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## GLOBAL

### **OMS – USFDA No hay evidencia de riesgo de COVID por alimentos y envases**

15 August 2020 Two cities in China have detected traces of the novel coronavirus in containers of imported frozen food. The WHO believes the risk of the virus entering the Chinese food chain remains low. Reuters reports that samples taken from the surface of frozen chicken wings imported into the southern city of Shenzhen from Brazil, as well as samples of outer packaging of frozen Ecuadorian shrimp sold in the northwestern city of Xian, have tested positive for the virus, local Chinese authorities said. Shenzhen authorities identified the chicken as originating from a plant owned by Aurora, Brazil's third-largest poultry and pork exporter.

As confirmed COVID-19 cases continue to rise globally, the discoveries raise fresh concerns that the coronavirus that causes the disease can spread on surfaces and enter the foodchain. A day earlier, officials started investigating whether the first COVID-19 cases in New Zealand in more than three months were imported by freight.

Viruses can survive up to two years at temperatures of minus 20 degrees Celsius, but scientists and officials say there is no strong evidence thus far the coronavirus can spread via frozen food.

"People should not fear food, food packaging or delivery of food," the World Health Organization's head of emergencies programme Mike Ryan told a briefing.

The US Food and Drug Administration and Agriculture Department said in a joint statement "there is no evidence that people can contract COVID-19 from food or from food packaging."

Brazil's Aurora, which is unlisted, said it had not been formally notified by the Chinese authorities of the alleged contamination. The company said it takes all possible measures to prevent the spread of the coronavirus and there is no evidence it is spread through food. Brazil's agriculture ministry said it was seeking clarification from Chinese authorities.

Reuters could not immediately reach the Ecuadorean embassy in Beijing.

Shenzhen's health authorities traced and tested everyone who might have come into contact with potentially contaminated food products, and all results were negative, the city's notice said.

"It is hard to say at which stage the frozen chicken got infected," said a China-based official at a Brazilian meat exporter.

The Shenzhen Epidemic Prevention and Control Headquarters said the public needed to take precautions to reduce infection risks from imported meat and seafood.

The health commission of Shaanxi province, where Xian city is located, said authorities were testing people and the surrounding environment connected to the contaminated shrimp products, which were sold in a local market.

In addition to screening all meat and seafood containers coming into major ports in recent months, China has suspended some meat imports from various places, including Brazil, since mid-June.

Seven Argentine meat processing plants are temporarily not exporting to China because they have registered cases of COVID-19 among their employees, a source from the Argentine agricultural health agency Senasa said on Thursday 13 August.

### **COVID-19: proyecto para encarar la lucha contra enfermedades animales en el SE de Asia**

TheCattleSite News Desk

17 August 2020 Project work in 11 countries funded by the Australian Department of Foreign Affairs and Trade will aim to prevent spread of zoonotic and animal diseases. Associate Professor Navneet Dhand from Veterinary Science leads the multi-agency program.

Animal disease detectives program As the coronavirus crisis continues to unfold, a consortium of veterinary scientists has been established to train a new generation of 'animal disease detectives' in 11 countries across Southeast Asia and the Pacific.

"A year after African swine fever wiped out more than a quarter of the global pig population and with more than 200,000 people dead from COVID-19, equipping veterinarians with the tools for disease outbreak investigation and surveillance has never been more important," said program leader Associate Professor Navneet Dhand from the University of Sydney School of Veterinary Science and Marie Bashir Institute for Infectious Diseases and Biosecurity.

The scientific consortium includes more than 40 experts from veterinary schools across Australia, New Zealand and the Asia-Pacific.

"The coronavirus outbreak has underlined how urgent this work is," Associate Professor Dhand said. "The majority of emerging infectious diseases, such as coronaviruses, are zoonotic: they spread from animals to humans.

"To protect humans from these diseases we must look for pathogens and disease 'upstream' in domestic animals and wildlife before they spread to the human population."



Associate Professor Dhand said the consortium will engage with government animal health authorities and educators in the Asia-Pacific region to strengthen the capacity to detect, respond, control and prevent animal disease outbreaks that could affect human health, animal health and farmer livelihoods.

The program is funded by the Indo-Pacific Centre for Health Security at the Australian Department of Foreign Affairs and Trade.

Associate Professor Dhand said: “Our program will support our neighbours’ efforts to deal with these emerging threats and in doing so, strengthen Australia’s biosecurity, health and economy.”

Researchers emphasise that while this coronavirus has its origins in an animal transfer, there is no evidence the COVID-19 virus can be contracted from pets or other animals.

Transboundary animal diseases, which travel quickly across borders, and zoonotic diseases, which transfer from animals to humans, are increasing in frequency due to a range of factors, Associate Professor Dhand said. These include population growth, urbanisation, land-use change, encroachment into wild habitats and increasing global air travel.

“These diseases can spread rapidly across borders and have huge economic and health impacts. We are finding this out right now with coronavirus,” he said.

The DFAT-funded program will develop capacity for early intervention in the investigation and management of animal disease outbreaks in the Asia-Pacific region, helping to halt the spread of transboundary diseases.

“We will work with our international partners by strengthening on-the-job training for veterinarians and para-veterinarians,” Associate Professor Dhand said.

“Our focus on disease surveillance will support veterinary authorities to identify any change in animal health patterns so that early intervention and preventative actions can be taken to stop the spread of disease,” he said.

Alongside the on-site training, veterinarians and para-veterinarians will be offered project work with their in-country animal health ministries. Selected candidates will be provided with fellowships for further training in Australia’s world-class veterinarian schools.

## CHINA

### Importaciones de carnes en aumento

20 August 2020

Key points:

Total China beef imports are up 43% for the year-to-June

South American beef suppliers continue to grow presence in China

The value of China market continues to grow, despite Australian beef supply tightening

June import data shows the demand for animal protein in China continues to thrive across all species.

Driven by the pork shortage caused by African Swine Fever (ASF), import demand has accelerated since early 2019. Estimate conclude that ASF has destroyed approximately 40% of China’s pig herd, with industry recovery likely to take several years.

June import volumes highlight the demand for protein, with total meat imports reaching 873,000 tonnes shipped weight (swt), just shy of the record 902,000 tonnes swt in March. However, the March figure likely included carry over from port disruptions caused by COVID-19 in January and February, which indicates that demand is likely still increasing.

Year-to-date pork imports are up 153%, with supplies from the United States, Spain and Germany responding to increased demand. However, despite the increased imports, China pork prices at retail are still almost double what they were a year ago.

Beef imports are up 43% for the year-to-date, with Brazil and Argentina the top two suppliers to the market. As discussed earlier this month, Australian exports to China have softened, with South American nations picking up the shortfall. Relative to the five-year average (2015–19), Brazil and Argentina have grown their market share to 35% and 22% respectively, while Australia’s share has contracted from 19% down to 16% this year. With an increasing reliance on South American suppliers, combined with Australia’s supply contraction, this shift in China market share is unsurprising.

While import volumes of beef and pork have increased, imports of sheepmeat are one of the few species categories to show some contraction this year – down 4% on 2019 levels, primarily driven by supply factors out of both New Zealand and Australia. However, a number of additional factors have been influencing market demand this year. For instance, the majority of sheepmeat is used in hot pot restaurants which have been affected by COVID-19 restrictions. Furthermore, GIRA figures show that China’s domestic sheep/goat meat production in 2020 has lifted 2.6% compared to year-ago levels. Regardless, Australian export prices for lamb and mutton have lifted 2% and 9%, respectively, on 2019 levels, which will help to generate additional value amid periods of constrained supply.



### Global beef export prices diverge

There have been some volatile currency movements in the past month, which have affected beef export prices. The Australian dollar has appreciated and now sits at US\$73¢, while the Brazilian Real and Argentinian Peso continue to decline in value against the US dollar. This is reducing the competitiveness of Australian beef.

Australia's beef exports to China are valued at AU\$1.2 billion for the year-to-June, up 16% on 2019 levels for the same period. Australian grainfed exports to China have been growing this year, and now account for a third of all exports, up from 25% in 2019. Additionally, Australia remains the primary supplier of chilled beef to China, occupying total market share of 79% for the year-to-date, which is another key factor contributing to the growth in export value.

China remains a key destination for Brazilian beef, with reports indicating that July exports to China were an impressive 87,000 tonnes swt. The performance of Brazil's domestic market, combined with a lack of access to destinations such as Japan and South Korea, mean that Brazilian packers are particularly reliant on the China market. While South American beef exports to the US have lifted, this is off a relatively low base.

Despite economic impacts from COVID-19, the recent outlook from the OECD-FAO indicates the ASF-induced pork import demand surge will provide support to export prices in the short-term, as will the growing number of affluent households who seek high quality protein.

### **USDA estima que en 2021 la producción de carne de cerdo en China se recuperará en un 9,5%**

14/08/2020

El Departamento de Agricultura de Estados Unidos ha hecho pública el segundo de sus informes anuales sobre la evolución de la producción de carne en China para este año 2020 y 2021. En cuanto a la producción ganadera de porcino, el USDA afirma que el número de casos oficiales de peste porcina africana notificados por China disminuyó significativamente desde el segundo trimestre de 2020. Fuentes oficiales y de la industria de China coinciden en que las inversiones en medidas de bioseguridad y cadena de suministro, tomadas principalmente por empresas porcinas más grandes, han sido en gran medida efectivas para controlar la PPA propagada.

Además, el apoyo de la política del gobierno ha estimulado positivamente la recuperación de los cerdos, lo que ha dado como resultado un crecimiento continuo de los inventarios ganaderos en la primera mitad de 2020. Se prevé que esta expansión continúe en 2021. Las previsiones para 2021 comenzarán el inventario de cerdas en 31 millones de cabezas y 2021 terminando el inventario de cerdos en 370 millones de cabezas, equivalente a más del 80% del nivel previo a la expansión de la PPA.

Respecto a la producción de carne de cerdo, las cifras de 2020 serán las más bajas con cerca de 38 millones de t debido también a la debilidad de la demanda interna, pero se espera que para 2021 crezca en un 9% hasta los 41,5 millones de t conforme se recupere el censo porcino.

Sobre las importaciones, se espera que en 2020 sean de 4,3 millones de t, en niveles de récord, pero caerían en un 14% en 2021 hasta los 3,7 millones de t ante la subida de la oferta nacional. La covid-19 continúa restringiendo directa e indirectamente las importaciones de carne de cerdo, incluido el gobierno chino que toma medidas regulatorias contra las instalaciones extranjeras. Las políticas opacas de China hacia las carnes importadas crearán una cantidad significativa de incertidumbre comercial entre la industria cárnica.

En cuanto a la carne de vacuno, se espera que siga creciendo en 2021 tras las fuertes ganancias que ha obtenido este sector en 2019 y 2020. Pero el incremento de los costes productivos y la disponibilidad de importaciones a precios inferiores limitarán la expansión de la producción nacional de carne de vacuno.

Por ello, la producción en 2021 se espera que alcance los 6,9 millones de t. Si bien COVID-19 afectó a algunos mataderos e instalaciones de distribución, la principal limitación para el aumento de la producción fue la escasa demanda. La desaceleración en el sector foodservice debido a COVID-19 ha debilitado significativamente la demanda. Si bien la mayoría de las empresas han reabierto en China, los vientos en contra económicos que plantea COVID-19 continuarán afectando la demanda.

Respecto a las importaciones de carne de vacuno desde China, pese al cierre del sector foodservice en los tres primeros meses de 2020, en el primer semestre se han alcanzado los 4,3 millones de t. Pero para 2021 se espera que la covid-19 siga teniendo un gran papel en la marcha de las importaciones tanto por la demanda con posibles cierres de restaurantes, como para la oferta local.

Al igual que la carne de cerdo, las autoridades chinas han implementado una serie de nuevos requisitos comerciales relacionados con la covid-19, que crearán una cantidad significativa de incertidumbre comercial entre la industria cárnica.

Combinados, estos factores contribuirán a reducir las importaciones de carne vacuna en 2021, a 2,7 millones de t.



## **Alertan sobre faltante de alimentos hacia 2025**

17 August 2020

China is expected to have a food supply gap of about 130 million tonnes by the end of 2025 as demographic shifts see its urban population expanding while its rural workforce ages.

Reuters reports that the warning came from a Chinese government think tank, the China Academy of Social Sciences' Rural Development Institute (RDI). The report states that as the rural population dwindles and farmers struggle to boost their earning, Beijing must make food security a major priority.

Within five years, the proportion of the population living in urban areas is expected to hit 65.5 percent of China's total, up from 60.6 percent by the end of last year, with around 80 million rural residents moving into the cities.

At the same time, the proportion of rural residents aged 60 or older is expected to hit 25.3 percent, the report said, up from around 15 percent in the 2010 census.

Worries about China's food supplies returned to the spotlight this month after President Xi Jinping spoke against "shameful" food waste, prompting a wave of initiatives by enterprises and local governments.

Maintaining food supplies is a major source of political legitimacy for the ruling Chinese Communist Party, but steady population growth along with rapid rates of industrialisation and urbanisation have put the country's increasingly scarce land and water resources under more pressure.

According to a recent study by the China Institute of Water Resources and Hydropower Research, China's arable land use rose by 15.7 percent from 1981 to 2016, and could increase another 14 percent by 2032, when the population is expected to peak.

To guarantee food security, the Chinese government has sought to set limits to urban and industrial encroachment on rural regions, and it is also cleaning up polluted land and water to make more available for agriculture.

## **Guangzhou continuó importando carnes y pescado**

USDA 19/08/2020 - Guangzhou, the provincial capital of Guangdong in South China, has not/suspended imports of meat and seafood, despite widespread media reporting to the contrary. The misleading news seems to stem from a notice that a local cold storage association sent to its members on August 18 to remind them to follow established guidelines for safe handling of meat and seafood, and to ask them to temporarily suspend imports from undefined COVID-affected areas. However, importers are not in any way obligated to stop shipments as the cold storage association has no authority on the matter. (Note: The General Administration of Customs China (GACC) is responsible for import inspection and quarantine control.)

This notice was later misinterpreted in the news as the city of Guangzhou halting imports of meat and seafood, most likely due to an earlier report of a sample of imported Brazilian chicken testing positive for COVID-19.

However, Guangzhou authorities took no such action, and the city continues to import meat and seafood. More broadly, with the exception of the delisting of export establishments because of COVID-19 concerns, mainland China continues to import meat and seafood from around the world.

## **Argentina agregó una declaración adicional para exportar a CHINA**

Fonte: Valor Econômico. This post was published on 19 de agosto de 2020

Cinco frigoríficos argentinos que tiveram casos de covid-19 entre funcionários e que chegaram a ter as vendas à China suspensas voluntariamente poderão voltar a exportar para o país asiático com uma "declaração adicional" garantindo serem, agora, plantas livres da doença.

A garantia adicional, que foi oficializada ontem no site da Administração Geral de Alfândegas da China (GACC, na sigla em inglês), ocorre em meio aos esforços de Pequim para evitar a introdução do novo coronavírus em seu território a partir das importações de alimentos. A detecção, na semana passada, de traços de covid-19 em um lote de asas de frango vindo do Brasil aumentou o rigor de autoridades municipais da província de Guangdong.

Conforme o Valor informou na sexta-feira passada, Pequim e Brasília negociam um protocolo para ampliar a segurança no combate à covid-19 em frigoríficos brasileiros habilitados a exportar para o mercado chinês.

A China tem o claro objetivo de impor "risco zero" às importações de alimentos, em meio ao pavor em relação ao vírus. Mas, no Brasil, há uma diferença entre o que o Ministério da Agricultura pode legalmente fazer e o "risco zero" exigido pelo país asiático.

Sofrendo a mesma pressão, a Argentina decidiu incluir a garantia junto ao certificado dos frigoríficos exportadores. Ao que tudo indica, a declaração adicional "anti-covid" vale para os frigoríficos que tiveram casos do novo coronavírus. A Argentina é o segundo maior fornecedor de carne bovina para a China – o Brasil é o principal. No primeiro semestre, o país asiático foi responsável por 47% da carne bovina





exportada pelos argentinos. Com unidades na Argentina, Minerva e Marfrig estão entre as maiores exportadoras de carne.

Ao Valor, uma fonte da indústria argentina disse que o quadro ainda é nebuloso. Em Buenos Aires, não se sabe se a declaração de garantia adicional tem prazo de validade.

De qualquer forma, a decisão do governo argentino viabilizou, ainda que momentaneamente, a retomada das exportações dos cinco frigoríficos – quatro de bovinos e um voltado à produção de frangos.

Entre junho e julho, o governo argentino chegou a suspender voluntariamente a habilitação para exportação à China das cinco unidades. Poucas semanas depois, as plantas foram liberadas, e nesta quinta-feira, a “declaração adicional” foi acrescentada à autorização para a exportação.

Do lado brasileiro, sete frigoríficos chegaram a ter as vendas suspensas para a China. Atualmente, seis ainda estão proibidos de vender carnes para o país asiático.

Diferentemente do que ocorreu com a Argentina e outros países, o Ministério da Agricultura do Brasil não está suspendendo voluntariamente as vendas de frigoríficos que tiveram casos de covid-19.

Nesse cenário, cabe ao GACC bloquear as plantas, o que ocorreu após pedidos de informações baseados em notícias veiculadas na imprensa. O problema é que, nesse cenário, o protocolo para a retomada das exportações desses frigoríficos pode ser mais difícil.

Entre os sete frigoríficos brasileiros que tiveram as vendas para a China suspensas, apenas o mato-grossense Agra, de carne bovina, já pode voltar a exportar. Mas, neste caso, há uma particularidade irônica. Por um erro de comunicação, a China entendeu que o Brasil havia suspendido o Agra voluntariamente, o que pode ter facilitado a retomada da autorização chinesa.

Atualmente, estão com as exportações à China suspensas dois abatedouros da JBS (um de frango e um de suínos), dois da BRF (um de frangos e um de suínos), um da Minuano (de frango) e um da Marfrig (de bovinos). O abatedouro da Aurora, que exportou o lote de asas com traços de covid-19, segue, oficialmente, liberado para vender.

## **BRASIL**

### **Tendencia ascendente en los valores de la hacienda**

Sexta-feira, 21 de agosto de 2020 - Segundo levantamento da Scot Consultoria, na região Sul do Tocantins, a cotação subiu R\$2,00/@ na última quinta-feira (20/8) na comparação dia a dia, chegando em R\$230,00/@, bruto e à vista, R\$229,50/@, descontado o Senar, e em R\$226,50/@, livre de Senar e Funrural, ambos à vista.

No Espírito Santo, a cotação do boi ficou em R\$218,00/@, bruto, R\$217,50, sem o Senar, e em R\$214,50, descontado o Senar e o Funrural, preços à vista. Alta diária de R\$2,00/@.

Em São Paulo, a pouca oferta de boiadas e as compras cadenciadas das indústrias, com cinco dias úteis de escala em média, deram sustentação aos preços.

O boi gordo ficou cotado em R\$226,00/@, bruto, R\$225,50/@, livre de Senar, e em R\$222,50/@, descontados os impostos (Senar e Funrural), considerando os preços à vista.

Para a vaca e novilha gordas, a cotação ficou em R\$212,00/@ e R\$220,00/@, respectivamente, bruto e à vista. Em função do mercado aquecido para exportação e escassez de oferta, negócios para os bovinos jovens, de até 30 meses, ocorreram em até R\$232,00/@, bruto e à vista.

Fonte: Notícias Agrícolas. This post was published on 20 de agosto de 2020

Em entrevista ao Notícias Agrícolas, o Analista de Mercado da Agrifatto, Yago Travagini Ferreira, ressaltou que os preços do boi gordo atingiram o ponto de equilíbrio já que a carne no atacado não consegue avançar o patamar dos R\$ 15,00/kg. “A segunda quinzena do mês deu umas escaldada no mercado e os preços da arroba testaram patamares de R\$ 228,00/@, mas seguimos tentando romper a máxima do ano passado de R\$ 231,35/@”, afirma.

Os valores pagos pelos atacadistas não estão evoluindo em função da demanda interna enfraquecida, provavelmente a primeira semana de setembro tenha um volume maior de compra. “Ainda não sabemos do real impacto da pandemia sobre a remuneração da população, na qual não sabemos se o auxílio emergencial vai durar mais alguns meses”, comenta.

Do lado da demanda externa, os volumes embarcados estão com um bom ritmo só que a remuneração dos frigoríficos registrou uma queda com a renegociação de preços dos Chineses. “O preço médio da tonelada saiu de US\$ 5 mil no início do ano, e hoje, está em US\$ 4,029 mil por tonelada. Eles reduziram o valor pago e gera uma menor receita para o produto”, destacou.

Com relação ao confinamento, o analista aponta que os preços da reposição estão pensando muito na intenção de confinar e os preços do milho seguem com valorizações. A tendência é que os preços da arroba vão permanecer firmes ao longo deste ano, mas durante o mês de outubro pode ocorrer uma queda com a entrada de animais do confinamento do mercado. “Eu vejo um cenário de muita firmeza para o boi gordo até o final do ano”, conclui Travagini.



## **MAPA consideró desproporcionada la decisión de FILIPINAS de suspender importaciones de pollo desde Brasil**

Publicado em 17/08/2020 O Ministério da Agricultura, Pecuária e Abastecimento (Mapa) solicitou esclarecimentos às autoridades das Filipinas que anunciaram, na última sexta-feira (14), a suspensão das importações de carne de frango do Brasil.

O Brasil entende que a decisão tomada pelo governo filipino foi desproporcional ao interromper o comércio de todo um setor com base em notícias veiculadas pela imprensa chinesa de uma suspeita, ainda sob investigação pela GACC (órgão de sanidade da China), de detecção de ácido nucleico de coronavírus na embalagem de um produto referente a um estabelecimento comercial.

Além disso, as autoridades filipinas não notificaram oficialmente o Brasil da decisão ou fizeram qualquer contato prévio solicitando informações sobre o episódio na China, descumprindo artigos previstos em acordo da Organização Mundial do Comércio (OMC), em que os dois países são signatários.

O governo brasileiro informa que se a questão com as Filipinas se alongar, poderá apresentar uma Preocupação Comercial Específica (Specific Trade Concern) na próxima reunião do Comitê da OMC sobre Acordo Sanitário e Fitossanitário (SPS).

O Mapa reafirma que permanece em apuração a suposta detecção de ácido nucleico do coronavírus na superfície de uma amostra de asa de frango congelada, oriunda de um lote importado do Brasil, em Shenzhen, na província de Guangdong. Não houve comunicação oficial por parte das autoridades chinesas.

## **Hong Kong delistó a la planta brasileña donde se identificaron las muestras**

Por: ESTADÃO CONTEÚDO 18/08/2020

Segundo o Centro de Segurança Alimentar do país, a medida deve-se à presença de traços do novo coronavírus em um lote de asa de frango congelada pertencente ao frigorífico brasileiro

O governo de Hong Kong, província autônoma da China, suspendeu a importação de carne de frango da unidade da Aurora Alimentos de Xaxim (SC), conforme comunicado divulgado nesta terça-feira (18/8), no site do Centro de Segurança Alimentar (CFS, na sigla em inglês) do país. A medida, segundo o órgão, deve-se à presença de traços de novo coronavírus em lote de asa de frango congelada pertencente ao frigorífico brasileiro e detectada na semana passada pelo município de Shenzhen.

“Por uma questão de prudência, o CFS também suspendeu temporariamente o pedido de licença de importação de carne de frango para Hong Kong da fábrica em questão (número de registro: SIF601), enquanto espera por mais investigação do caso e detalhes de teste das autoridades competentes”, diz o comunicado.

O Departamento não cita nominalmente a empresa, mas sim seu número de registro no Serviço de Inspeção Federal (SIF). O comunicado informa que o CFS ao saber do incidente, em 13 de agosto, imediatamente contactou autoridades de Shenzhen e do Brasil para entender o caso, e acompanhou os principais importadores e varejistas locais.

“Uma investigação revelou que o lote de asas de frango em questão ainda não estava à venda em Hong Kong”, acrescenta a nota.

O órgão disse também que após o ocorrido em Shenzhen coletou 40 amostras de carne de frango congelada do Brasil em níveis de importação e atacado para teste da Covid-19 “como medida de precaução”. “Todas as amostras foram negativas para a Covid-19”, afirmou o CFS no comunicado.

Na nota, o CFS destaca que, de acordo com a Organização Mundial de Saúde e autoridades globais de segurança alimentar, não há evidências que indiquem que humanos possam ser contaminados pela Covid-19 por meio da ingestão de alimentos.

“O CFS continuará acompanhando o incidente e tomará as medidas cabíveis à luz do desenvolvimento mais recente”, conclui o Departamento no comunicado.

## **Análisis dieron resultado negativo en las muestras tomadas en Hong Kong**

Fonte: G1. This post was published on 20 de agosto de 2020

Após Hong Kong suspender as importações de carne de frango brasileira, devido a um caso de detecção de traços de coronavírus em uma embalagem do produto saído do Brasil, o território asiático realizou testes em amostras de frango congelado do Brasil, que testaram negativo. As informações são do site G1. Conforme anúncio do Centro de Segurança Alimentar local feito na quarta-feira (18), os exames foram realizados como medida de prevenção depois que a prefeitura de Shenzhen, que fica nas proximidades, anunciou que detectou a presença de vestígios do vírus em um pacote de asas de frango compradas do frigorífico Aurora, de Xaxim (SC), no último dia 13.

Segundo o G1, na nota da autoridade sanitária asiática é citado que as autoridades de Shenzhen e brasileiras foram acionadas após o caso, e que o lote em questão não foi colocado à venda. O órgão



sanitário de Hong Kong anunciou que todas as 40 amostras coletadas dos lotes importados do Brasil testadas deram negativo para o novo coronavírus.

A Organização Mundial da Saúde e demais autoridades da área afirmam na nota que não há evidências de que pessoas possam contrair a doença pela comida, mas ressaltou que as pessoas devem evitar consumir produtos animais crus ou mal cozidos.

### **Coyuntura externa favorable para las frigoríficos brasileños**

Fonte: Valor Econômico. This post was published on 18 de agosto de 2020

Crise? Que crise? A expressão dá título a recente relatório no qual o banco BTG Pactual projetava o desempenho financeiro dos frigoríficos no segundo trimestre. Os analistas até já esperavam um resultado positivo, mas foram surpreendidos. No auge da pandemia, fabricar carne bovina, uma commodity de margens em geral acanhadas, foi especialmente rentável, superando as previsões mais otimistas.

Brasileiras, JBS e Marfrig, as duas principais indústrias de carne bovina do planeta, geraram tanto caixa que faz parecer difícil se alavancar, o que é um feito para um setor acostumado a endividamento elevado. No segundo trimestre, ambas atingiram o menor índice de endividamento da história. Juntas, geraram quase R\$ 14 bilhões em caixa livre – R\$ 10,5 bilhões somente na JBS -, lucrando em torno de R\$ 5 bilhões.

A conjuntura favorável e atípica do segundo trimestre está intimamente ligada aos impactos da pandemia sobre a produção de carne bovina nos Estados Unidos. Com a disseminação do coronavírus entre funcionários, dezenas de frigoríficos americanos foram paralisados temporariamente, provocando um buraco na oferta de carne e criando um excedente de bois não abatidos. Resultado: matérias-primas baratas e produto final nas alturas.

Com mais de 80% do faturamento nos Estados Unidos, Marfrig e JBS nadaram de braçada, ostentando uma margem Ebitda (lucro antes de juros, impostos, depreciação e amortização) de mais de 20% na divisão que abriga o negócio americano de carne bovina.

Dona da National Beef, quarto principal frigorífico dos EUA, a Marfrig teve o melhor desempenho entre os pares, entregando uma margem de 23,4%. Na JBS USA Beef, frente de negócios que também inclui a operação na Austrália e no Canadá, a margem Ebitda chegou a 20,4%. Para se ter ideia da magnitude desses resultados, basta dizer que, há poucos anos, números próximos de 10% eram muito comemorados pela indústria americana de carne bovina.

A injeção de rentabilidade americana fez muita diferença na margem consolidada das companhias. A Marfrig, companhia com faturamento de mais de R\$ 60 bilhões por ano, alcançou a margem Ebitda de 21,5% no segundo trimestre, um recorde. Na JBS, gigante com receita líquida anual de mais de R\$ 230 bilhões, a margem chegou a 15,5%, também o maior nível da história.

Embora seja um grande diferencial, o negócio de carne bovina nos Estados Unidos não foi o único a se destacar. No Brasil, onde os frigoríficos possuem grandes operações, o dólar apreciado favoreceu a rentabilidade da exportação e, quando combinado à voracidade da China, que nunca importou tanta carne quanto em 2020, a festa ficou completa para os frigoríficos.

O cenário também beneficiou o resultado da Minerva Foods, que não atua nos Estados Unidos. No segundo trimestre, a Minerva lucrou R\$ 253,4 milhões, pavimentando o caminho para a companhia dos Vilela de Queiroz voltar a distribuir dividendos para os seus acionistas, algo que não acontece desde 2017.

Quando se considera o desempenho das operações na América do Sul e, mais especificamente no Brasil, o grande destaque entre as proteínas também é a carne bovina. Mesmo na JBS Brasil – divisão que reúne a operação de carne, couro e novos negócios -, que costumeiramente entregava resultados piores que os da concorrência, o que por vezes era atribuído à fraqueza do preço mundial de couro e à maior presença, menos lucrativa, no mercado nacional, o desempenho melhorou, se aproximando bastante de Marfrig e Minerva.

Graças aos preços elevados pagos pelos chineses para importar carne bovina do Brasil e ao câmbio favorável, a margem Ebitda da JBS Brasil chegou a 12,4%, ante apenas 4,1% um ano antes. A Minerva, por sua vez, reportou 13,4%, incremento de 4,4 pontos. Na Marfrig, o negócio de carne bovina na América do Sul entregou uma margem Ebitda de 13,9%, avanço de 7,9 pontos.

Na agroindústria de aves e suínos, mercado de atuação de BRF e Seara (JBS), as exportações à China também contribuíram com as margens, assim como um expressivo crescimento das vendas de alimentos processados no Brasil. No segundo trimestre, a dona de Sadia e Perdigão teve um lucro líquido – considerando operações continuadas – de R\$ 307 milhões, um avanço de 60,8% na comparação anual.

Por outro lado, o frango é a mais frágil, entre as proteínas, neste momento. O custo com grãos, em parte por causa do apetite chinês, é um desafio para a preservação das margens e preocupa analistas. Afora isso, o preço da carne de frango no mercado chinês vem recuando, pressionado pelo recorde de produção da ave no país. Nesse quadro, a BRF é relativamente a mais afetada, o que talvez ajude a explicar o desempenho das ações na bolsa.





Na B3, nem todos os frigoríficos se recuperaram totalmente do baque da covid-19. Neste caso, o destaque positivo é a Marfrig. Os papéis do grupo subiram 61,7%, enquanto as ações da Minerva se valorizaram 3% no ano. JBS e BRF estão no vermelho, com desvalorização de 5,2% e 40,5%, respectivamente. O Ibovespa, índice do qual as quatro fazem parte, recuou 13,8%. Juntos, os frigoríficos listados na bolsa valem R\$ 100 bilhões.

### **Modifican el Reglamento de Inspección de Productos Animales**

Fonte: Mapa. 19/08/2020

O governo federal publicou nesta quarta-feira (19), no Diário Oficial da União, o Decreto 10.468, que altera o regulamento da Inspeção Industrial e Sanitária dos Produtos de Origem Animal (Riispoa) do Ministério da Agricultura, Pecuária e Abastecimento (Mapa), aprovado pelo Decreto nº 9.013, de 29 de março de 2017.

As alterações realizadas, em sua maioria, são motivadas pela necessidade de racionalização dos procedimentos de fiscalização para uma maior eficiência na prestação de serviços à sociedade”, explica o secretário de Defesa Agropecuária, José Guilherme Leal.

O decreto traz com mais clareza o conceito de inspeção em “caráter permanente”, que consiste na presença do serviço oficial de inspeção nos estabelecimentos de abate para realização das atividades de inspeção ante mortem e post mortem, apenas durante as operações de abate. As demais atividades industriais realizadas por estabelecimentos de abate ficam sujeitas à inspeção em “caráter periódico”, com frequência definida com base em risco, considerando a natureza dos produtos fabricados, o volume de produção e o desempenho dos estabelecimentos quanto ao atendimento das exigências legais.

As alterações no decreto trazem para o mesmo patamar as responsabilidades dos estabelecimentos de produtos de origem animal sobre a qualidade dos produtos recebidos da produção primária, incluindo obrigações de realizar o cadastro de fornecedores de produtos animais e de implementar medidas de melhoria da qualidade das matérias-primas, além da educação continuada dos produtores.

Para o secretário, o conjunto das alterações vai ao encontro das diretrizes do governo federal trazidas pela Lei de Liberdade Econômica. “As mudanças atendem a pleitos legítimos e tecnicamente fundamentados apresentados pelas áreas técnicas do Mapa, pelo setor produtivo, por organizações de proteção do bem-estar dos animais de abate e também por micro e pequenas empresas que fabricam produtos de origem animal”.

Outra mudança importante é delimitação dos produtos de origem animal sujeitos à fiscalização pelo Serviço de Inspeção Federal (SIF). Os produtos não comestíveis, como resíduos da produção industrial e as partes animais não consumíveis obtidas no processo de abate ou processamento de carnes, foram retirados do escopo de obrigações previstas no Riispoa.

“Os ajustes realizados preveem a simplificação dos procedimentos para respaldar o trânsito e a certificação sanitária dos produtos não comestíveis, sob os aspectos de saúde animal, inclusive para atendimento às exigências de exportação, bem como para a migração ou a regularização do registro perante o órgão competente, quando necessário, dos estabelecimentos que fabricam esses produtos e que tenham sido registrados junto ao SIF”, esclarece a diretora do Departamento de Inspeção de Produtos de Origem Animal, Ana Lucia Viana. Segundo ela, haverá prazo de transição destes procedimentos.

**Registro de estabelecimentos e de produtos**

Foram incorporados à regulamentação os princípios de simplificação e de automação do processo de registro dos estabelecimentos elaboradores de produtos de origem animal cuja atividade industrial represente menor risco sanitário. A obtenção do registro e o início do funcionamento passa a ser de responsabilidade exclusiva da empresa, que estará sujeita às sanções administrativas previstas na legislação em caso de descumprimento das exigências técnicas aplicáveis.

Em relação aos registros de produtos, as alterações preveem a isenção de registro de determinados produtos, previsão de registro automático para produtos que sejam destinados exclusivamente à exportação e o fim da avaliação prévia, pelo serviço oficial de inspeção, dos croquis dos rótulos a serem utilizados pelas empresas.

**Uso de sistemas informatizados para registros de controles de produção**

A partir de agora, os estabelecimentos nacionais poderão usar sistemas informatizados para registros de controles de produção, desde que garantam a segurança, a integridade e a disponibilidade da informação. A legislação referente aos produtos de origem animal já previa a obrigatoriedade de que os estabelecimentos disponham de programas de autocontrole que sejam desenvolvidos, implantados, monitorados e verificados por eles mesmos, contendo registros auditáveis que comprovem o atendimento aos requisitos legais.

**Possibilidade de abate de suídeos não castrados**

Até então, a legislação nacional proibia expressamente o abate de suídeos não castrados. A nova regulamentação traz nova abordagem ao tema, atribuindo maior responsabilidade aos estabelecimentos



para o monitoramento de alterações sensoriais na carne suína, em consonância com procedimentos adotados internacionalmente.

#### Pescados

Com as alterações realizadas na regulamentação, passa a haver a obrigatoriedade de que o desembarque do pescado oriundo da produção primária, quando não realizado diretamente no estabelecimento registrado, seja realizado em um local intermediário sob controle higiênico-sanitário do estabelecimento.

A regulamentação traz também outros avanços para o setor de pesca, ao permitir a realização de operações de sangria, evisceração e descabeçamento de determinados tipos de pescado a bordo, desde que o procedimento esteja previsto nos programas de autocontrole do estabelecimento.

As novas regras conferem maior segurança ao pescado produzido e comercializado no Brasil, pois requer controles mais eficazes de rastreabilidade e higiene, desde a captura do pescado.

#### Reinspeção de produtos de origem animal importados

A reinspeção dos produtos de origem animal importados passará a ser realizada, prioritariamente, nas zonas primárias de importação, pelo serviço de vigilância agropecuária internacional, ou seja, anteriormente à internalização dos produtos. Após os procedimentos regulares de reinspeção, os produtos aprovados poderão ter seu trânsito e comercialização autorizados.

Nos casos de produtos nacionais que sejam exportados e retornem ao Brasil, por processo regular de importação, a reinspeção deverá ser realizada em estabelecimento sob SIF.

#### Responsabilização administrativa

Ao mesmo tempo em que as mudanças conferem maior autonomia e responsabilidade aos estabelecimentos pela qualidade dos produtos de origem animal, são também previstos dispositivos mais eficientes para a responsabilização administrativa de empresas infratoras, inclusive com a previsão de enquadramentos específicos para os casos de não atendimento às exigências legais quando os registros de estabelecimentos ou de produtos forem concedidos de forma automática.

Outro ponto que merece destaque é a previsão para que o Mapa regulamente a sanção de perdimento de produtos apreendidos que não representem risco à saúde pública, a qual já consta na legislação desde 2010, porém, até então não passível de aplicação devido à ausência de regulamentação específica.

### **Normalización de la actividad en MT**

Fonte: Acrimat. This post was published on 19 de agosto de 2020

Com a volta de um dos dois frigoríficos que ainda estavam paralisados, Mato Grosso conta 95% das plantas em funcionamento. Em consequência, a utilização da capacidade industrial subiu cerca de 3,33%. Os dados levantados pelo Instituto Mato-grossense de Economia Agropecuária (Imea) são referentes ao mês de julho.

O volume de animais abatidos em julho deste ano em Mato Grosso também apresentou alta, sendo o maior de 2020: 485 mil cabeças, um aumento de 6,44% em relação ao mês anterior.

Mesmo com o aumento mensal de abates, o aumento da capacidade industrial mato-grossense fez com que a utilização caísse 7,08%, em relação ao mês anterior, ficando em 73,76%.

Para o próximo mês, o cenário ainda é incerto, pois mesmo se a demanda externa permanecer aquecida, a maior oferta de animais da seca tende a ser mais expressiva somente em outubro, o que sustenta os menores níveis da utilização frigorífica em relação a 2019.

### **Mato Grosso aumenta la participación de animales jóvenes en la faena**

Fonte: Portal DBO. This post was published on 20 de agosto de 2020

A quantidade de abate dos bovinos acima de 36 meses tem diminuído ao longo dos anos no Mato Grosso, uma vez que os animais mais jovens estão aumentando a sua participação. É o que mostra o relatório semanal do Instituto Mato-Grossense de Economia Agropecuária (Imea), divulgado nesta terça-feira, 18 de agosto.

Em 2019, a participação dos animais acima de 36 meses atingiu 31%, uma queda de 4 pontos percentuais na comparação com o percentual observado em 2018, de 35%. Neste ano, no acumulado de janeiro a julho, a participação de animais abatidos acima de 36 meses também está em 31%.

Por sua vez, diz o Imea, os animais entre 24-36 meses representaram 50% dos abates em 2019, aumento de 2 pontos percentuais sobre 2018 (48%). Na parcial deste ano, os bovinos entre 24-36 meses representaram 51% dos abates totais.

Na categoria de bovinos abatidos com menos de 24 meses, houve também houve acréscimo de 2 pontos percentuais em 2019, na comparação com 2018, para 19%. No acumulado de janeiro a julho de 2020, a participação da categoria de bovinos abatidos com menos de 24 meses atingiu 18%.

“Estes indicadores demonstram que o Estado tem conseguido produzir carne cada vez mais rápido, de qualidade – uma vez que de animais jovens é mais macia – e sem a necessidade de incrementos de área”, observa o Imea.



## URUGUAY

### **Con entradas largas, el mercado del gordo vuelve a ajustar a la baja**

por Cecilia Pattarino agosto 19, 2020

El mercado de gordo ajusta a la baja por tercera semana consecutiva. La industria está abocada a la faena de ganados de corral con destino a la Cuota 481 y presiona a la baja el precio de ganado gordo colocando a la demanda por debajo de una oferta de ganados de pasturas que es escasa.

Por los mejores novillos los pocos negocios concretados se realizan entre US\$ 3,30 y US\$ 3,35, un ajuste de cinco centavos respecto a fines de la semana pasada. En el caso de la vaca gorda los negocios se concretan entre US\$ 3,10 y US\$ 3,15. Las vaquillonas gordas especiales cotizan entre US\$ 3,25 y US\$ 3,30. Las entradas a planta van de 15 a 20 días promedio.

“Hay plantas que no están pasando precios o anotan cargas para los primeros días de setiembre –una vez finalizada la cuota-. Hasta ese momento no se espera un repunte en el precio del gordo. La oferta de ganados de campo es escasa y hay verdes que siguen atrasados y en algunas zonas del país se empieza a sentir la falta de agua”, dijo un consignatario consultado.

El mercado de reposición mantiene la firmeza aunque con pocos negocios concretados en el campo y más actividad en los remares por pantalla. Los terneros cotizan entre US\$ 2,30 y US\$ 2,10 dependiendo del peso y las terneras en el eje de los US\$ 2,05.

La exportación en pie está disminuida, el lunes en la Asociación de Consignatarios de Ganado no hubo referencias de precios ya que el productor no convalida los bajos valores ofrecidos por los terneros enteros sumado a los retrasos de pago por parte de las empresas.

En lanares hay menos plantas operando y limitaciones en la colocación de las carcasas más pesadas. Los precios ajustaron fuertemente a la baja en todas las categorías. En la grilla de ACG el cordero liviano y el pesado bajaron tres y 16 centavos respectivamente a US\$ 3,40, los borregos bajaron 11 centavos a US\$ 3,39, los capones seis centavos a US\$ 3,03 y las ovejas dos centavos a US\$ 3,01.

### **MGAP confirmó producción de terneros que es récord histórico**

21/08/2020 - Existencias de bovinos crecerían entre 4% y 6%, llegarían a 12,1 millones.

Récord histórico en la producción de terneros, donde se superarán los 3 millones de cabezas, crecimiento de las categorías jóvenes y una máquina de cría que permanece apostando a más, hacen que la ganadería viva el sueño del pibe.

La mala noticia es que la cantidad de ovinos se mantendría o incluso podría tener una muy leve caída.

El Ministerio de Ganadería, Agricultura y Pesca (MGAP) presentó ayer una proyección de las cifras de la Declaración Jurada Dicose 2020 y esos datos preliminares, coinciden con la proyección realizada por el Instituto Plan Agropecuario.

En ambos casos se marca la producción histórica de terneros y un incremento significativo de las categorías de bovinos “invernables”, lo que ayudaría a superar, a futuro, el faltante de ganado gordo preparado para faena.

“El stock ganadero se incrementó, aproximadamente entre 4% y 6%, lo que implicaría que pasaríamos de 11.400.000 a 12.100.000 bovinos”, confirmó el director del Sistema Nacional de Información Ganadera (SNIG), Gabriel Osorio.

El jerarca explicó que lo que le da fuerza a estos números, son los datos aportados por los mayores tenedores de ganado, que en el 90% de los casos hicieron la declaración vía formato digital. El incremento del stock bovino sería de 700.000 cabezas en este ejercicio.

La proyección tomó en cuenta tres variables: número de productores, superficie total y superficie ganadera. Según la base que use el número es diferente, explicó José Bervejillo, asesor de la Oficina de Programación y Política Agropecuaria (Opypa) del MGAP.

Respecto a la producción de terneros, según las dos modalidades usadas para la proyección oficial, se estaría con una parición de entre 3.050.000 y 3.100.000 cabezas. Crecen las vacas de invernada y los novillos de 1 a 2 años. El margen de error que manejó el MGAP para el cálculo es inferior al 1% y respecto al stock general de bovinos, según la metodología empleada la diferencia entre el cálculo máximo y el mínimo es de apenas 2,5%.

Plan Agropecuario. En la proyección realizada por el Instituto Plan Agropecuario (IPA), marcaba que los terneros producidos alcanzarían 2,9 millones, cuando el máximo histórico que se había logrado no superaba los 2.780.000 cabezas.

Desde el IPA, el ingeniero agrónomo Esteban Montes proyectaba que el número de vacas servidas se mantendría y habría un crecimiento de 10% en el volumen de vacas de invernada, producto de que muchos ganaderos incorporaron más vientres al rodeo de cría. Ese aumento en las vacas de invernada sería de 40.000 cabezas. A nivel global, se habló que el aumento del stock era de 4,8% en el ejercicio ganadero y se llegaba a 11.700.000 bovinos



Futuro. Para el ministro de Ganadería, Agricultura y Pesca, Carlos María Uriarte, el incremento del stock “es una buena noticia para la ganadería. Es una apuesta del sector desde hace muchísimo tiempo y luego de tantos años de apostar a llegar, es un logro de todos los productores, del sector ganadero, en una apuesta clara que se evidenciaba por otros números que el sector daba y que al final han llegado”.

Reflexionó que en las categorías de machos jóvenes, “quizás la poca oferta de animales preparados que hemos estado viviendo en los últimos tiempos, se pueda revertir en el corto plazo, acelerando los procesos de las cadenas más jóvenes y que se mantiene el rodeo de cría. La apuesta del sector a criar sigue fuerte”.

Miedo. A su vez, el subsecretario Ignacio Buffa, exhortó a los productores a “perder el miedo a producir para evitar una baja de precios”.

El jerarca dijo que lo que quieren las autoridades es que el cambio de existencias que está mostrando hoy el stock bovino, “sea el inicio de que en Uruguay se pierda el miedo a producir más. Salir de la lógica que producir más lleve a reducción de precios”.

De este modo, consideró que se podrá renovar “nuestra agenda de problemas y discusiones en la cadena cárnica. Que se consoliden todos los canales comerciales disponibles. Que habilite que la consolidación de la corriente exportadora en pie sea un elemento que contribuya a la cadena”.

### **Castiglioni: “Para octubre o noviembre se podría regularizar el mercado chino”**

19/08/2020 - 3:58 PM

El broker de carnes dijo que el negocio se ha tornado “muy especulativo” y aseguró que en las últimas dos semanas hubo un enlentecimiento en el cierre de acuerdos.

El broker de carnes uruguayo radicado en China, Daniel Castiglioni, estimó que “para octubre o noviembre se podría regularizar el mercado en relación a la oferta y demanda de carne” y de ahí en adelante “encontrar una normalidad de precios”.

El Director de Casti Trading dijo que en las últimas dos semanas el mercado “se encuentra tibio tirando a frío”, con una operativa “disminuyendo bastante” y “con valores más inferiores a los que veníamos acostumbrados hace dos meses atrás”.

La mayor parte de los operadores “se encuentran esperando”, y otros pocos están comprando “alguna cosita” a un precio que “parezca razonable”.

De todos modos, Castiglioni aseguró que China “nunca ha parado de comprar”, con énfasis “en volúmenes grandes, cada vez más, de Brasil y Argentina”. Y agregó: “La operativa sigue, pero en las últimas dos semanas nos encontramos con menor velocidad en la concreción de negocios”.

A pesar de que la pandemia impactó en un menor consumo de carne, estimado en una caída del 40%, el broker señaló que el negocio de la carne se ha tornado “muy especulativo”, con muchas empresas stockeando productos y esperando la oportunidad para vender.

“Hay mucho stock local en China, donde se encuentran mejores posibilidades de comprar carne, dado que al comprar de Latinoamérica, entran en la especulación del mercado con 45 a 50 días de viaje de la mercadería”, indicó.

### **Importante crecimiento de las importaciones de carne vacuna en China**

19/08/2020 - Uruguay quedó menos competitivo frente a los países de la región.

Las exportaciones de carne bovina de Brasil a China alcanzan un récord de 87.021 toneladas, lo que sería el volumen más grande embarcado en la historia de un país a otro en un mes. Así lo publicó ayer en su cuenta de Twitter el gerente de Marketing del Instituto Nacional de Carnes (INAC), Lautaro Pérez Rocha.

El gigante asiático “está comprando a un volumen importante y más que el año pasado, por más que hay algunos indicadores de recuperación de su stock de cerdos”, afirmó a El País el presidente de la Asociación de la Industria Frigorífica del Uruguay (Adifu) y director de Marfrig, Marcelo Secco.

Este fenómeno se viene registrando pese a que Uruguay perdió posición frente a otros proveedores de la región. “Uruguay se volvió mucho menos competitivo frente a Brasil y Argentina, que son los que están en la primer línea de las exportaciones de carne a China. Pasamos de primer oferente o primer exportador a ser uno más en el mercado y en la región perdimos peso relativo, especialmente a manos de Brasil, que incluso acaba de conseguir la habilitación para recortes (trimming)”, explicó el empresario uruguayo al analizar el mercado chino.

Destinos. A nivel de otros mercados, es importante mencionar que en la Unión Europea se están viendo “señales de flaqueza” en lo que refiere a consumo, seguramente por el rebrote de la pandemia y eso complica la exportación.

Rusia, si bien también presenta problemas de consumo, “está bien abastecido”, especialmente por carne bovina de Paraguay. Secco explicó que los importadores rusos están pretendiendo comprar a precios más bajos que los que ofrecen los chinos y eso hace que se atienda menos ese destino.





A su vez, en Estados Unidos, ya se cumplió la cuota de 20.000 toneladas pese embarque y vender fuera de cupo implica pagar un arancel de 26,4%. “Entrar fuera de cupo se justifica si se exportan productos con alto valor agregado”, no se pueden enviar productos estándares como delanteros o recortes de carne para industria, explicó el director de Marfrig.

A su vez, ese mercado de cortes premium, donde incluso algunas empresas —como es el caso de Marfrig— llegan con carne orgánica u otros productos con certificación de procesos, es considerado un destino de nicho (es chico). “Es un año difícil y obliga a los exportadores a estar muy atentos”, afirmó el director de Marfrig.

Oferta. Secco consideró que “hoy en Uruguay hay poca oferta de ganado y la que hay es cara con referencia con los valores de hacienda que maneja la región”.

Estimó que la oferta de ganado gordo se comenzará a recomponer más hacia octubre o noviembre si se transita por una primavera normal, como lo están marcando los pronósticos meteorológicos. “Pienso que la oferta se irá recomponiendo más hacia para finales del próximo trimestre, en función de cómo vengan las lluvias”, dijo Secco.

Es más, consideró que si se observa “el ganado que no se faenó y que está arriba de los campos, se debería poder pensar que con pasto se podría tener un último trimestre con actividad. Luego veremos si los mercados y los precios de compra y de venta se encuentran. Para eso hay que llegar hasta la orilla”.

### **Agencia del Gobierno chino destaca la apertura de oficina de INAC**

por Cecilia Pattarino agosto 19, 2020

Agencia de Noticias china, Xinhua, destacó este martes que Uruguay a través del Instituto Nacional de Carnes (INAC) instalará una oficina comercial en China para promover su producto estrella, la carne bovina.

Xinhua es la agencia oficial de noticias del gobierno de China y la más grande e influyente en el país, así como la más grande del mundo en términos de corresponsales.

«Estamos en los arreglos finales. En un primer paso funcionará en las instalaciones de la embajada uruguaya en Beijing (...) Somos un país pequeño, no somos un actor geopolíticamente importante pero sí tenemos una impronta, una confianza, una identidad que tenemos que desarrollar», sostuvo el presidente de INAC, Fernando Mattos, a Xinhua.

Esa representación apoyará la promoción y participación en ferias, los contactos con empresarios y autoridades, y la identificación de nichos de mercado para fortalecer la marca “carne uruguaya”.

La meta es asociar la marca «carne uruguaya», producto de un ganado criado a cielo abierto, a la «ausencia de hormonas y antibióticos», con un país que «tuvo menos problemas con la COVID-19», lo cual es una diferenciación y una ventaja frente a otros, evaluó Mattos.

La firma de un Tratado de Libre Comercio (TLC) con China tendría efectos positivos no solo para la carne bovina. «Si bien el nivel de protección de China no es muy alto el año pasado (los aranceles) significaron US\$ 140 millones», indicó. No obstante, más allá de los aranceles un tratado comercial «facilita un ámbito de negociación donde podamos ampliar el abanico de productos» y en áreas como la inversión.

### **Se relanza el Grupo Pro-Carnes**

por Cecilia Ferreira - agosto 19, 2020

En setiembre se realizará el relanzamiento del grupo Pro-Carnes –integrado por INAC, representantes del MGAP, Cancillería, gremiales de la industria frigorífica y representantes de los productores- con la participación del ministro de Relaciones Exteriores, Francisco Bustillo, con el ministro de Ganadería, Agricultura y Pesca, Carlos María Uriarte y el ministro de Industria, Omar Paganini.

El grupo Pro-Carnes era antes ANAMC, una comisión interinstitucional de acceso a mercados, creada en el año 2016 y que ha venido funcionando desde entonces, con reuniones bajo convocatoria.

Avanzar en el acceso a mercados es uno de los aspectos sobre los que mayor hincapié ha hecho la industria, como alcanzar mejoras arancelarias y hacer efectiva la apertura de nuevos mercados.

### **¿Incide en Uruguay que Brasil deje de vacunar contra Aftosa?**

16/08/2020 - 4:00 AM

¿Será una amenaza o una ventaja para el país, cuando la enfermedad lleva 19 años sin verse en la región?

Aftosa: productores y técnicos coinciden en que, al menos por el momento, la ganadería uruguaya debe seguir protegiéndose con la vacunación.

Aspirando a subir un escalón en el estatus sanitario, para poder aprovechar mejor sus mercados, Rio Grande do Sul quiere convertirse en un Estado libre de fiebre aftosa sin vacunación.

Esta semana, los pecuaristas riograndeses confirmaron a su gobierno que apoyan el cese de la vacunación contra la enfermedad y se comprometieron a mejorar la vigilancia en sus campos. La decisión



fue comunicada por la Federación de Agricultores de Rio Grande do Sul (Farsul) a su gobierno, reflejando la decisión que adoptaron todos los Sindicatos que la componen.

La última vacunación anticipada fue en abril y la ministra de Agricultura, Tereza Cristina Corrêa da Costa Dias, estará comunicando esta decisión a la OIE, suspendiendo la vacunación que correspondía a este mes. Rio Grande do Sul se pretende sumar a Santa Catarina (no vacuna desde hace 17 años) y Paraná. En otro bloque, en el noreste, suma a los estados de Acre y Rondonia, que tienen alrededor de 20 millones de cabezas bovinas.

El presidente de Farsul, Gedeão Pereira, dijo que se acató la decisión de la mayoría de los Sindicatos y reafirmó el compromiso de “trabajar profundamente por la defensa del retiro de la vacunación. Todos somos socios y queremos lo mejor para el agro y la pecuaria de Rio Grande do Sul”, aseguró.

Pereira explicó en un video institucional que todos los productores “seremos responsables de la vigilancia que vamos a tener que hacer en nuestros establecimientos y en nuestro Estado”. Admitió que hubo una discusión muy fuerte y fueron 44 los Sindicatos que se mostraron favorables a dejar de vacunar y otros 39 se opusieron.

“Estamos en el sur de Sudamérica y protegidos por Uruguay, Argentina, Paraguay y así como otros estados (San Pablo y Matto Grosso) que están vacunando”, explicó el gremialista.

Brasil es un gran exportador de carne suína carne con hueso al mundo, aprovechando la producción de Santa Catarina y busca llegar a los grandes nichos de carne bovina: Japón, Corea del Sur, México y otros para valorizar sus exportaciones.

El presidente de Farsul, afirmó que “el mercado internacional funciona en base a la confianza si se tienen los parámetros adecuados. Los mercados se quedan esperando a ver qué va a ocurrir con Brasil y es momento de dar el paso de dejar de vacunar”.

Visiones. La decisión de Rio Grande do Sul, si bien ya se preveía, puso un poco nerviosos a los productores ganaderos uruguayos. ¿Será una amenaza o una ventaja para Uruguay? ...

Por ahora, Uruguay aspira a seguir manteniendo la vacunación obligatoria contra fiebre aftosa en su rodeo bovino, asegurándose los mercados de alto valor que costó mucho conquistar: Estados Unidos, Japón, Corea del Sur, China, México y Unión Europea, entre otros.

Las diferencias marcadas de precios que existían en la década del 90 entre circuito aftósico y no aftósico, quedaron atrás y Uruguay demostró la seriedad de sus certificaciones y el trabajo mancomunado entre el gobierno y el sector privado, al momento de salir al mundo a brindar garantías sanitarias. Hoy es el único país que puede acceder a Japón y Corea del Sur, siendo libre de aftosa con vacunación, aunque entra con cortes desosados.

“Creo que no será una amenaza el cese de la vacunación del rodeo bovino en Rio Grande do Sul”, admitió a El País Roque Almeida, veterinario que es delegado de Cooperativas Agrarias Federadas (CAF) en la Comisión Nacional Honoraria de Salud Animal (Conhasa).

Según la visión de este profesional, el vecino Estado brasileño “se podría transformar en un centinela que complementaría la vigilancia sanitaria que haga Uruguay”, para evitar el reingreso de la fiebre aftosa a su territorio.

Es que tendría ganado sin cobertura de vacuna que sería el primer afectado si vuelve la circulación viral o una amenaza de aftosa a la región. Ese grupo de bovinos, se sumaría a la centinelización que hacen los ovinos y los cerdos en Uruguay, que desde hace muchos años no se vacunan contra la enfermedad.

“Si surgiera la enfermedad, Uruguay podría prevenir o tendría la oportunidad de reaccionar antes”, dijo Almeida.

A su vez, aclaró que no dejaría de vacunar el stock bovino uruguayo. “No veo mal la decisión de Rio Grande do Sul en la medida que Uruguay mantenga la vacunación. Para nosotros no sería un problema”, afirmó Almeida.

Sin beneficios. Desde la óptica de Jorge Bonino Morlán, médico veterinario y delegado de los productores por más de tres décadas ante la Organización Mundial de Sanidad Animal (OIE), la decisión adoptada por Rio Grande do Sul no traería beneficio alguno.

Recordó que el paso se dio en base al Plan Estratégico que Brasil presentó y en base al estudio de su situación sanitaria. En el marco de ese plan, un paso primario es el cese de la vacunación si se quiere erradicar la aftosa.

Bonino afirmó que Uruguay “deberá seguir manteniendo toda su vigilancia interna y externa para evitar reintroducciones de la aftosa. Deberá tener mayores precauciones en la frontera para evitar correr cualquier riesgo.

Si el estatus de Rio Grande cambia y Uruguay mantiene el suyo, será necesario concretar nuevos protocolos sanitarios que no impidan el comercio de animales y carnes.

“Hacer nuevos acuerdos sanitarios no es nada imposible”, consideró el delegado de los ganaderos uruguayos ante la OIE.



A partir de que Rio Grande determine la fecha del cese de la vacunación y lo comunique a la OIE, deberán pasar dos años sin focos, antes de que el plenario de delegados del organismo que regula las normas sanitarias en el mundo para el comercio de animales y subproductos, le otorgue su nuevo status. Hoy Brasil sólo tiene a Paraná y Santa Catarina reconocidos por el mundo como estados libres de aftosa sin vacunación.

Desventaja. Para los ganaderos del norte, la decisión de Rio Grande del Sur le aporta “una desventaja al Uruguay”, porque “el que se quemó con leche ve la vaca y llora”, afirmó Jorge Riani, productor y vicepresidente de la Federación Rural.

Recordó los focos de fiebre aftosa que padeció Artigas en el 2000, luego que Uruguay desde 1996 había sido reconocido como libre de aftosa sin vacunación.

“Los focos del 2000 dejaron a los productores de Artigas aislados por un año, donde no se podía vender ni un solo producto, incluso, ni los cueros”, afirmó Riani recordando esa odisea.

Contó que en ese momento, “el MGAP le puso un candado a Artigas y se tragó la llave. Hubo un sobre endeudamiento a nivel de productores y costó mucho salir”.

También consideró que Uruguay es un país pequeño con poco poder de comercialización. “Brasil, como es una potencia y por la cantidad de producto que maneja, siempre va arreglar con los mercados. Si llega la aftosa a Uruguay, no tenemos tanto poder de negociación, nos va a pasar como en 2001, vamos a quedar aislados del mundo. Seremos un país donde el 70% de las exportaciones provienen del agro y aislados”, analizó.

Al igual que la mayor parte del sector productor y de los veterinarios, Riani consideró que “Uruguay no debería dejar de vacunar. Entiendo que Brasil es una potencia muy importante y se anima a dejar de vacunar para dar un paso más alto y elevar su status sanitario”.

Según su visión, “nosotros no precisamos mercados más importantes que los que ya tenemos”, por eso los productores están “muy preocupados”, afirmó Riani.

Riani: “es una desventaja”

El vicepresidente de la Federación Rural, recordó el infierno que vivieron los productores de Artigas con los focos de aftosa en el 2000. “El que se quema con leche ve a la vaca y llora. Estuvimos aislados durante todo un año sin poder vender nada. El MGAP le puso un candado a Artigas y se tragó la llave”

### ***Olaverry | Un estatus para la conquista de más mercados...***

16/08/2020 - 4:00 AM

La posición de Brasil de avanzar en la erradicación de la vacuna contra la fiebre aftosa para lograr más mercados, pone en alerta a Uruguay y afina aún más la línea de ventajas competitivas del país en el mundo. Desde que asumió Bolsonaro el 1 de enero del 2019, se ha pensado a Brasil con una política comercial liberal y agresiva, marcando preferencias por las negociaciones bilaterales e indicando, en varias oportunidades, que el Mercosur es demasiado estricto por su perfil ideológico.

En esa globalización, Brasil ha determinado un plan estratégico para eliminar, de forma escalonada, la vacuna contra la fiebre aftosa y así ganar más posición en mercados de primera fila mundial, es el caso de Japón; que, como excepción, Uruguay ingresa respaldado por una trazabilidad total del rodeo e importantes avances en pro de la inocuidad de los alimentos: por ejemplo, hoy no tener casos de Covid-19 en las industrias agro exportadoras.

El martes la ministra de Agricultura de Brasil, Tereza Cristina, declaró libre de aftosa sin vacunación a los estados de Acre, Paraná, Rio Grande do Sul, Rondonia y regiones de Amazonas y Mato Grosso; aproximadamente unas 69 millones de cabezas, según estimaciones difundidas por Faxcarne. Mientras tanto, las regiones están pendientes de que la Organización Mundial de Salud Animal (OIE) reconozca el nuevo estatus sanitario.

“Brasil apuesta cada vez más a la apertura de mercados, en especial a los destinos asiáticos, en momentos de posiciones récords de exportaciones país de carne bovina, soja y maíz”, dijo a Valor Agregado Gedeão Pereira, presidente de Federação de Agricultura de Rio Grande do Sul (Farsul). Y agregó: “Se quiere llegar a mercados que aún no aceptan los productos cárnicos de Brasil, que compran en volumen y pagan buenos valores”.

Entre enero y julio del 2020, en plena pandemia, Brasil ha exportado al mundo 1,16 millones de toneladas de carne bovina fresca y congelada, y menudencias bovinas, un aumento del 14% en volumen y 12% en valor (más de US\$ 4.200 por tonelada) en comparación con igual periodo del año pasado.

Más allá que el producto de Uruguay es reconocido en el mundo por su calidad y los aspectos anteriormente mencionados, la competencia de los países vecinos, que se manifestó con fuerza en 2020 a raíz de importantes devaluaciones de la moneda brasileña y argentina frente al dólar americano, preocupan al complejo cárnico y a las autoridades uruguayas.

La demanda mundial de carne sigue superando a la oferta y el déficit de carne en China a causa de la fiebre porcina continúa marcando un crecimiento en las compras del gigante asiático. La necesidad de proteína animal ha mejorado la posición de Brasil y Argentina, con la habilitación de más plantas



frigoríficas y, en el caso de Argentina, con la modificación del protocolo sanitario que favoreció a la colocación de cortes con hueso y enfriados; algunos beneficios que Uruguay supo tener casi exclusivos años atrás y lo posicionó como el principal proveedor de carne bovina al país asiático.

Las ventajas competitivas de Uruguay se van afinando a medida que los mercados se van abriendo y se suman más oferentes. De todas maneras, en los primeros siete meses del año el país supo posicionarse como líder del Mercosur en cuanto al valor medio de exportación de la tonelada de carne con una cotización de US\$ 5.200 por tonelada, e intenta acercarse a las referencias de ganaderías más desarrolladas, como la de Australia.

Desde el sector industrial uruguayo se plantea la necesidad de revisar la competitividad país, bajando costos de producción y logística, analizando los problemas estructurales de una ganadería de futuro.

Ahora, los anuncios de Brasil de seguir a fondo con el plan estratégico de erradicar la vacuna contra la fiebre aftosa y cambiar su estatus sanitario pone en alerta a Uruguay y al resto de la región. Lo que para el país norteño es una oportunidad de dar un salto más, para otros son amenazas.

En el caso de Uruguay, el representante de la Asociación Rural del Uruguay (ARU) en la Junta del Instituto Nacional de Carnes (INAC), Ricardo Reilly, comentó a Valor Agregado que “el país tiene sus mercados consolidados y es respetado a nivel mundial por su trabajo sanitario”, por tanto “en corto plazo no veo que Brasil pueda ser una competencia directa”.

Sin embargo, dijo que Uruguay “debería seguir vacunando internamente”, y a su vez tomar otras medidas en referencia a los aspectos sanitarios y a las acciones en la frontera. En ese sentido indicó: “Hay que crear la llamada zona buffer y controlar al máximo la vacunación, ayudar a la campaña de difusión y exhortar a cumplir planes, que se hace muy bien y nos diferencia en el mundo”.

Uruguay tiene en Brasil el mercado ovino con hueso y los asados vacunos, y, a pesar que para este corte bovino los números no están cerrando, con un cambio de estatus podría afectar o implicaría aumentar controles a las exportaciones.

Poco tiempo atrás, el Ministerio de Ganadería, Agricultura y Pesca (MGAP), en conjunto con el INAC y el Instituto de Investigación Agropecuaria (INIA), encargó a una consultora independiente un estudio para analizar los costos y los beneficios que implicaría dejar de vacunar contra la aftosa. El informe de 86 páginas concluye que Uruguay destina alrededor de US\$ 37 millones anuales para mantener a la fiebre aftosa lejos de su rodeo bovino, asegurarse el acceso a los mercados con sus animales en pie, carne y subproductos y en análisis que demuestran la ausencia viral. Además agrega que eliminando la vacuna, los costos bajarían en US\$ 19 millones, pero se incrementa el riesgo de introducción, exposición y diseminación de la fiebre aftosa.

También establece los beneficios para el país basado en un escenario libre de aftosa sin vacunación. “Se prevé que se obtendrán ganancias a partir de cinco productos bovinos (lengua, carne de quijada y cabeza, asado, rabo y mondongo) y el acceso de cortes con hueso a la UE será posible”.

### **Uruguay se debería enfocar en “acuerdos comerciales” y “sanidad”, dijo Secco**

17/08/2020 - 2El exCeo de Marfrig Global Foods proyectó un segundo semestre “estable” para el mercado de la carne bovina.

En un año “extremadamente particular en el mundo” a raíz de la pandemia, “el negocio de la carne no se vio afectado porque se produjo con normalidad, pero los mercados tuvieron momentos complicados”, comentó a Rurales El País Martín Secco, ex Ceo de Marfrig Global Foods y actual productor ganadero en Tacuarembó.

Explicó que Europa, un mercado importante por los precios de exportación, paralizó su demanda en marzo y abril; mientras que China, un mercado de volumen, ha sido de idas y vueltas con paralización de compras, renegociaciones de precios y subas y bajas.

Martín Secco, que dijo que esta situación no se puede comparar con el impacto que significó el brote de aftosa en el país, imagina un segundo semestre del año “estable”, que “sería fundamental para planificar el negocio”.

A futuro, señaló que la política país en cuanto a la producción y exportación de carne “no debería cambiar y se debería enfocar en dos prioridades: los acuerdos comerciales y la sanidad”, ya que “son dos bastiones que nos van a permitir avanzar en los mercados que tenemos”.

En la sanidad, dijo que Uruguay “tiene que seguir reforzando el estatus, y no solo pensar en la aftosa, sino en varios deberes que tiene el país y se debe encarar como política de Estado”. En cuanto a la posición de Brasil de seguir en su plan estratégico de erradicación de la vacuna contra la aftosa, comentó que “hubiera preferido que Brasil mantuviera su situación”, pero aseguró que “hay presiones de otros negocios”, como la producción de cerdo en Rio Grande do Sul.

Ante la decisión brasileña, dijo que con todos los frentes abiertos que tiene Uruguay, “no transitaría por el mismo camino”.





## **Segundo semestre se proyecta “estable” para el mercado global de carne**

19/08/2020 - El broker de carnes Juan Lema aseguró que China “seguirá siendo un actor muy relevante en la importación”.

A pesar de las dificultades lógicas del comercio mundial a causa de la pandemia, la demanda global de carne bovina se proyecta con un leve crecimiento y se explica por las mayores compras de China.

Para el cierre del 2020 se espera que China compre 2,8 millones de toneladas de carne bovina de las 8,8 millones de toneladas que se comercializan en el mundo, un aumento del 50% frente a 2019, año en que también creció en niveles similares, según explicó el broker de carnes Juan Lema.

El director de Agromeals dijo a Rurales El País que Uruguay “ha perdido participación en el mercado internacional”, principalmente en China a raíz de una mayor competencia de Brasil y Argentina.

“El importador chino se mueve por precios”, aseguró el broker y agregó: “El ganado de Uruguay está un 30% más caro que Argentina y 40% que Brasil, es difícil competir en esas condiciones y al país le está costando”.

Y más allá de que la calidad de la carne uruguaya está bien posicionada, Lema dijo que por el tipo de producto que demanda China, el ganado de Brasil se adapta muy bien.

De acuerdo a la “gran oferta” de Brasil, Lema explicó que “los precios están condicionados” y la industria uruguaya “no cierra la ecuación”, pero “hace un gran esfuerzo para seguir trabajando”.

Finalmente, consideró que China “seguirá siendo un actor muy relevante en las importaciones de carne”, pero con una “estabilidad de valores”, dado que “hay una diversidad de oferta de distintos orígenes que hace que no se desesperen y paguen precios exagerados como sucedió anteriormente”.

## **Industria frigorífica registraría pérdidas de alrededor de US\$ 70 millones**

por Cecilia Ferreira agosto 19, 2020

El 2020 cerrará con una faena de 1,9 millones de cabezas de ganado, el registro más bajo en 17 años, y en 2021 se ubicará en 2,3 millones, estimó Eduardo Urgal, director de Frigorífico Pando. En 2020 el complejo industrial registraría pérdidas de alrededor de US\$ 70 millones, el doble que en 2019, de acuerdo a su proyección.

“Siendo optimista deberíamos llegar a 1,9 millones (de cabezas) faenadas, que a nadie debería llamar la atención (...) Estaba marcado el 2020 como el año de menor actividad, de menor industrialización, empleo, exportación y así se va a dar”, dijo al programa Tiempo de Cambio de radio Rural.

Según el industrial, el año próximo podría esperarse una faena de 2,3 millones de vacunos o de 4,6 millones entre 2021 y 2022. “Creo que es una pésima noticia para el complejo que este año tengamos 1,9 millones de cabezas, una pésima noticia que tengamos US\$ 300 millones menos de exportación”, remarcó. Para Urgal la recuperación esperada de un año a otro no es suficiente.

Consideró que “con cinco años ininterrumpidos de relación flaco/gordo favorables a la cría” se habría esperado una reacción más “agresiva” en lo productivo. “El gran valorizador de los terneros no es Turquía, está en Uruguay”, dijo, apuntando a la exportación de ganado en pie.

“Para aumentar la faena tenemos que aumentar la rotación, reduciendo la edad de faena, acompañado eso de la producción de terneros. Creo que por es el camino de desarrollo del complejo”, consideró.

Mejorar la competitividad

Sin las condiciones para producir más barato que los países competidores y compartiendo los prácticamente todos los mismos mercados, “ese diferencial de competitividad nos deja absolutamente fuera de juego”, sostuvo. Y remarcó la necesidad de mejorar aspectos vinculados al acceso, como mejoras arancelarias.

“Hoy es bien difícil la situación, básicamente por la oferta que tenemos de Argentina y de Brasil en los mercados que han sido clave en los últimos años para Uruguay. Una oferta que está incrementada en volumen y que en precio no tiene punto de comparación, empezando por un diferencial en la hacienda que en algunos casos es de más de 40%”, señaló. “Estamos rodeados de Argentina y de Brasil en todos los frentes”, dijo, haciendo referencia también a los volúmenes crecientes de importación de carne en Uruguay.

El escenario hacia adelante sería de mayor faena en 2021 y un precio del ganado gordo más bajo. “Estamos en un escenario hostil para la industria”, subrayó.

“Para la demanda china de carne vacuna Brasil presenta un gran atractivo: una oferta voluminosa a precios imbatibles (...) los negocios hoy nos pasan por el costado muchas veces sin tener la chance de participar de ellos”, indicó.

Hacia adelante, “creemos que va a aumentar la demanda”, aunque aclaró que, en lo inmediato, la pandemia de coronavirus genera una incertidumbre permanente para la toma de posición de los diferentes mercados.



## UNIÓN EUROPEA

### Mesa de Carne Sustentable Europea tiene nueva Directora

17 August 2020

OSI Europe's Operations Director and Head of Sustainability, Claire Donoghue, has been named Board Chair of Europe's largest multi-stakeholder group for beef sustainability.

The European Roundtable for Beef Sustainability (ERBS) announced her election to the three-year position on 15 July, 2020.

As Board Chair, Donoghue will oversee the continued development of the sustainability platform, which launched in 2018 as a regional division of the Global Roundtable for Sustainable Beef (GRSB). Like its global counterpart, the ERBS works with stakeholders across the beef industry, from farmers to distributors, to guide improvements in a range of sustainability areas. ERBS is focused in particular on animal health and welfare, animal medicine usage, farm management and greenhouse gas emissions.

"As a founding member of the ERBS and staunch supporter of sustainability roundtables, OSI is thrilled to have one of our own at the helm of a group we've been proud to work with," said Nicole Johnson-Hoffman, OSI's Chief Sustainability Officer. "We look forward to continuing to support Claire's work, at OSI and ERBS, to advance our vision of a more sustainable beef industry."

Donoghue comes to the role with extensive experience both in the beef industry and as a leader within the ERBS. Since late 2018, she has chaired its Technical Working Group, which develops strategies to recognise national and local beef sustainability programmes. Rather than develop new standards, ERBS offers recognition to existing sustainability initiatives that commit to achieving eight common sustainability targets. These ERBS targets include a 15 percent intensity reduction in greenhouse gas emissions and 50 percent reduction in the use of certain animal medicines (those labeled "Highest Priority Critically Important Antimicrobials" by the World Health Organisation) by 2023.

In her new role, Donoghue is closely tracking the progress of recognised programmes and platforms toward ERBS targets. She also plans to continue to closely collaborate with the Global Roundtable for Sustainable Beef (GRSB) and expand the ERBS Board to new members and representatives from more European countries.

"This is an exciting time to chair the ERBS. The Technical Working Group have worked closely with beef stakeholders to create common goals. Now, we will be focusing on reporting our progress against these goals, and will encourage further engagement from European stakeholders. I look forward to leading this group, while working collaboratively with our peers and subject matter experts throughout our global network" she said.

### REINO UNIDO: cuarentena modificó pautas de consumo

16 August 2020 Data from AHDB shows that Brits are buying more take-out than they did before lockdown, with latest figures showing a 2 percent rise in orders compared to March 2020.

After a fall in sales at the start of lockdown due to fewer collections and the closure of drive-thrus, the takeaway market has returned to growth for the first time in four months.

And according to Kantar, takeaway orders even exceeded the pre-COVID-19 high during the first two weeks of July, with consumers generally returning to their pre-lockdown eating habits.

This has been largely driven by collected and drive-thru orders, which account for most takeaways. However, Britain's delivery orders are now more than double what they were in the four weeks to 22 March.

According to AHDB, the reopening of large chains such as McDonalds, Greggs and KFC have played a key role in the latest figures – accounting for 58 per cent of orders prior to lockdown.

And the latest research shows that the wider choice in fast food chains has benefited all sectors, with big gains for the red meat sector, potatoes and dairy.

AHDB Retail Insight Manager Rebecca Gladman said: "The absence of fast food brands at the start of lockdown hit the potato and beef sectors hard, with takeaway (collected/delivered) volumes in the first twelve weeks of lockdown down 35 percent and 22 percent respectively.

"However, the reopening of most fast food brands has brought good news for all sectors with volumes rising at pace, without negatively impacting lamb and cheese – the only two sectors to benefit from the limited takeaway options at the start of lockdown."

According to AHDB estimates, lamb volumes are up 89 per cent in the 20 weeks to July 12, with kebabs being key to the impressive growth. Pizza has accounted for most of the growth in cheese volumes – up 83 per cent during the 20-week period.

Pork has returned to year-on-year growth, with increases coming from a variety of sources such as Chinese takeaways and ham and pepperoni pizza. And a 9 percent growth in beef volumes has been helped by burger sales, with AHDB estimating Big Macs alone accounted for 24 percent of growth during the 20 weeks.



Despite fish and chip shops having a bigger share of the market under lockdown, potato volumes fell due to the absence of big brands. However, June and July have delivered a better performance for the potatoes sector, but not enough to offset those early losses.

Rebecca added: "These trends show the extent to which the market is driven by outlets and suppliers, particularly the big brands. Their importance for this market cannot be underestimated. With choice now broadening and largely back to where it was prior to lockdown, consumers have generally returned to their pre-coronavirus habits when it comes to takeaway.

"The patterns of what we eat and where we eat have been significantly impacted by Covid-19. The Eat Out to Help Out Scheme will bring further shifts to anticipated consumption patterns, but with dine-in footfall below pre-coronavirus levels as we began August and takeaways proving to be a safe option for many, it's likely the takeaway market will remain buoyant for some time."

## **BREXIT se reanuda las negociaciones entre UE y Reino Unido**

20 August 2020

Negotiators for both the European Union and United Kingdom began a seventh round of trade talks on 19 August in a bid to reach a post-Brexit deal before the January 2021 deadline.

Reuters reports that the proposed deal will cover all aspects of future relations, from trade to security. However, diplomats say that a deal is still weeks away from being finalised.

British chief negotiator David Frost and his EU counterpart, Michel Barnier, dined together on Tuesday 18 August ahead of the talks, which have snagged on the issues of fishing rights in British waters and ensuring state aid preserves fair competition. "The state aid part of the level playing field and fisheries remain the main hurdles. If this moves, everything else will fall into place," said an EU diplomat.

"This round should not bring major breakthroughs: eyes are on the last one in September."

No breakthrough in recent round of Brexit talks

21 August 2020

The latest round of negotiations between the UK and European Union on future diplomatic and trade ties after the Brexit transition period ends have brought no breakthroughs.

Reuters reports that an EU official believes that pre-existing sticking points in the negotiations mean that there is little chance of a deal being agreed in this round of talks.

"Nothing has moved. [There were] some technical exchanges that weren't entirely pointless but nothing noteworthy on the topics that matter," said the official, who is involved in the talks and spoke on condition of anonymity.

Last March, Britain became the first country ever to leave the EU - after 46 years of membership - and the two are now negotiating a new partnership from 2021 on everything from trade and transport to energy and security.

Persistent disagreements over state aid rules and fishing quotas have so far thwarted a deal, which the EU says must be in the making in time for approval at a 15-16 October summit of the bloc's 27 national leaders to enable ratification this year.

Beyond the biggest stumbling blocks, differences also linger in discussions on migration, security, dispute-settling mechanisms, human rights guarantees and other areas.

Despite time being short, the EU side has been relatively upbeat in recent weeks that an agreement can be reached with the coronavirus pandemic bringing economic havoc and both sides of the English Channel wanting to avoid an even deeper recession.

## **ESTADOS UNIDOS**

### **Desafíos del sector exportador**

Derrell Peel - Oklahoma State University

August 17, 2020 09:10 AM

The U.S. is on track for record production of beef, pork and broilers in 2020. Before COVID-19, it was recognized that meat trade would be critical for markets in 2020 and that certainly remains true at this point. After the severe disruptions in the first half of the year, expectations for meat trade have been revised and there is more uncertainty about global meat markets going forward.

Pork exports through June are up 27.4 percent year over year, led by a 335.6 percent year over year increase in pork exports to China. China has replaced Mexico as the top pork export destination, with Mexico down 2.8 percent for the year to date. Number three pork export market Japan is up 2.8 percent so far in 2020 following a 23.2 percent year over year decrease in June.

Broiler exports are up 4.2 percent year over year thus far in 2020, with latest data for June showing a 1.1 percent decrease from one year ago. Mexico remains the largest broiler export market with year to date exports up 2.0 percent following a 6.0 percent year over year decrease in June.



China is the second largest broiler export market accounting for 7.6 percent of total broiler for the first half of 2020. The sum of broiler exports to China and Hong Kong, a better measure of total broiler demand in China, is up 173.5 percent year over year in the January-June period.

Year to date beef exports are down 7.6 percent for the January-June period, following a 33.0 percent year over year drop in June and a similar decrease in May. Japan remains the largest U.S. beef export market and is up 5.6 percent year over year in the first half of 2020. However, this follows a 20.7 percent decrease in June and a 23.6 percent year over year decrease in May.

Number two South Korea is down 7.4 percent year over year through June following double-digit monthly decreases in April, May and June. Mexico, the number three market in recent years has seen monthly decreases averaging 66.9 percent in the second quarter, dropping Mexico to the fourth largest beef export market with a year to date total down 37.7 percent from one year ago.

Canada, currently the third largest beef export market, is up 12.0 percent in the first half of the year. China remains a small beef export market (1.4 percent of total exports this year) but is up 70.9 percent for the year to date. Hong Kong is down 8.0 percent so far this year and the combined total of China and Hong Kong is up 0.2 percent for the year to date.

With a weaker global economic situation, meat trade forecasts have been revised. Total pork and broiler exports are still projected higher year over year but beef exports are now projected to be lower year over year.

China will continue to be a major driver of global protein trade, especially pork. Mexico remains a major concern with dramatic economic weakness expected to continue. Four of the five largest beef exports markets dropped sharply in the second quarter; and will be watched closely for recovery in the second half of the year. China will remain a minor beef export market in 2020 but is likely to continue growing, barring major geopolitical disruptions.

### **Negociaciones comerciales con China se reanudan**

20 August 2020 China and the United States have agreed to hold trade talks in the near future to evaluate the progress of the Phase 1 trade deal.

Reuters reports that news of the talks came from the Chinese commerce ministry. Ministry spokesman Gao Feng made the comments at a weekly online briefing but did not elaborate.

The move follows remarks made by the White House Chief of Staff Mark Meadows on 18 August that no new high-level trade talks were scheduled. However, both sides report that they are in touch about implementing the Phase 1 deal.

The deal, reached on 15 January and hailed as a major breakthrough after a two-year long trade dispute between the world's two largest economies, set ambitious targets for China to sharply boost purchases of US farm and manufactured goods.

But ties quickly soured in the aftermath of the coronavirus pandemic and China's imposition of a new national security law in Hong Kong.

Both sides traded threats and sanctions on individuals and businesses, such as Chinese video platform TikTok.

Official data also suggests China's imports of US farm and manufactured goods, energy and services are well behind the pace needed to meet a first-year target increase of \$77 billion over 2017 purchases.

China's purchases have increased as its economy recovers from this year's coronavirus lockdown, however.

On Tuesday 18 August, US President Donald Trump told reporters he had postponed a 15 August review of the trade pact, in frustration over Beijing's handling of the virus pandemic.

### **Reacción de NAMI sobre una investigación en torno a los precios de la carne de vacuno en EE.UU.**

19/08/2020 El North American Meat Institute (NAMI) ha emitido un informe sobre una investigación llevada a cabo por el USDA en torno al incremento de precios registrados en la carne de vacuno en EE.UU. De acuerdo con el informe del NAMI, dos hechos como el incendio de la planta cárnica de Tyson Foods en Holcomb (Kansas) y la evolución de la covid-19 en el país han tenido efectos extremos e imprevistos sobre los mercados de la carne.

“En su análisis de los efectos del incendio y la pandemia, el USDA no encontró nada malo y confirma que la interrupción en los mercados de carne de vacuno se debió a eventos devastadores y sin precedentes”, dijo la presidenta y directora ejecutiva del Meat Institute, Julie Anna Potts. “Es difícil ver cómo las propuestas legislativas recomendadas por el USDA hubieran cambiado el resultado del incendio o la pandemia. Continuaremos las discusiones con los grupos de productores, el Congreso y la Administración para asegurar que haya un mercado justo y competitivo. Es especialmente crítico en estos tiempos de incertidumbre que los productores y empacadores trabajen juntos”, ha añadido.





Tanto el incendio como la covid-19 provocaron, según NAMI, la capacidad de procesado de ganado vacuno, provocando que los precios del ganado listo para sacrificio se redujera y también la oferta de carne en los supermercados, lo que hizo que subieran los precios.

Pese al paso del tiempo, aunque el sacrificio semanal de ganado y la producción de carne de vacuno se ha recuperado a niveles casi normales para esta época del año, tras caer en casi un tercio a fines de abril, la gran cantidad de ganado pendiente de sacrificio y la continua demanda de carne de los consumidores siguen siendo factores que muestran la evolución del mercado.

### **North American Meat Institute anunció un acuerdo con la Administración de Seguridad y Salud Laboral**

August 19, 2020 The North American Meat Institute (Meat Institute) and the U.S. Department of Labor's Occupational Safety and Health Administration (OSHA) have signed a two-year alliance to provide Meat Institute members, the public, and other stakeholders with information, guidance, and access to training resources that will help protect workers, according to a release from the institute.

"Through this alliance, we look forward to working with OSHA to continue our work to protect the health and safety of the men and women who work in meat and poultry facilities during the COVID-19 pandemic and thereafter," said Meat Institute President and Chief Executive Officer Julie Anna Potts, says in the release. "These workers are essential to making food for our nation and are a critical part of our rural economies."

"The security of America's food supply relies on meat processing facilities continuing to operate with a healthy workforce," said Principal Deputy Assistant Secretary of Labor for Occupational Safety and Health Loren Sweatt, in the release. "Together, OSHA and the North American Meat Institute can help ensure that employers in this critical industry have the tools and information they need to protect workers from the risk of the coronavirus."

During the alliance, participants will develop information about recognizing risks of coronavirus transmission, best practices for preventing transmission and the challenges for exposure control in meatpacking and processing facilities. They will also conduct outreach to small- and medium-sized facilities about available guidance and compliance assistance resources, including the On-Site Consultation Program, as well as providing information on OSHA's enforcement policies and procedures related to the meatpacking industry, the release says.

## **AUSTRALIA**

### **Exportadores sudamericanos ganan gradualmente mayor participación en el Mercado estadounidense de carne manufactura**

Jon Condon, August 18, 2020

CURRENCY movements and current flatter demand out of China are helping push prices for Australian manufacturing beef into the US to lower levels.

The A\$ closed trading yesterday at US72.2c, a 12.5pc appreciation versus the US\$ over the past three months, and its highest level seen since February last year. That is making Australian imported manufacturing beef look relatively expensive against both US domestic product, and imports from alternate suppliers.

Since early June, imported lean grinding meat prices into the US have gradually fallen, as the US processing industry has got back on its feet following earlier closures due to COVID. Prices reached a 2020 peak of A\$816c/kg at the end of May in the midst of US Plant closures, but have declined more than 17pc since then.

Prices for 90CL frozen lean were quoted by trade sources yesterday at US215c/lb CIF, delivered East Coast, worth the equivalent of around A\$6.20/kg, FAS.

Some players described the present market for manufacturing beef as 'steady', rather than falling any further.

"The COVID-related beef plant closures in the US back in April and May certainly set the market for imported manufacturing meat on fire during the big handbrake on US production – but it also dampened demand and price pretty quickly when US processors got back to work," a trade source said.

Traders said while the market was still very quiet, there had been a little buying interest at current levels. The absence of New Zealand beef in the market at present as part of NZ's annual production cycle had supported that, as had low production generally in Australia.

Growing South American competition

Recent trade commentary makes it clear that beef exports out of South America are gradually on the rise in the US market, challenging traditional imported beef suppliers like Australia and New Zealand.



“South American volumes are coming off a low base, tonnage-wise, which is why the trend looks a bit startling,” an Australian export trader said yesterday. “But it’s fair to say that we are not used to competition in the US imported beef market from this region.”

There has been some speculation that Argentina may in fact fill its 20,000 tonne US beef quota this year, for the first time. If that happens, the price advantage over Australia might see Argentina continue to sell beef at full tariff rate into the US.

“Certainly Uruguay has done that at different stages in the past,” a trade source said.

Brazil currently exports to the US under the ‘other countries’ quota of 60,000t each year, shared with smaller players like Nicaragua, Costa Rica and others. Nicaragua is a regular shipper, in small quantities, into the US market.

“In a big year, Brazil could easily put 40,000 to 50,000t into the US under that quota, given how aggressively they ship – but the fact is that currently Brazil is heavily focussed on the China market,” the trade source said.

**Record export volume**

Last month, Brazil consigned more than 87,000t of beef to China, plus another 18,800t to Hong Kong, totalling almost 106,000t of beef consigned in a single month – probably the single largest one-month, country-to country beef trade the world has ever seen, a trader suggested to Beef Central.

At the same time as this dramatic rise in volume is occurring, price per tonne of Brazilian beef into China continues to drop away sharply, however. July shipments averaged \$4315/tonne, the lowest price seen since mid-2017.

One of the key reasons why Brazil is consigning so much beef to China is its lack of access to alternate higher-paying volume markets like Japan, Korea and the US.

Over time, however, more of the major grinders operating in the US market are approving more plants for supply in South America. Another three large JBS plants in Brazil/Argentina were recently approved to service the Burger King chain in the US, for example.

“All of that is adding momentum to South American beef supply into the US,” an Australian trade source said.

“At a US15-17c/lb discount to equivalent Australian manufacturing beef at present, there are more US end-users electing to adopt South American product for the first time – they feel they have to do it.”

However, the more South American plants get approved for supply into the large US end-users, the narrower the price gap between Australian and South American beef was likely to become – both as an increase to the South Americans, and a detriment to Australia.

“It certainly isn’t the first time there’s been a looming threat out of South America for market share in the US imported trade. In the past, though, that’s been defused by disease issues, or food safety inspection concerns such as Brazil’s ‘Weak Flesh’ meat inspection corruption scandal.”

“But that won’t inevitably happen again – this new competition may be the new norm for Australian exports into the US. If anybody was planning to launch a new US export business on the expectation of no competition out of South America, I think they would be a little foolhardy – even if volumes are not likely to be all that significant for the timebeing.”

Hygiene-wise, and reliability of shipping wise, Australia still maintained a distinct reputational advantage in the US market, but South American product was not likely to go away in the US market, any time soon, at current price levels.

**China diversion**

Also contributing to the recent US imported market price trend is exporter diversion out of the China market, due to voluntary or formal plant suspensions and other COVID-related matters. Australia’s exports to China last month were down 26pc on the previous month, to 12,500t. That has served to take some of the competitive tension out of the market from US customers, Beef Central was told.

Steiner Consulting’s weekly US imported beef report points out that imported trim volume levels into the US are still quite high, year-on-year.

Because of COVID absenteeism in US plants, the US simply did not have the labour to pull as many cuts, trim them, and bag and pack them,” a trade source said. “That continues to push more domestic material into bins (destined for grinding), keeping a lid on imported price.”

“It’s keeping the US domestic retail mince market pretty well full, and being utilised. And unlike the restaurant end of the food service sector, the quick-service restaurants (ie burger outlets), while still very cautious, are still doing OK in the US, despite COVID.”

**Light trading**

This week’s Steiner US imported beef market report says trading was generally light on limited manufacturing meat offerings from Australia last week, noting that New Zealand supplies are seasonally limited at this time.

“US importers have been buying aggressively in Argentina, but at this time we are being told that quota is close to being filled,” Steiner said.



“Until now the availability of South American product was seen as part of the reason for the downward pressure on imported values. While possible, we think the main factor has been the decline in domestic lean beef prices,” it said.

It was hard to know how much beef Argentine packers would be willing to ship to the US out-of-quota, Steiner said.

However the strong US\$ and relatively high value of US lean beef might encourage some out-of-quota product to continue to flow.

A fortnight ago Reuters reported that seven Argentine meat processing plants had temporarily suspended shipping product to China due to COVID-19 infection among workers.

If these were beef plants (species was not identified in the Reuters reports), given the volume of beef Argentina ships to China, Steiner said temporary lack of access to the Chinese market might divert more product to the US, regardless of the quota availability.

Meanwhile imports to the US from all supplier countries continued to increase, with volumes in the last four weeks averaging 27,700t/week, 35pc higher than a year ago.

“The increase in imports has been broad-based, with both Australia and New Zealand imports up compared to a year ago. Additionally, we continue to see more availability from Central America and Ireland. The increase in imported beef supplies and the decline in domestic lean beef prices have so far made it difficult to set a bottom under the imported beef market,” Steiner said.

US domestic beef production had now mostly recovered from earlier setbacks caused by COVID, even as daily slaughter remained under year-ago levels, Steiner said.

Packers were running more shifts on Saturdays to offset the reduction in capacity per shift, due to new COVID mitigation measures. Fed cattle in the US also continued to come to market at heavier weights, Steiner said. In May and June fed cattle carcass weights were as much as 5pc higher than a year ago, while current weights are about 2pc over last year’s levels.

“But even as slaughter has improved, packers continue to struggle with labour availability in their trimming/fabrication lines. There are also reports that the new measures taken have negatively impacted productivity and yields. We think that this has increased the amount of beef currently going into the grinder,” Steiner said.

As a result, it was somewhat surprising that lean beef prices have been trending lower even as cow slaughter is down from a year ago.

“It is important to consider the impact that the overall increase in fed beef production has had on the market,” Steiner said. “We think more fed beef cuts are currently going into the grinder for two reasons: limited labour to trim and the need to put a floor under the price of round and chuck cuts.”

Ample imported beef supplies, domestic US beef production near year-ago levels and above average price multiples to the cut-out made it difficult to reverse the trend in lean beef values, at least in the near term, Steiner said.

US retailers had kept prices for ground beef above year ago levels, even as supply growth has recovered.

In part this was due to the shift in demand towards retail sales out of food service, Steiner said.

“While this was sustainable during the summer months thanks to higher grilling season demand, the seasonal demand shift and high retail prices could result in a slowdown in volume sales and lower prices may be needed to clear the market.”

### **Lanzan programas de cortes “grassfed” premium certificados**

Jon Condon, August 19, 2020 Peter Andrews, head of one of Australia’s largest portioning and value-added meat businesses, shares his thoughts on the future of certified grassfed brand programs, the importance of diversification in meat businesses during turbulent times, and the impact that COVID has had on the red meat supply chain since April.

CERTIFIED grassfed brand programs have a strong future in the upper end of food service industry, Andrews Meat Industries head Peter Andrews says.

Speaking in a podcast hosted by JBS as part of its Great Southern Grass Matters series, Mr Andrews said certified grassfed product was definitely ‘on-trend’ with Australian and international restaurant and hotel chefs.

“From 2004 to about 2011, we always used to buy grainfed for our food service supply business – mainly because chefs were chasing marbling and consistency. But the problem was that grainfed can also have a very large eye muscle size, making it hard to portion control, to cut smaller steak portions that chefs are increasingly demanding these days,” he said.

However chefs were increasingly wanting to feature a pasturefed product, provided it had some marbling and consistency, and the development of farm-assured pasturefed products like JBS’s Great Southern program now offered that.



“It also has a smaller eye muscle, which lends itself to using a lot of different cuts on the animal, and using them in different ways. We’ve found we can do a lot more work with cuts like a T-bone, an OP rib or a rib sirloin, for example,” he said.

“Smaller carcass size means we can cut a bone-in steak portion in a range from 300 grams to 500 grams, whereas a grainfed product more or less starts at 500g. It gives us a lot more versatility, and gives chefs more options.”

Sample of Great Southern’s Little Joe marbling score 4 and up farm-assured grassfed product. Click on image for a larger view

“On the boneless cuts, like a striploin, cube roll or tenderloin, again they are smaller eye muscle size, making it easier to portion a 200g or 180g tenderloin steak which still has a little thickness to it, which is what chefs are looking for. If you try to cut that portion-weight tenderloin steak off a heavier grainfed carcass, it’s going to be a much thinner steak.”

Mr Andrews said JBS’s Great Southern brand now played an integral role in the Andrews Meats business.

“The Great Southern brand has now become integral to the business – it has basically become the leading brand for the the pasturefed product that we sell, ranging from Great Southern, to the higher level Pinnacle (BMS2+) and Little Joe (BMS4+) within the family of brands,” he said.

Supply guarantees

With about 2000 active clients, the Andrews Meats business undertook around 800 to 900 deliveries daily to customers, Mr Andrews said.

“We’re a just-in-time business, which means the customers order the night before, for delivery the next day. It provides a window of just 5-6 hours in the early hours of the morning to get all that product portioned, put onto a truck and delivered,” he said.

By nature of the sheer size of JBS’s Great Southern program, one of the attractions with the farm-assured program was guarantee of supply, Mr Andrews said.

“We purchase the product in advance, and have surety that we will have the product delivered and supplied. They give us a commitment to how much of a particular product they can supply over a forecast period of time.”

“When we are quoting to chefs for their menus, they want to know with confidence that they can access the product, for a certain period, whether that be three, six or 12 months. They also want to know what the price stability will be for the product, and we can get that with Great Southern, as well as having the guarantee of supply and quality.”

Mr Andrews said he thought certified grassfed programs would only continue to increase in their appeal within the food service market.

“That applies especially with premium products like Great Southern’s Little Joe. If you’d said to me five years ago that you could provide a marbling score four and better grassfed product, I would not have believed you. It just didn’t exist.”

“But through the Great Southern program and the work that’s been done, they’ve developed the Little Joe product, which is absolutely amazing – it’s marbled and looks like grainfed, but is certified off grass. It’s a nice, small, eye of meat, and when chefs see that, and what they can get out of pasture-fed beef, they will just keep wanting that product,” he said.

Grainfed has become more of a generic product in the marketplace compared with premium pasturefed, Mr Andrews said.

Business diversifies

Mr Andrews gave a brief summary of Andrews Meats’ growth over the past 30 years.

“From around 1995, we started looking at portion control and value-adding. There wasn’t a lot around then, and very little branded beef in the market,” he said.

Originally Andrews looked for small individual; farmers it could align with, trying to brand their products to appeal to chefs, to get away from the ‘commodity market’ that existed at the time.

From around 1999, a lot of pubs, hotels and clubs were starting to deal with better cuts of meat, and Andrews started focusing more on the higher restaurant market. Part of that was centred on new hotels and restaurants that were opening across Sydney, in time for the 2000 Sydney Olympic Games.

In 2004, the business was diversified into three divisions – food service (including portion-cutting), pre-cooked/value-added meat, and export and branded meat, mostly under grainfed brands and Wagyu. Those three divisions now make up a big part of what Andrews does.

“One of the main reasons we wanted to grow the export business was to supply back into the food service market our own brands – brands that we could control, so that we weren’t reliant on companies to distribute their brands,” Mr Andrews said.

“What we found was that every time we’d take on another company’s brand, over a matter of time, for whatever reason we’d lose that brand. So we wanted to control the brand that we promoted to our customers, and it’s the main reason why we diversified into export.”

Andrews’ export business ended up flourishing, growing into a much bigger business.





“Initially it was to export products and supply branded grainfed product back to our food service business. But since then, we’ve obviously taken on a lot of additional brands over the years.”

#### Blockchain-enabled traceability

The launch last year of a Blockchain-enabled traceability program for JBS’s King Island brand was an exciting step for Andrews Meats – but more so for end-users, Mr Andrews said.

“Under the program, chefs will be able to buy a primal or some portioned steaks and trace each portion back to the farmer who grew the animal. There’s a lot of future in having that individual traceability right through the system, and it’s one of the attributes that chefs and some retail customers are starting to look for. It’s that whole provenance story – where the product came from and who grew it – that supports and underpins the value and quality of the product,” he said.

But Blockchain traceability was not just about the chef or the end-customer. Farmers would get more out of the technology than anybody else in the long-run, Mr Andrews said, as information and data is collected over time. “It’s still all very new, but will keep improving over time, allowing livestock suppliers to improve their own operations and the consistency and quality of the meat they produce.”

Asked whether blockchain style traceability may one day become the norm in branded beef, Mr Andrews said once end-users started seeing more and more such products hitting the market, there would be greater demand for it. “More suppliers will have to go this way,” he said.

#### COVID impact on meat trade

Being heavily exposed to the food service trade as it is, COVID-19 had made conditions ‘really hard’ for Andrews Meats over the past four or five months, Mr Andrews said.

“Between revenue growth and diversification, most of our longer serving staff had to this point only ever seen this business go one way, and that’s up,” he said.

But once COVID struck – basically shutting down all food service trade, except for the vulnerable care market that the company supplies – it represented a big hit to the Andrews business.

“It was a challenging time – we certainly did not see it coming, and you can never prepare yourself for such an event. Once the announcement was made on the Sunday that venues would close the following evening, it meant that basically nobody ordered the next day,” Mr Andrews said.

“Our business dropped by 80pc overnight. All we were supplying in the end were nursing homes, hospitals and vulnerable care groups.

“We knew something was coming, in what was happening overseas, but just didn’t know how that would affect us. We’re in a better place now, but nobody knows where all this is heading, or how long it will last.”

With stock holdings averaging \$19-\$20 million, a lot of the product held by the business had to be discounted or diverted into other channels.

“The hardest part was turning off the supply chain. We had meat already booked to come in that we could no longer use. We had to defer or cancel product, and had some very difficult conversations with suppliers,” Mr Andrews said.

Fortunately, at the same time, retail was booming, with insatiable demand for product, meaning a lot of wholesalers and traders were able to sell much (but not all) of that product into the retail market.

“We couldn’t sell it all though, because a lot of the product we produce is bespoke, for certain customers. The cruise line industry, for example, represents 15pc of our revenue, and at the end of July we still had product tied up in freezers for the cruise lines, which is produced specifically to their requirements.

During the depths of the COVID impact on retail, mince meat became incredibly popular, and anything that could be minced – topsides, rounds, silversides, chucks – was commanding a high price for retail use. At the same time there was also a retail surge for steak cuts as well.

“There was even a rush on Wagyu, but it was a crazy time – people were emptying butchery shelves every day. What was happening was that a customer entering a shop was seeing empty shelves, so if all that was left was pork, they’d buy that too. Everybody was just trying to fill their fridges and freezers with whatever they could – no different that toilet paper and bread.”

#### Value in diversification

With the second COVID wave sweeping through Victoria, Mr Andrews said it was important to remain cautious – with a downturn in trade following recent spikes in Sydney, on top of what has happened in Victoria.

“Planning forward, we’re just going to be cautious. We know it is going to be a long and slow road back. There’s part of our market that we know we will not see at all this year – the airline trade, cruise ships, and international hotels, conventions and function centres. Sporting venues have also been greatly reduced. Combined, they represent 30pc of our business, so we know there are some hard times ahead.”

“While none of us knew that there was going to be a pandemic, what we have learned out of all this is the value that a diversified business model provides in delivering a more secure and sustainable business.

“Having a business that operates in exports, has a cooked/value-added division, and the food service division has worked for us during these difficult times. Obviously with food service being hit the hardest, the other divisions have been able to carry the business.”



“This is a year where you really can’t look at your results – it’s about survival, and keeping the business strong. A lot of the things we are doing now are about the future – strengthening our management team, retraining, thinking of new ideas and initiatives, and how we can play in that business-to-consumer space in the future.”

“We’re still investing in the business, in infrastructure and elsewhere. We’re not looking at this as an excuse to stop working on things, remaining optimistic that things will change, and we want to come out of this strong.”

### **Tendencia ascendente en el valor de los sebos**

20 August 2020

Key points:

Tallow prices found support in July

Hide prices continue to hold no market value

Beef offal exports reflect lower cattle slaughter levels

Tallow

The latest MLA Co-product report shows that in 2020 the tallow market has continued to perform strongly in an otherwise mixed year for Australian offal products.

All tallow prices firmed in July, with the price of 1% FFA tallow averaging \$973/tonne, up \$49/tonne from June and \$131/tonne above year-ago levels. The price of 2% FFA tallow averaged \$963/tonne, up \$41/tonne compared to June and \$118/tonne above year-ago levels.

Demand for biodiesel in Singapore has helped support these prices, as tallow is a raw material for biodiesel production. Maintenance at the Singapore biodiesel plant, the largest of its kind worldwide, is nearing completion, with this also underpinning a lift in prices.

The demand for biofuel is anticipated to increase in the coming years, in part due to high oil prices, albeit the recent oil price crash has held back the upside for tallow prices. A focus on reducing greenhouse gas emissions is also expected to increase demand. However, Australian tallow production is anticipated to decline in the short-term due to lower domestic turnoff

Hides

The hide market remains under extreme pressure. Despite being open, the markets in China and Italy remain subdued as they are reluctant to purchase until sales contracts for finished leather are confirmed. Demand is also extremely soft due to the impacts of COVID-19. Nearly all hides from cattle under 350kg carcass weight are making less than \$1/hide, with many small or poor condition hides holding no market value.

Beef Offal

Beef offal prices have been mixed, as offshore demand for lower value red meat products remains strong. In July, prices for premium items such as thickskirt eased 15% month-on-month to average \$9.05/kg. However, lower-cost products such as cheek meat and liver increased by 3.7% and 8.5% month-on-month to \$7.26/kg and \$1.28/kg, respectively.

Offal exports

Australian beef offal exports followed a similar trend to overall exports in July, declining 6% from June volumes to 13,120 tonnes shipped weight (swt). For the calendar year-to-July, beef offal exports are reported 4% below year-ago levels, at 94,275 tonnes swt, as lower cattle turnoff has impacted the availability of product for export.

### **Industria de carnes: objetivo de ser Carbono Neutra hacia 2030**

20 August 2020

The Australian red meat and livestock industry has set the ambitious target to be carbon neutral by 2030 (CN30).

This means Australia’s beef, lamb and goat industries – including production, lot feeding and meat processing – are aiming for no ‘net release’ of greenhouse gas (GHG) emissions into the atmosphere in 10 years’ time.

But what does this really mean on-farm and what can producers do to reach this goal?

Here, MLA Manager – Sustainability Innovation, Doug McNicholl, shares what producers need to know about CN30 and the part MLA is playing to reach this target.

“The industry has created an opportunity to turn today’s pressures into tomorrow’s opportunities,” Doug said.

MLA’s approach to achieving CN30 is focused on delivering multiple benefits to industry, customers, consumers and the community.

“The CN30 target sends a clear signal to government and consumers that the red meat industry is proactively addressing emissions.”



Staying ahead of current and future consumer, customer and community expectations regarding environmental credentials allows red meat producers to stamp their mark in a competitive global protein market.

“Demonstrated commitment to environmental stewardship, through initiatives such as CN30, enables ongoing trust and support for our industry. It underpins our position as a responsible producer of high-value, clean, safe and natural protein,” Doug said.

What’s in it for producers?

The big wins for producers from CN30 activities include:

novel animal supplements and legumes which can increase live weight gains and dramatically reduce methane emissions

increased soil organic matter from deep-rooted pastures and legumes, which improves soil health, feedbase productivity and drought resilience

improvements in genetics and herd management which can reduce methane emissions per kilogram of live weight produced, enabling productivity improvements alongside reductions in emissions intensity.

“Whether it’s reducing net emissions, boosting productivity or developing new markets, these CN30 activities deliver multiple benefits to producers and the community,” Doug said.

Is CN30 actually achievable?

Doug said CN30 is achievable with industry commitment, the right policy settings and new investment in research, development and adoption.

CSIRO has presented some theoretical pathways for the Australian red meat industry to achieve CN30; however, the support of producers will be crucial to the initiative’s success.

Australian red meat producers have a long and proud history of adapting to environmental and market conditions. As custodians of around half of Australia’s land mass, an enormous opportunity exists to be the prime example of a productive, profitable, carbon neutral industry.

What will this mean for Australia’s national herd in 2030?

According to Doug, carbon neutrality doesn’t need to come at the cost of livestock numbers.

CSIRO analysis shows it’s possible to achieve CN30 without reducing herd numbers below the rolling 10-year average (25 million cattle, 70 million sheep and 0.5 million goats).

By 2030, producers will be even more attuned to the influence of genetic, environmental, technological and market factors on red meat production, and will be able to:

access the best information, enabling selection of livestock with multiple attributes to increase productivity and reduce methane emissions per kilogram produced

select supplements, pastures, legumes and trees with multiple attributes, enabling livestock to thrive in more extreme weather and climate conditions

access more established markets for low and zero carbon red meat and co-products.

What’s in the CN30 pipeline?

MLA is working on a range of tools and technologies for producers to cost-effectively reduce emissions and boost the value of red meat sales by demonstrating environmental stewardship credentials to customers, consumers and the community.

These include the following tools and technologies and technologies:

Carbon accounting tool and training packages

“An important first step is providing producers with a carbon accounting tool so they can determine their net GHG emissions position, identify strategies to reduce these emissions and improve carbon storage on-farm,” Doug said.

“MLA’s CN30 Manager, Margaret Jewell, has been working with producers across the country to develop a next generation arm-level accounting tool.”

A carbon accounting training manual is also being developed to help producers get on the front foot and maintain or improve productivity while reducing emissions.

New supplements and feedbase options

More than three-quarters of emissions from enteric fermentation (digestion) are from beef cattle on pasture. Approximately half these emissions are from cows aged more than two years.

“This is why MLA and its research partners are investing in new feedbase options and supplements which reduce methane emissions from livestock and improve animal growth rates and reproduction,” Doug said.

“Legumes such as leucaena and desmanthus can raise animal productivity, reduce methane emissions and offer additional soil health benefits by fixing nitrogen.”

Several supplements have been identified which provide reductions in enteric methane and improvements in animal productivity, including the following:

3-Nitrooxypropanol (3-NOP) is likely to be available to producers within the next few years and can reduce enteric methane emissions in cattle fed grain-based diets



marine macroalgae such as *Asparagopsis* spp has been shown to substantially reduce enteric methane emissions when incorporated into feedlot rations.

### **Evolución ascendente del dólar australiano**

Jon Condon, August 20, 2020

THE Australian dollar has continued to creep higher this week, reaching a new 18-month high. The currency reached as high as US73c during trading yesterday, before closing at 72.4c – a 12pc rise since March.

Our currency also continues to appreciate against other trading partner currencies, including the Japanese yen, Euro and British pence.

Increasing softness in the troubled US economy, combined with strong commodity prices for coal and iron ore are driving the A\$ higher, analysts say.

Higher currency value creates headwinds for Australian beef exports, making our product look relatively expensive against other competitors.

Westpac chief economist Bill Evans said recovery in the Chinese economy was underpinning a decent outlook for commodity prices, and largely influencing the rise in the value of the Australian dollar.

“When interest rates are stable the way they are, then it’s mainly commodity prices that influence currency value,” he said.

The relative performance of China and the US was going to be very important for the Australian dollar, Mr Evans said, however speculation around currency movements would remain uncertain while the pandemic persisted.

The A\$ is noted for being a ‘commodity’ currency – that is, its value against other world currencies is mainly correlated from the price of commodities that Australia exports.

The 12pc rise in the A\$ from its March low has been due to its largest export partner, China, growing demand for commodities such as copper and iron ore.

On Friday, the Reserve Bank of Australia chief Philip Lowe warned that trying to stimulate the economy by devaluing the A\$ dollar would be both costly and risky, saying he believed the currency was a ‘fair value’ in the current economic climate. He said the Australian dollar was one of the most actively traded currencies in the world.

Some analysts are suggesting the A\$ may push towards US75c in the near term.

Earlier, National Australia Bank suggested that the A\$ could hit US80c within the next two years.

Head of NAB Foreign Exchange, Ray Attrill, said the currency trend reflected the bank’s increased conviction that the recent weakening in the US\$ was ‘for real,’ and had a fair way to play out over the next couple of years.

NAB now sees the A\$ at US74c in December, up from 72c in its previous forecast, and rising to US78c at the end of 2021.

Recent data from the US showed the world’s largest economy collapsed in the midst of the COVID pandemic in the April-June period, falling 32.9pc on the same period the previous year. The slide was the worst since quarterly records began in 1947.

## **EMPRESARIAS**

### **JBS mantiene su plan de cotizar en Wall Street**

17 August 2020 Brazil’s JBS SA is reviving plans to list shares on Wall Street after dealing with the fallout of the coronavirus pandemic.

Reuters reports that JBS CEO Gilberto Tomazoni announced the plans on 14 August after the meat packing giant posted stronger-than-expected quarterly results.

Speaking on a conference call with analysts following the company’s second-quarter results, Tomazoni said the focus is turning towards the Wall Street listing now that the worst of the COVID-19 outbreak appears to have passed.

“In the last quarter we said we would prioritise the protection of our people and tackle the operating challenges imposed by the pandemic,” Tomazoni said.

“Now things are more under control. We have learned to deal with the challenges. We are again discussing the listing,” he said.

Despite the volatility caused by the pandemic, JBS late on Thursday 13 August posted quarterly net profits that were nearly twice as high as the average of analysts’ estimates, buoyed by a strong performance in its beef and pork divisions at home and in the United States.

JBS shares rose 4 percent in early trading on Friday 14 August but later trimmed gains to trade 1 percent higher.





Regarding the timing for the US listing, Tomazoni said "it cannot happen this year" given the steps needed to complete such an undertaking.

JBS managers also said the company will cut financial expenses by an estimated \$100 million this year. Chief Financial Officer Guilherme Cavalcanti noted, hypothetically, that if JBS exchanged all of its debt for a 10-year bond, it could reduce financial expenses by a further \$100 million given its good credit rating. In the second quarter, JBS' leverage ratio fell to 1.75x in dollars, its lowest in history.

"In terms of financial performance, this was a quarter to remember," Banco BTG Pactual analysts said in a note to clients on Friday 14 August.

### **JBS medida judicial obliga distanciamiento en trabajadores**

21 August 2020 A beef plant in Pontes e Lacerda owned by JBS SA has been ordered by a labour court to impose a 1.5-meter distance between workers in the production line to stop the spread of COVID-19.

Reuters reports that labour prosecutors gave the distancing order on 20 August.

The ruling comes after an outbreak of COVID-19 at that plant, where at least 145 workers were infected as of 27 July, according to labour prosecutors in Mato Grosso, Brazil's largest farm state. JBS employs 1,035 people there, the statement noted.

"As the contamination occurs through respiratory droplets and also through the air, it is essential to maintain adequate distancing," the prosecutors' statement said referring to workstations where people spend at least eight hours in closed quarters with little air ventilation.

JBS declined to comment on the ruling, but has repeatedly defended its health protocols as "robust."

The company, which has had outbreaks in at least three other plants in Mato Grosso, has said it follows federal rules passed in June that outlines requirements for meatpackers during the pandemic.

Despite those measures, prosecutors say the company has not done enough, and have taken the company to court in a bid to improve protection for workers at another three Mato Grosso beef plants in Colíder, Confresa and Araputanga.

All of the cases are pending.

If not possible to enforce the 1.5-meter distance at the Pontes e Lacerda facility, then the company should install physical barriers to protect the workers, the ruling said, according to the prosecutors' statement.