



## NOTICIAS INTERNACIONALES AL 11/06/2021

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## **GLOBAL**

### **FAO costo de las importaciones globales registró un valor récord**

10 June 2021

Global food import costs are expected to rise 12% in 2021 to a record due to surging commodity prices and robust demand during the COVID-19 crisis, the United Nations food agency said.

Reuters reports that the world's food import bill, including shipping costs, is projected to reach \$1.715 trillion this year, from \$1.530 trillion in 2020, the Food and Agriculture Organization (FAO) said in its twice-yearly Food Outlook report on 10 June.

Growth in agricultural trade during the pandemic showed the inelastic nature of food consumption and the resilience of international markets, but price rises since late 2020 were raising risks for poorer import-reliant countries, the FAO said.

Its monthly food price index hit a 10-year high in May, reflecting sharp gains for cereals, vegetable oils and sugar.

The FAO said a separate index of food import values, including freight costs that have also soared, reached a record in March this year, surpassing levels seen during previous food price spikes in 2006-2008 and 2010-2012.

A strong volume increase for staple food imports last year had already driven up global import costs 3% to a record.

Exceptions were beverages and fish products that are more sensitive to economic conditions and which saw demand curbed by supply chain difficulties, the FAO said.

China's imports have been a driver of agricultural demand and prices in the past year, partly reflecting Beijing's efforts to rebuild its pig industry after a disease outbreak.

Chinese maize (corn) imports in the upcoming 2021/22 season were expected to rise to 24 million tonnes, keeping China as the world's top importer after its maize imports are expected to quadruple to 22 million tonnes in 2020/21, the FAO forecast.

A recovery in Chinese pork output was expected to reduce global trade, offsetting growth in beef and poultry flows to leave overall meat trade stable this year, the FAO said.

## **CHINA**

### **Utilizarán reservas estatales de carne de cerdo para estabilizar la producción y los precios**

por Cecilia Ferreirajunio 9, 2021

Las autoridades chinas anunciaron este miércoles que tienen como objetivo utilizar las reservas estatales de carne de cerdo para estabilizar la producción y los precios. En lo que va del año la carne de cerdo acumula una caída de precios de más del 50%.

China se está recuperando de un nuevo brote de peste porcina africana que redujo el stock de cerdos durante 2018 y 2019, con precios que este año han caído mucho más de lo esperado, dijeron analistas consultados por la agencia de noticias Reuters.

La Comisión Nacional de Desarrollo y Reforma de China (NDRC) dijo en un comunicado que planea mejorar la forma en que operan sus reservas de carne de cerdo para ayudar a estabilizar la producción porcina y los precios de la carne de cerdo.

El broker Juan Lema, director de Agromeals, dijo el pasado 27 de mayo al programa Tiempo de Cambio de radio Rural que la caída del precio del cerdo, a contrapelo de lo que ocurre con la carne vacuna, respondería a una "liquidación de pánico de los cerdos de las granjas porque hay muchos productores que están viendo que la situación de la peste porcina africana está empeorando entonces está habiendo una liquidación a corto plazo de stocks que están haciendo que el precio baje", apuntó.

Para el operador, en el corto plazo se mantiene la posibilidad de que baje el precio del cerdo, pero "lo que se pronostica luego de esa liquidación y por las dificultades que está teniendo en la recuperación de stock los precios del cerdo vuelvan a subir".

China no ha dado a conocer el volumen de sus reservas de carne de cerdo congelada, pero se estima que la reserva es demasiado pequeña para influir significativamente en el mercado. La NDRC dijo que aumentaría significativamente sus existencias, pero no dio más detalles.

También establecerá una reserva temporal adicional que desempeñará un papel más activo en la fijación de precios comprando en el mercado cuando los precios bajen demasiado y liberando existencias cuando la oferta sea escasa.

"El propósito clave es enviar una señal al mercado de que el gobierno no permitirá que los precios caigan más", dijo Pan Chenjun, analista senior de Rabobank, consignó Reuters.

Los precios del cerdo vivo ya han comenzado a repuntar en muchas regiones esta semana, poniendo fin a una fuerte caída de meses que tomó al mercado por sorpresa.



Pero hablar de nuevos brotes de enfermedades en el sur y el suroeste en las últimas dos semanas podría provocar más ventas de pánico por parte de los agricultores, agregó el analista de Rabobank, haciendo que los precios bajen nuevamente y provocando compras por parte de la reserva.

## **BRASIL**

### **Menos oferta provocó alza de precios**

Sexta-feira, 11 de junho de 2021 - 06h00

Para garantir as compras e o consequente alongamento das escalas de abate, os frigoríficos paulistas ofertaram preços maiores pelos animais terminados na última quinta-feira (10/6).

Segundo levantamento da Scot Consultoria, na comparação diária, o preço do boi gordo subiu R\$1,00/@ e da novilha gorda R\$2,00/@. O da vaca gorda ficou estável no estado.

Desta forma, em São Paulo, o boi gordo ficou cotado em R\$316,00/@, a vaca gorda em R\$294,00/@ e a novilha gorda em R\$309,00/@, preços brutos e a prazo. Animais de até quatro dentes que atendem os requisitos para exportação ficaram cotados em R\$320,00/@, preço bruto e à vista.

No Rio de Janeiro, a baixa oferta de boiadas resultou em alta de R\$3,00/@ para o boi gordo e R\$1,00/@ para a vaca gorda na comparação diária. Não houve mudança no preço da novilha gorda.

Em Minas Gerais, na região de Belo Horizonte, a oferta enxuta pressionou os preços, resultando em alta de R\$1,00/@ para o boi, vaca e novilha gordos.

### **CEPEA: demanda reducida presiona los precios hacia abajo**

07/06/21 Depois de operarem no encerramento de abril nas máximas nominais da série do Cepea, os preços da carne bovina recuaram ao longo de maio no mercado atacadista da Grande São Paulo. No dia 31 de maio, a carcaça casada bovina foi negociada a R\$ 19,80/kg, à vista, acumulando queda de 2,65% frente à média verificada no dia 30 de abril. Trata-se, inclusive, da primeira queda no acumulado de um mês neste ano.

De acordo com pesquisadores do Cepea, a pressão vem da demanda interna bastante enfraquecida, tendo em vista o atual contexto econômico, o desemprego elevado e o consequente poder de compra fragilizado da maior parte da população brasileira. Além disso, os preços competitivos das principais carnes concorrentes, a suína e avícola, reforçam a menor procura pela proteína bovina.

Agentes de frigoríficos consultados pelo Cepea indicam dificuldades em vender a carne nos atuais patamares. Assim, enquanto as unidades de abate habilitadas a exportar acabam tendo as vendas internacionais como “válvula de escape” – favorecidas especialmente pelo dólar elevado e pela demanda externa aquecida –, as que trabalham apenas com o mercado brasileiro relatam estar com as margens apertadas.

### **Cepea advierte mayor retención de hembras en 2021**

10/06/2021

No 1ºT/21, foram abatidas 2,4 milhões de fêmeas (vacas e novilhas) - o menor volume para um primeiro trimestre desde 2003

Os preços recordes dos animais de reposição levaram muitos pecuaristas brasileiros a reforçar o movimento de retenção de fêmeas nas fazendas ao longo do ano passado e, especialmente, nos primeiros meses de 2021, informa nesta quarta-feira o Centro de Estudos Avançados em Pesquisa Aplicada (Cepea).

De janeiro a março deste ano, foram abatidas 2,411 milhões de fêmeas (vacas e novilhas), o menor volume para um primeiro trimestre desde 2003, quando os abates somaram 1,93 milhão de cabeças, de acordo com dados do Instituto Brasileiro de Geografia e Estatística (IBGE).

### **Valor de Exportaciones de carnes bovinas creció 2% a mayo 2021**

Fonte: Abiec adaptação IHS Markit Producción de carnes bovinas revela mejora en la productividad del sector

11/06/2021 - Exportações brasileiras de carne bovina crescem 2,2% em faturamento no acumulado de 2021

As exportações brasileiras de carne bovina apresentaram um aumento de 2,2% no faturamento entre janeiro e maio deste ano, somando US\$ 3,2 bilhões em comparação com o mesmo período do ano passado, segundo os dados da Secretaria de Comércio Exterior (Secex) divulgados pela Associação Brasileira das Indústrias Exportadoras de Carnes (Abiec). No acumulado do ano foram exportadas 710.093 toneladas, diferença de 2,9% em comparação com o mesmo período do ano passado, quando os embarques somaram 731.422 toneladas.

Na comparação entre o mês de maio com abril de 2021, as exportações somaram US\$ 725,2 milhões,



uma alta de 2,5% no faturamento ante US\$ 707,2 milhões. O volume embarcado no período ficou em 149,8 mil toneladas, leve desaceleração de 1,4%. As exportações para China cresceram 7,6% no período para 67.317 toneladas, um aumento de 11% em faturamento que fechou o período em US\$ 343,2 milhões. As exportações para os Estados Unidos apresentaram alta de faturamento de 12,9%, passando de US\$ 65,3 milhões para US\$73,8 milhões, com embarque de 10.728 toneladas, um alta de 20,1%. Ao avaliar maio de 2021 em comparação com maio de 2020, o ritmo de crescimento desacelerou em 7% no faturamento que passou de US\$ 779,9 milhões para US\$ 725,2 milhões. O ritmo dos embarques também foi menor no período, passando de 182,6 mil toneladas para 149,8 mil toneladas.

#### Principais destinos

A China segue como o principal destino das exportações de carnes, tendo somado 317.081 toneladas embarcadas entre janeiro e maio, um aumento de 10,4% em relação às 287,2 mil toneladas embarcadas nos primeiros cinco meses do ano passado. O faturamento no período cresceu 5,4% e fechou em US\$ 1,5 bilhão. O volume embarcado para os Estados Unidos também cresceu no período e ficou em 33.800 toneladas, alta de 165,6%, enquanto o faturamento aumentou 149% e encerrou o período em US\$ 250,7 milhões. Outro país de destaque no período foi Filipinas, com crescimento de 111% no faturamento, que chegou a US\$ 106,2 milhões, com crescimento de 78,6% no volume embarcado, que passou de 14,6 mil toneladas para 26,1 mil toneladas.

A comparação de maio deste ano com maio passado também aponta os Estados Unidos entre os mercados de destaque com aumento de 175,6% no faturamento, que passou de US\$ 26,7 milhões para US\$ 73,8 milhões e crescimento de 186,3% no volume, com embarques de 10.728 toneladas. A receita com exportações para o Chile cresceu 146,4%, passando de US\$ 13,5 milhões para US\$ 33,4 com crescimento de 97,6% nos embarques para 6.981 toneladas. Foram exportadas 4.474 toneladas para a União Europeia, um crescimento de 15,1%, passando de 3,8 mil toneladas para 4,5 mil toneladas, enquanto o faturamento aumentou 21,7%, passando de US\$ 24,7 milhões para US\$ 30 milhões.

#### **Faena: cae la de vacunos y fue récord la de aves**

10/06/2021 - Abate de bovinos cai e de frangos é recorde no primeiro trimestre

O abate de bovinos no 1º trimestre de 2021 foi de 6,56 milhões de cabeças, o menor resultado desde o 1º trimestre de 2009. Esse índice representa uma queda de 10,6% em comparação ao 1º trimestre de 2020, e de 10,9% contra o 4º tri de 2020. Mato Grosso continua liderando o abate de bovinos, com 15,7% da participação nacional, seguido por Mato Grosso do Sul (11,7%) e São Paulo (10,2%).

Os dados são da Estatística da Produção Pecuária, divulgada hoje (8) pelo IBGE, que também mostra que foram abatidas 1,57 bilhão de cabeças de frango, um novo recorde na série histórica iniciada em 1997. A pesquisa registra que o abate de suínos foi de 12,62 milhões de cabeças no 1º trimestre de 2021, o melhor resultado para este período desde o início da série. “Houve uma continuidade da tendência observada em 2020: queda no abate de bovinos e crescimento de suínos e frangos”, explica o supervisor da pesquisa, Bernardo Viscardi.

Santa Catarina continua liderando o abate de suínos, com 28,9% da participação nacional, seguido por Paraná (20,3%) e Rio Grande do Sul (17,5%). Já o Paraná lidera amplamente o abate de frangos, com 33,1% da participação nacional, seguido por Rio Grande Sul (13,9%) e Santa Catarina (13,3%).

No que diz respeito ao abate de bovinos, o 1º trimestre de 2021 também seguiu a mesma tendência de 2020 em relação ao abate de fêmeas, cujo total para este período foi o menor desde 2003: 2,41 milhões de animais. “Ao mesmo tempo, os preços médios da arroba bovina e do bezerro atingiram valores máximos nas respectivas séries”, ressalva Viscardi. Mesmo com a queda, a exportação segue aquecida, já que a Secretaria de Comércio Exterior (Secex) do Ministério da Economia registrou o terceiro maior volume de carne bovina in natura exportada para o período, com recorde para um mês de março (133,82 mil toneladas).

No abate de suínos, que apresentou aumento de 5,7% em relação ao mesmo período de 2020 e de 0,6% na comparação com o 4º trimestre de 2020, além do recorde para um 1º trimestre, o mês de março atingiu a maior marca de um mês da história da pesquisa. Viscardi explica que, além da exportação aquecida, os preços do animal vivo e da carne suína no mercado interno sofreram desvalorização ao longo do trimestre, aumentando sua competitividade em relação às demais proteínas. “Nesse aspecto, há influência da restrição orçamentária dos consumidores e das medidas restritivas adotadas para conter a pandemia de Covid-19”, afirma o pesquisador.

A mesma explicação se aplica ao frango, cujo abate no 1º trimestre de 2021 foi 3,3% maior em relação ao mesmo período de 2020 e de 0,7% maior na comparação com o 4º trimestre de 2020. “Como o desempenho das exportações da carne de frango permaneceu em patamares apenas razoáveis nesse trimestre, podemos considerar que boa parte desse aumento foi destinado ao consumo interno”, diz Viscardi, lembrando que o preço da carne de frango é mais favorável à grande parcela da população na comparação com as outras proteínas concorrentes, principalmente a carne bovina.





## **Producción de carnes bovinas revela mejora en la productividad del sector**

09/06/2021 Dado foi levantado pelo economista agroindustrial Thiago Bernardino de Carvalho durante a live "Pra onde vai a arroba do boi?", que foi tema do programa DBO Entrevista

Preços do boi em alta, reposição cara e insumos em escala de valorização maior ainda. É possível que o pecuarista brasileiro ainda possa tirar bom proveito do turbilhão de solavancos no mercado do boi gordo?

A resposta é que sim. Pelo menos é o que mostra um dado apontado pelo economista agroindustrial Thiago Bernardino de Carvalho, pesquisador do Centro de Estudos Avançados em Economia Aplicada (Cepea/Esalq-USP). "Produzimos mais carne neste primeiro trimestre de 2021 do que todos os primeiros trimestres desde 1997", diz Thiago.

Com base nos dados do Instituto Brasileiro de Geografia e Estatística (IBGE), o peso médio dos animais no primeiro trimestre deste ano gira em torno de cerca de 262 kg de carne bovina, a cada animal abatido.

Além disso, o economista Yago Travagini Ferreira, analista de mercado da Agrifatto, acrescenta. "Não só estamos produzindo animais mais pesados como estamos abatendo bovinos cada vez mais jovens", afirma Ferreira.

Carvalho e Ferreira foram os convidados do DBO Entrevista, que foi ao ar na segunda-feira, 7, com o tema "Pra onde vai a arroba do boi?" (confira abaixo a entrevista completa, em vídeo). O programa promoveu uma discussão sobre o mercado do boi e trouxe um panorama da atividade, possíveis cenários da reposição e de preços.

O segredo da eficiência

Para os analistas, mais do que tentar acertar os preços da arroba do boi, fazer a melhor aposta de contrato futuro e buscar o melhor preço de reposição, a tônica é uma só: ter sempre em mente qual é o custo da atividade. Essa informação que guiará as tomadas de decisão do confinamento e da fazenda de recria e engorda a pasto.

Ter as contas na ponta do lápis, produzir o que o mercado quer, atender às exigências do que o frigorífico procura, e, em épocas de exportações atrativas, produzir o gado que atenda ao mercado externo deve estar no check-list do pecuarista mais atento. Para Carvalho, é aí que vai fazer a diferença das margens da atividade. "Entender essa dinâmica da comercialização não é simples, mas é esse o pecuarista que vai se sobressair", avalia.

Perspectivas da reposição

Uma boa notícia é que a tendência de preços do boi magro possa melhorar daqui para frente, segundo avalia Ferreira. Segundo ele, o pior cenário de preços é justamente agora.

"Não vemos muito espaço para a reposição voltar a surfar aqueles 20% e 30% de ágio ou até mesmo uma valorização maior do que o boi gordo", diz o economista Yago Travagini Ferreira, da Agrifatto.

No entanto, os preços ainda seguem firmes e a mudança de preços mesmo só deve ocorrer a partir de 2023, quando o ciclo pecuário, com maior oferta de bezerros deve chegar ao mercado.

SAIBA MAIS | "Está em curso o maior acúmulo de bezerros da história nos próximos anos no País", aponta Mendonça de Barros

Risco no apetite chinês?

As exportações seguem também ainda firmes, especialmente por conta das compras chinesas. Apesar de Carvalho perceber que é comprador extremamente favorável pairam dúvidas, quando se trata dos fundamentos da economia.

"É grande a dependência nossa com a China. Quando falamos de China e Hong Kong juntos são cerca de 60% do destino da carne bovina. Sei que é um mercado muito favorável e temos de aproveitar mesmo, mas, como economista, sei que depender de um grande comprador ou depender de um único grande vendedor é complicado", diz Carvalho.

O que serve de consolo é justamente a tarefa de recomposição dos rebanhos de suínos no gigante asiático, que ainda está em curso, abrindo os precedentes para a importação de proteína animal de outros países como a carne bovina brasileira.

## **URUGUAY**

### **Mercado del gordo firme con oferta escasa de ganados especiales**

por Cecilia Pattarinojunio 9, 2021

El mercado de la hacienda gorda mantiene la firmeza con valores levemente superiores que la semana anterior y nada parece indicar que en el corto plazo bajen los precios. La avidez de la demanda industrial llevó la faena a máximos de tres años y medio. La oferta por ganados gordos especiales es escasa mientras que con los buenos precios se incrementó la oferta de ganados buenos y generales.

Según la estadística del Instituto Nacional de Carnes, el novillo gordo –que incluye negocios de campo y de corral- promedió US\$ 4,036 por kilo en cuarta balanza, tres centavos más que la semana anterior. Con



máximos de US\$ 4,32 probablemente por ganados de corral, pero con la gran mayoría de negocios concretados a US\$ 4,02.

Los novillos gordos de campo promediaron US\$ 3,98 por kilo en cuarta balanza, cuatro centavos más que los US\$ 3,94 de la semana anterior y se consolida como el más alto desde comienzos de 2020.

En el caso de la vaca, el precio promedio por todos los animales comercializados la última semana fue de US\$ 3,73 por kilo cuarta balanza, dos centavos más que la semana anterior, registrándose una considerable cantidad de operaciones a US\$ 3,90.

Las vaquillonas fueron junto con los novillos las que más subieron: promediaron US\$ 3,83 las de campo y US\$ 3,92 las que incluyen también ganados de corral. Con valores máximos que superaron los US\$ 4,20 en corrales.

Santiago Sánchez de Victorica y Asociados dijo a Blasina y Asociados que “El mercado está firme y seguramente esta tendencia se mantenga. Las entradas están largas, hasta 20 días principalmente por un aumento en la oferta de ganados generales o buenos y por la faena de ganados de corral. La mayor firmeza es por ganados especiales (que en el caso de los novillos cruzan los US\$ 4) son los que más escasean”.

El mercado de reposición no acompaña la firmeza del gordo. En el campo, la concreción de negocios mermó lo que llevó a un ajuste a la baja en los valores. La oferta está pretenciosa y la demanda cautelosa debido a la baja disponibilidad de pasto. Se mantiene la preferencia por negocios cortos como vacas de invernada y novillitos.

En el 164º remate de Lote21 los terneros bajaron levemente respecto al remate del mes pasado a US\$ 2,31 por kilo en pie, con máximos de US\$ 3,16 por un lote de terneros livianos y mínimo de US\$ 2,12 por un lote de terneros pesados. Los novillitos de dos a tres años se mantuvieron estables en US\$ 1,84.

Los lanares mantienen la firmeza de precios con una demanda industrial que supera ampliamente la oferta. El cordero cotiza entorno a los US\$ 3,85 por kilo; los borregos a US\$ 3,8; y la oveja a US\$ 3,60 por kilo.

### **Hasta mayo, el valor de las exportaciones uruguayas de carne supera en un 26,5% al de 2020**

07/06/2021 China supone el 53% de los ingresos en los cinco primeros meses del año

EUROCARNE | De acuerdo con los datos facilitados por INAC, hasta finales de mayo el valor de las exportaciones cárnicas uruguayas suma 921,2 millones de dólares, lo que supone un 26,5% más que en 2020. De esta cifra, el 79% correspondió a carne vacuno y el 5% a carne ovina.

En cuanto a mercados, China supone el 53% de los ingresos en los cinco primeros meses del año, seguido por los países de Norteamérica con el 16% y la UE con el 13%.

Específicamente para la carne vacuna, Uruguay ha exportado ya en estos cinco meses 187.903 toneladas lo que supone un 20,8% más que en 2020, pero está lejos de las 201.875 toneladas que registró en 2019. China con 109.265 toneladas, es el principal comprador de la carne vacuna uruguaya, sumando un 31,4% más de compras de carne que en 2020.

### **Aflojan los precios para la carne en China y EEUU; repuntan en Europa**

por Cecilia Ferreirajunio 9, 2021

Dentro de un escenario de firmeza, en los últimos días se ha registrado un afloje en los precios pagados por la carne vacuna en China y EEUU, mientras que repunta el mercado europeo, señaló un broker consultado por Ganadería.uy.

“En general tanto en China como en EEUU en los últimos 10 días nosotros lo vemos un poco más flojo y Europa un poco mejor”, sostuvo.

De acuerdo al operador, en China están bajando un poco los precios desde hace una semana, diez días y ahora la tónica pareciera ser de una Europa un poco más resplandeciente, y China y EEUU con buenos valores pero no llevando todo lo que se ponga sobre la mesa.

“En EEUU hay necesidad de que la pandemia termine, avanza la vacunación, la economía está firme y hay ganas de gastar dinero, señales que permiten ser optimistas. Los precios habían subido mucho y desde aproximadamente una semana están un poco más serenos”, dijo.

En la región, Argentina continúa exportando hacia Europa y EEUU. Hay versiones que señalan que sigue llegando carne desde Argentina a China, con permisos de exportación previo al cierre, mientras que otros exportadores no estarían enviando.

En carne ovina “China está bajando los precios de compra. En estas últimas semanas empezó a pasar precios que están entre US\$ 500 y US\$ 1.000 debajo de lo que venía comprando”, señaló al programa 100% Mercados de radio Rural Diego Saavedra, gerente de Central Lanera Uruguay. Esto se traduce en una desaceleración del ritmo de compras e impacta en la faena, apuntó.



### **Carniceros ofrecen dos cortes premium a 359 pesos el kilo**

07/06/2021 Rebaja del 40% en una iniciativa que es hasta agotar el stock.

La Unión de Vendedores de Carne (UVC) promociona dos cortes bovinos este mes: colita de cuadril y el bife angosto. En ambos casos, a través de acuerdos de precio con los proveedores, ambos se venden al público con una rebaja de 40% frente a su valor habitual en los expendios.

Según informó la gremial, la colita de cuadril y el bife angosto salen en las carnicerías de las grandes superficies o puntos de venta de los frigoríficos \$ 480 por kilo, pero la promoción actual impulsa estos cortes a \$ 359 por kilo.

“Cualquier esfuerzo es poco para agradecer a los consumidores el apoyo que hemos tenido en las promociones”, afirmó Rafael Rodríguez, vicepresidente de la Unión Vendedores de Carne. El comerciante y directivo, afirmó que las carnicerías de barrio “siguen luchando para conseguir los mejores precios y continuar con estas ofertas, apuntando siempre a la excelencia”. Agregó que las carnicerías “están del lado del cliente y el que no coma la mejor carne va a ser porque no quiere, porque va a tener la oportunidad”.

La gremial de carniceros evalúa, en Sesión Permanente desde marzo de 2020, el impacto de la crisis sanitaria en las carnicerías tradicionales. El sector sustenta de forma directa e indirecta a más de 10.000 familias uruguayas.

El pasado mes de abril, la UVC había lanzado al mercado interno el entrecot a \$ 359 por kilos hasta agotar stock. En el anterior lanzamiento de este corte, las carnicerías tradicionales vendieron en menos de 10 días más de 40 mil kilos de entrecot, también con un 40% de rebaja en el precio habitual. Nuevamente se espera que el stock se agote rápidamente, porque los consumidores se vuelcan cada vez más a las carnicerías.

### **China modera, buscando el punto de equilibrio**

06/06/2021 – Es cada vez mayor la preocupación por la garrapata en el país. Ahora el tema está distorsionando la actividad productiva de algunos corrales de engorde. Se aguarda con expectativa reuniones oficiales de esta semana.

Continúa dinámico el mercado de las carnes. La intervención del gobierno de Alberto Fernández en las exportaciones de carne de Argentina sigue generado un cambio importante en el mercado internacional. La medida del país vecino coincidió con el comienzo de la feria de SIAL en Shanghái donde se observó incertidumbre y cautela lo que dificultó cerrar nuevos negocios en el marco del evento.

De todos modos, los exportadores se posicionaban con ajustes al alza que fueron entre un 5 y 10%, dependiendo de los cortes. Algunos importadores lo validaron y otros no.

Argentina venía exportando a China unas 70 mil toneladas de carne bovina con hueso por mes, esto en el primer trimestre del año generó un ingreso de divisas de más de 600 millones de dólares.

Lo que se supo sobre el tema es que, en esta semana que pasó, el gobierno argentino recibió a representantes del Consejo Agroindustrial y si bien se mantiene el cepo a las exportaciones de carne está abierto un canal de dialogo.

Sobre el punto, Daniel Castiglioni, broker uruguayo de carnes radicado en China, confirmó que la primera semana fue de incertidumbre, a la espera de qué pasaba en Argentina. Sin embargo, señaló que durante la presente semana los precios del mercado local empezaron a tener modificaciones.

“Los valores de exportación empezaron a bajar intentando ver cuál va a ser el precio, aún no está claro. El importador chino no tiene mucha confianza a la hora de salir a comprar productos”, dijo.

La apertura del denominado “canal gris” es una respuesta, y la más importante, dado que empezó a entrar más carne de contrabando. “Ese es uno de los motivos por los que los precios no han subido”, señaló Castiglioni.

De todas formas, el broker manifestó que los precios que ofrece el gigante asiático “son muy buenos”, incluso mejores a los de mayo. “La realidad es que la demanda está. Hay que encontrar el punto de equilibrio”, agregó.

La interna.

En nuestro país el mercado de haciendas está también con precios firmes, los novillos especiales se colocan en el eje de los US\$ 4 y las vacas también especiales se venden a US\$ 3.80. Operadores consultados para esta columna consideran que se observa una industria mejor posicionada en la compra lo que ha permitido en este marco de firmeza moderar la suba que se venía registrando.

La faena de vacunos en la semana 21 se ubicó en 45 mil cabezas una caída de unos 10 mil frente a la semana anterior, esta baja responde sobre todo al feriado por el Día de la Carne y a la inactividad de la planta e BPU en Durazno. Mañana lunes vamos a tener los datos de la faena correspondiente a la semana que cerró ayer.

A propósito de BPU, la planta de capitales japoneses retomó la actividad aún sin la posibilidad de exportar a China. Sobre este tema, en la semana pasada llegaron al ministerio de Ganadería nuevas consultas de





los servicios chinos que fueron contestadas de forma inmediata y se confía en lograr una habilitación en breve.

### **Carne uruguayana podría mejorar acceso a COREA**

08/06/2021 - Si el Mercosur logra cerrar un Tratado de Libre Comercio

La concreción del Tratado de Libre Comercio (TLC) entre el Mercosur y Corea del Sur, resolvería el principal problema que frena la colocación de mayor volumen de carne bovina en ese destino: los altos aranceles (40%).

La semana pasada se desarrolló en forma remota la 6ta. Ronda de Negociación entre el Mercosur y Corea del Sur, con el objetivo de finalizar un TLC, que sería relevante para la cadena cárnica local.

Uruguay es hoy el único país de la región que puede exportar carne vacuna a Corea del Sur -quedó habilitado en 2013-, pero mantuvo una participación marginal, con un flujo exportador de US\$ 6 millones como promedio anual, según mostró un estudio de Inteligencia de Mercado elaborado por el Instituto Nacional de Carnes.

Los US\$ 6 millones son menos del 1% de las importaciones totales de Corea del Sur y en sentido análogo, este flujo representa 0,5% de las exportaciones uruguayas de carne bovina. El máximo valor exportado por Uruguay se alcanzó en 2017 y fue US\$ 12 millones. Según datos de INAC, los cortes de mayor demanda en este mercado son: aguja, carne para manufacturas, paleta, pecho, asado, nalga y bola de lomo.

Este patrón exportador por producto es similar al de Australia, por ejemplo. Entre 2019 y 2020, Uruguay exportó un promedio anual de US\$ 720 millones y 165 mil toneladas de estos productos. China compró el 70%, mientras que Corea del Sur el 0,6%.

El problema en este mercado son los altos aranceles que debe pagar la carne uruguayana, que está en inferiores condiciones frente a otros proveedores y el TLC, de lograrse, resolvería este problema. Los países que tienen ese acuerdo, como Estados Unidos, Australia y Nueva Zelanda, pueden ingresar con aranceles preferenciales de 13,3%, 18,6% y 21,3%, respectivamente.

Potencial. Este mercado cuenta con características estructurales que lo posicionan como importador de productos agro: baja disponibilidad de superficie agrícola y un alto ingreso por habitante. Es el cuarto mayor importador en valor y volumen de carne bovina.

Este país importó un promedio de 2.500 millones de dólares y 410 mil toneladas anuales entre 2016 y 2020. Esto es aproximadamente 8% de la importación mundial.

El mercado importador coreano ha crecido a una tasa de 9% anual en los últimos cinco años. Esto es superior al crecimiento del mercado mundial.

En términos sanitarios solamente 9 países logran cumplir con los requisitos necesarios para ser autorizados para abastecer a Corea del Sur. Uruguay es el único país del Mercosur habilitado actualmente. Esta situación es meritoria en ese sentido, aunque la habilitación uruguayana es incompleta, ya que permite cortes desosados y no incluye productos con hueso, bloques de carne, ni trimmings (recortes de carne generados durante el retoque de los cortes de alto valor).

El mercado coreano paga elevados precios por unidad y en los últimos cinco años, el precio promedio de la tonelada fue de US\$ 6.200.

Esto es 15% superior al promedio mundial. Tanto la gastronomía como los hábitos de consumo occidentales utilizan a la carne como ingrediente. El consumo per cápita de carne bovina es de 16 kilos y 2 de cada 3 kilos son importados. Corea, carne, Uruguay, TLC

### **Stock récord por alto en vacunos y por lo bajo en ovinos**

por Cecilia Pattarino junio 9, 2021

La ganadería vacuna consolidará su tercer año de crecimiento y de aumento de la producción. El stock alcanzará máximos absolutos superando los 12 millones de animales. En cambio, la faena de ovejas en máximos de 11 años llevará al stock ovino a mínimos desde que hay registros.

La producción de más de tres millones de terneros el año pasado marcó un ingreso fuerte de animales al rodeo, que superó significativamente a las salidas por faena y exportación en pie.

Según estimaciones de Esteban Montes, técnico del Plan Agropecuario, el stock ganadero al 30 de junio de 2021 se ubicaría en el entorno de los 12,1 millones de animales, 2% por encima de un año atrás: 11.881.134 animales.

Con 4,354 millones de vacas de cría la producción de terneros alcanzaría los 2,85 millones de cabezas en 2021, por debajo del récord histórico de 3,015 millones del año pasado.

“Con una faena de 2,2 millones de animales, una exportación en pie de 150.000 animales y unos 300.000 animales entre mortandad y consumo de los establecimientos la extracción en el ejercicio es de 2,65 millones de animales, lo que significa que hay un excedente de 250.000 cabezas que se sumarían al stock del año pasado llevando al stock a 12,1 millones de animales”, indicó Montes en entrevista con Tiempo de Cambio de radio Rural.



Según montes el stock de vacas de cría aumentaría en unas 50 mil cabezas (de 4.353.689 cabezas a algo más de 4.400.000. De esa forma, marcarán un récord histórico.

Los más de 3 millones de terneros y terneras del año pasado generaron una buena entrada de novillos y vaquillonas de uno a dos años este año, lo que lleva a un aumento considerable de estas categorías, que son las que impulsan el crecimiento del stock general y el de los vientres de cría.

“Se mantiene un stock criador como en años anteriores y más joven, hay más categorías de animales de uno a dos años, fruto del ingreso récord de terneros del año pasado”, dijo Montes.

**Stock ovino en mínimos históricos**

La faena de lanares se duplicó respecto a un año atrás, impulsada por un fuerte aumento en la faena de ovejas que alcanzó máximos desde 2010 y enciende una luz amarilla en el sector ovino que, a pesar de una buena señalada, probablemente marque un nuevo ajuste a la baja en el stock nacional a mediados de año ubicándose por primera vez en la historia por debajo de los 6 millones de animales: 5,9 millones aproximadamente.

### **Garrapata: piden aumentar los controles en predios y multar**

05/06/2021 - Relevamiento mostró que productores usan poco herramientas de control

En el marco de las 48a. Jornadas Uruguayas de Buiatría, se presentó un relevamiento técnico en la sesión Posters, donde se a 27 productores ganaderos sobre los antecedentes, situación actual de la presencia de garrapata y tristeza parasitaria en su ganado, los métodos de control, principios activos empleados, uso de la hemovacuna, situación de resistencia a los acaricidas, así como su opinión sobre la campaña sanitaria. La iniciativa fue llevada adelante por Ornella Galliazze e Inés Peirano (estudiantes de grado, Facultad de Veterinaria), Cecilia Miraballes (Plataforma de Salud Animal- INIA/Tacuarembó), Daniela Sapriza (Unidad Académica Extensión Veterinaria, Facultad de Veterinaria) y Stephanie Lara (Unidad Académica Salud de los Rumiantes, Facultad de Veterinaria).

Conclusiones. “De los 27 productores entrevistados en establecimientos de Artigas, Salto, Paysandú, Río Negro, Florida y Lavalleja, 23 productores reportaron antecedentes de la presencia de garrapata en su ganado, de los cuales 10 han logrado eliminarla”, se establece en las conclusiones del relevamiento.

“Únicamente tres productores declararon que sus animales nunca estuvieron infestados y sólo un productor sin antecedentes de garrapata declaró tener al momento de la entrevista animales infectados”, agregaron los investigadores.

Referente al método de control utilizado, todos los establecimientos con garrapatas realizan tratamientos farmacológicos ya sea empleando baños, aplicaciones pour-on o inyectables. “Los productores destacaron que los baños de inmersión necesitan de mantenimiento y mayor cantidad de personal. Por este motivo han disminuido mucho su uso más aún al comparar la practicidad que brindan las otras vías de administración”. Asimismo, “el 70% de los productores mencionaron que utilizan menos de dos principios activos con mecanismo de acción diferente para controlar la garrapata, lo cual refleja el escaso empleo del tratamiento generacional impactando en la resistencia a los acaricidas (Cuore y col., 2015)”.

Por otro lado, siete productores sospechan de resistencia a al menos un principio activo debido a que han constatado fallas en la eficacia del producto. Sin embargo, ninguno de los entrevistados ha realizado diagnóstico de laboratorio para conocer los perfiles de sensibilidad de los garrapaticidas.

Las respuestas marcan que hay herramientas como el diagnóstico de resistencia a los específicos, el tratamiento generacional e incluso la hemo vacuna que se aplica a las terneras para evitar episodios de tristeza parasitaria, en muchos casos, no se están usando bien.

“Los productores consideran necesario aumentar los controles oficiales en los predios y aplicar multas a los productores que tienen animales infestados, no establecen planes sanitarios y afectan a sus linderos. Además, sugieren que se amplíe la divulgación de la información técnica”, destacó el trabajo presentado en Buiatría.

**Hemoparásitos.** Respecto a los antecedentes de hemoparásitos en 13 establecimientos ha habido brotes.

En paralelo, sobre la hemovacuna, “18 entrevistados la conocen y a pesar de saber que la vacuna reduce los brotes sólo cinco de ellos la han usado alguna vez. Hay productores que han oído hablar de brotes de tristeza y muertes en animales vacunados, lo que les da mucha desconfianza y temor”.

En las entrevistas, los productores mencionaron que “no la emplean alegando que no quieren asumir los costos. No obstante, es probable que esas muertes se deban a errores en la conservación y aplicación de la vacuna, a situaciones de estrés, problemas nutricionales, enfermedades concomitantes más que a fallas en la eficacia de las vacunas disponibles en el mercado”.

Los veterinarios tienen mucho trabajo de extensión por hacer para concientizar a los productores sobre el uso de las alternativas para controlar esta parasitosis. No hay garrapata “invencible” y hay ejemplos de erradicación en predios ganaderos forestales en el norte del país, que muestran se puede vencerla.

Garrapata.



El presidente de la Asociación Uruguaya de Productores de Carne Intensiva Natural (Aupcin), Dr. Álvaro Ferres, dijo en Valor Agregado de radio Carve que “la problemática de la garrapata está distorsionando la actividad productiva en algunos corrales de engorde”. Sostuvo que la garrapata es un tema que está avanzando cada vez más y que, particularmente en los corrales de engorde, provoca varios tipos de problema: de logística, de llenado y de cargada de ganado.

Hay corrales de engorde en donde ya se ha dado que el ganado se pierde la oportunidad de la ventana y eso significa un menor ingreso. “Si llega a venir un ganado con garrapata al corral la esparce. Entonces, uno empieza a desconfiar y a no querer cargar”, dijo.

En ese sentido, Ferrés mencionó la necesidad de contar con un plan nacional efectivo y eficiente para el control de la garrapata.

En MGAP reconoce que hay problema y viene trabajando en un rearmado de la campaña de garrapata que se estructura varias medidas que se vienen evaluando por parte de las autoridades en consulta con el sector privado. Las medidas son más de 10, una de ellas es facilitar y hacer más accesible el costo de test de resistencia que hoy se hace en el servicio oficial. Se entiende que esto podría hacer más efectivo el uso de las drogas que hoy están habilitadas para el control de la garrapata. En esta semana se van a reunir los directores de los Servicios Ganaderos y Sanidad Animal con las autoridades de la Cartera para avanzar en la estructura de la nueva campaña.

### **“Uruguay es un país libre de fiebre aftosa, dónde se practica la vacunación”**

08/06/2021 - Jorge Bonino Morlán, representante de Uruguay ante la OIE, dijo a Rurales TV que el nuevo estatus sanitario de Brasil, donde varios Estados fueron reconocidos libres de aftosa sin vacunación, que “nos da fortaleza regional, pero hay que estar atentos a todo, como siempre se ha estado”.

El especialista en el tema recordó que “tenemos un plan en base al Plan Hemisférico de Erradicación a la Fiebre Aftosa, como los tienen todos los países de América, donde se marcan distintas etapas que han sido analizadas y reconocidas por expertos”.

En base a eso, sostuvo que “Uruguay tiene que seguir con vacunación que está dentro del programa de control y no de erradicación, que es muy bueno y exitoso y por eso tenemos el reconocimiento que tenemos en el mundo, con las precauciones y las vigilancias epidemiológicas que ya se hacen”.

“Uruguay es un país libre de fiebre aftosa, donde se practica la vacunación, y lo separo para que se entienda bien” finalizó.

## **PARAGUAY**

### **Haciendas gordas con precios estables y entradas a plantas en una semana**

11/06/2021 GANADERÍA

Las plantas frigoríficas exportadoras cierran la semana con precios estables para la compra de hacienda, luego de las subas que se registraron el pasado lunes. Un industrial confirmó a Valor Agro que se están cerrando negocios de machos y vaquillas a US\$ 3,40 por kilo carcasa y vacas a US\$ 3,20. Además, dijo que los machos trazados para la Unión Europea se valorizan 5 centavos de dólar más, US\$ 3,45. Un ejecutivo de otro frigorífico marcó el mismo valor por machos, pero ubicó a las vaquillas en US\$ 3,37 a la carne. Y agregó: “En este momento no estamos comprando vacas, estamos llenos”. Por otro lado, un operador del mercado confirmó a Valor Agro las referencias de lista anunciadas por las industrias, aunque también aseguró que se están concretando negocios por más centavos. Finalmente, los industriales comentaron que las compras vienen estables y los ingresos de los animales a las plantas se están marcando dentro de 7 a 10 días, aproximadamente. Fuente: Valor Agro.

### **Carne paraguaya debería pagar más aranceles para ingresar a Rusia a partir del 2022**

06/06/2021 GANADERÍA

A partir del próximo año, en 2022, la carne bovina paraguaya deberá pagar más aranceles para ingresar a Rusia, debido a un cambio en las condiciones de acceso a ese mercado. Según un documento al que accedió Valor Agro, el incremento de aranceles responde a un cambio en la lista de países beneficiarios del Sistema General de Preferencias. Dentro de la lista de países, 76 en total, se encuentran proveedores vecinos como Brasil y Uruguay. El Instituto Nacional de Carnes de Uruguay (INAC) publicó un comunicado donde confirma que a partir del 12 de octubre del 2021 la Unión Económica Euroasiática retirará el beneficio. Además, el INAC expresa que el aumento de aranceles afecta a la carne y a las menudencias bovinas, sin embargo Valor Agro no pudo confirmar que las menudencias paraguayas también sean afectadas. Es así que los aranceles subirían del 11,25 al 27,5% para la carne bovina congelada y del 11,25 al 15% para la carne bovina enfriada. Mientras que las menudencias pasarían del 9,38 y 11,25% al 12,5 y



15%, respectivamente. La política rusa de aumento de los aranceles se debe a un fuerte impulso a la producción local y una línea de reducir las importaciones a mediano plazo. En 2020, los principales proveedores de carne de Rusia fueron Bielorrusia, Paraguay, Brasil y Argentina: estos cuatro exportadores representaron el 89% de la importación en valor. Paraguay fue el principal proveedor sudamericano, con una participación de 26% en el mercado ruso. Entre enero y mayo del 2021, Paraguay lleva exportado 36.238 toneladas de carne bovina por más de US\$ 136,5 millones y 7.881 toneladas de menudencias por más de US\$ 14,7 millones. Fuente: Valor Agro.

### **TAIWÁN oficializó la habilitación de las menudencias bovinas de Paraguay**

04/06/2021 GANADERÍA

, Taiwán comunicó oficialmente la habilitación de las menudencias bovinas de Paraguay, en un documento que fue remitido al presidente del Servicio Nacional de Calidad y Salud Animal (Senacsa), José Carlos Martín. “A partir de hoy podemos vender menudencias a Taiwán”, confirmó a Valor Agro el Presidente del Senacsa y agregó: “Después de dos años de trabajo se abren más oportunidades, en un mercado importante, para los productos bovinos de Paraguay”. Martín explicó que el año pasado Taiwán compró al mundo un aproximado de 29 mil toneladas de menudencias. De tal manera, la apertura del mercado asiático podría significar un 20 a 25% de las exportaciones totales de menudencias paraguayas. Otro hecho importante, es que Taiwán importó menudencias a un valor promedio de US\$ 2.500 por tonelada, mientras las ventas paraguayas a los mercados del mundo promedian algo más de US\$ 1.800 por tonelada. “Es una opción relevante para valorizar el producto y generar impacto en toda la cadena”, añadió. En la comunicación oficial recibida, explica que “el Buró de Inspección de Sanidad Animal y Vegetal se encuentra conforme con la aplicación de sus últimas recomendaciones solicitadas a la institución a su cargo, por lo que la última versión del mencionado certificado puede considerarse como versión final”. A partir de ahora, Paraguay podrá enviar a membrana del bife angosto, tendinosa, membrana del vacío, tendón de Aquiles, aorta, tendones, bonete/retículo, ligamento cervical, mondongo, membrana del diafragma, librillo, cuajo, rabo, corazón, entraña fina, y entraña gruesa. Fuente: Valor Agro.

### **Athena Foods envía el primer cargamento de menudencias a Taiwán**

08/06/2021 GANADERÍA

La compañía Athena Foods realizó el primer embarque de menudencias bovinas el pasado 4 de junio a Taiwán, una vez se oficializó la apertura del mercado por parte de las autoridades asiáticas. En total fueron aprobados 16 cortes de menudencias vacunas, en este primer embarque serán enviadas unas 4 toneladas. “Estamos muy contentos de poder ampliar la gama de productos que ofrecemos a Taiwán, la aprobación de las menudencias es un paso más para afianzar la relación de hermandad que tenemos con este país”, aseguró Murilo Santos, gerente comercial de Athena Foods Paraguay. Y agregó: “La exportación de este producto animal representa para el sector industrial del país y la compañía, un hecho que llena de orgullo a todos los que han sido parte de este importante logro”. Además señaló que Taiwán se ha convertido en uno de los principales mercados para la carne paraguaya, que ha adquirido gran popularidad y hoy en día es uno de los principales proveedores de carne congelada por encima de USA, Australia y Nueva Zelanda. Taiwán se posicionó en el puesto tres de volúmenes de exportación de carne bovina durante el periodo de diciembre del 2020, según datos del Servicio Nacional de Calidad y Salud Animal (SENACSA).

### **Reunión con autoridades rusas para presentar medidas adoptadas ante residuos de tetraciclina, ractopamina y sulfametazina**

7 de junio de 2021 © Oficina central

El 3 de junio, en formato de videoconferencia, se llevaron a cabo negociaciones entre el asistente del Jefe del Rosselkhoz nadzor Artem Daushev y el Director General de la Dirección Principal de Calidad e Inocuidad de Productos Animales de la República del Paraguay (DIGECIPOA) Julio Barrios.

Al evento también asistieron especialistas de las autoridades competentes de los dos países.

La parte rusa lamentó la falta de materiales faltantes con resultados detallados de estudios de laboratorio y medidas tomadas en relación con seis productores paraguayos de productos pecuarios que exportan materias primas de carne de res, cerdo y kish al territorio de la Federación de Rusia.

Anteriormente, debido al descubrimiento del contenido de tetraciclina, ractopamina y sulfametazina en los productos de estas empresas, lo que constituye una violación de las normas y requisitos de la Unión Económica Euroasiática, se prohibió el envío de productos controlados a Rusia.

La parte paraguaya envió previamente parte de los materiales al Rosselkhoz nadzor. Especialistas del Servicio examinaron estos documentos y expresaron la necesidad de brindar información adicional. Además, los especialistas rusos tenían dudas sobre la exactitud de la determinación por parte de científicos extranjeros de la fuente del contenido de sustancias en los productos pecuarios.





Según Artem Daushev, asistente del jefe de Rosselkhoznadzor, es aconsejable considerar la cuestión de reanudar el suministro de los productos de las empresas paraguayas mencionadas a la Federación de Rusia solo después de que todos los materiales faltantes se hayan presentado al Rosselkhoznadzor en su totalidad y analizados por especialistas del Servicio e instituciones subordinadas.

El director general de DIGECIPOA, Julio Barrios, se comprometió a enviar toda la información necesaria a sus colegas rusos en un futuro próximo.

Las partes acordaron continuar la discusión de este tema después de un estudio exhaustivo de los materiales por parte de los científicos de Rosselkhoznadzor.

## **REINO UNIDO**

### **AHDB analizó el efecto del cierre de las exportaciones argentinas sobre las importaciones del RU**

09 June 2021 AHDB In mid-May, Argentina's president imposed a 30-day ban on beef exports from the country, intended to manage domestic supply availability and price inflation.

The industry reacted strongly and immediately threatened to suspend livestock trading. Reports indicate that by Monday 31 May officials had temporarily shut down 12 beef exporters over "irregular" operations and had seized over 220 tonnes of meat.

According to USDA data, Argentina produces just over three million tonnes (cwe) of beef annually and in recent years has been exporting around a quarter of this. Argentina is the world's fifth largest exporter of beef. Markets that would likely be affected by the export ban would be those with the largest share of Argentinian exports. By far the largest market is China (76%), but Chile (5%) Israel (5%) and Germany (4%) also receive notable volumes. Argentina is the second biggest beef supplier to China, accounting for 23% of imported beef volumes.

According to Argentina's National Institute of Statistics & Census, the UK ranks 15th on the list of recipients of Argentinian beef. The UK imported 545 tonnes in 2019, and due to the pandemic closing many restaurants, only 171 tonnes in 2020. In the year to date, the UK has imported little or no Argentinian beef.

Beef that the UK does import from Argentina can come in under the High Quality Beef quota originally negotiated with the EU. Only 111t of Argentina's annual quota (29,500t) remained with the UK on exiting the EU.

### **Consumidores apoyan un acuerdo de libre comercio con AUSTRALIA**

Terry Sim, 08/06/2021

HALF of the Britons surveyed in a recent poll would buy Australian lamb and beef more often if it was stocked in United Kingdom supermarket shelves more frequently at cheaper prices.

The new poll from the free market think tank the Adam Smith Institute (ASI) and research and strategy firm at C|T Group RSR has found Brits and Australians want to expand trade and secure a comprehensive deal.

The survey found 65pc of Britons support a free trade deal with Australia, while 5pc are opposed. There was majority support across all key demographic groups across the United Kingdom, and across the political spectrum. About 69pc of Australians surveyed supported a free trade deal, with 3pc opposed.

About 33 percent of the UK citizens surveyed said they would probably purchase Australian lamb more often if it was stocked more frequently, and more cheaply, on British supermarket shelves. Another 19pc said they would definitely buy more Australian lamb.

The survey found 35pc of the Britons surveyed would probably purchase cheaper Australian beef more often if it was stocked more frequently, and 15pc said they would definitely buy it more often.

The Britons surveyed also believed Australia has high food safety and animal welfare and do not want to block a deal to protect British farmers from competition. The survey found Britons wanted to buy more Australian wine, beef and lamb — as well as Tim Tams and Kangaroo meat. Australians want more UK cars, British cheese, and Scottish whisky.

Leading pollster and Head of Research at C|T Group RSR, Dr Michael Turner, found that Australia is the foremost priority to expand trade among Britons. This comes from a strong belief in Australia's high standards, that a deal will benefit both sides as well as the close family and friendship connections between Britons and Aussies.

The study found two-thirds of the Britons surveyed believe Australia has high standards of food safety and animal welfare, with just 6pc of people believing Australia has low standards.

Australia is also the top priority for more trade for the Britons, with two-thirds (66pc) saying the UK should trade more with Australia; followed by Canada (63pc), New Zealand (61pc), the United States (48pc) and Japan (42pc).





## ESTADOS UNIDOS

### Tendencia ascendente en los embarques de carnes bovinas: JAPÓN primer destino. Fuerte aumento de CHINA

10 June 2021

Newly-released data from the US Meat Export Federation (USMEF) shows that April's beef exports continued to build momentum after breaking records in March 2021.

April exports of US beef set another new value record at \$808.3 million, up 35% from a year ago, with export volume reaching 121,050 metric tonnes (MT) – up 23% year-over-year and the fifth largest on record. For beef muscle cuts, exports were the third largest ever at 94,656 MT (up 21%), valued at a record \$726.7 million (up 36%). For January through April, beef exports moved 5% ahead of last year's pace at 454,398 MT, with value up 10% to \$2.93 billion. Beef muscle cut exports were up 8% to 357,570 MT, valued at \$2.63 billion (up 12%).

"Looking back at April 2020, it was a difficult month for red meat exports as we began to see COVID-related supply chain interruptions and foodservice demand took a major hit in many key markets," said USMEF President and CEO Dan Halstrom. "While it is no surprise that exports performed much better in April 2021, we are pleased to see that global demand continued to build on the broad-based growth achieved in March."

Halstrom cautioned, however, that the COVID-19 pandemic is still a major concern for the US meat industry, adding uncertainty to the business climate in many export destinations. Logistical challenges, including container shortages and ongoing vessel congestion at many US ports, also present significant obstacles for red meat exports.

"While conditions are improving in many key markets, the COVID impact is the most intense it has ever been in Taiwan and heightened countermeasures are also in place in Japan and other Asian countries," he explained. "But foodservice activity is climbing back in our Latin American markets and retail demand – both in traditional settings and in e-commerce – has been outstanding and USMEF continues to find innovative ways for the US industry to capitalize on these opportunities. We are also working with ag industry partners and regulatory agencies to find ways to improve the flow of outbound cargo, which is essential to maintaining export growth."

Beef exports set second consecutive value record; per-head value also highest ever

In addition to the overall value record, beef export value per head of fed slaughter also reached a new high in April at \$367.45, up 1% from a year ago. Through April, per-head value averaged \$343.70, up 5% from the same period last year. April exports accounted for 15% of total beef production and 12.6% for muscle cuts, each up about one full percentage point from a year ago. Through April, exports accounted for 14.4% of total beef production (steady with last year) and 12.1% for muscle cuts (up from 11.9%).

April beef exports to South Korea increased 21% from a year ago to 23,482 MT, and just missed setting a new value record at \$182.7 million (up 36% and slightly below the August 2020 high). Through April, exports to Korea were up 11% in volume (92,478 MT) and 15% in value (\$686.7 million). Exports were also well ahead of the record pace of 2019, when full-year export value to Korea reached \$1.84 billion.

Beef exports to China continued to soar in April, reaching a record 17,233 MT (up from just 1,367 MT a year ago). Export value to China was \$130.6 million – up from \$11.5 million. Through April, beef exports increased more than 1,300% in both volume (48,291 MT) and value (\$364.6 million). These are new annual records, already exceeding the full-year totals posted in 2020.

While Japan remains the leading volume destination for US beef, April exports definitely felt the impact of Japan's safeguard tariff, which was in effect from mid-March to mid-April. During this time, US beef cuts entering Japan were tariffed at 38.5%, well above the rates imposed on major competitors. The rate for US beef dropped to 25% on 17 April, which is level with other major suppliers. US trade officials are in consultations with their Japanese counterparts on the safeguard threshold, which USMEF expects to be exceeded every year unless it is increased. April exports to Japan were down 19% from a year ago at 25,293 MT, valued at \$170.7 million (down 15%). Through April, exports were down 12% to 100,702 MT, valued at \$655.9 million (down 9%).

Other January-April highlights for US beef exports include

April beef exports to Mexico far exceeded last year's low totals at 17,190 MT (up 70%) valued at \$79.3 million (up 128%). Through April, exports were still down 2% from a year ago in both volume (68,721 MT) and value (\$324.4 million), but demand is trending upward with the gradual recovery of foodservice and tourism activity in Mexico.

Led by strong growth in Colombia and Chile, January-April exports to South America increased 13% from a year ago to 9,478 MT, with value up 30% to \$47.8 million. While total exports to Peru were up only slightly, beef variety meat shipments increased 5% to 2,281 MT, with value climbing an impressive 41% to \$3.4 million.



With January-April shipments on a record pace to Guatemala, Honduras, El Salvador, Costa Rica and Nicaragua, beef exports to Central America increased 42% from a year ago to 7,139 MT, valued at \$42.2 million (up 49%). Nicaragua is emerging as a strong destination for beef variety meat, with exports through April reaching 332 MT (up 261%) valued at nearly \$300,000 (up 176%).

April was the first month of 2021 in which beef exports to Taiwan were higher than a year ago in both volume (5,311 MT, up %) and value (\$51.5 million, up %). This pushed January-April exports to 17,854 MT (down 14%) valued at \$169.8 million (down 7%), but exports in May and June may be impacted by COVID containment measures, including a current suspension of dine-in restaurant service.

### **Proyecto de ley para dar mayor transparencia al mercado ganadero**

By NCBA June 8, 2021 Representative Vicky Hartzler (R-MO-4) introduced the Optimizing the Cattle Market Act of 2021 in the U.S. House. The legislation builds on a growing consensus among cattle producers, industry leaders, and Members of Congress that the current market dynamics — which stunt producer profitability and put undue market leverage on the side of meatpackers — are not sustainable for the beef supply chain.

If enacted, the bill would direct the U.S. Department of Agriculture (USDA) to create a cattle formula contracts library, and increase the reporting window for "cattle committed" from seven to 14 days. These measures would increase transparency in the industry and improve the opportunity for robust price discovery.

Rep. Hartzler's legislation also reiterates the need for expedited reauthorization of USDA's Livestock Mandatory Reporting (LMR) program, a step NCBA has long pushed for and reached agreement on with other industry groups.

The bill would also require USDA, in consultation with the Chief Economist, to establish mandated minimums for regional negotiated cash and negotiated grid live cattle trade. Minimums would be set within two years of passage of the bill, and would invite stakeholder input through a public comment period and the consideration of key, peer-reviewed research from land grant universities.

NCBA's member-driven, grassroots policy does not support mandated minimums at this time, opting instead for a voluntary solution. NCBA's grassroots policy also provides for a change in direction should certain conditions be met, which would mean pursuing a legislative or regulatory solution determined by membership.

"The growing momentum we're seeing in the House and Senate behind addressing these critical concerns in the cattle markets is reflective of the urgency producers are feeling across the country. Extreme market volatility, unpredictable input costs, a shifting regulatory landscape, and natural crises like drought leave cattle farmers and ranchers with a growing list of threats to their continued financial viability. Something needs to give," said NCBA Vice President of Government Affairs Ethan Lane.

"NCBA, alongside our affiliates and other industry associations, shares Rep. Hartzler's objectives and welcomes the discussion this bill will bring. While a government mandate on regional minimums for negotiated trade continues to be a hotly debated topic among producers, we are encouraged to see a proposal that builds on past efforts and moves us closer toward a realistic finish line."

### **NCBA solicita se apure la investigación sobre la industria frigorífica**

By INDUSTRY PRESS RELEASE June 8, 2021 On Tuesday Representative Mike Guest (R-MS-3) and Representative Darren Soto (D-FL-9) led a bipartisan group of 52 lawmakers in pushing the U.S. Department of Justice (DOJ) to complete their investigation into the meatpacking sector, and whether or not anticompetitive practices have contributed to a persistent imbalance in the cattle markets.

This letter is the latest result of a recent groundswell of bipartisan, bicameral attention into the need to return market leverage to the side of cattle farmers and ranchers and address the startling price disparity between live cattle and boxed beef.

Last week, NCBA — with the support of 39 state cattle groups — called yet again for a swift conclusion to DOJ's investigation into the packing sector.

"Market volatility leaves our producers with extreme uncertainty, and this lack of stability and profitability is problematic for the entire beef supply chain," said NCBA Vice President of Government Affairs Ethan Lane.

"The growing motivation in Congress to hasten the conclusion of the DOJ investigation and take action on the issues plaguing our industry's marketplace is the result of grassroots consensus among cattle producers. Across the country, in sale barns and state affiliate meetings, we're hearing the same frustration from our members — no matter how the pendulum swings, the leverage always seems to be on the side of the packers. We thank Rep. Guest and Rep. Soto for adding their leadership to this critical effort at a time when cattle producers need stability."

Last month, NCBA worked with Senator John Thune (R-SD) and Congressman Dusty Johnson (R-SD-AL) to deliver a similar, bicameral letter to DOJ.



## **USDA: proyectos para evitar prácticas monopólicas en la industria de carnes**

By USDA June 11, 2021 The U.S. Department of Agriculture (USDA) will begin work on three proposed rules to support enforcement of the Packers and Stockyards (P&S) Act, the 100-year-old law that was originally designed to protect poultry and hog farmers and cattle ranchers from unfair, deceptive, and anti-competitive practices in the meat markets. USDA's pending action was noted in the Unified Agenda of Regulatory and Deregulatory Actions released today by the White House Office of Management and Budget (OMB).

USDA intends to take three actions related to rulemaking in the months ahead. First, USDA intends to propose a new rule that will provide greater clarity to strengthen enforcement of unfair and deceptive practices, undue preferences, and unjust prejudices. Second, USDA will propose a new poultry grower tournament system rule, with the current inactive proposal to be withdrawn. Third, USDA will re-propose a rule to clarify that parties do not need to demonstrate harm to competition in order to bring an action under section 202 (a) and 202 (b) of the P&S Act.

"The pandemic and other recent events have revealed how concentration can take a painful toll on independent farmers and ranchers, while exposing working family consumers to higher prices and uncertain output," said Agriculture Secretary Tom Vilsack. "The Packers and Stockyards Act is a vital tool for protecting farmers and ranchers from excessive concentration and unfair, deceptive practices in the poultry, hog, and cattle markets, but the law is 100 years old and needs to take into account modern market dynamics. It should not be used as a safe harbor for bad actors. The process we're beginning today will seek to strengthen the fairness and resiliency of livestock markets on behalf of farmers, ranchers and growers."

USDA is working to make meaningful investments and improvement to build back a better food system that is fair and equitable, more resilient against shocks, delivers greater value to growers and workers, and offers consumers an affordable selection of healthy, affordable food produced and sourced locally and regionally. The planned P&S Act proposals will support USDA's efforts to ensure fairer and more resilient markets for farmers, ranchers and producers. In the last five years, stresses and disruptions caused by concentration in livestock markets have impacted not only producers, but consumers as well. As USDA works to strengthen the resiliency of supply chains, enforcement of the P&S Act will be critically important.

Earlier this week, USDA announced \$4 billion in assistance as part of the Build Back Better initiative, an effort designed to strengthen and transform critical parts of the U.S. food system so the food system of the future is fair, competitive, distributed, and resilient. Investments made through Build Back Better will include a mix of grants, loans and innovative financing to address problems throughout the food supply chain; these investments will include efforts to address the shortage of small meat processing facilities across the country as well as the necessary local and regional food system infrastructure needed to support them. Complementary efforts such as the P&S Act proposals announced today will also seek to put a spotlight on the need for greater transparency and competition in livestock markets and the meat processing sector, including unfair treatment of some farmers, ranchers and small processors.

The Unified Agenda released today demonstrates the Biden Administration's continuing work to build back better and more equitably. The agenda includes actions to deliver on the President's early commitments to protect health and safety, ensure a robust and equitable economic recovery, advance racial justice, and confront the climate crisis. The Agenda also continues the Administration's work to remove obstacles to recovery, equity, and sustainability.

USDA touches the lives of all Americans each day in so many positive ways. In the Biden-Harris administration, USDA is transforming America's food system with a greater focus on more resilient local and regional food production, ensuring access to healthy and nutritious food in all communities, building new markets and streams of income for farmers and producers using climate-smart food and forestry practices, making historic investments in infrastructure and clean-energy capabilities in rural America, and committing to equity across the Department by removing systemic barriers and building a workforce more representative of America. To learn more, visit [www.usda.gov](http://www.usda.gov).

## **Casa Blanca tomarà todas las medidas a su alcance para aclarar cyber ataques**

By AGDAY TV June 4, 2021 The White House says President Joe Biden will address cyber attacks with Russian President Vladimir Putin when they meet later this month.

The White House press secretary Jen Psaki also said the Biden administration won't take any options off the table when responding to the recent cyberattack on meat producer JBS, the world's largest meat processor.

It's thought that the JBS ransom-ware attack was carried out by cyber criminals likely operating out of Russia. That was also the case with the cyber attack that shut down the colonial gas pipeline last month.

Psaki acknowledged at the press briefing this week that cyber threats are on the rise.

"Obviously ransomware attacks, we've seen them increase over a period of time," said Psaki. "It's an increasing threat to the private sector and to our critical infrastructure and there are other countries, many



of whom we will see when the president is in Europe, who have similar concerns, so we expect this to be an issue of discussion."

Psaki was also asked if Biden thinks Putin could stop the attacks if he wanted to. She responded that the President certainly thinks Putin and the Russian government have a role to play.

The White House would not confirm whether or not JBS paid a ransom after the attack that shut down their operations in Australia and North America. JBS had most of their packing plants back online mid-week.

### **Automatización en los procesos de producción incrementan el riesgo de Cyber ataques?**

U.S. Farm Report 06/05/21 - Farm Journal Report Not even a month after a cyberattack shut down the Colonial Pipeline in the U.S. another cyberattack came. This time, it had a direct hit on agriculture.

"They've just gotten bigger and bolder," says Jason Crabtree, CEO of Qomplx and former advisor to U.S. Army cyber command.

JBS, the world's largest meat producer, was the latest victim of a cyberattack, and one that crippled JBS packing plants across Australia and North America.

"It's not just in the U.S., it's a global phenomenon," says Glynn Tonsor, livestock economist for Kansas State University.

As JBS plants started opening back up in days, the recovery was swift. However, the impact already sent ripples through the industry.

"We've had labor challenges for months now," says Tonsor. "Now you have an IT challenge. Anything that keeps certain plants offline will make that particular challenge worse."

#### **Processing Pinch**

Tuesday's USDA cattle slaughter numbers showing the U.S. processed 27,000 head fewer cattle than plants did the week prior, and the total impact this week looks to be larger.

"Our calculations is it looks like it backed up about 42,000 head of cattle," says Dan Basse of AgResource Company. "So important, if you will, but not devastating."

As the majority of JBS packing plant locations were back online in days, the overall blow to U.S. packing capacity wasn't as severe as if the situation would have lingered for weeks.

"If it stays at that level, nothing, you know, no other shoe to fall here, then the impact is relatively minimal, not for the company, necessarily. I'm sure they're scrambling a lot," says Derrell Peel, Oklahoma State University livestock specialist. "Some of their customers, both on the procurement side, as well as on the sales side are no doubt being impacted by flows of product. But in terms of a broader sort of a disruption in overall supplies of beef, and certainly anything that consumers would see, I don't think this will have that kind of impact if it stays at this level."

#### **Crunched Cattle Processing Capacity**

While the impacts seemed to be minimal last week, it's adding to the bigger issue packers already face.

"The timing is very unfortunate, because we've been struggling with capacity issues and trying to move enough cattle through to sort of get feedlots caught up and cleaned up and more current. And so this aggravates that a little bit," adds Peel.

"We have a lot of heavyweight cattle, we need to move through," says Basse. "Backing up 40,000 cattle is not a big deal today. But expanding the kills has been a real problem for packers, especially with beef prices is high. So, the packers are trying to work through the inventory, but we believe it'll take longer than many think, probably to the middle or end of summer."

Tonsor says bringing more processing plants back online isn't the only answer and isn't a quick fix.

"We can't just look at one news event label one a black swan event and move on," he says. "It's a function of a lot of other things. Simply adding more plants, which is talked about would ease some of that challenge. But that's not free. And we all need to remember why that hasn't been, you know, done already. They're expensive investments."

#### **The Threat of More Cyberattacks**

As the cattle complex worked to recovery from the cyberattack, the worldwide cyberattack also caught the attention of the White House.

"Obviously ransomware attacks, we've seen them increase over a period of time. It's an increasing threat to the private sector and to our critical infrastructure and there are other countries, many of whom we will see when the president is in Europe, who have similar concerns, so we expect this to be an issue of discussion," said White House Press Secretary Jen Psaki last week.

The White House said on Tuesday that Brazil's JBS SA informed the U.S. government that the ransomware attack against the company originated from a criminal organization likely based in Russia, a theory Psaki confirmed in the press briefing this week.

#### **U.S. Food Production at Risk**

As cyberattacks seem to become more common, it also brings up a broader concern as more of the food chain may be at risk.





"I do believe that automation, and then everything run by a central brain, a computer brain, if you will, offers that opportunity," says Basse. "And how good can our firewalls be? What do we have to do are the key questions for corporations going forward. But I do think that this is a shot across the bow of agriculture. I think we have to be attentive to it. I would say that automation is going to be good for processing margins and for agriculture in general. But it does expose us some different types of risks.

From robotic milkers to robots picking and processing lettuce, as more of food production relies heavier on automation and less on manual labor, creating an efficient food chain could come at a cost.

"What's an IT risk relative to labor excess risk? What's a modern facility driven by IT risk versus an old facility that might be more manual and maybe has a more fire risk with it because it's an older facility? So, there's a lot of tradeoffs in the broader risk context," says Tonsor. "We're homing in on cyber risk, because that's what we're talking about today. But it is far from the only risk."

Crabtree, who has experience dealing with cyber security issues, says solutions to cyberattacks, like the ones impacting everything from gasoline supply to beef, are possible.

"This is solvable," he says. "But a lot of organizations have made a choice not to bring in the experts or the technology or the process material they need to do so."

As companies work to beef up cyber security even more, Tonsor says the future of food could depend on it.

"These things are going to keep coming up, because we all rely on the internet," he says. "With that, that's another vulnerability. That's why companies keep investing in backup systems, and so forth. I'm an optimistic person. I think those investments make us more efficient, let us have a better world. And we shouldn't try to walk away from them. But we need to recognize that we got to manage them."

### **Eventos inesperados sacuden la ganadería bovina**

By GREG HENDERSON June 9, 2021 Three. In less than two years. That's the number of black swan events that have hit the cattle industry, stealing what meager margins cowboys had while creating windfall profits for beef packers.

A black swan is an unpredictable event of extreme rarity with potentially severe consequences. That describes the August 2019 fire at Tyson Fresh Meats' facility in western Kansas. Ditto the COVID-19 pandemic and last week's cyberattack on JBS's meat packing facilities.

At some point disruptions such as those cease to be black swan events, if only because they are no longer rare. One significant consequence of the back-to-back-to-back black swans is a surge in the popularity – or at least sampling – of fake meats. We really can't call this new trend a black swan because it was entirely predictable, but maybe it's a cygnet, which is what young swans are called. Market research group NPD reported plant-based shipments to restaurants fell 27% in April of last year during the pandemic disruption. Now, however, alternative meats have bounced back stronger, and much of that is because of price.

Pressure from various pandemic issues upended the pricing formula for both traditional meat and plant-based proteins, "making alt-meat a more competitive choice at the grocery store, far more quickly than any expert could have predicted," reports Laura Reiley in the Washington Post.

As retail beef prices have risen over the last year due to supply-chain disruptions, making fake meat is becoming easier and less expensive. That helps bring down the cost of soy and pea-protein meats faster than anticipated.

A pound of Beyond Meat is down to about \$5.70, according to the Washington Post. Beef prices are up 3.3% which puts ground beef at \$4.10 to \$6 per pound, according to the U.S. Bureau of Labor Statistics.

"Impossible Foods has cut its restaurant prices twice in the past year, and in February, the company cut retail prices by 20 percent, bringing the price of two quarter-pound patties down to \$5.49," Reiley reported.

The evidence suggests the COVID pandemic aided plant-based proteins to gain market share. But, as the plant-based industry is growing, it is still a minuscule segment of the \$1.4 trillion global meat market.

While the plant-based industry is growing, it still represents a minuscule part of the \$1.4 trillion global meat market.

"A lot of the things that have been said about those products have always dealt with growth rates," Steve Meyer, an economist with Partners for Production Agriculture said. "But when you start at zero, the growth rates are pretty darn high."

Indeed, alternative proteins have not disrupted animal agriculture to a large degree. Yet.

"By 2035, every tenth portion of meat, eggs and dairy eaten around the globe is likely to be alternative," says a new report from Boston Consulting Group and Blue Horizon Corporation. The report, "Food for Thought: The Protein Transformation," suggests alternative proteins could account for 11 percent of the market by 2035, and the number could be higher.

A key factor in the success of alternative proteins, marketing experts agree, is the growing consumer and investor interest in sustainability.





“Public concern for the climate – and, more broadly, sustainability – is rife,” the report’s authors wrote. “In addition, fully 85% of investors now incorporate environmental, social and corporate governance (ESG) into their investment strategies.”

Predictions of a 11 percent market share gain for alternative proteins over the next decade or so are far from a certainty. Alan Bjerga, SVP of communications at the National Milk Producers Federation told FoodNavigator-USA about the report, “This isn’t research. This is a marketing document.”

“Consumers tend to be very skeptical of highly processed, artificial foods; these types of reports often understate the factors that hinder their funders’ interests and overstate those that aide them,” Bjerga said.

Another skeptic of a rapid alternative protein growth at the expense of animal proteins is Jack Bobo, a veteran of 13 years at the State Department working on food policy. Now a consultant with Futurity, which advises companies at the intersection of food and technology, Bobo told FoodNavigator – USA it is logical to assume that lower prices will increase consumption (assuming that taste and texture also improve), and a race to the bottom could have some interesting effects on consumer psychology.

“The day these products become cheaper than (conventional beef) hamburgers is the day that hamburgers become a premium product.”

### **Demanda de carnes fortalecida en la pandemia**

By Laura Reiley June 8, 2021 Far from cooling the alt-protein trend, the pandemic has seen a surge in offerings and drop in prices

Plant-based meat was having a moment before the pandemic, nabbing celebrity investors, record-setting IPOs, “Whopper” fast-food deals and high-end chefs who transformed pea protein and soy into savory, expectation-defying deliciousness.

Then the pandemic hit, restaurants closed, and many Americans were stuck at home battling anxiety and sourdough starters. Industry experts wondered whether enthusiasm for this new food category would falter and sales flag — would plant-based meat turn out to be a fad rather than a movement? It fleetingly looked grim: Last April, plant-based protein shipments to restaurants fell 27 percent, according to market research firm NPD Group.

However, it appears that those worries were ill-founded. “Alt-meat” has emerged stronger than ever, much of it because of one thing: price.

Myriad pandemic pressures upended the pricing formulas for both traditional meat and plant-based proteins, making alt-meat a more competitive choice at the grocery store, far more quickly than any expert could have predicted.

It used to be that plant-based proteins generated a ton of hype and heady righteousness for health-oriented and environmentally focused consumers, yet a pound of ground Impossible Burger was still way more than double that of even the fanciest ground beef — making this new generation of faux meat a reach for the cost-conscious cook.

Even in the face of surging grocery prices, retail beef and pork prices cause sticker shock

Supply-chain problems and virus outbreaks in meat-processing plants have led to meat price increases that far outstrip those of groceries overall. Meanwhile, it’s getting easier and less expensive for companies to create a lot more of these plant-based proteins, bringing down the costs of the soy and pea-protein meats, dairy and eggs much faster than anticipated.

A pound of ground Beyond Meat is down to about \$5.70. Beef prices, up 3.3 percent from a year ago, mean ground beef can cost between \$4.10 and \$6, according to the U.S. Bureau of Labor Statistics. Impossible Foods has cut its restaurant prices twice in the past year, and in February, the company cut retail prices by 20 percent, bringing the price of two quarter-pound patties down to \$5.49.

“We plan to keep lowering prices as we achieve new production records and economies of scale and ultimately undercut the price of ground beef from cows,” said Impossible Foods President Dennis Woodside in an email.

Even plant-based egg prices are coming down. Matt Riley, senior vice president of global partnerships at Eat Just, said the company took its mung-bean-based Just Egg from \$7.99 to \$5.99 in March 2020 and then down to \$3.99 in January of this year — about the price of many pasture-raised eggs at the farmers market.

These price reductions, against a backdrop of surging grocery prices overall, have pushed the skeptics and the curious over the edge: They’re trying it. Beyond Meat’s grocery store revenue was up 108 percent in 2020, with more people reportedly becoming repeat customers. And while Impossible Foods, a private company, doesn’t release sales numbers, in 2020 it expanded retail sales from fewer than 150 grocery stores to 17,000 stores, as well as via direct-to-consumer sales.

Raising the steaks: First 3-D-printed rib-eye is unveiled

And the playing field got more crowded. In a year when groceries were just about the only thing consumers were buying, an eye-popping 112 new plant-based meat, egg and dairy brands hit grocery aisles in 2020,



reflecting some \$3.1 billion worth of new investments in “alternative proteins,” according to the Good Food Institute, a nonprofit organization that promotes alternatives to traditional meat, dairy and eggs.

Also, even as many restaurants were reduced to takeout, delivery and limited indoor dining, plant-based proteins on restaurant menus jumped by 118 percent in 2020, according to Datassential, a food market research company.

While the plant-based industry is growing, it still represents a minuscule part of the \$1.4 trillion global meat market, said Steve Meyer, an economist with Partners for Production Agriculture.

“A lot of the things that have been said about those products have always dealt with growth rates,” Meyer said. “But when you start at zero, the growth rates are pretty darn high.”

John Robinson, senior vice president of membership and communications for the National Cattlemen’s Beef Association, said that meat substitutes did not encroach upon beef sales during the pandemic, citing NielsenIQ data showing beef sales volume was up 2 percent in 2020. He said meat substitutes still represent less than 1 percent of the market volume: “This tells us that consumers still prefer beef over alternative proteins,” he said.

In other words, Big Meat isn’t scared.

Biden’s climate change plan may not nix cheeseburgers, but science says beef should be on the chopping block

The irony is, Big Meat and massive agribusinesses are driving down prices for plant-based products. Hedging their bets, Smithfield, Perdue, Hormel, Tyson and other huge meat companies have jumped into the fray. The price of Tyson’s Raised & Rooted spicy plant-based nuggets also inched down 24 percent during the pandemic. Plus, food-processing giants such as Archer-Daniels-Midland are developing “hundreds of different prototypes to fine-tune and customize to customers’ needs,” said Wendy Van Buren, the global commercial growth leader of alternative proteins for ADM. She said her mission is to make products that are more “accessible” to customers — meaning cheaper.

Lewis Bollard, program officer at Open Philanthropy, a research foundation that gives grants in areas including global health and farm animal welfare, said big food companies such as Cargill or Tyson help drive the ability to produce ingredients and products at a larger scale, building new layers of infrastructure to get them onto supermarket shelves.

“Plant-based start-ups are different than tech start-ups, because you need enormous production capacity. It’s a huge challenge going from almost nothing a decade ago to trying to compete with the animal agriculture industry that has had 1,000 years to scale up,” he said. Plus, as the big companies buy larger quantities of ingredients like yellow peas and mung beans, the price they pay drops, Bollard said.

One reason some people may be exploring plant-based proteins could be the growing number of people concerned about personal health and weight gain during the pandemic, according to Wendy Wesley, a nutritionist in St. Petersburg, Fla.

“My phone is blowing up with people who’ve gained the Covid 30,” she said. “They know the way out of this is through plant proteins. I’m not a vegan or vegetarian, but I’m always looking for ways to replace an animal protein with a plant protein, and my clients are in lockstep with me.”

She said that before the pandemic, prices on plant-based protein products was an issue: “People said, ‘Wow, that’s expensive,’ so coming down in price may turn some people into experimenters.”

## **AUSTRALIA**

### **Producción de carne en feed lot fue la mitad del total**

10 June 2021

Key points:

In Q1 2021, grainfed cattle made up more than 50% of beef production for the first quarter ever.

The feedlot sector has provided continuity in a period of tight supply.

51% of domestically consumed beef comes from feedlots.

For the first time ever, feedlot cattle made up more than 50% of beef production in Q1 2021. Furthermore, the majority of beef consumed domestically for the quarter was grainfed.

These calculations show the strength of the feedlot sector. They highlight that the feedlot sector has provided continuity of supply for processors during a period of constrained cattle supply in Australia.

The previous record for grainfed beef production was achieved in Q1 2020, when 49.2% of all beef produced was from feedlots. This trend was not surprising though, as turn-off from feedlots in Q1 2021 accounted for 47% of all cattle processed.

The statistic that more than 50% of domestically consumed beef is from feedlots can also be explained. Increasingly, domestic brands and quality assurance programs are finishing cattle on feed, for consistency purposes.



In Q1 2021, 19% of cattle on feed were on feed for less than 100 days. These animals are typically destined for the domestic market.

Going forward, these trends indicate that the Australian grainfed sector will continue to make up a growing percentage of cattle slaughter and beef production. The sector will also continue to offer processors continuity of consistent supply, painting a positive picture for the future of grainfed cattle in Australia.

### **COREA creció como destino de las carnes australianas**

10 June 2021

Key points:

Korea has maintained its place as Australia's second largest beef export market for the calendar year to May 2021.

Korea has one the highest per capita beef consumptions in Asia at approximately 13kg per head\*, which is forecast to continue to grow.

Sheepmeat is growing in popularity, with chilled lamb exports reaching record highs for the year to May despite ongoing COVID-19 disruptions.

Beef exports to Korea remain firm

Korea is one of the top export markets for Australian red meat. Export value to Korea in 2020 totalled A\$1.6 billion, representing 12% of Australia's global red meat export value. Demand for Australian red meat remains firm despite ongoing COVID-19 challenges. Beef exports to Korea for the calendar year to May 2021 grew 2% year-on-year to reach 63,700 tonnes ship swt.

High cattle prices and tight supply in Australia will likely add pressure on trade in the short- to medium-term. However, the long-term outlook for Australian beef exports to Korea remains strong. A steady increase in per capita beef consumption, supply constraints in Korea, improving supply in Australia and Australian beef's favourable position as a trusted, high quality product all support this outlook.

Among imported beef, which accounts for about two-thirds of total beef consumption in Korea, Australian beef is considered the most superior meat favoured by many Korean families (Source: MLA Global Consumer Tracker, 2020).

Besides beef, Korea is also one of the top three global export markets for Australian beef offal. In 2020, Australia exported 31,968 tonnes swt of beef offal to Korea, a 2% increase year-on-year. Demand growth is strong, however, Australian beef offal exports to Korea experienced a sharp drop for the 2021 year to May period (down 28% year-on-year), partly due to the enhanced inspection requirements for intestine products introduced recently as part of the government's efforts to maintain food safety.

### **EMPRESARIAS**

#### **JBS admitió haber pagado US\$11 millones a los hackers que atacaron sus sistemas**

10 June 2021

Meatpacking giant JBS USA says it paid a ransom equivalent to \$11 million following a cyberattack that disrupted its North American and Australian operations, the company's CEO said in a statement on 9 June. Reuters reports that the subsidiary of Brazilian firm JBS SA halted cattle slaughtering at all of its US plants for a day last week in response to the cyberattack, which threatened to disrupt food supply chains and further inflate already high food prices.

The cyberattack followed one last month on Colonial Pipeline, the largest fuel pipeline in the United States. It disrupted fuel delivery for several days in the US Southeast.

Ransom software works by encrypting victims' data. Typically hackers will offer the victim a key in return for cryptocurrency payments that can run into hundreds of thousands or even millions of dollars.

The FBI said earlier this month that the agency was investigating about 100 different types of ransomware.

The JBS meat plants, producing nearly a quarter of America's beef, recovered faster than some meat buyers and analysts expected.

"This was a very difficult decision to make for our company and for me personally," said Andre Nogueira, CEO of JBS USA on the ransom payment. "However, we felt this decision had to be made to prevent any potential risk for our customers."

The Brazilian meatpacker's arm in the United States and Pilgrims Pride Corp, a US chicken company mostly owned by JBS, lost less than one day's worth of food production. JBS is the world's largest meat producer.

Third parties are carrying out forensic investigations and no final determinations have been made, JBS said. Preliminary probe results show no company, customer or employee data was compromised in the attack, it said.

A Russia-linked hacking group is behind the cyberattack against JBS, a source familiar with the matter said last week. The Russia-linked cyber gang goes by the name REvil and Sodinokibi, the source said.

The Wall Street journal reported on Wednesday that the JBS ransom payment was made in bitcoin.



The Justice Department on Monday 7 June recovered some \$2.3 million in cryptocurrency ransom paid by Colonial Pipeline Co, cracking down on hackers who launched the attack.

### **JBS aprobó nuevos proyectos en el marco del Fondo para el Amazonas**

07 June 2021

The Fund for the Amazon has invested 50 million reais in six new projects that will provide incentives for production chains like cocoa, açai, and pirarucu, as well as platforms for access to credit and business consulting that could raise family incomes by up to 144%.

In the week of World Environment Day, the JBS Fund for the Amazon announces the first projects chosen to receive investments to promote actions in favor of forest conservation and preservation, improvements to the quality of life of the local communities and the scientific and technological development of the region. There will be six initiatives which, together, will receive R\$ 50 million from the Fund constituted by JBS in September 2020, with an infusion of R\$ 250 million in five years.

The objective of the Fund is to drive the promotion of actions for forest conservation and preservation and the sustainable development of the region. The organization analyzed more than 50 ideas for projects, including proposals received through the site or prospected by the team. Ten initiatives were invited to submit pre-projects that were analyzed by the Technical Committee consisting of 11 members nominated by research institutes and third-sector organizations. They are outstanding professionals in the fields of the environment and sustainable development, with extensive experience of the reality in the Amazon and who have already done significant work in the region.

“The projects that will receive the resources will develop the forest bioeconomy, helping to add value to its natural products and also contributing to environmental conservation and socioeconomic development”, says Joanita Maestri Karoleski, president of the JBS Fund for the Amazon. “One of our focuses was to support projects that recognize the value of those at the base of the forest chain, such as extractivist workers, indigenous people and other traditional communities that manage community business”, says Andrea Azevedo, the Fund’s director of programs and projects. The largest tropical forest on the planet is home to the world’s greatest biodiversity. There are over 5 million square kilometers of forests, covering nine Brazilian states, in a biome that is home to 20 million people.

Thanks to these actions that will be developed by the projects to be supported, forest areas will be conserved, restored and preserved, directly and indirectly, by developing new sustainable businesses. Also, from the environmental point of view, greenhouse gas emissions will be reduced by implementing new farming techniques and intensified livestock systems, while also avoiding deforestation. In addition, 30 bioeconomy start-ups will be created, while a further 20 community enterprises will be leveraged. In all, the projects should benefit around 16,000 families, through job creation, who will see their income rise by up to 144%. Also, the participation of women and young people in community businesses should increase by 30% in the wake of these initiatives.

Regenerative farming practices and the wealth of the bioeconomy

The first six initiatives chosen by the JBS Fund for the Amazon will take on an extensive range of activities within the biome. The implementation of agroforestry systems, which transform crop and livestock farming locations into areas that absorb carbon, will be implemented by adopting regenerative farming practices.

The pirarucu and açai chains will be strengthened by investments in certifying production, adding value to processing and management training for the community businesses. The bioeconomy start-ups will receive investments and mentoring. The freeing up of credit for small farmers will be facilitated so they can receive technical assistance and access to financing that will enable their business to prosper by increasing production without knocking down the forest. Also included is joint development with Embrapa of research and technologies to enhance the value of forest products such as açai, cocoa, manioc, nuts, fruits and fish.

### **Marfrig concentra el 31,66% de participación en BRF**

Fonte: Valor Econômico. A Marfrig Global Foods alcançou uma participação de 31,66% do capital social da BRF após operações realizadas na quarta-feira, 2, na B3.

Em comunicado ao mercado, a BRF informou que, por meio de opções e leilão realizados em bolsa, a Marfrig chegou a uma participação acionária de até 257.267.671 de ações.

Na quarta-feira (2), o Pipeline, site de negócios do Valor, já havia informado das operações da empresa de Marcos Molina, que movimentaram R\$ 401,9 milhões.

Em comunicado à CVM, a Marfrig reiterou que a aquisição da participação visa diversificar seus investimentos em um segmento que possui complementaridades com seu setor de atuação e que não pretende eleger membros para a administração da companhia, nem exercer influência sobre as atividades da BRF ou promover alterações no controle ou na estrutura administrativa.





## **JBS Australia compró el principal productor de carnes porcinas de Australia**

Jon Condon, 09/06/2021

JBS Australia is set to become the largest pork processor in Australia, following its acquisition of the nation's biggest pork producer, Rivalea.

In an announcement to the market this morning, JBS said it would pay A\$175 million for Rivalea's integrated pork processing, piggery, wholesaling and stockfeeds businesses, which kill about 1.4 million pigs each year, producing about 26 percent of Australia's pork requirements from plants at Corowa and Melbourne plants.

In September last year, Rivalea, Ltd – owned by listed Singaporean food group QAF – announced that it was pursuing the sale of the business.

After expanding its piggery sites in southern NSW and central Victoria, installing effluent-powered clean energy generators and spending \$8 million upgrading its Melbourne processing site's capacity, QAF said Rivalea was now "of sufficient scale to be an ideal platform for a new owner with a strong focus on the animal protein segment to take the business to the next level."

Rivalea's farming activities were originally established in 1971 by the US agribusiness group Bunge around Corowa on the NSW-Victorian border.

Bought by Singapore's QAF in 2001, the business was renamed Rivalea Australia in 2009. The vertically-integrated business employs more than 1000 staff and operates about 7600ha of farmland including a network of 25 piggeries in the Murray Valley and near Bendigo and in the Victorian Wimmera, carrying about 40,000 breeding sows. Contractors own another 18 of the Rivalea supply farms.

The acquisition will make JBS the largest producer of pork in Australia. JBS is already the largest processor of beef and sheepmeat in the country.

The move will allow JBS to increase its product diversification in Australia, increasing the volumes of value-added products using pork meat within the company's Primo business, as well as opening up new opportunities for domestic and export sales of pork, this morning's statement said. Marketers say there are significant synergies to be had by combining multiple proteins within the same marketing and distribution network, and offering existing food service and retail customers a wider range of protein choices.

The acquisition will add an extensive product line in various categories, and add important brands to JBS's portfolio, to create strong conditions to accelerate the growth of the value-added and branded businesses in Australia, in addition to strengthening the company's export platform," said JBS global chief executive Gilberto Tomazoni said.

"With total annual sales of circa AU\$400 million (US\$310 million), an EBITDA of AU\$37 million, Rivalea already has sustainability as the focus of its business strategy," he said.

"The company sells well-known Australian consumer brands such as Riverview Farms, Family Chef and St Bernard's that will strengthen our presence with consumers and customers," JBS Australia chief executive Brent Eastwood said.

The acquisition is subject to relevant regulatory approvals including the Australian Competition and Consumer Commission and the Foreign Investment Review Board. Given that both buyer and seller are foreign entities, there's likely to be little opposition, observers says.

JBS already a significant player in Australian pork market

While most attention on JBS's operations in Australia focuses on its beef and sheepmeat processing operations and Primo smallgoods division, the company already has a substantial pork processing business located at Port Wakefield, South Australia.

The Australian pork division has operated for 22 years, supplying domestic customers, mostly under the Seven Point Australian Pork label.

The division is now focused on processing for major supermarket retailers and processors under long-term partnerships, JBS says.

The Port Wakefield business employs around 300 staff, spends around \$17 million annually in livestock purchasing, and produces around 43,400t of pork annually. Recent plant upgrades are delivering 'exceptional shelf life and consistent food safety outcomes', the company says.

Other recent investments at the Port Wakefield site have enabled the team to start producing value-added pork products including marinated and dry-rubbed items.

Overseas, JBS operates the enormous Smithfield pork division in the US, one of the largest pork producers in North America, alongside its JBS US beef business, and Pilgrim's Pride chicken processing business.

The Rivalea purchase will also provide a ready channel to direct pork into JBS Australia's enormous Primo smallgoods division, which produces about 130,000 tonnes of (mostly pork based) sausages, smallgoods, cured meat and bacon at two sites in NSW and Queensland.

About Rivalea





Rivalea is a leading integrated Australian agri-food company based in the Riverina region of NSW. The company has extensive agricultural, processing and marketing interests that support high quality pork production for Australian and export markets.

Rivalea employs more than 1200 people, operating across a number of farming, processing and distribution sites:

Agricultural properties in Southern NSW and Victoria that primarily focus on the breeding and production of pigs

Specialised export accredited pork abattoirs, boning and packaging facilities at Corowa and Diamond Valley Pork (DVP), Melbourne. DVP provides contract processing services for external livestock for other pork producers, wholesalers and retailers.

Marketing resources that support key brands and customers are located in Albury, Melbourne, Sydney, Brisbane, Adelaide, Singapore and Tokyo.

The company distributes its pork throughout Australia, Asia and other parts of the world. Delivery to retail and wholesale businesses utilises an extensive network of both wholly-owned subsidiaries and contractors. The company wholesaling operations market company-owned branded pork, carcasses, commodity pork and pork offals. The wholesale operations also sell a range of beef and lamb products.

### **Minerva Foods invirtió en energías renovables**

Fonte: Avicultura Industrial.

A Minerva Foods, líder em exportação de carne bovina na América do Sul e uma das maiores empresas na produção e comercialização de carne in natura e seus derivados na região, anunciou a compra de mais de 369 mil certificados de energia renovável (I-REC) para 100% das operações, tornando-se a primeira empresa do setor a ter emissões líquidas zero no escopo 2.

Para o Brasil, a Companhia adquiriu certificados de energia eólica, já para os países da América do Sul, foram comprados os de energia mista, eólica e hidrelétrica, garantindo uma matriz energética renovável em todas as operações.

“Os certificados rastreiam os megawatts-hora consumidos e garantem que eles provêm de uma fonte renovável, com isso viabilizamos uma nova forma de comprovar a rastreabilidade da energia que estamos consumindo. Essa meta de nosso compromisso com a sustentabilidade já foi atingida em 2020 e seguiremos dessa forma como parte da nossa estratégia para sermos Carbono Neutro até 2035”, afirma Taciano Custódio, Diretor de Sustentabilidade da Minerva Foods.

A iniciativa reforça o compromisso da empresa com a sustentabilidade, contribuindo com o combate ao aquecimento global e mudanças do clima.

Compromissos com a Sustentabilidade

Com foco nas emissões, a Companhia se comprometeu a reduzir em 30% a intensidade das emissões de Gases de Efeito Estufa (GEE) nos escopos 1 e 2 até 2030; e a manter sua matriz energética carbono neutro com 100% da energia advinda de fontes renováveis.

Nos próximos anos, a Minerva Foods ainda investirá até R\$ 1,5 bilhão em projetos que ajudam a reduzir as emissões em toda a cadeia produtiva.

### **Tyson Foods reducirá a cero las emisiones de gases efecto invernadero hacia 2050**

10 June 2021

In conjunction with the release of the 2020 Sustainability Progress Report, the Tyson Foods raises the bar for action by pledging to achieve net zero green house gas emissions across its global operations and supply chain by 2050.

Tyson Foods, a leading global protein company, today announced its ambition to achieve net-zero greenhouse gas (GHG) emissions across its global operations and supply chain by 2050, including scopes 1, 2 and 3. As the first US-based protein company to have an emissions reduction target approved by the Science Based Target initiative (SBTi), this ambition, in conjunction with the release of the company's fiscal year 2020 (FY20) Sustainability Progress Report, underscores the Company's commitment to help combat the urgency of the growing climate change crisis.

“At Tyson Foods, we believe progress requires accountability and transparency and we are proud to exemplify that as we work to achieve net-zero greenhouse gas emissions by 2050,” said John R Tyson, Chief Sustainability Officer, Tyson Foods. “As the first US-based protein company in the food and beverage sector to have an emissions reduction target approved by the Science Based Target initiative, we hope to continue to push the industry as a leader and remain committed to making a positive impact on our planet, with our team members, consumers and customers, and in the communities we serve.”

The move to net zero is an expansion of the company's current science-based target of achieving a 30% GHG emissions reduction by 2030, which is aligned with limiting global temperature rise to 2.0°C.



As a global organization with 239 facilities and 139,000 employees worldwide, achieving net zero emissions is a large undertaking which will look at emissions tied to direct global operations, energy sources and throughout our supply chain. Requiring a collective effort from every team member in addition to external stakeholders, key areas the company will be prioritizing to meet this goal include:

Updating the baseline for emissions to align with limiting global temperature rise to 1.5°C, consistent with the Paris Agreement, by the end of 2023.

Establishing a pathway to using 50% renewable energy across its domestic operations by 2030.

Completing initial land stewardship target of engaging 2-million feed acres and expanding the total acres by 2025, including a total target of 100% of feed purchased by 2030.

Expanding the Company's current 5-million-acre grazing lands target for sustainable beef production practices by 2025.

Continuing work to eliminate deforestation risk throughout its global supply chain by 2030.

Supporting climate action policies through advocacy groups such as the Net Zero Business Alliance

"We believe what good food can do for people and the planet is powerful. Our net zero ambition is another important step in our work toward realizing our aspiration to become the most transparent and sustainable food company in the world," said Donnie King, Tyson Foods President and CEO. "Partnership and collaboration will be critical to our efforts, and we look forward to working with our customers, supply chain partners, and other stakeholders to achieve net zero."

The introduction of this new ambition comes in conjunction with the release of the company's FY2020 Sustainability Progress Report which details how the company is delivering on its sustainability targets across all of its business operations and shares the company's integrated approach to sustainability. The report focuses on three main pillars that reflect Tyson's core values and goals: Empowering People, Customers and Communities, Conserving Natural Resources and Protecting Our Planet, and Innovating Smart, Responsible Agriculture, and puts accountability on each and every team member to think about and enact meaningful change within their business units.

### **Cargill prevé buenas perspectivas para los alimentos "plant-based"**

07 June 2021

Cargill's Chief Executive Officer David MacLennan spoke at the National Grain and Feed Association on 4 June, telling delegates that plant-based protein could cannibalize US and global meat demand.

The plant-based protein industry will eat into consumer demand for meat as the rapidly growing sector expands, Cargill Inc Chief Executive Officer said on Friday.

"Our analysis is that in ... three to four years plant-based will be perhaps 10% of the market. We're a large beef producer and that is a big part of our portfolio. So there's some cannibalization that will occur," MacLennan said at a National Grain and Feed Association convention.

Privately held Cargill is a supplier of pea protein to meat alternative company Beyond Meat Inc through its joint venture with PURIS Foods.

MacLennan then went on to say that China's feed grain industry isn't likely to become self-sufficient.

Reuters reports that the industry will still depend on imports despite the country's efforts to ramp up domestic production.

Tightening domestic supplies of feed grains and soaring demand from China's pork producers has triggered record feed grain import purchases this year.

The surge in import demand has come despite directives by Beijing to boost domestic grain output and reformulate pig and poultry feed rations to reduce reliance on imported corn and soy.

"I think they realize comparative advantage ... Grow and produce what fits your climate, your natural resources, your soil, your water supply. They don't have it the way we, Brazil, Australia do."

"They need to depend on trade," he added.