work out that those savings are then being transferred to the host employer, who in turn is making a motza. This is a disgraceful situation and it should be an offense to milk the system in this way."

The situation caused an uneven playing field when processors were competing for livestock, he said.

"The taxpayer is paying a premium for cattle, while the workers are being thrown the crumbs. Cattle prices in Australia are now the highest in the world and the JobKeeper premium is playing a major part in this," Mr Journeaux said.

"JobKeeper was a great initiative that was designed to help workers keep their jobs, and helped support them throughout this Covid-19 crisis. Instead, for meatworkers, it has become a tool used against them with absolutely no support for them or their families."

The AMIEU called on the Federal Government to shut down the 'orts' and to urgently change the support system to help the Dinmore workers through this time.

"These workers are doing it tough. I certainly could not care less about the politics of this, but these workers deserve better and this Federal Government has an obligation to make sure they do. They are salt of the earth working people who pay their taxes. They work hard and at the moment they need a hand," he said.

### **Athena Foods acuerda compra de Vijagual por US\$26 millones**

7 de agosto de 2020 22:18 La planta de Bucaramanga pasa a formar parte del líder de la industria frigorífica de América del Sur. Esta planta será modernizada y duplicará su capacidad productiva para transformar más de 700 animales diarios y lograr mayor presencia en el mercado internacional.





Por un valor de US\$ 26 millones, Athena Foods (que hace parte del grupo Minerva S.A.), estableció un acuerdo de adquisición de la planta de sacrificio y deshuesado del Frigorífico Vijagual S.A. ubicada en Bucaramanga la capital del departamento de Santander.

Así lo dio a conocer Leandro Protzen, COO Colombia de Athena Foods, quien considera la mencionada transacción como una noticia de gran aporte para el sector ganadero y particularmente para la industria cárnica del país.

El acuerdo comprende la adquisición de activos, capital de trabajo e inversiones para ampliar y modernizar las instalaciones de la mencionada planta ubicada al nordeste de Colombia.

“Hemos logrado este importante objetivo que configura parte del propósito que nos mueve como compañía”, resaltó el empresario.

Considera que es un aporte al desarrollo de Colombia y al fortalecimiento del sector cárnico a través del posicionamiento de la carne colombiana en el exterior.

“Con esta planta que cuenta con una capacidad de procesamiento de 700 cabezas al día, estaremos duplicando la capacidad de producción de la compañía a nivel nacional para así continuar aportando a posicionar la carne colombiana en cada vez más países alrededor del mundo”, agregó Protzen.

Norma internacional

El Frigorífico Vijagual, funciona bajo el sello HACCP cuya operatividad reduce, controla y elimina los peligros que puedan comprometer la inocuidad de los alimentos que produce.

Además su esquema de producción está certificado con la norma ISO 9001 de ICONTEC que garantiza cada proceso de su unidad productiva en la que trabaja de manera amigable con el medio ambiente.

Parte del grupo

A partir de dicha operación Vijagual comienza a ser parte del grupo Athena Foods que es una empresa que pertenece a Minerva S.A. compañía con sede en Brasil y líder en el mercado global de exportación de carne de América del Sur.

Además de tener el frigorífico Red Cárnica cuya planta transformadora se encuentra ubicada en Montería en el departamento de Córdoba en Colombia, también hace presencia con esta actividad en otros 4 países latinoamericanos: Argentina, Chile, Paraguay y Uruguay.

### **Marfrig registró ganancias records en el Segundo trimestre de 2020**

Por: Portal DBO 12/08/2020

Valor de R\$ 1,6 bilhão é reflexo de uma melhor gestão operacional, segundo a companhia

8:13 pmA Marfrig Global Foods, uma das maiores empresas globais de processamento de carne bovina, anunciou na tarde hoje (12/8) seu resultado fiscal para o segundo trimestre de 2020.

De acordo com a companhia, o período foi de recordes históricos – resultado do desempenho operacional, significativamente acima da média de mercado – e das operações da América do Norte e América do Sul. A receita líquida consolidada atingiu, entre abril e junho deste ano, R\$ 18,9 bilhões, um crescimento de 54% em relação ao mesmo período de 2019.

Continue a leitura após o anúncio

O Ebitda Ajustado disparou 266% na comparação anual, passando de R\$ 1,1 bilhão para R\$ 4,1 bilhões. A margem Ebitda Ajustado atingiu 21,5% neste segundo trimestre – elevação de 1.247 pontos-base. O lucro líquido do período foi de R\$ 1,6 bilhão, contra R\$ 87 milhões no segundo trimestre do ano passado – crescimento de 1.743%. Os números registrados, muito acima das expectativas dos analistas foram acompanhados por uma geração de caixa livre de R\$ 3,3 bilhões.

Resultado da forte geração de caixa, o índice de alavancagem da Marfrig, medido pela relação de dívida líquida e Ebitda Ajustado dos últimos 12 meses, atingiu seus menores patamares históricos. Foi 1,79 vez, em dólares, e 2,07 vezes, em reais. Um term loan, com prazo de 36 meses e remuneração de Libor mais uma taxa de até 4% ao ano, substituiu um empréstimo ponte de 500 milhões de dólares. Com isso, o prazo médio da dívida da Marfrig foi alongado para 4,4 anos e os vencimentos de longo prazo passaram a representar 82% do endividamento total.

“Em um período tão atípico e desafiador, a Marfrig demonstrou sua capacidade de operar o negócio de proteína animal. Mantivemos todas as nossas plantas ativas e aumentamos a produtividade”, diz Marcos Molina dos Santos, fundador e presidente do Conselho de Administração da companhia.

A Marfrig opera na América do Norte, onde detém o controle da National Beef, quarta maior empresa de carne bovina dos Estados Unidos, e na América do Sul, com 20 unidades distribuídas por Brasil, Argentina, Uruguai e Chile. A Operação América do Norte abastece, principalmente, o mercado interno americano e é a maior exportadora de carne resfriada dos Estados Unidos para países asiáticos, como Japão e Coreia do Sul. A Operação América do Sul é a maior exportadora de carne bovina para China, um dos maiores destinos globais para produtos.



### **Minerva creo un area de Bienestar Animal**

Por: Portal DBO 13/08/2020 Nova estrutura é composta por um comitê técnico multidisciplinar de profissionais das áreas de sustentabilidade, compra de gado e transporte

A Minerva Foods, uma das maiores empresas de exportação de carne bovina na América do Sul, anunciou nesta quinta-feira(13/8) sua nova estrutura para a área de Bem-estar Animal.

Por meio de nota, a companhia afirma que o novo departamento será regido por uma nova política visando uma gestão cada vez mais sustentável.

A nova área de governança de Bem-estar Animal da companhia é composta por um comitê técnico multidisciplinar que envolve profissionais das áreas de Sustentabilidade, Compra de Gado, Transporte de bovinos, Qualidade e Comunicação.

“Seguimos os mais rígidos padrões internacionais em nossas práticas para garantir que os animais sejam tratados com cuidado, dignidade e respeito. A nova política adotada tem como objetivo conduzir nossas operações com princípios éticos e transparência não só entre nossos colaboradores, como entre nossos fornecedores e parceiros,” afirma Taciano Custodio, diretor de sustentabilidade da Minerva Foods. A companhia informa que segue as premissas dos cinco domínios do bem-estar animal recomendados pelo Farm Animal Welfare Committee (FAWC).

“Adotamos procedimentos de autocontrole internos específicos em todas as nossas plantas no Brasil e no exterior, com checklists periódicos de indicadores e com realização de auditorias internas mensalmente”, diz Tâmara Borges, coordenadora de bem-estar animal da companhia.

Criação do Selo de Bem-estar Animal

A reestruturação da área da companhia inclui a criação e adoção do Selo de Bem-estar Animal Minerva Foods, que “chancela, simboliza e unifica todas as discussões e iniciativas da companhia em relação ao tema. O selo simboliza a nova identidade e destaca a preocupação, cuidado e respeito aos animais.”

O selo estará presente em todos os uniformes dos colaboradores e em materiais de divulgação das práticas relacionadas à área, como em cartilhas compartilhadas com pecuaristas, fornecedores e documentos oficiais.