



## **NOTICIAS INTERNACIONALES AL 19/02/2021**

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## **GLOBAL**

### **Prevén importante aumento del precio de la carne por mayor precio de granos**

por Cecilia Pattarino febrero 17, 2021

La pandemia de Covid-19 trastornó las cadenas de suministro de alimentos, paralizó el transporte marítimo, enfermó a los trabajadores de las industrias y, en última instancia, elevó los costos de los alimentos en todo el mundo el año pasado. Actualmente los productores de carne se enfrentan a mayores costos debido a que los precios de los granos están en máximos de siete años

Según informó Bloomberg los costos de alimentación aumentaron 30% o más y para seguir siendo rentables, las industrias están aumentando los precios, lo que afectará a las cadenas de suministro y se mostrará en los próximos meses como precios más altos para la carne vacuna, de cerdo y pollo en todo el mundo.

La última vez que los granos fueron tan caros fue después de la sequía de 2014 en Estados Unidos, y los precios de la carne experimentaron un aumento dramático. Ahora, la carne podría volver a convertirse en un impulsor de la inflación mundial de los alimentos.

Las vacunas prometen un regreso a la vida normal y como consecuencia de la demanda impulsando los precios al consumidor. Los mercados de bonos estadounidenses y europeos están enviando señales de que la inflación ha vuelto. Las expectativas de inflación a un año de los estadounidenses la semana pasada subieron a su nivel más alto desde 2014.

Los productores de carne de los principales países exportadores están sintiendo el impacto de los mayores costos de los cereales. En Brasil, el mayor transportista de aves de corral, el costo de criar pollos aumentó un 39% el año pasado debido a la alimentación, según Embrapa, una agencia estatal de investigación agrícola y los costos volvieron a subir el mes pasado alrededor de un 6%.

Según la Organización de las Naciones Unidas para la Agricultura y la Alimentación los precios mundiales de la carne en enero subieron por cuarto mes consecutivo. “Definitivamente esperamos que se reduzcan los márgenes de ganancia y luego los productores tendrán que empezar a pensar de alguna manera en cómo van a cubrir ese precio”, dijo Upali Galketi Aratchilage, economista senior de la FAO.

Los brotes de enfermedades animales también podrían hacer subir los precios de la carne, y algunas partes de Europa y Asia experimentan brotes de influenza aviar. La fiebre porcina africana todavía se está propagando en algunos países y recientemente provocó que una empresa de cerdos filipina abandonara la industria.

## **CHINA**

### **Consumo de carne vacuna seguirá en aumento**

por Cecilia Ferreira febrero 17, 2021

Las perspectivas para la carne vacuna en China son positivas y aumentan las oportunidades para la carne producida a pasto. En el corto plazo, hay un optimismo moderado en el comercio de carne vacuna, teniendo en cuenta que el país asiático ha sentido el impacto económico generado por la lucha contra el Covid-19. Pero en el mediano y largo plazo las señales son más sólidas, con el consumo de carne vacuna aumentando de forma gradual pero constante, una vez que haya quedado atrás la pandemia.

Así lo señala el informe Beef – New To China Market Product Report, elaborado por la oficina del USDA en Shanghai y publicado a comienzos de febrero.

La carne vacuna congelada tiene un mercado mucho más grande en China en comparación con la carne fresca o refrigerada, debido a menores costos. Los principales proveedores de carne congelada son Brasil, Argentina, Australia, Uruguay y Nueva Zelanda. El informe del USDA señala que proveedores como Brasil o Argentina ofrecen productos cárnicos a precios mucho más bajos y que los importadores no esperan una calidad tan alta.

“Los verdaderos competidores de la carne vacuna congelada, fresca y refrigerada de EEUU son Australia y Nueva Zelanda. Después de años de trabajar con supermercados y restaurantes de alta gama, la carne de vacuno alimentada a pasto de estos dos países dominan el exclusivo mercado chino. Los consumidores se han acostumbrado al sabor de la carne de res alimentada con pasto y la consideran una fuente más saludable y natural de carne vacuna, un mensaje que ha sido impulsado intensamente durante años por campañas de marketing de Australia y Nueva Zelanda”, destaca el reporte.

El USDA -que centró este reporte en el comercio de carne de EEUU en China- mostró un ejemplo de la diferencia arancelaria entre los cuatro principales países exportadores de carne de res fresca y refrigerada en el país asiático. Y ahí aparece Uruguay, en desventaja competitiva con ciertos países que gozan de arancel cero debido al establecimiento de tratados de libre comercio con China.



## BRASIL

### Oferta reduzida por razones climáticas, falta de pasto y de animales gordos

Frigorífico continua na pressão, mas pecuarista resiste porque a conta não fecha e há risco de prejuízo na reposição

18/02/2021

Nesta quinta-feira (18/2), grande parte das indústrias frigoríficas ainda preferiu adotar uma posição de cautela nas suas compras de gado, devido sobretudo ao baixo consumo doméstico de carne bovina, informa a IHS Markit, que acompanha diariamente o mercado pecuário nas principais regiões do País.

Mas mesmo que as indústrias resolvessem ir com mais ousadia aos balcões de negócios iriam se deparar com um quadro de oferta de boiadas ainda bastante enxuto e preços da arroba nas nuvens – ao redor de R\$ 300 nas praças do interior paulista. Além disso, o pecuarista não está disposto a ceder a pressão baixista dos frigoríficos, e segura o quanto pode os poucos lotes que tem.

Segundo a IHS, há um atraso no processo de engorda dos animais mantidos nas fazendas de pecuária extensiva, em função do alongamento do período de monta e do desenvolvimento tardio do suporte do pasto, devido à demora este ano do período chuvoso no Brasil-Central. Para complicar ainda mais a vida dos frigoríficos, o mercado da pecuária de corte passa por um período de retenção no abate de matrizes, por causa dos altos preços do bezerro e demais categorias da reposição.

Como já mencionado neste texto, há também uma posição de cautela de boa parte dos pecuaristas, que resistem em negociar frente às pressões baixistas sobre os preços exercidas pelos compradores, informa a IHS Markit. Além disso, para os recriadores que necessitam fazer a reposição, há o risco de prejuízos em caso da venda de lotes de boiadas gordas muito abaixo dos preços vigentes atualmente.

No mercado atacadista brasileiro da carne bovina, o movimento segue nada expressivo em relação à procura e reposição entre atacado e varejo, relata a IHS. “Mesmo depois das recentes baixas acumuladas nos preços dos principais cortes bovinos, o escoamento se mantém inconsistente”, observa a consultoria.

Giro pelas praças

Na maior parte das praças pecuárias do Sudeste, a oferta de boi gordo se manteve restrita. Desta maneira, as escalas de abate das indústrias frigoríficas de São Paulo e Minas se mostraram relativamente mais encurtadas, informa a IHS.

Na região Sul, a pressão baixista da arroba ganhou relativa força. “Unidades de abate continuam a operar com capacidade ociosa elevada, com casos de paralisação dos abates diários, que devem ser retomados apenas em março”, observa a IHS. No Rio Grande do Sul, o preço do boi gordo cedeu nesta quinta-feira. Também há uma forte pressão de baixa nas praças do Paraná, decorrente da dificuldade no escoamento da carne.

Nas praças pecuárias das regiões Norte e Centro-Oeste do Brasil, o mercado registrou poucas movimentações, relata a IHS. Entre os fatores que contribuem para esse panorama, deve-se levar em consideração o consumo de carne vermelha mais fraco nos mercados locais, resultando em uma demanda menor dos frigoríficos, relata a IHS.

No Mato Grosso, os preços da arroba do boi gordo se mostram ligeiramente mais fracos e há uma queda de braço entre compradores e vendedores em Goiás e Mato Grosso do Sul.

No caso de algumas praças da região Norte, as chuvas dificultam o transporte dos animais, reduzindo “artificialmente” a oferta, o que colabora para estagnação dos preços locais.

Os poucos reportes de negócios ocorreram em Rondônia, onde compradores só conseguiram efetivar novos acordos oferecendo preços maiores, informa a IHS Markit.

No Nordeste, o preço da boiada gorda reagiu na Bahia, nesta quinta-feira, em função da necessidade de avançar nas escalas.

Diferencial de base MT-SP mais estreito

Desde julho de 2020, o diferencial de base MT-SP demonstrou uma tendência de estreitamento entre os Estados. Em janeiro deste ano, este indicador ficou em -5,79%, o menor patamar dos últimos 12 meses, informa a Instituto Mato-Grossense de Economia Agropecuária (Imea).

Esse cenário, diz o Imea, está atrelado à valorização mais acentuada da arroba mato-grossense sobre o preço da arroba paulista, devido à oferta reduzida de animais no Estado do Centro-Oeste.

Em janeiro último, a média do boi gordo a prazo em Mato Grosso foi de R\$ 272,21/@, livre de Funrural, com valorização de 9,05% no comparativo mensal. Enquanto isso, em São Paulo, o boi gordo a prazo ficou cotado na média dos R\$ 289,46/@ (também livre de impostos), mas com variação mensal menor, de 8,59%, compara o Imea.

Dessa maneira, o diferencial entre as praças apresentou recuo de 3,88 pontos percentuais ante a janeiro de 2020.

Para o próximo mês, prevê o Imea, é esperado que as cotações do boi gordo no Mato Grosso se mantenham em alta, uma vez que, além de escassez de boi ofertado, a maior retenção de fêmeas pode contribuir para este cenário.



### Relação de troca no MT

Mesmo com o avanço nas cotações do boi gordo e do bezerro de ano, a maior valorização semanal da arroba do boi gordo as regiões do Mato Grosso fez com que a relação de troca boi/bezerro apresentasse alta. Assim, o indicador fechou a 1,85 cab./cab.na última semana, um incremento de 0,60% em relação à semana anterior.

Menos boi e mais vacas

Segundo os dados do Instituto de Defesa Agropecuária do Mato Grosso (Indea), em janeiro deste ano, o Mato Grosso abateu 367,21 mil cabeças de bovinos, das quais 225,05 mil foram de machos, o que representou uma queda de 15,57% no comparativo com o mês anterior.

Por sua vez, o volume de fêmeas foi de 142,15 mil cabeças, acréscimo de 8,12% no mesmo comparativo.

Segundo o Imea, um dos principais motivos que influenciaram este cenário de abate maior de fêmeas foi a oferta mais escassa dos machos. “Para atender à demanda interna e aproveitar a alta na arroba, alguns pecuaristas decidiram continuar descartando as suas vacas nesse período”, justifica o Imea.

No comparativo com dezembro de 20, todas as regiões do Mato Grosso – com exceção da região nordeste (+0,61%) – apresentaram queda no número de bovinos abatidos, com destaque para as regiões sudeste (-20,66%), oeste (- 12,40%) e centro-sul (-7,25%) do Estado.

Diante disso, para o curto prazo, é esperada uma maior contenção de fêmeas nas fazendas do Mato Grosso, o que pode restringir ainda mais a oferta dos animais ao abate, observa o Imea.

### Mal comienzo de año para las exportaciones cárnicas ante el estancamiento chino

08/02/2021 - 12:44 PM

Se reducen un 6% en cantidad y un 11% en valor

Las exportaciones totales de carne vacuna en enero disminuyeron 6% en volumen y 11% en ingresos en comparación con enero de 2020, informó la Asociación Brasileña de Refrigeradores (Abrafrigo).

En total se manejaron 127.139 toneladas que generaron un valor de US\$ 549 millones.

China y Hong Kong incrementaron ligeramente sus niveles de importación sumando conjuntamente 79.896 toneladas (62,8% del total exportado), pero hubo una reducción significativa en su movimiento en relación a los últimos meses del año. año, cuando los chinos compraron más cantidad en previsión de su fiesta principal, el Año Nuevo Lunar. Según Abrafrigo, a partir de marzo, las exportaciones pueden volver a este nivel.

Entre los 20 mayores clientes del país, Chile fue el segundo país que carne brasileña importó, comprando 5.168 toneladas (-16,6% en relación a enero de 2020); el tercero fue Egipto, con 4.501 toneladas (-13,5%); el cuarto, Filipinas, con 3.115 toneladas (+ 12%). La quinta posición la ocupó Israel, con 3.062 toneladas (-13,5%); el sexto fue Arabia Saudita, con 2.813 toneladas (-29%), el séptimo fueron Emiratos Árabes Unidos, con 2.764 toneladas (-24,7%) y el octavo fue Italia, con 2.761 toneladas (+ 62%). Estados Unidos aumentó sus compras de carne vacuna en un 133%, ocupando el noveno lugar con 2.748 toneladas.

Entre todos los países importadores en enero, según Abrafrigo, 46 tuvieron un comportamiento positivo y otros 58 tuvieron un resultado negativo.

### IBGE - faena se redujo en el último trimestre de 2020

Por: Portal DBO 11/02/2021 Segundo o Instituto, a produção brasileira somou 1,96 milhão de toneladas de carcaças bovinas no período

O Brasil registrou o abate de 7,25 milhões de bovinos sob algum tipo de serviço de inspeção sanitária no 4º trimestre de 2020, queda de 10,3% na comparação com igual período de 2019. Em relação ao terceiro trimestre de 2020, houve uma redução de 5,8%. Os dados fazem parte da Pesquisa Trimestral do Abate de Animais divulgada nesta quinta-feira (11/2) pelo Instituto Brasileiro de Geografia e Estatística (IBGE).

Segundo o Instituto, a produção brasileira somou 1,96 milhão de toneladas de carcaças bovinas, uma queda de 6,5% em relação o quarto trimestre de 2019 e diminuição de 4,6% na comparação com o terceiro trimestre de 2020.

Couro

Os curtumes declararam ter recebido 7,5 milhões de peças inteiras de couro cru no quarto trimestre de 2020, queda de 3,9% em comparação ao quarto trimestre de 2019 e diminuição de 8,5% em relação ao trimestre anterior. A Pesquisa Trimestral do Couro investiga os curtumes que efetuam curtimento de pelo menos 5 mil unidades inteiras de couro cru bovino por ano. Fonte: Ascom

### URUGUAY

**Exportación en pie comenzó el 2021 con mayor dinámica que el año pasado y con perspectivas favorables**

por Cecilia Ferreirafebrero 17, 2021



El negocio de exportación en pie comenzó el 2021 con buen ritmo. En lo que va del año se llevan enviados al exterior 38.884 vacunos, mientras que un año atrás a esta fecha aún no se habían concretado embarques.

Los destinos fueron Turquía, China y Líbano. En el caso de Turquía, se exportaron 23.630 terneros enteros. El embarque a China fue de 11.254 hembras de las razas Hereford, Red Angus, Holando y Jersey, con fines reproductivos. Mientras que al Líbano se exportaron 4.000 vaquillonas.

“Cuando el ternero vale entre US\$ 1,90 y US\$ 2 vimos que empezó a tomar un dinamismo importante la exportación. Ya con el ternero ahora entre US\$ 2,10 y US\$ 2,20 se hace más lento, no todos los mercados pueden comprar a estos valores”, dijo a Tiempo de Cambio de radio Rural Alejandro Dutra, director de Escritorio Dutra e integrante de la Unión de Exportadores de Ganado en pie.

Otro factor que juega en el mercado es la suba de valores en los países vecinos competidores, como Brasil, “que estaba mucho mejor posicionado que nosotros y hoy no lo está”, subrayó.

El operador sostuvo que a los valores actuales antes era difícil concretar negocios, pero con los vecinos con valores similares “hay que ver lo que pasa”. Con la sanidad y calidad de los ganados como ventaja para Uruguay. “Hoy estamos con posibilidad de hacer exportaciones en este eje de valores. En estos valores va a ir saliendo en algo similar a 2019”, apuntó. Dutra estimó que el volumen exportado este año podría rondar las 150.000 cabezas.

Hay empresas acopiando terneros y barcos saliendo por estos días, movimientos que evaluó como positivos en la puerta de la zafra de terneros. Para el operador “la exportación va a fijar un piso al valor del ternero”, y las perspectivas para la ganadería son halagüeñas, con una demanda interna dinámica, “con buenas perspectivas para adelante y buen ánimo”.

### **Cambios más importantes del nuevo marco regulatorio del mercado interno de carnes**

09/02/2021 - 10:05 AM

El 21 de enero pasado se aprobaron tres decretos reglamentarios de la Ley de Transparencia Comercial e Inocuidad, que le confiere nuevas competencias al Instituto Nacional de Carnes (INAC) y de la Ley de Urgente Consideración que le otorga al INAC competencia para habilitar carnicerías en todo el país, luego de más de 30 años a cargo de los gobiernos departamentales (salvo para Montevideo)

¿Cuáles son los cambios importantes en la reglamentación de la Ley de Inocuidad y LUC?

Los decretos recientemente aprobados refieren a la creación de un Registro Único de Empresas Cárnicas (RUNEC), de un Reglamento Nacional de Distribución de Carnes y Derivados con destino Mercado Interno y de un Reglamento Nacional de Carnicerías.

Uno de los cometidos del INAC es contribuir a garantizar el acceso de nuestra población a carnes y derivados en cantidad y calidad suficientes. Para cumplirlo, se apoya en tres pilares fundamentales: contribuir a garantizar en el mercado interno la inocuidad alimentaria, la transparencia comercial y el acceso. Para ello, los decretos recientemente aprobados, ponen foco en la formalización y promoción del mercado doméstico bajo un nuevo modelo.

Esta nueva dimensión del mercado interno de carnes forma parte de uno de los ejes estratégicos del plan quinquenal del organismo, que es la integridad del producto y de los procesos. Este objetivo se refiere a los sistemas que permiten brindar la máxima transparencia comercial, enfocado a que las cadenas cárnicas tengan forma de ser supervisadas y monitoreadas para dar garantías a los consumidores.

El eje del nuevo marco regulatorio nacional está basado en que tres grandes aspectos: Infraestructura, Inocuidad Alimentaria e Idoneidad de los Agentes.

En primer lugar, uno de los cambios más relevantes que introduce el RUNEC es unificar en un solo Registro en el que los usuarios se inscriben y aportan la documentación que se requiera una sola vez, por más que se inscriban a más de una actividad. Antes, existían más de 50 Registros de Empresas distintos, amparados en Decretos y Resoluciones del Instituto. Además, el Registro Nacional de Carnicerías, si bien era de carácter nacional contenía falencias de datos respecto a las habilitaciones fuera de Montevideo.

Además, los propios consumidores se convertirán en más de 3 millones de supervisores de las empresas en donde compran su alimento, ya que podrán buscar en el RUNEC información del local donde adquieren la carne, chequear su habilitación y los datos que brinden garantías para hacer una compra segura.

Por otro lado, se le asigna al INAC el cometido de crear el Sistema de Registro y Gestión del Abasto (SRGA) que permitirá contar con un sistema preceptivo de información sólido que logra el control del flujo de mercadería de toda la cadena de forma eficiente y ágil, coadyuvando a la transparencia comercial. Se pasa a contar con trazabilidad en el mercado interno, se dejan de utilizar guías en papel y se sistematiza la información ya que había una desconexión entre las bases de datos del mercado interno.

Como gran desafío, el SRGA que se está desarrollando desde la Administración anterior, tendrá los próximos meses una segunda prueba piloto, con miras a lanzarlo sobre mitad de año. Este sistema permitirá un abordaje eficaz y eficiente, haciendo foco en lograr el consumo seguro y la transparencia comercial en todo el país.





Por último, este decreto modifica el sistema de garantías de ser un régimen poco equitativo, sin una justificación adecuada, desactualizado y rígido a un sistema adaptado a la realidad económica de las empresas, equilibrado y flexible. También, se le atribuyen potestades al INAC para establecer actividades que deben constituir, dentro de los límites establecidos en el Decreto.

En segundo lugar, los cambios más trascendentales que introduce el Reglamento Nacional de Distribución de Carnes y Derivados con destino Mercado Interno, van por el lado de establecer la obligatoriedad de instalación de equipo de frío para carnes y derivados, requisito que afectará a alrededor de 800 vehículos. También, se establece la obligatoriedad de contar con un Manual Procedimientos Operativos Estandarizados de Saneamiento (POES) y un Manual Buenas Prácticas de Manufactura (BPM), que podrán ser brindados por INAC

Por último, se crea la GEPYM (Guía Electrónica de Propiedad y Movimiento) que será la herramienta que se utilizará en el SRGA.

En tercer lugar, el Reglamento Nacional de Carnicerías presenta un importante número de cambios que se comentan a continuación.

Se introduce la novedad que podrán habilitarse en autoservicios (menor a 200 m<sup>2</sup>) carnicerías en la modalidad expendio. Entendiéndose por autoservicio: “aquel local de venta al por menor, que incluye la comercialización de alimentos entre otros artículos y el manejo de equipamiento de frío, dónde el consumidor elige y recoge personalmente los productos, disponiendo de una zona y personal de dedicación exclusiva para el cobro de la mercadería.”

Más cambios. Asimismo, las áreas mínimas de los distintos tipos de carnicerías se redefinen: carnicería de expendio independiente: 20 m<sup>2</sup> (área de trabajo 12 m<sup>2</sup>); carnicería de expendio en autoservicio/grandes superficies: 12 m<sup>2</sup>; carnicería de corte independiente: 26 m<sup>2</sup> (área de trabajo 18 m<sup>2</sup>) y carnicería de corte en grandes superficies: 18 m<sup>2</sup>.

Acorde con los cambios tecnológicos y con un consumidor cada vez más exigente, se autoriza la instalación de Cámara de Maduración en Seco bajo determinados requerimientos.

Se establece la obligatoriedad de la implementación de POES que aseguren una limpieza y desinfección eficaz y de operar en función a lo descrito en un BPM, que podrán ser brindados por INAC.

Se agrega para el personal que opera en carnicería formación técnica en manipulación de alimentos, estado de salud e higiene personal. Y se le indica al INAC elaborar un plan de formación técnica para el personal de la Carnicería (la capacitación resultante de dicho plan será obligatoria en las condiciones que establezca el Instituto).

En cuanto a las otras actividades que se pueden desarrollar en las carnicerías, se flexibilizan los trámites relativos a “fraccionamiento de productos chacinados y quesos” y el de “venta de productos cárnicos”. Requiriéndose en ambas situaciones, cumplir con lo establecido en el Reglamento y comunicar al INAC que se harán tales actividades, sin necesidad de pedir una autorización específica.

Otra gran novedad es que se autoriza la venta de productos cárnicos destinados al consumo animal reclamo realizado durante muchos años por las gremiales carniceras siempre que se cumpla con los requisitos plasmados en el Reglamento.

Además, para las carnicerías de expendio se permite la venta de productos y artículos no alimenticios (autorizados por INAC) relacionados con la cocción de Carnes y Derivados (ej. tablas, cuchillos, delantales, etc.)

En cuanto a la “elaboración de productos cárnicos no industriales”, se disponen determinados requerimientos de infraestructura y equipamiento, se establece que se debe presentar solicitud específica de habilitación. Los productos que se permiten elaborar son chacinados frescos no embutidos que autorice el INAC y chorizo carnicero. Se agrega la presentación de fichas técnicas de los productos a elaborar, así como la posibilidad de que los carniceros soliciten a INAC incorporar la elaboración de un nuevo producto.

En otro orden, la normativa faculta al INAC a determinar la forma y el momento a partir del cual se exigirá a las Carnicerías la identificación al público del país de origen de las Carnes y Derivados, reclamo de larga data realizado por distintos agentes del mercado interno.

Finalmente, cabe destacar que para llevar adelante los cambios de los tres decretos se establecen distintos plazos de adecuación.

En síntesis, el nuevo abordaje del mercado interno abre una etapa desafiante que requerirá una fuerte coordinación entre la institucionalidad, redundará en beneficio de toda la cadena, de la población y del prestigio internacional de las carnes de Uruguay.

### **Acordaron la creación de un “seguro especial” que cubrirá a trabajadores en cuarentena**

18/02/2021 - 3:50 PM

El Ministerio de Trabajo, las cámaras frigoríficas y la Foica acordaron un mecanismo para las cuarentenas de trabajadores que son contacto de un positivo de Covid-19



El Poder Ejecutivo, las Cámaras Empresariales y los trabajadores de la industria frigorífica acordaron crear un “seguro especial” para cubrir a funcionarios que tengan contacto con una persona que fue contacto de un positivo.

En diálogo con Rurales El País, Martín Cardozo, presidente de la Foica, recordó que la preocupación fue planteada por aquellos trabajadores que no tenían una cobertura ni desde la empresa ni desde el sistema de salud.

“Ahora los trabajadores estarán cubiertos con un seguro especial: el trabajador debe hacer la denuncia a la empresa de que tuvo contacto con una persona positiva y será la empresa la que evalúa en base a los datos que vuelque este trabajador. El médico de la empresa evaluará si se está en condiciones de trabajar o no. Si no está en condiciones pasa a un seguro parcial, que no cumple con el requisito de los 150 jornales trabajados (...) estará cubierto 10 días mensuales”, señaló.

También informó que el acuerdo estará vigente hasta el 30 de junio y tendrá una revisión mensual de ambas partes para que sea usado con responsabilidad.

## **PARAGUAY**

### **Frigoríficos vuelven a marcar precios de compra pero con una baja generalizada**

18/02/21 Luego de salir del mercado de compra por algunas horas, hay plantas frigoríficas que retomaron la oferta de precios para la faena de haciendas gordas, pero con una desvalorización para todas las categorías. Un industrial, que había dejado de comprar entre lunes y martes, dijo a Valor Agro que fijó las referencias de la semana en US\$ 3,20 por kilo carcasa para los machos y vaquillas, y en US\$ 3 para las vacas. Un ejecutivo de otro frigorífico marcó la misma referencia para los machos, mientras que ubicó en US\$ 2,95 a las vacas. “No estoy buscando vacas”, explicó ayer a Valor Agro. Pese a esto, un operador dijo que “difícilmente la baja pueda ser sostenible”, dado que la oferta de hacienda en el mercado “se mantiene escasa” y “la mayoría de las plantas están compradas de ganado por pocas jornadas”. Fuente: Valor Agro.

### **Exportaciones a Chile se redujeron 40% frente al promedio mensual del último trimestre**

16/02/2021

Las exportaciones paraguayas de carne bovina a Chile comenzaron el año con un total de 7.842 toneladas en enero, un aumento del 6,4% frente al mismo mes del año pasado; sin embargo desde la industria entienden que el principal mercado de Paraguay inició el año con una “rara” performance. A pesar del incremento en la comparación anual, frente al ritmo exportador del último trimestre del año pasado, con un promedio mensual de 13.038 toneladas entre octubre y diciembre, lo enviado en enero del 2021 representa una caída del 40% en el volumen exportado. En el mismo trimestre del 2019, Paraguay había negociado un promedio mensual de 8.226. Lo que comprende una suba del 58,5% en las toneladas enviadas a Chile entre octubre y diciembre del 2020. Un exportador aseguró a Valor Agro que el mercado chileno “está parado” en valores y dijo que está directamente relacionado a la incertidumbre de los importadores de acuerdo a cómo se puede comportar el consumo, debido a los efectos de la pandemia de Covid-19. Durante enero del 2021 el país negoció 7.842 toneladas a un precio promedio de US\$ 4.548 por tonelada. La cotización significa una desvalorización de US\$ 315 por tonelada, frente a los US\$ 4.863 logrados en enero del año pasado. Fuente: Valor Agro.

### **Rusia dejó de ser una buena opción para exportadores**

19/02/2021 - 10:16 AM

El mercado ruso no es hoy la primera opción para las plantas paraguayas, varias de las cuales no tienen la habilitación para exportar.

VALOR AGRO | Según un industrial, los precios se mantienen estables con una referencia para la rueda en US\$ 4.200 CIF y US\$ 3.700-3.800 para el chuck & blade, pero siempre con “un volumen muy acotado” de negocios, informó Faxcarne.

En enero del 2021 el país exportó a Rusia 4.957 toneladas de carne bovina, una reducción del 9,53% en comparación con igual mes del año pasado; con una facturación que suma algo más de US\$ 17,4 millones.

### **Se frenaría la posibilidad de exportar ganado en pie por posición sanitaria de Brasil**

18/02/2021 GANADERÍA

Las autoridades brasileñas informaron un sorpresivo cambio en su calendario en relación al programa de levantamiento de la vacuna contra la fiebre aftosa en Mato Grosso del Sur, lo que frenaría la posibilidad de exportar ganado en pie al país vecino. Ayer jueves, el presidente del Servicio Nacional de Calidad y Salud Animal (Senacsa), José Carlos Martín, lideró una reunión en Pedro Juan Caballero con sus pares



brasileños del Ministerio de Agricultura, Pecuaria y Abastecimiento (MAPA) y la Agencia Estadual de Defensa Sanitaria Animal y Vegetal de Mato Grosso del Sur (IAGRO). En un encuentro catalogado como “muy productivo por la profundidad de los temas”, uno de los más importantes fue la viabilidad de habilitar la exportación de ganado en pie, luego de presiones de las empresas frigoríficas del Estado vecino y de productores paraguayos. El Presidente del Senacsa comentó a Valor Agro que las autoridades brasileñas aprobaron la vigencia de los protocolos sanitarios para el intercambio comercial de bovinos (para faena, terminación y reproducción), de equinos y de ovinos. Con los protocolos revisados, “se acordó que la habilitación de la exportación de ganado vivo dependería de una decisión política”, comentó Martín, aunque dijo que la posterior información que presentó Brasil frenaría todas las posibilidades de avanzar en el intercambio de hacienda. Las autoridades del MAPA e IAGRO informaron que el país acelerará el programa para erradicar la vacuna contra la fiebre aftosa en el estado de Mato Grosso del Sur. “Fue un comentario que nos sorprendió a todos, no se lo esperaba”, indicó el Presidente del Senacsa. Explicó que Mato Grosso del Sur pretendía dejar de vacunar en el año 2023 para cambiar su estatus sanitario a libre de aftosa sin vacunación, sin embargo los jefes brasileños aseguraron que la última vacuna se aplicará en noviembre del 2021. José Carlos Martín señaló que “Brasil trabaja en su plan de levantar la vacunación en varios estados, una posición soberana de cada país, en el cual se respeta”. Además, confirmó que “esta decisión del país vecino nos obliga a replantear y modificar algunos planes operativos que teníamos, especialmente en zonas limítrofes con el estado de Mato Grosso del Sur”. Fuente: Valor Agro.

### **Los granos y la carne estuvieron presentes en reunión entre Lacalle Pou y Abdo Benítez**

18/02/2021 - 10:04 AM

En un encuentro oficial realizado en la residencia presidencial de Punta del Este, el presidente Luis Lacalle Pou recibió este miércoles a su homólogo de la República del Paraguay, Mario Abdo Benítez. Los mandatarios de ambos países abordaron temas de la agenda bilateral y estuvieron acompañados por los respectivos cancilleres, Francisco Bustillo y Euclides Acevedo.

La reunión entre los mandatarios tuvo lugar pasado el mediodía en la residencia presidencial ubicada en la avenida Roosevelt, en la ciudad de Punta del Este, departamento de Maldonado.

Lacalle Pou recibió a Abdo Benítez junto con el ministro de Relaciones Exteriores, Francisco Bustillo. Posteriormente, los mandatarios participaron en un almuerzo en el que abordaron temas de la agenda de Uruguay y Paraguay.

El presidente uruguayo remarcó la relación histórica que une a ambas naciones. “Son países que tienen, necesariamente, una virtud en las relaciones complementarias. Un país como Paraguay, sacrificado, de trabajo, que ha crecido en el mundo, y un país como el nuestro, que tiene gran parte de su origen y razón de ser en el transporte, logística y salida al mundo”, señaló.

Agregó que durante el encuentro conversó con Abdo acerca de la importancia del comercio paraguayo, específicamente en cuanto a rubros como grano y carne, y acerca de la necesidad de que esos productos lleguen a los respectivos mercados. Para ello, nuestro país dispone de vías navegables de salida al mundo, como los ríos Uruguay o el de la Plata, precisó.

Mercosur. La reunión también incluyó un diálogo coloquial, dijo Lacalle, sobre las reuniones con los presidentes de Brasil, Jair Bolsonaro, y de Argentina, Alberto Fernández, como forma de encontrar coincidencias entre los intereses nacionales de cada país en el ámbito de la integración regional que propone el Mercosur.

“Puedo decir con mucho agrado que la vocación paraguaya de abrirse al mundo es igual a la de Uruguay y sigue vigente con más fuerza. Por eso, el avance de los países del Mercosur al mundo es importantísimo. Para Paraguay y Uruguay es determinante en los tiempos que se vienen”, sentenció.

“El mundo se está abriendo a nuestros commodities, a nuestras materias primas, y nosotros estamos capacitados a ofrecerlos. Necesitamos entrarle al mundo, a esos mercados, en igualdad de condiciones que nuestros competidores. Por eso, el avance con países del mundo que son consumidores mayores de nuestras materias primas, hacia allí tenemos que ir a negociar, con nuestras particularidades y compromisos”, agregó el mandatario uruguayo.

En ese sentido, consideró que mientras hay quienes hablarán de flexibilización, de elasticidad o de distintas velocidades, lo cierto es que a 30 años de creación del Mercosur “hay que rever el recorrido, quedarse con lo bueno, impulsar lo mejor para que sea un trampolín al mundo”.

Lacalle Pou insistió en que el encuentro fue informal, para que después negocien las cancillerías formalmente, pero sin embargo, insistió en que este allanamiento del camino es muy importante en este mundo moderno, en la diplomacia presidencial.

Por su parte, Mario Abdo Benítez remarcó que el gran desafío es la búsqueda de integración, encontrar aliados estratégicos para la región y para el mundo, disponer de logística, para que la producción paraguaya pueda exportarse en beneficio de ambos países.





Expresó que Uruguay tiene grandes oportunidades para llegar a los mercados del mundo y que, en ese sentido, la hidrovía Uruguay- Paraná es un potencial logístico de gran utilidad para esta alianza entre naciones.

Agregó que coincidió con Lacalle Pou sobre la necesidad de una lucha común en el mundo actual, donde todas las sociedades requieren madurez, entendimiento, con divisiones y debates internos que sirvan para enriquecer. “Es tiempo de construir puentes, encuentros, destinos comunes y que la solidaridad no se acabe para toda la humanidad”, indicó.

Finalmente, Abdo Benítez expresó la necesidad de fortalecer y buscar beneficios para Paraguay y Uruguay en temas bilaterales, en la estrategia que presentarán en la próxima reunión de presidentes de Mercosur prevista para fines de marzo en Foz de Iguazú, Brasil.

En otro orden, destacó las medidas adoptadas por el gobierno de Uruguay para enfrentar la pandemia de COVID-19.

## **UNIÓN EUROPEA**

### **Organizaciones rurales en contra del acuerdo con Mercosur**

12 February 2021

EU farming unions have started a campaign to explain why they cannot support the EU-Mercosur free trade agreement as it stands.

While discussions on the ratification of the trade agreement between Europe and the Mercosur countries resumed with the launch of the Portuguese Presidency of the Council, Copa-Cogeca, CIBE and AVEC have decided to launch a new campaign on social media to explain concisely and with concrete examples the fears that this agreement raises in the farming community.

In a 6-minute video launched on 11 February, the three European organisations are taking on the challenge of explaining the three main reasons why they oppose the agreement reached in June 2019. The video reminds us in its introduction that the agricultural community has been supportive of the EU trade agenda and has welcomed a number of them in recent months in the run-up to Brexit. However, as recalled by the European Parliament, the agreement with Mercosur appears to be quite different. As it stands, it is unacceptable to EU farmers at a time when they will have to find solutions to respond the Green Deal objectives.

The three main reasons given in this video are clear. First, the agreement with Mercosur is unbalanced in its agricultural chapter, especially for already fragile sectors. Through the example of the beef sector, it is easy to understand that this agreement is going to transfer the bargaining power from EU livestock farmers to big operators in Mercosur countries.

Secondly, European farmers rightly fear the cumulative and hardly measurable impacts of all the agreements already signed and those still to come. This was confirmed by the Commission study on the cumulative impact assessment on agriculture products. In this context, the EU-Mercosur agreement is the straw that could break the camel's back. The example given in the video speaks for itself: in the poultry sector, each year imports from Mercosur countries will represent the production of Denmark, Finland and Sweden combined.

The last essential argument featured is that the EU-Mercosur agreement will clearly widen the gap for EU farmers due to double standards for EU farmers. The example of the sugar beet sector is a symptomatic case. Through this agreement, Europe will import sugar and ethanol that in no way respects our production standards. According to CIBE; Brazil, for example, uses 27 herbicides and insecticides that are banned in Europe. While we are discussing ambitious targets under the Farm to Fork strategy, this double standard and unlevel playing field seems completely incomprehensible to the entire farming community and will inevitably result in a transfer of production to countries where we have no control over the setting of production standards.

It is therefore essential that the scrutiny procedure follows its normal course avoiding any loopholes. The European and national Parliaments must have their say and the voices of citizens, consumers and farmers must be heard.

## **ESTADOS UNIDOS**

### **Tormenta invernal sacude al Mercado de hacienda**

By DERRELL PEEL - OKLAHOMA STATE UNIVERSITY February 15, 2021

A massive and extended winter blast has engulfed the southern plains before spreading across much of the Delta and mid-south then ultimately affecting most of the eastern half of the country.

The extended cold temperatures began a week ago with most of Oklahoma already enduring continuous sub-freezing temperatures for 150 to over 200 hours as of Monday morning (February 15). Temperatures in early week are reaching record sub-zero levels with wind chill values of -25 to -30 degrees Fahrenheit.



Temperatures are expected to remain below freezing for at least another 100 hours. Snow totals of four to ten inches have accumulated with more snow expected mid-week. This storm is unprecedented in Oklahoma due to both the record cold temperatures and the duration of cold. I'm having flashbacks to my formative years caring for cattle in Montana winters.

The brunt of the storm impacts are directly borne by cattle producers who are struggling to provide water and feed access for cattle. These conditions require near continuous efforts to chop ice and provide feed. Cattle nutritional requirements are sharply boosted in this weather and producers must consider both the quantity and quality of feed.

Cattle will not be physically able to consume enough medium to low quality hay to provide sufficient energy in these conditions and must receive additional supplement or high quality hay. In some cases, deep snow may prevent cattle from accessing standing forage, especially since Oklahoma cattle are not used to foraging through snow.

If there is a silver lining in this storm, it is that conditions are cold but relatively dry. The snow that has fallen has not, for the most part, penetrated the hair coat of cattle keeping the hide dry. With adequate feed and water, cattle can handle this type of cold weather relatively well. These conditions are more typical of the central and northern plains and Rocky Mountain areas. Areas south and east of Oklahoma are receiving rain and ice ahead of snow, producing more dangerous hypothermia conditions typical of winter storms in the south.

This storm is likely ahead of most calving in Oklahoma but if calving is in progress, the extreme cold is a significant risk. Newborn calves can experience frozen ears and tails, marking them for life as a cold weather survivor. These calves are frequently discounted at marketing due to buyer fears of foot damage and other injuries that may impact the calves later in life. Once calves are dry and feeding they can endure the cold, dry weather pretty well and may, in fact, be insulated by dry fluffy snow when bedded down.

Several auction markets in Oklahoma and other areas closed last week and many will be closed this week. Oklahoma feeder cattle prices dropped three to ten percent last week with lower demand more than offsetting sharply reduced sales volumes. Wheat pasture cattle and other stockers are no doubt experiencing reduced gains or even weight loss in these conditions. Many cattle grazing dual-purpose wheat will need to be removed and marketed in the next two to three weeks, very likely a bit lighter in weight than expected.

Feedlot cattle are no doubt impacted as well and the market effects will be apparent over time. Reduced performance will show up as lower carcass weights in the coming weeks. The residual impacts of this historic weather event will likely effect cattle markets for several weeks.

### **USDA y FDA enfatizan que la información epidemiológica y científica actual indica que no hay transmisión del COVID-19 a través de los alimentos o de los envases de los alimentos**

By KATIE JAMES February 18, 2021

In the year since the COVID-19 outbreak was declared a global health emergency, the USDA, the FDA and the CDC continue to stress that there's no credible evidence that food or food packaging is associated with or a likely source of transmission of SARS-CoV-2, the virus that causes COVID-19, according to a release from acting USDA Secretary Kevin Shea and acting FDA Commissioner Janet Woodcock, MD.

The agencies say their confidence in the safety of the U.S. food supply has remained steadfast and consumers should be reassured that they "continue to believe, based on understanding of currently available reliable scientific information, and supported by overwhelming international scientific consensus," that the foods consumers eat and packaging they touch are highly unlikely to spread SARS-CoV-2.

It is crucial to remember that COVID-19 is a respiratory illness that spreads from person to person, unlike foodborne or gastrointestinal viruses like norovirus, that make people sick through contaminated food, the release says. While there are few reports of the virus being detected on food and packaging, most studies focus primarily on the detection of the virus' genetic fingerprint rather than evidence of transmission of virus resulting in human infection.

The agencies stress that "given that the number of virus particles that could be theoretically picked up by touching a surface would be very small and the amount needed for infection via oral inhalation would be very high, the chances of infection by touching the surface of food packaging or eating food is considered to be extremely low."

They also note that this update is being provided based on the best available information from scientific bodies across the globe, including a continued international consensus that the risk is "exceedingly low for transmission of SARS-CoV-2 to humans via food and food packaging." For example, the release continues, a recent opinion from the International Commission on Microbiological Specifications for Foods (ICMSF) (PDF), stated: "Despite the billions of meals and food packages handled since the beginning of the COVID-19 pandemic, to date there has not been any evidence that food, food packaging or food handling is a source or important transmission route for SARS-CoV-2 resulting in COVID-19."

Additional literature reviews and analyses from other countries agree, it says.



In consideration of the more than 100 million cases of COVID-19, the agencies have not seen epidemiological evidence of food or food packaging as a source of SARS-CoV-2 transmission to humans. This type of transmission has not been attributed to food products or packaging through national and international surveillance systems, and food business operations continue to produce a steady supply of safe food following good manufacturing practices and preventative controls. This includes focusing on good hygiene practices and keeping workers safe.

Based on scientific information that has become available over the course of the pandemic, both the USDA and the FDA continue to be confident in the safety of the food available to American consumers and exported to international customers.

## **AUSTRALIA**

### **Exportaciones en el nivel menor para un mes de enero de los últimos diez años**

Jon Condon, February 3, 2021 AUSTRALIAN beef exports are off to their slowest start to a new calendar year in at least ten years.

Monthly export data released by DAF this morning shows January beef and veal exports to all markets at just 49,604 tonnes – down 29,600t or 37 percent on this time last year.

January is always the slowest month of the trading year for Australian beef, following Christmas plant closures and slower demand in the post-New year period, but this year's decline has been particularly acute.

Beef exports for January for the past eight years have averaged 63,500 tonnes.

While individual monthly shipment data extends only back to 2013, trade sources suggest it may be the lowest January export figure since 2011, when eastern Australia was hit by floods, including lengthy closure of the nation's largest beef export port at Brisbane.

No eastern states slaughter report has yet been issued for the week ended Friday, but eastern states beef kills so far in 2021 have averaged less than 75,000 head, versus 117,000 head for the same four weeks last year.

All major export markets have been affected by the slowdown in rates of slaughter due to cattle availability and record high livestock prices, making processing operations increasingly difficult. Since December, two smaller southern beef processors have announced lengthy closures of their facilities due to current trading conditions. Few other plants have been operating at anything like normal capacity.

Japan remained Australia's largest export beef outlet for the month, but volume was significantly down. January trade totalled 12,541 tonnes, down 32pc on this time last year.

Despite the start of Chinese New Year festivities on 12 February – normally a major consumption period for Australian beef – January exports to China totalled just 9167t – almost 12,000t or 56pc below January last year. Last month's trade was among the lowest in-month figure to China since the market started to fire in 2017.

January volume to the United States was also historically low last month, with just 7061 tonnes consigned to East and West Coast US ports. This is one of the lowest in-month trade volumes seen in 30 years, and reflects the large disconnect on price between US domestic and imported Australian grinding beef.

South Korea was one of the few markets that performed closer to normal trading patterns, taking 8421 tonnes of Australian beef last month, down 15pc on last year.

With the exception of Indonesia and the Middle East, secondary markets also fell away badly. Indonesia took 3186t of mostly frozen beef last month, up 10 tonnes on this time last year, while the Middle East region, led by Saudi Arabia, accounted for 2049t, up 98t on last year.

The European Union market continues to struggle under the weight of COVID restrictions, taking just 536t in January, down 36pc on last year.

#### **Container access issues**

Compounding Australia's cattle supply and meat price competitiveness issues, Australian food exporters are being caught in a global supply chain crunch as a shortage of refrigerated shipping containers drives up costs and impacts use-by date issues.

The container shortage is also compounding the challenges faced by exporters, who are experiencing significant delays at international ports because of stringent COVID-19 management protocols.

The WA Meat Marketing Cooperative (WAMMCO), which exports premium lamb products to international markets including the United States told the ABC today it was facing delays of about ten days to secure appropriate containers for key export markets.

"Shipping around the world is happening very slowly, so we are having a lot of difficulties getting chilled product to our markets in adequate time to fill our shelf-life in supermarkets," WAMMCO chairman Craig Heggaton said.

"It's hard enough getting hold of the container, then it gets to the port and sits there for an extra 10 to 20 days ... so that's less time on the supermarket shelf life before the use-by date expires," he said.



“If it sits at Fremantle for another 20 days, plus 30 days on a boat, we’ve only got a 70 or 80 day product — that leaves 30 days on a shelf.”

“Normally we’d get a container straight away and it would be 30 days from Fremantle to the US to get on a supermarket shelf.”

Mr Heggaton told the ABC the cooperative had taken extreme measures to ensure products were getting to market on time.

“At the moment we’re actually trucking some containers to Adelaide or Sydney to catch a boat in a more adequate timeframe, but that is obviously costing us quite a lot,” he said.

“There are times where we might airfreight some of this product, which is obviously a very expensive option — but even air freight is hard to come by because of the lack of flights.” Matthew Bronickis from the WA Freight and Logistics Council told ABC that some of the challenges had stemmed from a build-up of empty containers in China.

“There’s massive issues ... containers aren’t being turned around in China, and of course supply and demand means the price is going up,” he said.

“It’s an issue of the number of empty containers coming back to origin ... China being the origin and one of the largest export markets into Australia.”

He said the sea freight challenges were unlikely to be resolved until air freight resumed to normal levels.

“If anything, the changing face of international aviation is that the different providers ... will change from week to week, month to month as to what their services are going to be,” he said.

## **Valor de las exportaciones de carnes bovinas mermó en 2020**

18 February 2021

Key points:

Australia trailed Brazil in overall value of beef exports in 2020

Despite the challenges of 2020, South Korea was a high performing market for Australia

Australian red meat exports in January trail recent years, with beef exports sitting at 49,600 tonnes swt for the month

Global export value

Export values for 2020 are now available, with Brazil taking the title of the world’s most valuable beef exporter, eclipsing US\$7 billion for the year. Incentivised by higher prices, strong gains were made off the back of Brazilian beef being re-directed from the domestic market towards international destinations, largely influenced by China.

Australian beef exports trailed 2019 levels last year, declining 11% to sit at US\$6.64 billion for the year. The Australian beef export price grew by 4.5% last year, demonstrating the enduring demand for beef, despite the challenges presented in 2020.

US beef export value contracted by 5% last year, with exports impacted by the waning US dollar through most of the year. US export volumes also tapered, impacted by challenges to the processing industry as the effect of COVID-19 unfolded. However, export volumes in the second half of the year bounced back, with steady volumes likely to continue this year. Interestingly, US trade to China picked up significantly, particularly through the second half of the year, albeit off a low base.

Japan remains Australia’s most valuable export market

Last year, international demand held up fairly well despite the spread of COVID-19 and notable challenges to supply. Retail and e-commerce channels supported sales and offset some of the decline within the foodservice industry. Food delivery has certainly proven critical, and has provided much needed support for demand, particularly for the fast food industries in markets such as the US and Japan.

Japan, the US and China were the most valuable markets for beef exports, however, values were down on 2020 by 3%, 7% and 28%, respectively. South Korea was a strong performer, as export value sat even with the year prior. Last year certainly demonstrated that these long-term relationships with key markets, such as Japan, the US and South Korea, creates stability and resistance to unexpected demand shocks.

While many markets declined in value relative to 2019, there were a few destinations that showed marked improvements. Singapore, Hong Kong and Canada all grew in terms of overall value, up A\$33 million, A\$25 million and A\$18 million, respectively, on 2020 levels.

While there are some green shoots on the horizon regarding vaccine roll-outs and the eventual recovery of travel and tourism, restrictions and lockdowns across markets continue to affect the dynamics of trade. While hospitality has shown some encouraging signs in certain markets, the timeline for recovery remains blurred and tough to estimate. Supply challenges will also remain a consideration this year.

Regardless of short-term challenges, the long-term fundamentals for demand remain strong, as perceptions of Australian red meat remain positive and global consumption of beef is forecast to continue growing, particularly in developing markets.

2021 exports off to a slow start





Red meat trade has kicked off to a slow start this year, with total beef exports in January just below 50,000 tonnes swt. While January is typically a slower month for trade, with holiday shutdowns affecting processing capacity, this was the smallest month of red meat trade since January 2012. Slaughter levels this month so far have remained subdued, so a similar result could be likely for export volumes in February.

### **Existencias en feed lots superaron el millón de cabezas por tercer año consecutivo**

18 February 2021

Key points:

Grainfed cattle numbers have now remained above 1 million head for three years

There were 1,048,307 cattle on feed in Australia as at 31 December 2020

Feedlot capacity and utilisation remained stable from the last quarter.

MLA and the Australian Lot Feeders' Association (ALFA) released the results of their December 2020 lot feeder survey today. The survey results show that the number of cattle on feed and national utilisation both increased slightly for the quarter, while national feedlot capacity marginally eased.

The number of cattle on feed nationally as at 31 December 2020 was 1,048,307 head, an increase of 37,985 from September. Feedlot numbers grew in every state except Queensland. In WA and Victoria, cattle on feed numbers increased by over 20%, up 8,364 and 9,853 to 46,302 and 56,816 head, respectively. Grainfed cattle experienced smaller rises in SA and NSW, with cattle on feed up 11% and 6%, respectively. In contrast to all other states, the number of cattle on feed in Queensland fell during the December quarter, down 0.5% to 588,692 head.

National utilisation for the quarter was up slightly, from 70% to 73%, reflecting the increase in cattle on feed. Capacity for the quarter remained at the historically high level of 1.4 million head.

Cattle on feed numbers typically increase in the southern states across summer, as pasture availability is limited in this time. However, the result of the survey demonstrates that the jump of cattle on feed for December 2020 was not as large as in previous December quarters. This was largely due to the improved seasonal conditions throughout 2020 for southern states and heavy summer rains experienced in Queensland in December.

Interestingly, the increase of cattle on feed in December 2020 coincided with high feeder steer prices. However, these high feeder prices were offset by high grainfed over-the-hooks (OTH) prices and low feed costs.

From an export perspective, grainfed beef exports grew in the quarter despite the Australian dollar appreciating against the local currencies of all key export markets. Grainfed beef exports were up 21% for the quarter to 82,783 tonnes shipped weight (swt), with Japan remaining the largest destination for grainfed beef.

The survey results and export data reinforce that the grainfed sector is an important component of the Australian beef sector, and confidence in lot feeding is high.

### **Impacto del COVID en las exportaciones australianas de carnes bovinas**

Jon Condon, January 20, 2021

AUSTRALIA'S beef exports to the European Union collapsed to their lowest level in 16 years during 2020, due to a range of short and longer-term factors.

Often categorised as Australia's most valuable beef export market on a dollars/tonne basis, the European Union (still including the United Kingdom until its formal departure back on 31 December), last year accounted for just 8525 tonnes of Australian beef.

That was the lowest volume seen since 2006, when the region was still in recovery mode after the devastating effects of BSE on consumer confidence over beef.

Last year's volume represented only 61pc of trade seen in the previous 2019 year, but in fact the downwards trend in trade has been consistent over the past six or seven years. Back in 2014, for example, total EU trade was more than 25,000t, with better than 10,000t of that destined for the UK, alone. Last year's direct or indirect shipments to the UK were just 1567t – perhaps the lowest level seen since World War Two.

Reflecting the high-value of the EU market on a \$/tonne basis, last financial year (2019-20), 97pc of Australia's exports to the region were in chilled form. In virtually all of Australia's other export beef markets, frozen shipments heavily outweigh chilled.

The recent decline in trade throws greater light on the need for Australia to expedite trade agreements with both the EU, and the newly-separated United Kingdom.

Meat & Livestock Australia's general manager for international markets, Andrew Cox, told Beef Central in a discussion late last year that a number of factors were in play in recent beef volume performance into the EU/UK region.





“Supply side issues in Australia, with drought and eligibility of cattle and adjustment to that, has had an affect, as has market conditions and the considerable impacts of COVID-19 across Europe last year,” Mr Cox said.

Australia’s quality beef exports into the Europe region have traditionally been targeted at the food service (restaurant, hotel and catering) sector, and the onset of COVID last March saw dramatic declines in sales into food service, without the ability to simply transfer into retail and supermarket sales, as it did elsewhere. “The way Australia’s beef trade into the EU works, it is not a simple action to shift from food service into retail, as has happened in Australia and some other markets,” Mr Cox said.

The economic difficulties brought on by COVID across Europe last year had also seen consumers tighten their spending on relatively expensive items like Australian steaks and lamb. Another factor in the EU last year was the uncertainty surrounding BREXIT, and the impact this had on economies within the union of countries.

For some Australian exporters, opportunities existed elsewhere last year for HGP-free cattle that might otherwise have gone to the EU market, Mr Cox said. China was the obvious target for some of that HGP-free meat.

Five of six years ago when Australia’s HGP-free grainfed beef started taking off into the EU market, there was not as much international competition for that beef, but since the arrival of China in earnest in 2017-18, that product had attracted another very large competitor.

#### Trade prospects

As a region of 28 countries, the European Union contains the largest population of households earning more than US\$35,000/year in the world – yet its stance towards agricultural imports has restricted Australia’s ability to grow trade with the region.

While existing EU quotas are being split between the EU and UK as a consequence of Brexit, Australia’s negotiation of free trade agreements with the EU, and now separately the UK, provide opportunities to modernise the existing trading regime, MLA says.

Australian trade negotiations with the EU started in June 2018, and have gone through a number of cycles, while negotiations with the UK began more recently in June 2020. These negotiations represent the first opportunity in more than 40 years to significantly reshape Australian’s red meat market access into the region.

While Australia has historically been a strong contributor to the HQB global grainfed quota (utilising an estimated 25pc of the shared quota in 2018-19), changes to the administration of the quota have now limited access for Australian grainfed beef. An agreement between the US and EU that started this time last year provides the US exclusive access to 18,500t shipped weight of the quota, increasing incrementally to 35,000t over a seven-year period.

Statistics released by US authorities in the past few days suggest that the US beef industry has not benefited greatly last year – the first full year of the newly-negotiated US-specific High Quality Beef (HQB) quota with the EU.

US exports to the region last year reached 12,806t. With a total of 18,500t reserved for US beef for 2020, this left 5694t of quota unused last year.

“This is the result of the high focus of US beef sales to the European restaurant sector, which was mostly shut down in both the spring first wave and the autumn second wave of the COVID-19 pandemic,” US Meat Exporters Federation said this week.

Because the US HQB quota year starts from 1 July, 2470t of the unused quota will be carried over to the next quarter of the US-specific quota.

Under the new Agreement, the US-specific HQB quota for 2021 increases to 23,000t, but is again likely to be under-utilised, given the limited capability of the US grainfed industry to produce HGP-free grainfed beef with whole of life traceability.

Australia, which previously benefitted from the non-country-specific HQ Grainfed quota alongside the US, now sits with a string of South American countries including Uruguay and Brazil, as well as NZ, in a much smaller 10,000t global quota.

#### Grassfed quota

Australia still maintains a country-specific Hilton Grassfed beef quota with the of about 7500t, but this attracts a 20pc tariff on exports, versus zero tariff under the HQ grainfed quota discussed above. For a range of reasons, including avoiding tariffs, Australia’s beef exports to the EU have swung heavily towards grainfed in recent years. Having been the dominant trade until a decade ago, Hilton grassfed exports last financial year totalled just 16pc of Australia’s total volume, at 1822t. In fact Australia has not filled its annual Hilton quota entitlement since 2016.

The acute declines seen in Australia’s country-specific grassfed export volumes under the Hilton quota into the EU in recent years can explained by two things: Changing market conditions, and the impact of drought on Australia’s ability to produce high quality young grassfed beef in recent years. Some EU-eligible cattle



that would have previously been sold off grass into the Hilton quota have in recent years been diverted as feeders, into the HQ Grainfed stream.

The arrival of another very large export customer for HGP-free beef – China – is a significant part of the decline in use of the Hilton EU quota. China has managed to bid-away large quantities of Australian HGP-free grassfed beef from customers in the EU, and in some cases, Beef Central is told that some beef producers who were previously accredited under EUCAS have abandoned their eligibility because of the additional regulatory burdens involved.

Certainly on a global basis with the explosive growth in China trade in beef since 2018, there is a lot more competition globally for HGP-free beef than what was seen previously.

#### Trade access

With the separation of the UK and the EU formalised in December last year, Australia's trade access discussions with both parties has gained greater urgency.

"The pleasing thing is that despite all the COVID disruptions last year, Australia's trade agreement discussions with both the EU and the UK were progressed, albeit in a virtual form," MLA's general manager for trade and market access, Andrew McCallum said.

The most recent rounds of FTA discussions were held online just before Christmas, and another round is scheduled for February-March this year, for both the UK and the EU agreements.

For the purposes of the trade negotiations, red meat is classified by both the UK and the EU negotiators as one of a basket of 'sensitive' commodities, and these are yet to be discussed in dialogue. Discussions to this point have dwelt on broader principles only.

Mr McCallum said despite the challenges, there was an 'aspiration' to try to conclude both trade agreements in 2021 – but much would depend on COVID developments and travel freedom.

"There is only so much that can be done virtually in these discussions," he said. "All the other trade negotiations Australia has been involved in over the years have had face-to-face discussions as a key part, especially at the final stages of the process."

Mr McCallum said he expected that negotiators would push along this year "as hard and as fast as they could", with the hope that at some point later this year, face-to-face meetings to nut-out the more delicate points may again be possible.

The only way Australia would get a 'fix' on improved market access to the EU/UK was via significant outcomes within the Free Trade Agreement negotiation process, he said.

Using Canada as an example, its recently completed FTA with the EU saw the removal of tariffs on all beef exports – grain and grassfed – and a progressive expansion in its annual quota.

As it has in other markets like the US, the outcomes from current FTA negotiations with the EU and UK will heavily influence Australian beef's export destiny in the European region for the next 30 or 40 years.

## EMPRESARIAS

### **Minerva selló un principio de acuerdo con SALIC para adquirir una planta en AUSTRALIA**

Beef Central, February 19, 2021

Brazilian red meat processor Minerva has signed a non-binding memorandum of understanding with Saudi investor, the Saudi Agricultural and Livestock Investment Company (SALIC) aimed at the possible acquisition of processing assets in Australia and the formation of a joint venture focussed on breeding, farming, processing and exporting sheep and cattle.

Beef Central broke the news about Minerva's intentions in Australia in this article last September.

Last week Minerva Foods approved the signing of a contract governing the sale, supply and exports of goods produced and sold by the company to SALIC, in the capacity of supplier, and Salic (UK) in the capacity of buyer.

Minerva said that with SALIC's support, the supply contract should strengthen Minerva Foods' exposure and operations in the Middle East and Asia, which comprise around 65pc of the world's population and 40pc of global GDP.

According to the US Department of Agriculture, these markets accounted for more than 60pc of global beef imports in 2020. In the three first quarters of 2020, the region was the destination of around 55pc of Minerva Foods' beef exports.

Under the Supply Contract, SALIC may acquire up to 25,000 tonnes of Minerva's products per year, at market prices in accordance with pre-defined terms and procedures, a statement said.

Minerva Foods also signed a non-binding memorandum of understanding with SALIC, aimed at the possible acquisition of assets in Australia and the formation of a joint venture focused on breeding, farming, processing and exporting sheep and cattle in that country.

"Australia is the world's leading exporter of sheep meat processed products and the second largest exporter of beef. It is recognised worldwide for the tradition and quality of its products, accessing both high-



growth markets, such as Asia and the Middle East, and markets with high income levels that enable high profitability, such as the US, Europe, Japan and South Korea, among others,” Minerva said.

“The company believes that Australia uniquely complements our operations in South America, maximising sales opportunities and operating synergies, reducing risks and contributing to our strategy of consolidation in the animal protein export market.”

Minerva said that with the potential creation of the joint venture in partnership with SALIC, it is seeking to maximise new business opportunities, in order to meet the growing global demand for animal protein.

SALIC Australia’s wholly owned subsidiary Merredin Farms is the local farming entity that produces high quality crops and livestock products. It controls Australian farming and grazing assets totalling 211,000 ha. The land portfolio includes 158,000ha arable land of which just over 90,000 ha are cropped in the current season.

In addition, the business runs about 40,000 Merino sheep. SALIC UK is the Group’s wholly owned subsidiary based in London, established in 2014 to facilitate SALIC’s investments in new overseas ventures. It oversees SALIC’s investment fund management activities in the UK, acting as a holding company for investments in Europe, North America and other regions.

About SALIC

The Saudi Agricultural and Livestock Investment Company (SALIC) is a Saudi joint stock company owned by the nation’s Public Investment Fund, focused on agricultural investment and livestock production in countries with comparative advantages, in order to contribute to the achievement of food security and the provision of food products and price stability in Saudi.

### **Tyson incentiva la vacunación de sus trabajadores**

(Associated Press) By GREG HENDERSON February 17, 2021

Tyson Foods announces additional incentives for frontline workers to receive vaccinations for COVID-19. The company said in a news release it already offers free, on-site COVID-19 vaccinations at its U.S. facilities, and now will also compensate workers for up to four hours of regular pay if they are vaccinated outside of their normal shift or through an external source.

The company said several hundred team members, mostly health service staff and workers over the age of 65, have already been vaccinated. Tyson expects about 1,000 frontline workers in Illinois, Missouri and Virginia will be vaccinated this week and is prepared to provide free access at other locations across the country as more doses of the vaccine are made available.

Tyson Foods is partnering with Matrix Medical Network to educate the company’s 120,000 U.S. team members about the vaccines and is working with local and state health officials as well as approved vaccine providers to access doses, pursuant to prioritization regulations. Vaccinations for Tyson Foods team members are voluntary, but highly encouraged, according to the company.