



## **NOTICIAS INTERNACIONALES AL 17/12/2021**

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## **CHINA**

### **Fiebre Porcina Africana y su impacto en la producción de carne porcina en 2022**

Eric Barker, 06/12/2021 THE spread of African Swine Fever (ASF) has decimated pork production across the world in recent years and has been credited for contributing to the surge in demand for Australian beef. No, they are not hotels – these multi-storey piggeries are an example of how China is radically reformatting its pork industry

China has been one of the worst affected by ASF, with its pig producers liquidating herds and beef imports increasing dramatically in the past two years. Europe, South America and other parts of Asia have also seen bad outbreaks.

With herd recovery still hanging in the balance for China and other countries, many will be watching how it unfolds next year. Last month, Rabobank said ASF was going to be the biggest market driver for 2022.

“While ASF outbreaks continued in China and Vietnam during 2021, both countries are recovering,” the report said.

“Herds are being rebuilt in large farms, and pork production increased strongly in 2021, squeezing out poultry. This trend is expected to continue in 2022.

“However, ASF is still active, so herd rebuilding is susceptible to any virus mutations or loosening of biosecurity measures.”

China’s herd rebuild from ASF has reportedly been based on the construction of medium-to-large piggeries, with a lot of smaller operators permanently exiting the industry.

Independent meat analyst Simon Quilty said the rebuild in China was facing major economic challenges, demonstrated by the collapse of real estate giant Evergrande.

“Hog prices continue to be below breakeven, so whether you’re a small, medium or large operation there will be economic losses if you start rebuilding herds,” Mr Quilty said.

“The ability to get finance has become a lot more difficult in recent times, Evergrande has been a good example of that – those problems are undermining market confidence.”

Rush to the door

Despite African Swine Fever taking hold several-years-ago, Mr Quilty said the virus had caused many Chinese pig producers to sell their herds in 2021.

“New variants came about because of black-market vaccinations that were put into the general hog population in a desperate attempt to control ASF,” he said.

“Those variants were a mild version of the virus, but they were harder to detect and as a result the country saw many more pig losses.”

Mr Quilty said with the harder-to-detect variants spreading through China, a lot of producers rushed to sell their herds before their animals contracted ASF.

“We call this trend the rush to the door, where producers rush to sell animals regardless of whether they were finished,” he said.

“With all that pork coming on the market, prices dropped very quickly to a point where producers could not breakeven. When it dropped below breakeven it became an economic liquidation where small operators, who once made up 50pc of China’s pig herd, exited the industry.

“That’s paved the way for medium-to-large operators to establish themselves.”

Beef demand could remain strong regardless of ASF

As China has looked to make up for the loss in pork in recent years, a new market has emerged for the beef industry.

Mr Quilty said beef was growing in popularity with Chinese consumers and was likely to remain a part of their diets after ASF is sorted out.

“Even with the flood of Chinese pork coming on the market and prices plummeting, beef imports have been increasing and prices have been rising,” he said.

“Our expectation is that demand for beef will continue.”

Despite the increase in beef imports to China, Australian exports to the country have been decreasing.

“Australia’s role has diminished, due to the herd rebuild and the licenses that were suspended by China last year,” Mr Quilty said.



## CONSORCIO DE EXPORTADORES DE CARNES ARGENTINAS

Both Rabobank and Mr Quilty are predicting the global cattle herd to contract next year. But Mr Quilty said with demand for beef in China on the opposite trajectory, there was an opportunity for the Australian beef industry.

“Beef is almost existing in its own market now and it is independent of other meats like pork and poultry,” he said.

“The Chinese consumer has fallen in love with beef, the introduction was made by ASF but it now has a market of its own.”

### **BRASIL tres meses fuera del mercado**

Jon Condon, 03/12/2021

THREE months after Brazil voluntarily suspended its beef exports to China after BSE detections, it remains locked out of the world's biggest imported protein market.

Brazil suspended beef trade to China on 4 September after tests on two suspect animals confirmed cases of atypical BSE.

Based on the outcome of a previous BSE episode in Brazil in 2019, many anticipated trade with China would likely re-open within two weeks, creating relatively little disruption to supply.

“Although disruptive, it is unlikely the restrictions will last very long,” Meat & Livestock Australia told stakeholders back in September.

“The last instance of Atypical BSE in Brazil was resolved within 10 days, and given China's reliance on Brazil to fulfill beef volumes and China taking 60pc of Brazil's beef exports, both countries are incentivised to amend this as quickly as possible.”

Eighty-seven days after the original shut-down, trade has still not resumed.

The closest Brazil has got to trade recommencement came earlier this week, when Chinese authorities agreed to allow Brazilian beef held in storage, packed prior to the September 4 closure, to be released for sale in China. Some onlookers have seen this concession as the first step in a restoration process in trade.

Trade sources said as many as 3000 40-foot containers of Brazilian beef bearing pre-September 4 production date certificates might have been released, which might sate China's demand for a short period, at least.

Brazil's three-month absence from the China market has created the biggest void in global beef trade seen this year. It's role was made all the more significant by China's ongoing battle with African Swine Fever in its pork industry.

Brazil accounted for almost 40pc of China's January-October beef imports, of 1.97 million tonnes, with Brazil share accounting for 758,700t. Conversely, from Brazil's perspective, China accounted for 58pc of all its exports up to September this year, amounting to 1.6 million tonnes.

To put this into some context, Australia's entire beef exports to all markets this year will struggle to exceed 900,000t.

Brazil's overall beef exports plummeted during October as a consequence of the China suspension.

October export sales plummeted to 8200t, down from 112,000t the month before.

Some analysts speculate that the beef suspension, now approaching its fourth month, is a strategy by the Chinese to lower Brazilian meat prices which were rapidly climbing. The price of fat cattle in the Brazilian market since the suspension started has fallen about 20 percent, according to South America's Merco Press.

On top of the Brazil suspension issue, second largest China exporter Argentina, which directed 68pc of its 750,000t total exports last year into China, is still only partially back in business.

So what has happened to Brazil's beef surplus, in the absence of China?

Some anticipated volumes to rise sharply into the US, especially in the absence of high Australia beef production and export this year. Meat traders said while there has been a modest rise in South American imported volume into the US this year, it has not been particularly significant.

Trade sources say that while there has been a modest rise in Brazilian volumes into the US since September, it is nothing like the volume some had anticipated earlier.

Australia's own exports to China have shown little change, in the absence of competition from Brazil since September. As reported in yesterday's monthly exports summary, Australia's exports to China in October reached only 13,157t, much the same as this time last year.

Similarly, the US was seen as a possible substitute for some Brazilian and Argentinean volume since September. But unlike Australia, the US processing industry is primarily focussed on chilled meat (for domestic consumption), not frozen. China remains a predominantly frozen meat market, making it more difficult for US to compete, especially from HGP-free product stipulated by China.



## **CONSORCIO DE EXPORTADORES DE CARNES ARGENTINAS**

While exports of beef produced on or after September 4 remain suspended, the Brazilian government and industry expressed optimism in local media reports this week about the suspension being lifted.

Brazil's department of agriculture said it had already forwarded all the documents requested by the Chinese authorities, to resume beef exports.

Brazil's agriculture minister Tereza Cristina told media that she was hopeful that Brazilian beef exports will resume to China some time in December.

### **Preven alza de aranceles sobre las importaciones de carnes porcinas en 2022**

China will raise import tariffs on most pork products next year, the finance ministry said, amid the sharp increase in domestic production. Tariffs for most favored nations, including the U.S., will return to 12% on Jan. 1, from 8% currently, according to a ministry statement. China lowered its tariffs on frozen pork in 2020 from 12% to 8% as the country faced soaring domestic meat prices.

## **BRASIL**

### **Mercado expectante todavía no acusó el efecto “China”**

Sexta-feira, 17 de dezembro de 2021 - 05h30

Com o anúncio da retomada da exportação para a China, os compradores paulistas avaliaram o mercado para traçar estratégia de compra para os próximos dias.

Com escalas de abate relativamente confortáveis, as cotações permaneceram estáveis.

No Espírito Santo, com as escalas de abate alongadas e o consumo fraco, os preços vigentes caíram. A cotação do boi gordo caiu R\$1,00/@ na comparação feita dia a dia, enquanto a cotação da vaca e novilha gordas ficou estável.

Na região de Paragominas - PA os preços do boi e novilha gordos caíram R\$1,00/@. O da vaca ficou estável.

Por: Denis Cardoso 16/12/2021

Em SP, cotações giram na casa dos R\$ 315, mas poderão subir para além de R\$ 325 no curto prazo, embaladas pela retomada dos embarques ao gigante asiático

Depois de 103 dias de espera, o Brasil voltou (desde quarta-feira, 15 de dezembro) a poder certificar e exportar carne bovina para a China.

Neste cenário, no mercado físico do boi gordo, o jogo virou a favor dos pecuaristas, que agora possuem a “força” de escolher o melhor negócio a ser feito, relatam os analistas da Agrifatto.

“Agora o chicote trocou de mão, e quem tem boi-China para vender é rei”, afirma a médica veterinária Lygia Pimentel, CEO da Agrifatto.

A boiada padrão-China é abatida mais jovens, com idade até 30 meses.

Por enquanto, a referência balcão em São Paulo segue em torno de R\$ 310-315/@. No entanto, os negócios devem se avolumar próximo aos R\$ 325/@ nos próximos dias, preveem os analistas da Agrifatto.

“A tendência é de alta na arroba, até porque, daqui para frente (até janeiro-fevereiro), teremos menos oferta de boiada gorda”, prevê Lygia, em podcast realizado na quarta-feira pela Agrifatto.

Na avaliação da CEO da Agrifatto, as geadas ocorridas este ano em algumas regiões pecuárias do Brasil atrapalharam o desenvolvimento das pastagens, o que deve resultar em maior lentidão na oferta de gado produzido a pasto a partir do próximo ano.

Ao mencionar as áreas que atualmente sofrem problemas com a recuperação dos pastos, Lygia cita os Estados de Minas Gerais, São Paulo, Mato Grosso do Sul, além da região sul de Goiás.

O economista Yago Travinigi, analista da Agrifatto, estima que, durante o ausência da China, o Brasil deixou de faturar US\$ 1,22 bilhão, o equivalente a 177 mil toneladas de carne bovina.

Segundo os consultores da Agrifatto, no momento, há frigoríficos já embarcado boiadas ao mercado chinês.

“Essas plantas já tinham lotes de boi-China em estoques e por isso já conseguem atender prontamente a demanda dos importadores chineses”, relata Lygia.

Segundo apurou a Scot Consultoria, com o anúncio da retomada da exportação para a China, os compradores seguem avaliando o mercado para traçar estratégia de compra para os próximos dias.

“Com escalas de abate relativamente confortáveis, as cotações permaneceram estáveis em São Paulo”, informa a Scot.

Dessa maneira, os preços da arroba do boi, vaca e novilha gordos estão em R\$ 312, R\$ 293 e R\$ 305, respectivamente (valores brutos e a prazo).



## **CONSORCIO DE EXPORTADORES DE CARNES ARGENTINAS**

Segundo a IHS Markit, a disparidade entre os preços de compra e venda do boi gordo cresceu forte em função da “queda de braços” que se instaurou no mercado.

Enquanto isso, continua a IHS, o mercado doméstico de carne bovina segue inconsistente, o que contribui para a posição de cautela das indústrias frigoríficas.

O clima chuvoso em grande parte do Brasil tem colaborado para melhoria da massa verde nos pastos, o que auxilia na retenção de animais, observa a IHS.

“A oferta de gado terminado praticamente sumiu e a ponta vendedora perde valores mais altos pelo boi, sob alegação dos prejuízos gerados pelos elevados custos com ração e queda nos valores da arroba em setembro e outubro de 2021, depois do cancelamento dos envios da proteína brasileira à China”, declaram os analistas da IHS.

Na opinião da consultoria, a disponibilidade de mercadoria nas câmaras frias está adequada à demanda vigente e há relatos de sobras de alguns cortes bovinos devido ao ritmo lento das vendas (interna e externa), além do menor preço das carnes concorrentes (frango e suínos).

“Poucas unidades de abate fecharam as suas programações para a primeira semana de janeiro. Porém, mesmo aquelas plantas frigoríficas que têm necessidade de preencher as suas escalas de abate para depois do Natal, não chegam a ir com tanto apetite às compras de gado”, ressalta a IHS.

Na B3, os preços dos contratos futuros do boi gordo registraram altas expressivas, efeito de forte movimento de compras especulativas geradas pela notícia de reabertura do mercado chinês ao produto brasileiro.

### **CHINA LIBERÓ IMPORTACIONES DE CARNES BOVINAS**

Las expectativas son altas en el corto plazo. China aumentará 4% sus compras de carne vacuna en 2022 y Brasil seguirá siendo su principal mercado.

El precio de la arroba está en 312 reales y «en verdad, no está habiendo negocios porque los frigoríficos ahora van a tener que remontar sus estrategias de compras, pero ya los productores están pidiendo 340 reales», según relevó Agrifatto.

Brasil exportó a China 716.139 toneladas de carne vacuna por US\$ 3.863 millones entre enero y noviembre de 2021.

Para principios de setiembre de 2021, cuando los dos casos aislados de vaca loca cerraron las puertas de su principal mercado, la vertiginosa curva ascendente de las exportaciones brasileñas se truncó.

Había empezado el año con menos de US\$ 500 millones mensuales en exportaciones a todos sus mercados –alrededor de 60% a China-. Desde febrero comenzaron a crecer a un promedio de 20% mensual. Para agosto ya había superado los US\$ 1.000 millones mensuales y con perspectivas de seguir creciendo. En octubre y noviembre, según los últimos datos de Aduanas, exportó US\$ 424 millones y US\$ 399 millones: perdió al menos US\$ 600 millones por mes.

En todo 2020 las exportaciones de Brasil a China habían totalizado 868.703 toneladas y US\$ 4.037 millones, el 48% del total de las exportaciones totales de carne vacuna, y en el presente año se perfilaban para superar largamente los US\$ 5.000 millones.

“Al final una buena noticia para la ganadería y para Brasil. China levantó el embargo que nunca debería haber tenido lugar, demostrando que el tema nunca fue sanitario, sino político-económico. Con 1.400 millones de personas que alimentar, y una clase media emergente muy importante, a la que le gustaba nuestra carne por el precio, la calidad y la cantidad, el gobierno chino ya no podía manejar este embargo”, dijo el presidente de la Asociación de Criadores de Mato Grosso (Acrimat), Oswaldo Ribeiro Júnior, citado por Noticias Agrícolas.

La Administración General de Aduanas de China dejó en claro que las importaciones de productos brasileños se limitan a productos procedentes de animales de menos de 30 meses.

«Con esto, la certificación y envío de proteína animal a China se normalizará y podrá reanudarse a partir de hoy», informó el Ministerio de Agricultura de Brasil.

«Es realmente una buena noticia que llevamos esperando un tiempo, ya habíamos entregado toda la información técnica y estábamos esperando la confirmación», dijo la ministra de Agricultura, Tereza Cristina, en una entrevista con la radio Jovem Pan.

### **Comunicado Oficial anunciando reapertura**

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O governo brasileiro recebeu com satisfação a notícia de que a Administração-Geral de Aduanas da China (GACC) finalizou a avaliação dos dois casos de Encefalopatia Espongiforme Bovina (EEB) atípica ocorridos no Brasil em setembro deste ano e autorizou, a partir de hoje, a retomada das exportações brasileiras de carne bovina àquele mercado.





## **CONSORCIO DE EXPORTADORES DE CARNES ARGENTINAS**

O resultado positivo ora alcançado é fruto da estreita coordenação entre o Ministério da Agricultura, Pecuária e Abastecimento (MAPA) e o Ministério das Relações Exteriores do Brasil, tanto em Brasília quanto em Pequim. É decorrência, também, do fluido diálogo que se manteve com as autoridades chinesas desde o primeiro momento. O MAPA imediatamente prestou à GACC todas as informações pertinentes sobre suspeita de dois casos de EEB, antes mesmo de suas confirmações pelo laboratório internacional de referência da Organização Mundial de Saúde Animal (OIE), em Alberta, no Canadá.

Assim que confirmadas as duas ocorrências, que se verificaram atípicas, a Organização Mundial de Saúde Animal foi formalmente notificada, em 3 de setembro. Após análise dos elementos pertinentes e confirmação da atipicidade, aquela Organização encerrou o caso no mesmo dia, sem alteração do status sanitário do Brasil, que segue como de risco insignificante para EEB.

Mesmo assim, as exportações foram suspensas temporariamente, em estrito cumprimento a protocolo bilateral vigente.

A decisão das autoridades chinesas confirma a excelência dos controles sanitários oficiais brasileiros.

A China é o principal destino das carnes exportadas pelo Brasil. Em 2020, o Brasil exportou US\$ 4,04 bilhões de carne bovina para aquele país, 48% do total de nossas vendas globais. Mesmo com a suspensão desde setembro, as exportações brasileiras de carne bovina para China já totalizaram, em 2021, US\$ 3,87 bilhões, 46% das vendas globais do produto.

### ***Mejoran las expectativas del sector***

Por: Cepea/Esalq 16/12/2021 A expectativa é de que a liquidez no mercado spot nacional se aqueça, embora a retomada da comercialização visando atender ao mercado chinês possa demandar alguns dias. A retomada das exportações brasileiras de carne bovina à China animou agentes de mercado consultados pelo Cepea.

Vale lembrar que os envios ao país asiático estavam suspensos desde o início de setembro deste ano.

A expectativa de operadores do setor pecuário é de que a liquidez no mercado spot nacional se aqueça, embora a retomada da comercialização visando atender ao mercado chinês possa demandar alguns dias.

Do lado da procura, alguns frigoríficos indicam estar com as escalas de abate mais alongadas, mas especialmente de animais que são destinados ao mercado doméstico.

Quanto à oferta, no campo, parte dos pecuaristas já se afastou das vendas neste ano, relatando que deve voltar a negociar apenas no início de 2022, tendo em vista questões fiscais.

Além disso, a oferta de animais prontos para abate segue restrita. Por outro lado, os custos de produção em patamares elevados podem levar alguns produtores a disponibilizar novos lotes.

Lygia Pimentel 15 de dezembro de 2021 Categorias: Boi, Notícias Comentários: 0

Na madrugada desta quarta-feira, o órgão governamental chinês alfandegário (GACC) declarou que está permitido a volta das importações de carne bovina brasileira a partir desta quarta-feira.

E durante a manhã o Ministério da Agricultura, Pecuária e Abastecimento (MAPA) brasileiro emitiu um comunicado confirmando a liberação das exportações de carne bovina a China, destacando que até mesmo a carne que foi produzida entre o dia 04/09/2021 e 14/12/2021, e que atenda os requisitos chineses poderá ser certificada. Além disso, a certificação volta a ser emitida a partir do dia 15/12/2021 para novas cargas.

Após 103 dias de embargo a proteína bovina brasileira, com o país sem poder emitir novas certificações habilitando a exportação a China, temos a volta do principal importador de carne bovina em 2021 as compras.

### ***Exportaciones Enero a Noviembre retrocedieron 7 % por efecto CHINA***

Fonte: Valor Econômico. 6 de dezembro de 2021

Com a suspensão do envio de novas cargas à China desde o início de setembro, em razão dos casos atípicos da doença da “vaca louca” identificados em Minas Gerais e Mato Grosso, e a decorrente forte queda dos embarques em outubro e novembro, o volume das exportações brasileiras de carne bovina acumulou queda nos primeiros 11 meses deste ano.

Segundo dados da Secretaria de Comércio Exterior (Secex) compilados pela Associação Brasileira de Frigoríficos (Abrafrigo), as vendas totais de cortes do produto (in natura e processados) ao exterior somaram 1,716 milhão de toneladas de janeiro a novembro, 7,15% menos que em igual período de 2020. Graças ao aumento dos preços médios, a receita ainda cresceu 10% na comparação, para US\$ 8,5 bilhões.



## CONSORCIO DE EXPORTADORES DE CARNES ARGENTINAS

Apenas em novembro o tombo mais uma vez foi forte, como havia sido em outubro. O volume exportado ficou em 105,2 mil toneladas, 47% menos que no mesmo mês do ano passado, e a receita caiu 41%, para US\$ 844,9 milhões.

Principais destinos

Responsável, em condições normais, por absorver cerca de 60% das exportações de carne do Brasil, a China se manteve como principal destino das vendas nos primeiros 11 meses do ano apesar do embargo. Comprou 928,8 mil toneladas no intervalo (pelo continente e por Hong Kong), segundo a Abrafrigo, mas com baixa de 13,3% ante o mesmo período do ano passado.

Em seguida aparecem os Estados Unidos, com 117,8 mil toneladas (aumento de 116,6%) e Chile, com 99,1 mil toneladas (alta de 21,3%).

A expectativa no mercado é que nas próximas semanas a China emita mais algum sinal positivo sobre a suspensão definitiva do embargo. No dia 24 de novembro, o país asiático liberou a entrada de cargas brasileiras certificadas até 4 de setembro.

### Mejoran los embarques en diciembre

Lygia Pimentel 6 de dezembro de 2021

As exportações de carne bovina in natura iniciaram dez/21 acelerando o ritmo. Durante os 3 primeiros dias úteis do mês corrente, uma média de 5,29 mil toneladas da proteína bovina foram embarcadas diariamente, volume 23,76% superior ao que foi visto na média diária de nov/21. Até o momento, 15,86 mil toneladas da proteína vermelha foram exportadas, 18,38% menos que o mesmo período no ano passado. O preço pago pela tonelada ficou na casa dos US\$ 4,81 mil, desvalorizando 2,23% no comparativo com o mês de nov/21. Com isso as vendas externas do produto geraram uma receita de US\$ 76,34 milhões, montante equivalente a 11,89% de todo dez/20, quando a carne bovina in natura era comercializada a um preço 6,37% inferior.

As exportações de milho fecharam os três primeiros dias úteis de dez/21 em 412,6 mil toneladas, uma média de 137,53 mil ton/dia, ritmo 8,73% superior à média do mês passado. A um preço médio de US\$ 228,3 mil/ton, as vendas externas do cereal consolidaram um montante de US\$ 94,19 milhões, volume correspondente a 10,16% de todo o dez/20, quando a tonelada era avaliada em US\$ 190,90.

Já as importações do cereal começaram o mês perdendo forças. Com uma média diária de 15,47 mil toneladas, as compras internacionais do cereal somaram em 46,40 mil toneladas neste início de dezembro, queda de 52,70% ante a média diária de nov/21. O preço pago pelo milho no mercado internacional ficou em US\$ 237,70/ton, com isso, foi realizado um investimento de US\$ 11,03 milhões para as compras internacionais do período, montante equivalente a 28,58% de todo o dez/20, quando a tonelada valia US\$ 156,60.

Com uma média de 104,63 mil toneladas exportadas diariamente, os embarques de soja iniciaram dez/21 reduzindo o ritmo comparado ao mês anterior. Durante os três primeiros dias úteis do mês, o volume de 313,91 mil toneladas da oleaginosa deixaram o Brasil, queda de 23,15% ante a média diária de nov/21, mas o volume exportado no período já supera em 14,53% todo dez/20.

A soja foi comercializada no mercado internacional a US\$ 483,7/ton, recuo de 5,31% ante a média de nov/21. Até o momento, um montante de US\$ 151,82 milhões foi arrecadado com as vendas externas da oleaginosa, valor 1,5 vezes maior do que todo dez/20, quando a tonelada era avaliada em US\$ 378,30.

Agrifatto

### Fuerte caída de la faena en el tercer trimestre de 2021

Fonte: IBGE. 9 de dezembro de 2021

No 3º trimestre de 2021, foram abatidos 6,94 milhões de cabeças de bovinos sob algum tipo de serviço de inspeção sanitária, queda de 10,7% ante o 3º trimestre de 2020, e de 2% frente ao 2º trimestre. Foi o resultado mais baixo para um segundo trimestre desde 2004. O mês de melhor desempenho no trimestre foi agosto, (2,52 milhões de cabeças) e setembro foi o de menor atividade (1,91 milhão de cabeças).

O resultado mantém a tendência de retenção de fêmeas observada desde o início de 2020: o total de fêmeas abatidas foi de 2,29 milhões. O volume de carne bovina in natura destinada ao exterior foi o mais elevado para um trimestre, considerando a série histórica da Secretaria de Comércio Exterior (SECEX/ME), com recordes para os meses de agosto e setembro, 181,6 mil toneladas e 187,0 mil toneladas, respectivamente.

O abate de 829,71 mil cabeças de bovinos a menos no 3º trimestre de 2021 em relação ao mesmo período do ano anterior, foi ocasionado por reduções em 21 das 27 Unidades da Federação (UFs). Entre aquelas com participação acima de 1,0%, as reduções mais significativas ocorreram em: Mato Grosso (-279,94 mil cabeças), Mato Grosso do Sul (-218,62 mil cabeças), Rio Grande do Sul (-131,21 mil cabeças),



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Rondônia (-83,84 mil cabeças), Paraná (-78,61 mil cabeças), São Paulo (-49,01 mil cabeças) e Santa Catarina (-31,23 mil cabeças). Em contrapartida, as maiores altas ocorreram em: Goiás (+38,15 mil cabeças), Tocantins (+37,15 mil cabeças) e Minas Gerais (+19,08 mil cabeças).

No ranking das UFs, Mato Grosso continua liderando o abate de bovinos, com 16,4% da participação nacional, seguido por São Paulo (10,9%), e Goiás (10,8%). Mato Grosso do Sul, segundo colocado no 3º trimestre de 2020, caiu para a quarta posição, após a queda de 24,4% no número de cabeças abatidas em comparação com o contabilizado período desta Pesquisa.

Aquisição de couro cai nas duas comparações

No 3º trimestre de 2021, os curtumes investigados pela Pesquisa Trimestral do Couro receberam 7,37 milhões de peças de couro, queda de 10,4% em relação ao adquirido no 3º trimestre de 2020 e de 2,2% frente ao 2º trimestre de 2021. Esse cenário foi influenciado pela redução do abate de bovinos, sobretudo em setembro, quando foram contabilizadas 2,06 milhões de peças adquiridas, 23,5% abaixo do mesmo mês do ano anterior.

O comparativo entre os 3os trimestres de 2020 e 2021 indica uma variação negativa de 854,38 mil peças no total adquirido pelos estabelecimentos, proveniente de reduções em 11 das 19 UFs que possuíam curtumes elegíveis pelo universo da Pesquisa. As variações negativas mais expressivas, em UF com mais de 5,0% de participação na aquisição de couro, ocorreram em Rondônia (-193,33 mil peças), Mato Grosso (-189,29 mil peças), Mato Grosso do Sul (-173,62 mil peças), Rio Grande do Sul (-168,28 mil peças), Paraná (-130,44 mil peças) e São Paulo (-31,49 mil peças). Em contrapartida, houve aumento da aquisição no Pará (+29,44 mil peças).

Mato Grosso continua a liderar a relação de Unidades da Federação que recebem peças de couro cru para processamento, com 16,7% da participação nacional, seguido por Mato Grosso do Sul (12,5%) e São Paulo (11,9%).

### **Récord en el número de animales confinados**

9 de dezembro de 2021

O número de bovinos em confinamento bateu recorde em 2021, segundo dados divulgados hoje pela DSM, dona da marca de suplementos animais Tortuga. A pesquisa da múlti holandesa apontou que 6,5 milhões de animais foram confinados neste ano até o início de dezembro, com crescimentos de 2% ante 2020 (6,4 milhões) e de 37% em relação a 2015, o primeiro ano do censo (4,7 milhões).

O gerente técnico de confinamento da DSM, Hugo Cunha, afirma que o número poderia ter sido ainda maior, se não fosse a suspensão das exportações de carne bovina para a China, em setembro, que derrubou por algumas semanas o preço da arroba e pressionou a rentabilidade dos pecuaristas.

“Nossa estimativa inicial era de uma rentabilidade de 2% a 4% ao mês para este ano. Quem fechou o primeiro giro [entre março e maio] conseguiu no começo algo menor, em torno de 1% ao mês”, disse, em encontro com jornalistas.

“Depois do ‘efeito China’, começamos a ver a rentabilidade diminuir a ponto de se tornar negativa, de 5% a 10% ao mês, chegando a R\$ 1 mil de prejuízo para quem não conseguiu segurar os animais no momento do embargo”, acrescentou.

Neste ano, o maior crescimento registrado foi no Estado de São Paulo – alta de 17%, para 1,12 milhão de bovinos confinados. Outro avanço expressivo foi no Paraná, de 16%, para 379 mil animais. Mato Grosso, maior rebanho do país, confinou 1,38 milhão de bovinos, alta de 1%, enquanto em Goiás, outro grande produtor, o número permaneceu estável em 1,07 milhão.

Para 2022, a companhia afirma ser cedo para projetar custos, mas estima que será um ano bem mais favorável para o pecuarista confinar do que foi 2021. “O ponto positivo é que podemos ter custos mais controlados. Este ano, o custo foi 80% superior com quando comparado com 2020. Uma diária, que era de R\$ 9, foi para R\$ 18 e até mais que R\$ 20, em algumas regiões”.

Fonte: Valor Econômico.

### **Brasil analiza cómo le afectan las barreras sanitarias al comercio internacional de carne**

06/12/2021

La cadena ganadera brasileña está constantemente sujeta a requisitos impuestos por los grandes mercados importadores, especialmente restricciones relacionadas con las barreras sanitarias que dificultan o impiden el acceso

Brasil ocupa el primer lugar en el ranking de exportadores de carne vacuna y avícola y el cuarto lugar en las exportaciones mundiales de carne de cerdo, lo que demuestra el papel estratégico del país en el mercado internacional. Sin embargo, la cadena ganadera brasileña está constantemente sujeta a requisitos impuestos por los grandes mercados importadores, especialmente restricciones relacionadas





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con las barreras sanitarias, que dificultan o impiden el acceso de los productos brasileños a los diferentes mercados. Estas demandas se intensificaron aún más después del inicio de la pandemia, con el aumento de la preocupación del mercado mundial por la calidad de los alimentos y la bioseguridad.

En esta coyuntura, el 4 de septiembre de 2021, se identificaron dos casos atípicos de Encefalopatía Espongiforme Bovina (EEB), conocida como “enfermedad de las vacas locas”, en Brasil. Dos días después de confirmados los casos, la Organización Mundial de Sanidad Animal (OIE) declaró que el estado de salud de Brasil en relación con la enfermedad no cambiaría, ya que los casos de EEB atípicos no representan un riesgo significativo para la cadena de producción de carne ni para la salud pública en general. Aun así, el anuncio de los casos culminó en la suspensión de los envíos de carne a China (principal destino internacional de la proteína brasileña) y en el cierre temporal de algunos mercados.

Egipto y Arabia Saudita, el tercer y sexto destino de la carne de vacuno brasileña, respectivamente, cerraron sus mercados durante 10 días después de confirmar los casos. Sin embargo, es la suspensión de los envíos al mercado chino lo que ha sido motivo de gran aprensión por parte de los exportadores brasileños: los envíos de carne vacuna a China están suspendidos desde el 4 de septiembre, sin una reanudación prevista, a pesar del mantenimiento del estatus de riesgo insignificante para la EEB. en Brasil.

Al mismo tiempo, todo el continente norteamericano está en alerta tras la identificación de casos de peste porcina africana (PPA) en República Dominicana en julio de 2021. Desde 2018, el mundo ha seguido la explosión de casos de PPA en China y la detección de la enfermedad en otros países, incluida Europa. LA PPA puede matar pjaras enteras de cerdos porque es causado por un virus altamente contagioso. En respuesta a la incursión de la PPA en República Dominicana (primer brote en las Américas), la OIE aconsejó a los países que intensificaran sus esfuerzos de vigilancia. Estados Unidos, por ejemplo, estableció una zona de protección en Puerto Rico y las Islas Vírgenes, debido a su proximidad con República Dominicana. Aunque ambas áreas no están ubicadas en el territorio contiguo de los Estados Unidos, si se detectan casos de PSA,

Si bien la PPA no es un problema de seguridad alimentaria, como la EEB atípica, la reacción del mercado internacional siempre ha sido de cautela, acompañada de la imposición de sanciones al país afectado. El cierre del mercado chino para la carne de vacuno brasileña es el mayor ejemplo de este tipo de medidas, y puede ser un indicio de que las restricciones internacionales por casos de enfermedades animales serán cada vez más sustanciales a partir de ahora. Brasil, debido a su papel dominante en el comercio mundial de carne, estará cada vez más sujeto a los requisitos del mercado externo y las barreras sanitarias relacionadas con la salud animal.

Esta situación se ve reforzada por el cuestionamiento de Brasil en el ámbito del Sistema de Solución de Controversias de la Organización Mundial del Comercio (OMC), iniciado el 8 de noviembre de 2021, sobre la adopción de controles discriminatorios para la detección de la bacteria de la Salmonella en algunas categorías de carne de ave exportada. a la Unión Europea. A juicio de las autoridades brasileñas, no existe evidencia técnica o científica que justifique la aplicación de criterios microbiológicos más estrictos para la detección de salmonela por parte de la Unión Europea, lo que estaría en desacuerdo con las reglas del Acuerdo sobre Medidas Sanitarias y Fitosanitarias de la OMC, creando, por tanto, barreras sanitarias injustificadas al comercio internacional.

Ante todo esto, para Cepea el contexto presentado demuestra el gran desafío que enfrenta Brasil en los próximos años para continuar con su posición predominante en la oferta de carne en el mercado mundial. Manteniendo el estado sanitario, aunque indispensable, por sí solo no es suficiente para ello, como lo demuestra la suspensión de los envíos a China. Al tratarse de barreras no arancelarias, las sanciones relacionadas con las barreras sanitarias pueden tener diferentes interpretaciones.

Por tanto, las negociaciones políticas para el cumplimiento de los requisitos sanitarios también son fundamentales. Así, los líderes que negocian acuerdos comerciales internacionales deberán trabajar cada vez más cerca de las autoridades sanitarias de Brasil, para garantizar el acceso de los productos brasileños no solo a los mercados tradicionales, sino también a los más exigentes.

## **URUGUAY**

### **Se tonifican los valores en el mercado ganadero**

Por Manuela García Pintos, 14/12/2021 Según la ACG, vacas y novillos aumentaron siete centavos La firmeza en el mercado ganadero es indiscutible. Tan así que, solucionado el conflicto con la Foica, la faena ha tonificado los valores y agilizado las entradas a planta. Esta semana, con entrada más cortas y mayor firmeza en los valores, sumado al respiro que dio el agua de los últimos días, el mercado del ganado gordo recuperó su fluidez.



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Según la Asociación de Consignatarios de Ganado (ACG) “con excelente faena y demanda activa, se acortan las entradas y se afirman los valores”. Tras su reunión semanal de precios de referencia, la ACG fijó para el novillo US\$ 4,21 por kilo (siete centavos más respecto a la semana anterior); la vaca US\$ 3,98 (siete centavos más); y la vaquillona US\$ 4,03 (seis centavos más).

Daniel Dutra, director de Escritorio Dutra, hizo referencia a que, una vez solucionado el conflicto con el sindicato de la industria frigorífica, “de aquí en más se dará una tonificación en los valores”, porque se ha faenado mucho ganado.

Según datos del Instituto Nacional de Carnes (INAC) en la semana al sábado 11 de diciembre se habían faenado 60.233 cabezas: 26.932 novillos; 24.778 vacas; y 7.157 vaquillonas (entre otros).

El consignatario hizo referencia a que hay “muy poco ganado gordo” en los campos, por lo que, si la industria sigue con una faena abultada -como viene sucediendo desde hace algunas semanas- “lo que puede esperarse es que los valores se sigan tonificando” en un mercado que semana a semana evidencia su dinamismo.

Según el cierre de año que realizó el Instituto Nacional de Carnes la generación de divisas creció más de 50% comparado con el año anterior. Sumando el mercado interno, la generación de divisas en el sector cárnico alcanzaría los US\$ 4.000 millones y es un récord histórico.

La faena de bovinos cerrará con un récord de 2,6 millones de cabezas, producto de un primer semestre que fue similar a 2019, pero con un tercer trimestre con niveles históricamente elevados (subas de más de 50%). A su vez, la faena de ganado de corral también será la más alta de los registros, con 350.000 cabezas y un incremento de 23% respecto al año anterior. Se debe sumar una exportación en pie en niveles altos, con más de 200 mil cabezas bovinas, pese a la menor demanda desde Turquía, pero con mayor demanda por ganado bovino desde China.

### **Precio de la carne en China corrigió 8,5%**

16/12/2021

Tras la reapertura de Brasil al mercado

El gobierno de China levantó totalmente el embargo a la carne brasileña que regía desde el 4 de septiembre, cuando se detectaron dos casos de encefalopatía espongiforme bovina atípica o enfermedad de la vaca loca en los estados de Mato Grosso y Minas Gerais.

Según Ricardo Reilly, delegado de la Asociación Rural ante INAC, la normalización del comercio entre China y Brasil “va a tener un impacto, tal vez no tanto en el precio internacional de la carne, pero sí en el precio de la hacienda”.

Este miércoles buena parte de los frigoríficos brasileños se mantuvo fuera del mercado, mientras trazan las estrategias de reactivación para los próximos días-

Ricardo Reilly dijo a Tiempo de Cambio de radio Rural que es necesario ver cómo se reacomoda y se rehabilita la carne cárnica, pero estimó que a nivel local “no debería tener un impacto tan grande”.

Teniendo en cuenta el nuevo escenario –esperado, porque incluso ya se había prolongado más de lo previsto inicialmente- dijo que es difícil hacer pronósticos 2022, aunque “debería ser un año relativamente similar a este, en el promedio anual, sin concentrarnos solo en el último cuatrimestre y los precios de exportación y las cifras de faena”.

Otras fuentes de la industria local apuntaron que «la entrada a China de 140.000 toneladas que estaban embarcadas antes del 4 de setiembre de alguna forma atemperó el mercado. Así que va a ser un aterrizaje más suave».

A propósito, Daniel De Mattos, asesor del directorio de BPU Meat, sostuvo que “no hay dudas” de que el volumen de exportación de Brasil va a influir en el nivel de formación de precios de China. De hecho, mencionó que hace dos o tres semanas se han dado correcciones en los valores a la espera de la apertura de Brasil.

“El mercado ya corrigió entre 8% y 10% dependiendo el corte. Un 8,5% en promedio. Hay que ver si la concreción de la reapertura genera mayores correcciones”, dijo.

De todas formas, opinó que la ganadería no va a volver a precios bajos, y, aunque los picos se van a moderar, “la relación va a ser muy favorable”.

Situación. De Mattos comentó que Uruguay está “claramente” en medio de una coyuntura de cambios en donde se le abren más mercados y hay una voluntad del gobierno de seguir mejorando sus accesos. “Tenemos la posibilidad de penetrar el sudeste asiático durante los meses que viene. Más allá del precio hay una demanda consolidada y Uruguay es uno de los jugadores importantes”, aseguró.

Por otro lado, el industrial afirmó que la ganadería “puede ir a más” en el sentido de que el Plan Estratégico propone un objetivo de producir 700 mil toneladas de carne: 200 mil para destinar al mercado



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interno y 500 mil para la exportación. Según De Mattos, es un objetivo “muy loggable”, pero advirtió que hay que prepararse.

“Cada vez que se libera el comercio, como la cuota Hilton, la USA o el acceso a mercados grandes como China, la sector responde. La ganadería ha cambiado, el productor muestra que puede invertir y que hay tecnología disponibles”, indicó.

Sin embargo, mencionó que hay cuestiones macro que amenazan, como una posible retracción de los capitales desde la economía de Estados Unidos y, entre otros, altas tasas de inflación. En tanto, insistió en “mantener y mejorar” los accesos sanitarios incorporando nuevos mercados y accesos arancelarios. “Si esas cosas se pueden controlar, no queda duda que vamos rumbo a las 700 mil toneladas”, aseguró.

BPU Meat Uruguay realizó, este miércoles, su evento clásico evento de fin de año denominada, en esta ocasión, “Avanzar hacia el Futuro Juntos”.

De la misma participó el ministro Fernando Mattos; el presidente del INAC, Conrado Ferber; y el embajador de Japón en Uruguay, Hideki Asari, entre otros.

### **Noviembre de US\$ 5.000: El mejor momento de la industria**

por Eduardo Blasinadiciembre 8, 2021

Finalmente se cumplió la profecía del anterior presidente de INAC Federico Stanham, 500 mil toneladas exportadas en los últimos 12 meses, más de US\$ 5.000 por tonelada exportada en noviembre. Un hito que desde esta publicación anticipábamos con ansiedad y que finalmente se ha cumplido.

Esto genera una situación muy interesante para la industria, y por transitiva para el resto de la cadena cárnica. El diferencial de precios de exportación y de hacienda está en los máximos del año, de modo que puede suponerse que los márgenes industriales son interesantes.

Lo que suele suceder en noviembre y en diciembre, solo que en este año con un precio del novillo mayor al de años anteriores. Incluso en 2019, que había sido excepcional para los precios de hacienda, a esta altura se estaba en una bajada muy fuerte de precios por la caída del mercado chino.

Lo que lleva a pensar en una trayectoria gradualmente creciente para el novillo gordo en las próximas semanas y un mercado de reposición que cuando la Niña pase, probablemente marzo o abril, puede tener una zafra buena para los criadores y tal vez también para los invernadores.

Porque lo importante de un buen precio de exportación es que es capaz de generar buenos precios para todos.

### **Por paro en el puerto quedaron trancados embarques de 481**

por Cecilia Ferreiradiciembre 8, 2021 Este miércoles se levantó el conflicto en el puerto de Montevideo que, como en otros rubros, impactó en la operativa de exportaciones de carne. “Desde la semana pasada queda carne sin cargar. Cuota 481 ya quedó sin entrar”, dijo a Ganadería.uy una fuente industrial.

Otro empresario de la industria frigorífica señaló que, ante la situación sindical en el puerto, su empresa enviaría parte de lo que resta de cuota por avión.

La empresa Montecon definió dejar sin efecto el despido de 30 trabajadores y el recorte de los jornales asegurados a sus trabajadores. Vanesa Peirano, dirigente de Supra, dijo a Ganadería.uy que las medidas quedaron suspendidas y que “la empresa Montecon canceló las medidas. Se vuelven a los mismo jornales y no va gente a seguro de paro”

### **Proyecto busca regular normativa que asegure la faena de animales ante medidas gremiales**

06/12/2021

Destinado al Ministerio de Trabajo y Ministerio de Ganadería a cargo del diputado Juan Moreno

El diputado del partido Colorado, Juan Carlos Moreno, presentó al Ministerio de Trabajo y al Ministerio de Ganadería un proyecto de resolución en el que exhorta a cumplir la ley de protección y bienestar animal y que se regulen las acciones que perjudiquen esta ley.

A raíz de las medidas adoptadas por el sindicato de la industria frigorífica durante las últimas semanas, el diputado entiende que se deben acordar mecanismos que garanticen, cuando haya medidas gremiales, la faena de los animales de producción que ya hayan sido ingresados a las plantas de industrialización.

Semanas atrás hubo tres días de paro de actividades de faena, cuando los animales ya estaban en muchas plantas frigoríficas prontos para faenar, lo que hizo que deban permanecer en los frigoríficos. Al continuar con las medidas de paro durante dos días más, esos animales no pudieron ser faenados y debieron, en muchos casos, ser devueltos a sus establecimientos.

En ese sentido, el diputado Moreno entiende que el Ministerio de Trabajo y el Ministerio de Ganadería, deben “generar un marco de responsabilidad respecto del bienestar animal” y solicitó que “se fomente una



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regulación” para garantizar el bienestar animal y la faena de los animales que ya están en planta al momento de una medida gremial.

“Miramos al tema con preocupación; no solo en la industria frigorífica sino en otras cadenas como la aviar o la lechería. Buscamos dar respuesta a quienes en un reclamo justo salieron afectados. Cuidar la marca país”, dijo.

Señaló que se exhorta a que ejecuten una ley activa y en su articulado marca muy claro la responsabilidad de los tenedores de animales, cuidando la inocuidad, en este caso, de la carne

### **Sistema Automatizado de Tipificación sería habilitado para todas las plantas en 2022**

Por Yonnatan Santos, 15/12/2021

Ya está funcionando en algunas plantas para ser homologado por INAC

El Sistema Automático de Tipificación (SAT), está instalado en 25 plantas frigoríficas del país y permite la una evaluación en conformación y terminación de las canales dentro de las plantas.

Este proyecto se encuentra como hito en el Plan Estratégico de INAC en la Línea 2 de "Generación de valor con mejor acceso y posicionamiento de la marca país", en el programa destinado a calidad de carnes.

### **Exportaciones en pie: China sustituye a Turquía y la ternera pasa al ternero**

por Eduardo Blasinadiciembre 15, 2021

El mercado de reposición tuvo una estabilidad notable, prolongando la de años anteriores. Como si los vaivenes de China, el ganado gordo, el precio de exportación a US\$ 5.000 no fueran más que una brisa en el mercado del ternero que cerró el año sobre los US\$ 2,15 por kilo.

El temor de El Niño y la brutal devaluación de la moneda de Turquía fueron factores que impidieron la transmisión de precios aún en los momentos eufóricos del gordo, lo mismo que sucedió con los reproductores. Vender a China sin la competencia de Brasil es algo muy interesante pero de corto plazo interpretó el mercado.

Diferente es el panorama de las hembras. China comprando y una ganadería que se ve sólida para adelante llevaron a que en el cierre de Plaza Rural este año el precio de la ternera promediara US\$ 2,20 contra US\$ 2,18 del ternero. Algo que sucede muy ocasionalmente y que da una señal fuerte. Se extrae lo más posible, pero se precisan más vientres.

China irrumpió este año como comprador no solo de carne, también de ganado en pie, no para faenar, sino para multiplicar. China entra, Turquía sale y el mercado de reposición puede estar ante un cambio estructural, podríamos decir feminista, para estar a la altura de estos tiempos.

### **Marcelo Secco: “Ojalá que el novillo esté por arriba de los US\$ 4” en 2022**

03/12/2021 El CEO de Grupo Marfrig, Marcelo Secco, es optimista en lo que refiere al precio del novillo de cara a 2022. “Ojalá que esté arriba de los US\$ 4 por kilo”, dijo, aunque aclaró que eso dependerá de cómo se posicione China en su flujos de compras, influido por la oferta que pueda tener en donde Brasil juega un rol preponderante.

“Ojalá que la presión a la baja de China sea medida en función de la oferta que tenga y eso nos permite configurar un escenario de trabajo estable y bueno”, explicó el industrial.

Actualmente la industria se encuentra regularizando los compromisos de descarga de haciendas y entrega de mercadería, tras los sucesivos paros de la FOICA de las últimas semanas.

“Sin dejar de mirar lo que pasa en el mercado exterior, porque la interna nos distrae, pero nuestro negocio es dependiente de lo que suceda en el mundo”, señaló.

Además, sostuvo que todo indica que vamos a estar en faenas cercanas a las 60 mil cabezas por efecto de las fiestas y por los compromisos atrasados.

“No veo un problema de oferta, entre otras cosas, porque a mucha gente le tocó lluvia. Desde ese punto de vista, en diciembre y enero no sería el problema de oferta. Una vez terminados los compromisos hay que ver cómo programar una demanda en función de lo que está pasando en China y en Europa que están queriendo dar señales más flacas de lo que se venía operando, pero todo era predecible”, aseguró.

China. Sobre el mercado chino comentó que está recibiendo cargas e internalizando el volumen de Brasil que aprobó.

A su vez, comentó que -después de año nuevo- plantea una corrección de precios de 6% a 8% en carne. “Es un escenario más conservador en materia de precios, pero la demanda está”, dijo.

El mundo está expectante por lo que pase con la aprobación final de Brasil, para los embarques de carne de enero. “En función de eso se verá. Veo con optimismo el reingreso de Brasil al mercado. Semanas más o menos, pero no hay razón para que Brasil no pueda retomar la exportación en el corto plazo”, aseguró.





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Europa. En Europa pasan dos cosas: por un lado, los embarques que ya no son para navidad y, por el otro, la nueva ola de covid-19 que algunos lugares están muy complicados. “Eso siempre amenaza al operador programando compras y asumiendo riesgos. Se han planteado bajas considerables, hasta que eso no se reactive habrá que esperar algunas semanas más para saber si es un problema para el consumo o no”, señaló.

En tanto, Secco manifestó que si no es por una amenaza sanitaria, Europa seguirá siendo “un mercado interesante” para los enfriados.

Israel. Si bien no está claro cuántas cuadrillas de faena Kosher para exportación a Israel hay en Uruguay, Secco estimó que serán cuatro o cinco equipos que trabajan con normalidad y sin grandes volúmenes dado que los precios de China son buenos y eso desafía al precio de Israel.

Estados Unidos. Con Estados Unidos “se siguen haciendo negocios por fuera de cuota”. Es un mercado dinámico, dijo, y con buenos niveles de valores. “Los precios de la carne son muy buenos, es un lindo año para haber tenido una ventana arancelaria mayor para poder aprovecharla”, lamentó el industrial.

De todas formas, aseguró que la venta a EE.UU. va a seguir siendo superior a las 20 mil toneladas porque hay negocios que permiten hacerlo.

Conflictos. Lamentable no solo el conflicto de la FOICA de la semana pasada generó pérdidas para el sector productivo, sino que ahora se agrega el conflicto a nivel del puerto, que dejó enfriados de 481 en el piso y “no los levantó”. “Estamos tratando de programar cargas, sería catastrófico que ingrese fuera de cupo, sería otra pérdida más”, advirtió.

### **Sudeste asiático un mercado potencial**

09/12/2021 Uruguay apunta a la valorización y tramita acceso a mercados

Uruguay continúa trabajando para ingresar con su carne a los países que conforman la Asociación de Naciones del Sudeste Asiático (Asean), que son Brunéi, Camboya, Indonesia, Laos, Malasia, Myanmar, Filipinas, Singapur, Tailandia y Vietnam. Según un nuevo informe de Acceso e Inteligencia de Mercados, divulgado ayer por el Instituto Nacional de Carnes (INAC), Uruguay no tiene acceso sanitario a 9 de los 10 miembros del bloque para exportar carne bovina.

Desde el INAC se destacó que el Asean “es un relevante importador de carnes y su atractivo comercial irá en aumento por razones estructurales”, pero a la vez, “de lograr un flujo exportador relevante de carne bovina a esta región, se alcanzaría un nivel de acceso a los mercados igual al de Nueva Zelanda”.

Potencial. El estudio de INAC recordó que entre 2018 y 2020, el bloque importó un promedio anual de US\$ 2.382 millones y 644 mil toneladas de carne bovina, con un precio promedio de importación de US\$ 3700 por tonelada -peso embarque (PE)-, aproximadamente. Esta asociación “representa el 6,5% de la importación mundial de carne vacuna en valor. En términos de productos, el 86% del valor importado en el período mencionado corresponde a carne congelada sin hueso”.

Son 4 los miembros del bloque que explican el 80% de la importación total en valor: Indonesia, Malasia, Filipinas y Vietnam. Del lado de los proveedores, esta proporción se explica por las colocaciones de India, Australia, Estados Unidos y Brasil, señaló INAC.

El informe agrega que estos exportadores operan en segmentos diferenciados. Por un lado, “India es dominante en la colocación de carne de búfalo congelada sin hueso en países como Indonesia y Malasia. Este segmento representa el 27% de la importación de carne vacuna de Asean y evidencia valores promedio por tonelada (peso embarque) de US\$ 3100”.

Asimismo, “la carne congelada sin hueso exportada por Australia, Estados Unidos y Nueva Zelanda alcanzan precios promedio entre US\$ 4000 y US\$ 5600 la tonelada (peso embarque) en sus principales mercados: Indonesia, Filipinas y Vietnam. Este segmento representa el 28% de la importación total de Asean”.

Australia es el exportador “dominante en la colocación de carne enfriada: Singapur, Indonesia y Tailandia son los principales compradores. Este segmento representa el 7% de la importación total y registra valores promedio por tonelada PE de US\$ 10.600”, según mostró el trabajo técnico de Acceso e Inteligencia de Mercados.

Otra característica relevante de los países que conforman este bloque del sudeste asiático, es que “su patrón de consumo permite la valorización de menudencias y subproductos”. Por ejemplo, Indonesia es el principal mercado de las menudencias bovinas australianas”.

Para Uruguay, históricamente los países que conforman el Asean han tenido una baja relevancia relativa en las exportaciones de la cadena cárnica uruguaya.

El valor máximo registrado fue US\$ 25 millones en 2009, incluyendo todas las carnes, menudencias y subproductos. Las exportaciones uruguayas a este bloque se han posicionado en niveles inferiores, con valores que oscilan entre US\$ 5 y US\$ 17 millones anuales, destacó el INAC.



## CONSORCIO DE EXPORTADORES DE CARNES ARGENTINAS

### 2022 será un buen año para el mercado de la carne

05/12/2021

Ha sido un gran año el 2021 y la expectativa es que el 2022 no le vaya en zaga. Se han conjugado varios factores para determinar un escenario de inusitada firmeza, con una demanda pujante por proteína animal, un contexto alcista para los precios de las materias primas y gran voracidad de algunos demandantes, fundamentalmente desde el continente asiático

Entrado ya el último mes del año, es momento de mirar hacia adelante y analizar las expectativas en el mercado internacional de la carne vacuna para el año próximo. Ha sido un gran año el 2021 y la expectativa es que el 2022 no le vaya en zaga. Se han conjugado varios factores para determinar un escenario de inusitada firmeza, con una demanda pujante por proteína animal, un contexto alcista para los precios de las materias primas y gran voracidad de algunos demandantes, fundamentalmente desde el continente asiático.

Pandemia mediante la incertidumbre es grande, por lo que podrían darse acontecimientos actualmente difíciles de vislumbrar que pueden alterar de forma significativa el escenario para el año que viene. Un ejemplo sobre algo del estilo es esta nueva variante ómicron, surgida en el sur de África.

Pero, asumiendo que esto no será más que una advertencia de que no estamos del otro lado de la orilla y que, por lo tanto, todo transcurrirá dentro de los carriles que actualmente se pueden prever como más probables -de una atenuación del impacto de la pandemia a nivel mundial, en la medida que la vacunación siga avanzando- las probabilidades de que se repita un buen año son altas.

El precio internacional de la carne vacuna alcanzó niveles récord en 2021. El valor medio FOB de los países de Oceanía, el Mercosur y Estados Unidos -los grandes proveedores del mercado internacional- superó por primera vez los US\$/t 7.000 en octubre de 2021, con una suba anual de más de US\$/t 2.100 (41%).

La principal explicación de estas cotizaciones tan altas es la muy intensa demanda desde China.

Durante varias semanas de este último trimestre de 2021 este país asiático fue incluso el principal destino para los exportadores estadounidenses, algo muy difícil de imaginar tan solo unos pocos meses atrás.

Claro que la suspensión de las importaciones desde Brasil, su principal proveedor, tienen que ver con este hecho, pero más allá de ello, los importadores de China deben pagar precios mayores que los de Japón y Corea del Sur -los otros grandes mercados para el producto estadounidense- para captar más volumen.

Para 2022 las expectativas son de una demanda que siga siendo intensa, con China como principal comprador. Es interesante la visión del Rabobank para el año que viene en cuanto a que será mayor la demanda de China por cortes Premium, por lo que observa un panorama promisorio en la colocación de carne de alta calidad en este destino.

Por su parte, desde el lado de la oferta se esperan variaciones en el saldo exportable de varios países claves, algunos creciendo y otros disminuyendo.

En el caso de Brasil y Australia, el rodeo vacuno aumentará y habrá una mayor disponibilidad de hacienda para faena.

Son dos de los tres principales proveedores de carne vacuna al mundo, por lo que se trata de un hecho saliente.

Sin embargo, no se supone que estos aumentos sean lo suficientemente elevados como para quebrar la firmeza del mercado.

Primero, porque serán parcialmente compensados por una menor producción del otro gran productor y exportador, que es Estados Unidos.

Todas las proyecciones son de que este país disminuirá su producción el año próximo.

La prestigiosa consultora Steiner pronostica que el precio del 90 CL -carne magra, el principal producto de importación de EEUU- crecerá en promedio alrededor de 12-15% en 2022 a un entorno de US\$ 6.500-6.700 por tonelada.

Este encarecimiento de Estados Unidos debido a una menor oferta interna lo posiciona como un destino atractivo para los exportadores del Mercosur el año próximo.

Respecto de Brasil y Australia, las expectativas son de precios de la hacienda para faena inferiores a los picos de 2021, pero manteniéndose en niveles elevados en una comparación histórica.

Meat & Livestock Australia pronostica una faena de 6,65 millones de vacunos en Australia en 2022 y el Rabobank de 6,5 millones; ambos pronósticos concuerdan en que aumentará respecto a los 6 millones de 2021, pero quedan muy lejos de los casi 8,5 millones de 2019, cuando el pico de liquidación provocado por la última gran sequía en ese país.



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En el caso de Brasil los pronósticos son similares: aumentará la producción respecto a 2021, iniciando una fase de crecimiento, pero esta expansión será acompañada por una similar en la demanda doméstica, determinando un saldo exportable similar al del año en curso.

Otros importadores

Desde la región del Medio Oriente y el norte de África (MENA), países muy dependientes del precio del petróleo, las expectativas son de una demanda sólida, respaldada justamente en las proyecciones alcistas para el precio del crudo, que mejoran el poder adquisitivo de la población

En estos días trabaja en el país una misión sanitaria de Egipto que auditará 23 frigoríficos para elevar las posibilidades de colocación en este destino, el principal importador del MENA. Actualmente hay solo cuatro plantas habilitadas.

Con quien no se puede ser demasiado optimista es con Europa. Su propensión a proteger sus ineficiencias productivas la hará seguir cerrándose y elevando barreras a la importación.

Europa no quiere que ingresen alimentos que se producen de forma más eficiente en otras partes del mundo. Con el pretexto del cuidado del medio ambiente, seguirá subsidiando las ineficiencias propias e intentarán hacer cada vez más difícil la llegada de productos importados, fundamentalmente en el caso de los derivados de los vacunos que, lobby mediante, tienen tan mala prensa en el viejo continente.

En América del Sur el principal importador es Chile. El resultado del próximo balotaje entre el candidato de extrema derecha y el de extrema izquierda genera incertidumbre.

Más allá de ello, las expectativas son de volúmenes de importación en niveles similares a los de este año, unas 380 mil toneladas equivalente carcasa, de acuerdo con el Departamento de Agricultura de Estados Unidos.

A su vez, Rusia demostró interés en volúmenes de importación crecientes de carne vacuna, al anunciar una cuota adicional de 200 mil toneladas libres de arancel para 2022.

Además, rehabilitó varias plantas en Brasil. Da la sensación de que aumentará los volúmenes de importación el año que viene.

Más allá de si ello determinará un mayor flujo desde Uruguay, el hecho de que otros grandes exportadores eleven las ventas a este destino, deja espacio en otros demandantes.

Por último, Uruguay comenzó a moverse para mejorar su inserción en el sudeste asiático, región donde habitan cientos de millones de personas y hacia donde las colocaciones, por el momento, son insignificantes.

Países como Filipinas o Malasia, destinos trascendentes para otros exportadores de la región como Brasil, podrían elevar las compras de carne uruguaya una vez se avance en la certificación sanitaria y religiosa.

Es fundamental tener la mayor cantidad de mercados abiertos para hacer una utilización lo más óptima posible de las colocaciones en el exterior.

Las previsiones, por lo tanto, son de un mercado demandado y posiblemente con una participación de China proporcionalmente algo inferior a la de este año, al haber más posibilidades de colocación en Estados Unidos y otros destinos como Egipto y el sudeste asiático.

### **Importaciones de carne en noviembre fueron las más altas desde comienzos de 2020**

por Cecilia Ferreiradiembre 8, 2021

Cuarto mes consecutivo de suba para las importaciones de carne vacuna. En noviembre las compras sumaron 3.326 toneladas, 13% más que en octubre y el mayor volumen registrado desde enero de 2020. En la comparación interanual la suba fue de 34%.

El valor promedio por tonelada fue el más bajo desde mayo: US\$ 4.710.

El principal país proveedor, como ha sido a lo largo del año, fue Brasil con 2.992 toneladas. Lejos, en segundo lugar, Paraguay con 333 toneladas.

En lo que va del 2021 hasta el cierre de noviembre Uruguay llevaba importadas 24.874 toneladas de carne vacuna por un valor de US\$ 114 millones.

## **PARAGUAY**

### **Precio del ganado gordo para exportación se mantiene firme en US\$ 3,80 a la carne**

14/12/2021 GANADERÍA

En un momento donde las lluvias están acompañando a los ganaderos en las dos regiones del país y las industrias necesitan cumplir los compromisos con los clientes, el mercado de haciendas gordas se mantiene con precios firmes. Un industrial dijo a Valor Agro que la empresa está comprando machos y vaquillas a US\$ 3,80 por kilo carcasa y vacas a US\$ 3,60. Sin embargo, la cotización de las hembras difiere dependiendo de las intenciones de compra de las plantas. Otro frigorífico comentó que el precio de compra de vacas es US\$ 3,30 por kilo al gancho, de todas maneras señaló que "no estoy comprando



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vacas, sino priorizando machos jóvenes y preferentemente de los confinamientos". Por otro lado, un operador confirmó los valores de compra y apuntó que se pueden conseguir referencias superiores por cargas especiales en volumen o calidad. Desde la industria frigorífica proyectan que el 2022 continúe con demanda y precio internacional de la carne firme, por tanto se prevé que el mercado de hacienda se comporte similar al año que cierra. Fuente: Valor Agro.

### **UNION EUROPEA**

#### **Política Agropecuaria Común (PAC) rigen cambios**

Les nouveaux règlements de la PAC, qui constituent les actes de base, ont été publiés au Journal officiel hier 6 décembre. Un accord politique entre le Parlement européen et le Conseil a été conclu le 25 juin, introduisant une politique agricole commune (PAC) plus équitable, plus verte, plus respectueuse des animaux et plus souple. Elle comprend des ambitions environnementales et climatiques plus élevées, alignées sur le pacte vert, ainsi qu'une répartition plus équitable des aides, en particulier pour les petites et moyennes exploitations familiales et les jeunes agriculteurs. Le Parlement européen et le Conseil ont voté positivement sur les nouveaux règlements les 23 novembre et 2 décembre 2021 respectivement. En ce qui concerne les prochaines étapes, la législation dite secondaire, détaillant la mise en œuvre de la nouvelle PAC, est actuellement en préparation. Les actes secondaires les plus urgents seront adoptés par la Commission avant la fin de l'année, le reste devrait être adopté au cours de la première partie de 2022. Les États membres ont jusqu'au 31 décembre 2021 pour soumettre leurs plans stratégiques de la PAC. La Commission évaluera ensuite ces plans et fournira ses observations aux États membres. La Commission dispose de six mois pour approuver les plans, tels que révisés par les États membres si nécessaire, afin qu'ils s'appliquent à compter du 1er janvier 2023, date à laquelle la nouvelle PAC entrera en application, après une période transitoire.

#### **Proyectan baja del consumo de carnes en la UE**

Por Pablo Antúnez, 16/12/2021 Informe de Comisión Europea reveló cambios en la canasta de consumo de los países del bloque

Prevén bajas en el consumo de carne en la Unión Europea, uno de los mercados de más alto valor para Uruguay. Según las previsiones de la Comisión Europea sobre la evolución de la producción y el consumo de carne en el viejo continente, se estima que el consumo mundial crecerá hasta 2031 a un ritmo medio anual del 1,4% gracias al aumento de la población y los ingresos en los países en desarrollo.

Según publicó Faxcarne, el informe de referencia estima que si bien una gran parte de la demanda mundial se cubrirá con la producción local, se necesitarán 3,4 millones de toneladas adicionales de importaciones de carne (especialmente aviar y bovina) para cubrir la brecha en muchos países, además de los 37,3 millones de toneladas actuales.

La UE se beneficiará sólo de forma limitada de la demanda adicional, principalmente de carne de aves. La participación de las exportaciones de la UE en el comercio mundial disminuirá del 20% actual al 17% para 2031 debido a la caída de las exportaciones de carne porcina a Asia, informó el portal Eurocarne.

Por otro lado, después de una caída en el consumo debido al Covid-19 y la escasez de carne en China, se prevé que el consumo de carne de la UE disminuya de 69,8 kg en 2018 a 67 kg per cápita en 2031, contrariamente a la tendencia a nivel mundial. La caída general irá acompañada de un cambio en la canasta de consumo. Se espera que la carne bovina continúe con su tendencia a la baja (de 10,4 kg per cápita a 9,7 kg).

### **ESTADOS UNIDOS**

#### **USMEF: Exportaciones de carnes rojas alcanzaron récord en facturación**

09 December 2021 October was another strong month for U.S. red meat exports as beef export value continued to soar, according to data released by USDA and compiled by the US Meat Export Federation (USMEF).

October pork exports were below last year's large total but year-to-date shipments remained slightly above the record pace of 2020.

"USMEF has always prioritized market diversification, and this is more critical than ever now that the red meat industry faces unprecedented transportation challenges and rising input costs," said President and CEO Dan Halstrom. "Exports will likely reach about \$18 billion in 2021, which is a remarkable achievement. While global demand is tremendous and we are cautiously optimistic about further growth in 2022, supply chain pressures are not easy to overcome and are a growing concern for exporters and their international customers."





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Broad-based growth puts beef exports on \$10 billion pace

Beef exports reached 115,709 metric tons (mt) in October, up 7.5% from a year ago, while export value climbed 48% to \$956.9 million – the second-highest total on record, behind August 2021. Through the first 10 months of the year, beef exports totaled 1.19 million mt, up 17% from a year ago. Export value increased 38% to \$8.53 billion, surpassing the 2018 record (\$8.33 billion) with two months to spare.

U.S. beef exports will top \$2 billion this year in each of three key Asian markets – South Korea, Japan and China/Hong Kong. Exports have already surpassed previous annual records in China/Hong Kong and Central America and October exports to Colombia were record-large.

Record shipments to Mexico and Colombia bolster October pork exports

Pork exports totaled 226,206 mt in October, down 7% from a year ago, while export value slipped 3.5% to \$618.8 million. For January through October, pork exports were up slightly from a year ago in volume (2.47 million mt) and increased 8% in value (\$6.84 billion). Exports to Mexico continued to strengthen in October as shipments reached a new monthly high of 83,929 mt, up 38% from a year ago. January-October exports to Mexico are ahead of the record pace established in 2017, when full-year shipments exceeded 800,000 mt and topped \$1.5 billion in value.

Pork exports to Central America and the Dominican Republic continued to shine in October and have already set annual records, while exports to Colombia have rebounded to pre-COVID levels. Although China's demand for pork muscle cuts has softened significantly, it remains a critical, value-adding destination for U.S. pork variety meat.

### **Informe oficial: Empresas frigoríficas triplicaron sus márgenes en la pandemia**

13 December 2021 Transportation, labour were not the cause of rising costs, report finds

The four largest meat-processing companies, which control 55-85% of the market share for beef, pork and poultry, have taken advantage of their market power and lack of competition to effectively increase their net profit margins 300% since the beginning of the pandemic.

According to White House economics advisers, many of the supply chain issues affecting prices, including changes in demand patterns, bottlenecks and shutdowns, are related to the pandemic. But some of the price increases impacting Americans are due to greedy corporations - America's four largest meat processors control 55-85% of the market for beef, poultry and pork - that have increased meat prices while underpaying farmers.

"Dominant corporations in uncompetitive markets [are] taking advantage of their market power to raise prices while increasing their own profit margins," National Economic Council Director Brian Deese wrote in the White House report.

In September, the White House economics team said meat prices were the biggest contributor to rising costs at the grocery store, partially because just a few corporations dominate meat processing. The November Consumer Price Index said more of the same: meat prices are the single largest contributor to the rising cost of food people consume at home. In fact, according to the report, beef, pork and poultry price increases made up a quarter of the overall increase in at-home prices last month.

The financial statements of the four largest meat processors - Tyson Foods Inc, JBS SA, Marfrig Global Foods SA, and Seaboard Corp RIC - show a collective increase of gross profits of more than 120% since before the pandemic, while their net income has surged by 500%. The four companies have also recently announced over a billion dollars in new dividends and stock buybacks, on top of the more than \$3 billion that has been paid out to shareholders since the pandemic began.

While some have thought that rising prices are due to increased input costs, such as labour and transportation, financial statements contradict those claims. According to the White House report, their profit margins, so the amount of money the companies have taken after costs, has skyrocketed since the pandemic. Gross margins are up 50% and net margins are up over 300%.

But as the report points out, not all profit-taking was fair. In its Q4 earnings call, for instance, Tyson Foods Executive Vice President Stewart Glendenning admitted that the company's pricing actions and strength in the beef segment led to approximately \$5.6 billion of sales price mix benefit, a number that he further admits more than offset the higher cost of goods sales. As the White House report pointed out, beef prices increased by more than 35%, while the company was actually selling less beef than before.

If rising input costs were the cause, those profit margins would be not be inflated, as higher prices would be offset by higher costs.

"Instead, we're seeing the dominant meat processors use their market power to extract bigger and bigger profit margins for themselves," wrote Deese in the report. "Businesses that face meaningful competition can't do that, because they would lose business to a competitor that did not hike its margins."



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In November, the USDA announced \$32 million in support for 167 meat and poultry slaughter and processing facilities. The funding will help them to expand capacity and efficiency through the Meat and Poultry Inspection Readiness Grant (MPIRG) program.

"The meat price increases we are seeing are not just the natural consequences of supply and demand in a free market," Deese concluded in his report. "They are also the result of corporate decisions to take advantage of their market power in an uncompetitive market, to the detriment of consumers, farmers and ranchers, and our economy."

Incredibly strong US consumer demand for meat products negated fears this year that a higher feed cost environment would limit processor margins, writes Brian Earnest, livestock analyst with CoBank.

### **Fuerte impacto de los precios de la carne sobre la inflación**

15 December 2021 The story for 2022 is consumer-level meat inflation. The Bureau of Labor and Statistics' CPI for all meats, poultry, fish, and eggs hit an all-time high in October, up 12% YoY. As restaurant menus and grocery prices adjust, consumer-level meat inflation is likely to continue well into the new year.

While higher retail prices could limit consumption growth, tighter cattle supplies, ongoing broiler breeder issues, and sow herd reductions should support favorable processor margins through at least the first half of 2022. The supply outlook implies that per capita U.S. meat consumption likely peaked at 225 pounds annually in 2020 and will edge lower through at least 2023.

The early 2021 tailwind of record profitability for beef packers would typically bring significant slaughter capacity expansion, but this is not the case. Low farm-level cattle prices from 2019 through mid-2021, combined with the extreme drought in the Western U.S., have set the stage for lower feeder cattle supplies for at least the next 2-3 years. Expect the major packers and smaller independents to fiercely battle for fed cattle supplies, which in turn, will raise cattle prices and moderate packer margins.

Wage rates and overall labor costs are expected to remain firmly higher in 2022 as the industry seeks solutions to reduced labor availability. Automation capital expenditures at the plant level will continue in earnest despite the rapidly rising costs of machinery and equipment. Most processors view this as a necessary cost of doing business moving forward. The U.S. broiler sector, which has been highly successful in expanding capacity in recent years, is probably best suited to benefit from expanding automation.

The U.S. pork sector faces a challenge in managing hog production and product supplies to accommodate the upcoming implementation of California's ballot measure, Prop 12. It mandates that pork sold in the state must be raised under compliant sow housing standards. Estimates suggest that only about 4% of sow operations were compliant through mid-2021, but California currently consumes 14% of all U.S. pork production. With the industry having exhausted most of its legal options, it appears that Prop 12 will indeed become law, with the full impact expected in the second quarter of 2022. Expect much higher pork prices in California, at least until the appropriate supply chains are developed.

U.S. meat exports have been growing steadily since 2016, but as the Phase One trade agreement with China sunsets in 2021, it is unclear if the U.S. will remain a primary source for China's protein needs. China has rapidly rebuilt its domestic hog supplies after the African Swine Fever outbreak of 2018-19, and domestic hog and pork prices have dropped sharply in recent months, corresponding with notable declines in pork and poultry shipments. Although beef exports have been robust during the second half of 2021, the collective U.S. protein opportunity in China may have already peaked. Ongoing port delays and container shortages are likely partially to blame, but those will persist throughout 2022. Mexico will remain a top destination for pork and poultry exports in 2022, but it is unlikely that it would be able to absorb the entire deficit from reduced opportunities in China.

### **Congreso: Proyectos de ley para transparentar mercados ganaderos**

By NCBA December 8, 2021

On Wednesday the U.S. House voted to pass two NCBA-supported pieces of legislation that are critical to providing producers with greater transparency in the cattle markets.

The House voted 418-9 to advance H.R. 5290, introduced by House Agriculture Committee Chairman David Scott (D-GA). This legislation, which was supported by Ranking Member Glenn "G.T." Thompson (R-PA) and unanimously approved by the Committee, would extend authorization for livestock mandatory reporting (LMR) through September 30, 2022.

The authorization for LMR — the most important tool cattle producers have for understanding transactions and trends in the cattle markets — is currently set to expire along with federal funding on February 18, 2022.



## **CONSORCIO DE EXPORTADORES DE CARNES ARGENTINAS**

By an overwhelming vote of 411-13, the House also passed the Cattle Contract Library Act of 2021. NCBA secured the introduction of this bipartisan legislation in October, led by Rep. Dusty Johnson (R-SD) and Rep. Henry Cuellar (D-TX).

“The fact that House Agriculture Committee Chairman Scott and Ranking Member Thompson have both been vocal champions for LMR reauthorization is yet another indication of the broad-base support this measure has among producers across the country. LMR is absolutely essential to fair, competitive, and transparent cattle markets. We appreciate Chairman Scott's leadership, and the heavy engagement we have seen from both sides of the committee on this issue. We also thank Rep. Johnson and Rep. Cuellar for their work to equip producers with vital market data through a cattle contract library,” said NCBA President Jerry Bohn.

The creation of a cattle contract library and the reauthorization of LMR are both widely supported across the cattle and beef industry. When livestock groups met in Phoenix earlier this year to identify common goals and priorities, those two measures were agreed upon as urgent.

NCBA left that meeting and immediately set to work advancing these proposals. We upheld our commitment to the industry, even when R-CALF changed their tune and refused to support these viable, popular solutions.

### **Background**

NCBA has long advocated for increased transparency in the cattle and beef supply chain.

In October 2021, NCBA Vice President and South Dakota rancher Todd Wilkinson testified before the House Agriculture Committee and underscored the need for greater transparency in live cattle markets.

In August 2021, NCBA succeeded in pushing USDA to make more market data publicly available. The agency began publishing a new daily report on the foundational prices used in cattle market formulas, grids, and contracts, and a new weekly report on the volume of cattle purchased at each different level of pricing.

In June 2021, NCBA led a letter with the support of more than 36 state affiliate groups urging Congress to act on the reauthorization of LMR. LMR is the legislative mandate that requires large meat processors to regularly report information on their transactions, such as the price they pay for livestock and the volume of purchases.

### **Congreso: Proyecto de Ley sobre Fletes Marítimos**

By JENNIFER SHIKE December 15, 2021 House Approval of Ocean Shipping Reform Act: Key Step for U.S. Ag Exports

Although red meat exports are on a record pace in 2021, shipping delays and obstacles remain a major concern for exporters and their international customers. U.S. Meat Export Federation (USMEF) President and CEO Dan Halstrom said that shipping delays and other transportation obstacles remain a major concern for U.S. exporters and their international customers.

Last week the U.S. House of Representatives approved the Ocean Shipping Reform Act of 2021 (H.R.4996). The legislation received strong bipartisan support, clearing the House on a vote of 364-60.

“These headwinds in the global supply chain continue to be a risk to our great demand on the export side. However, we are starting to see some signs of perhaps the tide improving here. The House representatives approved the Ocean Shipping Reform Act. This is a huge step in the right direction in terms of enforceability of some of these booking contracts for our exporters,” Halstrom said in the USMEF Audio Report.

During the USMEF Audio Report, Halstrom thanked House members for their support of H.R. 4996 and agricultural trade associations such as the Agriculture Transportation Coalition (AgTC), National Pork Producers Council (NPPC) and North American Meat Institute (NAMI) for rallying support for the bill. He added that expanded hours of service at several ports and heightened efforts to clear incoming cargo in a more timely manner are also important steps needed to ensure prompt and reliable delivery of U.S. agricultural products destined for overseas markets.

“I think this will focus the shippers to further prioritize export shipments. The reality is that a sale is not complete until it's delivered, and hopefully delivered on time. In the end, this is the key. We have to service our customers. We have one of the best reputations in the world on shipping our product overseas,” Halstrom said.

Much of this cargo is chilled, not frozen, he explained. Because of this, there are shelf-life concerns and more importantly, demands that this product arrive on time in a specific week for consumption.

“This effort by the House will be met very well by our international customer base,” Halstrom added.



## **CONSORCIO DE EXPORTADORES DE CARNES ARGENTINAS**

### **Mesa Redonda de Carne Sustentable: se unió al Programa Trust In Beef**

By INDUSTRY PRESS RELEASE December 15, 2021

The U.S. Roundtable for Sustainable Beef (USRSB) joins the Trust In Beef™ program as a founding partner and technical advisor. Trust In Beef is a new effort to empower beef producers to accelerate the adoption of their sustainability journey and provide consumers with real-life proof of the continuously improving environmental performance of American beef. The program is led by Farm Journal's social purpose division, Trust In Food, and its industry-leading beef brand, Drovers.

"The time is right for beef producers to be seen as a meaningful part of the climate solution," says Amy Skoczlas Cole, executive vice president of Trust In Food. "The U.S. Roundtable has paved the way to ranch-level sustainability progress with their science-based tools and frameworks. Trust In Beef will use these resources as a technical underpinning for our work to connect beef producers with the trusted guidance, similarly-situated peers, local resources and operational advice they need to unlock and showcase environmental benefits within their operations."

Trust In Beef launched in Fall 2021 and is supporting 200,000 beef producers in accelerating continuous improvement in environmental performance while ensuring that consumers see and hear real-life examples of producer environmental stewardship.

"We are honored to partner with Trust In Beef to help tell the industry's sustainability story," said Debbie Lyons-Blythe, chair-elect of the U.S. Roundtable for Sustainable Beef. "Our members are committed to continuous improvement, which makes this partnership a great fit. We look forward to working with the Trust In Beef team to share ongoing progress in the beef industry with consumers."

### **USDA: Programa de Certificación de Carne Bovina Baja en Carbono**

13 December 2021 It's the first of its kind for verification for beef raised with reduced greenhouse gas emissions

Low Carbon Beef, a cattle certification program that enables beef farmers and ranchers to earn premiums by reducing carbon emissions of their cattle operation, has secured approval as a USDA Process Verified Program (PVP) Service Provider from the USDA Agricultural Marketing Service (AMS).

The approval marks the first USDA PVP for calculating the life cycle greenhouse gas emissions for beef production. The PVP will enable beef providers to differentiate and market beef that is raised with reduced greenhouse gas emissions.

The Low Carbon Beef certification is designed to provide a quantifiable measure for cattle raised with a reduced carbon footprint. The process verifies that cattle have been raised with reduced greenhouse gas emissions using a comprehensive lifecycle assessment that quantifies the impact of sustainable herd management practices and cattle performance throughout the life of the animals.

"We have met many farmers and ranchers who are eager to show how their practices are producing more sustainable beef. This program allows these animal caretakers and environmental stewards to document and validate their efforts," said Colin Beal, founder of Low Carbon Beef LLC.

Low Carbon Beef is actively enrolling cattle for certification and exploring related research pilots with supply chain partners. The cattle certification program offers customised economic and environmental assessments to enable specific cattle operations to understand how many GHG emissions they generate and economic considerations for reducing those emissions.

## **AUSTRALIA**

### **Tratado de Libre Comercio con REINO UNIDO fue firmado**

Beef Central, 17/12/2021

AUSTRALIA has today signed the Australia-UK Free Trade Agreement (FTA), which means the trade pact is now set to enter into force during 2022.

The FTA includes the elimination of tariffs and significant new quotas which will boost agricultural exports, according to Australia's Federal Agriculture Minister David Littleproud.

It will also facilitate mobility of skilled agriculture workers between Australia and the UK and enhance technical collaboration

"This is a huge achievement for Australian agriculture and our farmers," Mr Littleproud said.

"This agreement will open up new and enhanced market access for our beef, sheep meat, wine, sugar, dairy, grains, horticulture and seafood exports once it enters into force.

"The UK is a high value market and the reduced trade barriers will provide more opportunity for Australia to export premium products and provide UK consumers with increased choice.





## **CONSORCIO DE EXPORTADORES DE CARNES ARGENTINAS**

“The agreement is the most comprehensive free trade agreement Australia has signed with any trading partner apart from New Zealand.

“It will contribute to Australia’s post-COVID recovery and provide a boost to Australia’s economy, including delivering more jobs and business opportunities, particularly in rural and regional Australia.

“There will be immediate new market diversification opportunities and reduced trade costs for many sectors, including wine, seafood, rice and horticulture.

“New commercially significant up-front quotas for beef, sheep meat, sugar and dairy will also provide immediate benefits for our farming communities.

“The FTA will also cover a variety of measures critical for the further development of Australian agriculture, including improved investment arrangements and enhanced trade in manufactured goods and services.

“It also establishes closer cooperation on biosecurity, animal welfare and antimicrobial resistance that will not impact Australia’s standards or right to regulate in these critical areas.

“The FTA will also facilitate agricultural labour mobility between the UK and Australia providing new opportunities to support the exchange of skilled labour.”

Australia’s agricultural trade with the UK in 2020-21 was worth \$823 million with key exports including wine (\$514m), lamb and mutton (\$77m), beef and veal (\$11m), pulses (\$15m), wool (\$8m) and nuts (\$7m)

Total exports to the UK were at an all-time high in 2020-2021. Australian agriculture, forestry and fisheries exports to the UK increased by \$182m from the previous year (\$641m to \$823m).

The complete elimination of tariffs on all agricultural goods within ten years will provide opportunities for continued strong growth of Australian exports into the future.

Inking of deal positive for future partnership: Red meat taskforce

The virtual signing of the Australia-United Kingdom Free Trade Agreement (A-UK FTA) by Australian Minister for Trade, Tourism and Investment Dan Tehan and the UK Secretary of State for International Trade Anne-Marie Trevelyan today has been met with strong support by Australian red meat industry representatives.

The terms of the A-UK FTA, which were agreed in principle by Prime Ministers Morrison and Johnson in June 2021, will see Australian beef and sheepmeat/goatmeat access to the UK liberalised over a transition period.

For Australian red meat producers and exporters, this will mean that Australia will be better placed to help supply some of the UK’s import requirement for high-quality beef, sheepmeat and goatmeat.

“The inking of the FTA solidifies an already close partnership between the two countries,” said Andrew McDonald, chair of the Australia-UK Red Meat Market Access Taskforce.

“Australia and the UK have a long history of trade, with the UK being a loyal purchaser of Australian beef and sheepmeat, albeit in small volumes.

“Under the A-UK FTA, future trade will be more streamlined, removing burdensome costs from the red meat supply chain that ultimately disadvantage British consumers and stifle opportunities for market development.

“The FTA also represents an opportunity for Australian and British exporters to further diversify their markets and demonstrates both countries commitment to rules-based, open trade.

The deal, once ratified, will result in Australian beef and sheepmeat exports entering the UK under a tariff rate quota (TRQ) regime – with initial TRQ tonnages gradually increasing over a 10 year transition period. Product within the TRQ amounts will enter tariff free. Whilst there will be no TRQ regime post year 10, a volume safeguard provision will apply until the end of year 15, beyond which no safeguards will apply.

“Our gratitude is extended to Australian Trade Minister Dan Tehan, UK Secretary of State for International Trade Anne-Marie Trevelyan and their respective negotiating teams for their dedication to achieving this momentous outcome.

“We look forward to continuing to work with Minister Tehan and his team in seeking to expedite ratification of the agreement and thereby securing timely entry into force in 2022,” Mr McDonald said.

AMIC welcomes a new era with signing of the Australia-United Kingdom FTA

The Australian Meat Industry Council (AMIC), as the only peak representative of red meat exporters in Australia, welcomes and supports today’s signing of the landmark free trade agreement with the United Kingdom.

The virtual signing of the Australia-United Kingdom Free Trade Agreement (A-UK FTA) by Australian Minister for Trade, Tourism and Investment Dan Tehan and the UK Secretary of State for International Trade Anne-Marie Trevelyan, will allow improved access for Australian farmers to more than 64 million UK consumers.

AMIC has been at the forefront of negotiations through the Australia-UK Red Meat Market Access Taskforce, chaired by AMIC member (NH Foods) Andrew McDonald.



## **CONSORCIO DE EXPORTADORES DE CARNES ARGENTINAS**

For beef, a tariff-free quote of 35,000 tonnes at entry into force will expand to 110,000 tonnes in year 10. Tariffs on beef will be eliminated after ten years.

For sheep meat, a tariff-free quote of 25,000 tonnes at entry into force will expand to 75,000 in year 10. Tariffs on sheep meat will be eliminated after ten years.

“The expansion of current markets is very welcomed in a time of market volatility,” said AMIC CEO Patrick Hutchinson.

“Not only does AMIC work towards new and improved market access, but we continue to strive for market “longevity”, which is becoming a far more crucial issue than accessing new markets as we defend our current market shares globally.

“We have shared, as an export nation, a long history of meat exports to the UK, dating back to 1879 when 40 tonnes of frozen beef and mutton were shipped from Sydney to the UK.

“Our export members are exceptionally positive about re-engaging on expanded trade with the UK, post Brexit.

“AMIC extends its gratitude to Minister Tehan and UK Secretary of State for International Trade Ann-Marie Trevelyan on the signing of this agreement, which will further strengthen the strong trade relationship between our two countries.”

**Trade deal to give Aussie Beef Royal Treatment: Cattle Council of Australia**

Cattle Council has welcomed a new Free Trade Deal between the UK and Australia that was signed between the two countries today. The deal creates significant new opportunities for Australian beef producers with trade to be fully liberalised over ten years.

Cattle Council CEO, Travis Tobin said Australia had the best beef in the world – and the UK has many of the world’s top restaurants.

“Jamie Oliver and Gordon Ramsay would be chomping at the bit to offer more Australian beef,” Mr Tobin said.

“It would not surprise me to see Australian steak served at the Royal Family’s dining tables.

“UK consumers can be confident that our beef has been produced to the highest standards, with world-leading food safety, animal welfare and environmental practices.

“The UK and Australia have a long, shared history, both culturally and commercially.

“This deal will further diversify our export markets, creating ongoing certainty for Australian beef producers.

“The UK has been a long-term trading partner with Australia and will now be able to enjoy more of our high-quality product.

“This partnership marks an enhanced and prosperous new relationship with the UK.

“It also signals a strong commitment by both Governments to delivering free trade.

“This deal has been a long time coming and is a credit to Australia’s Trade Minister, Dan Tehan and his UK counterpart, Anne-Marie Trevelyan.

“I’m sure that in the coming years this trade deal will become a positive trading relationship for both countries.

“I also hope we see Australian and UK producers collaborating more to help address our common challenges, including the global protein shortage.”

### **Exportaciones se mantuvieron en 75 mil toneladas en el mes de noviembre de 2021**

Jon Condon, 02/12/2021

STRONG international beef demand and a softening Australian dollar normally spell good times for beef exporters, but the supply side of the equation continued to muzzle Aussie beef exports during November – as it has all year.

Department of Agriculture figures released this morning show total chilled and frozen exports to all export markets last month reached just 75,712 tonnes, down about 16 percent on the five-year average for November in-month trade.

Calendar year to date, exports to all markets have reached a little over 810,000t – down about 144,000t, or 15pc on the same 11 months last year.

Low rates of slaughter due to herd rebuilding after earlier drought, and the national herd size at 30 year lows means Australia is still a long way from returning to normal production levels.

With a month’s worth of trade remaining, Australia’s full year 2021 beef exports now look like reaching a little below 900,000t, their lowest level in 36 years.

While the current outstanding seasonal conditions across eastern Australia will certainly aid recovery, a return to more normal volume is still some way off.



## **CONSORCIO DE EXPORTADORES DE CARNES ARGENTINAS**

In its most recent update, Meat & Livestock Australia has projected 2022 year exports to improve off the current record low base by 24pc to 1.06 million tonnes, before restoring to a more normal 1.14mt the year after that.

That will be driven by a lift in slaughter numbers next year of 24pc, to 6.65 million head, before lifting further to 7.45 million head the following year.

Restoration of female kill will play a big part in that. Queensland, the nation's dominant processing state, has seen the female portion of its beef kill this year hovering in the mid to low 30 percent range for most of the year, as all available females are retained for breeding purposes.

The trend is clearly reflected in the proportion of frozen beef versus chilled beef leaving our shores. Frozen (heavily weighted towards female kill) volume to all markets last month reached a little over 71pc, compared with close to 76pc back in 2019, when female kill was extremely high.

On the positive side, the A\$ has depreciated significantly against the US\$ during November, adding to the competitiveness of our product in export markets. The A\$ started November at a little over US75c, falling to US71.3c yesterday.

Demand for chilled and frozen beef out of North Asia and the US continues to be strong, with frozen lean manufacturing beef prices into the US hitting record highs in recent weeks (see earlier report).

Most markets impacted

All major markets are being impacted by current low production levels.

Largest export customer Japan last month took 20,239t of Australian beef, an 8pc rise on the previous month, but 20pc below November last year. For the year-to-date, volume to Japan has reached almost 217,000t, down 12pc on last year.

Exports to the United States sank to a historic low last month, reaching just 8281t, down almost 40pc on the previous month, and 14pc behind November last year, due to ongoing shipping and logistics challenges and a range of other factors. Total trade this calendar year to the US has reached a little less than 130,000t, compared with almost 200,000t this time last year.

South Korea recorded a large jump in trade last month, but it was mostly due to the impending triggering of the country's Safeguard tariff on Australian beef, which sees tariff levels rise sharply for the remainder of the year. Trade in November hit a surprising 18,238t, as importers raced to build stocks ahead of the tariff rise. That figure was up almost 29pc on the previous month, and 10pc higher than November last year.

Trade for the year to date has reached almost 150,000t, a 3pc increase on the same period last year, preserving Korea as one of Australia's most consistent customers.

There was a modest improvement in trade with China, where volumes last month reached 13,157t. That was up 4pc on October's trade, and much the same as November shipments last year. Year-to-date, China's share has reached 134,552t, down 26pc on the previous year, due to low cow kill, trade restrictions in place on some Australian plants, lack of competitiveness of Australian product versus other suppliers, and other factors.

Among secondary export markets, last month's results were mixed.

Exports to Indonesia, almost entirely made up of frozen beef, edged higher at 2927t, 13pc higher than October, but much the same as this time last year. Year to date Indonesia has taken 42,700t, down marginally on the year before.

The Middle East region took 2472t of beef last month, up marginally on the month before, but 14pc lower than last year, as cheaper South American imports continue to encroach.

In the absence of new working trade agreements, the challenges facing Australian exporters in the European region remain apparent, with November shipments totalling less than 100t into the UK (now reported separately) and 900t into the European Union. Year to date, the UK has taken just 963t (down 38pc on the year before), and the EU, 7454t (down 8pc).

### **Evolución del comercio de hacienda en pie desde 2011**

James Nason, 03/12/2021

The evolution of specialist stand-alone exporters has been one of the defining trends of change in the cattle export sector in the 10 years since the climactic events of the June 2011 Indonesian trade suspension.

At the time of the ban there were 35 licensed livestock exporters operating from Australia, according to the Federal Department of Agriculture, which included small part-timers who held licenses to export cattle, sheep or goats on an opportunistic basis.

Ten years later there are still now 29 "active exporters", according to the Department, but how many of those are truly active is debatable, with as few as eight now dominating the vast majority of Australia's cattle exports.



## **CONSORCIO DE EXPORTADORES DE CARNES ARGENTINAS**

In 2011 Wellard was the biggest cattle exporter by volume, followed by companies including Austrex, North Australian Cattle Company/Elders International, Landmark International, South East Asian Livestock Exports (SEALS), International Livestock Exports (ILE), Livestock Shipping Services (LSS), Halleen Livestock Traders.

A decade later some of those names remain and have prospered in the new operating environment.

While there are no publicly-released figures showing volumes handled by each exporter, Austrex which is a major player in southern dairy and beef breeder heifer exports in addition to northern cattle exports, is now thought to be Australia's largest cattle exporter, following Wellard's decision in 2019 to cease livestock trading and focus instead on chartering its vessels to other exporters.

WA-based exporters LSS, ILE and Halleen have all continued to operate and grow over the past decade, with LSS and its fleet of vessels in particular developing into a major player in the South East Asia cattle trade, adding to its long-standing trade into Middle East supply chains.

Chinese investment came into Australia's livestock export sector in a big way in 2015 and 2016 in anticipation of major trade opportunities opening up following the signing of a new protocol allowing Australian feeder and slaughter cattle to China for the first time.

However the trade failed to fire, and the presence of Chinese ownership has since diminished again.

Names such as Phoenix have come and gone. Chinese backers for a period owned former Elders live export company NACC, until it entered voluntary administration in June. NACC has since relaunched with a backing from a new source, the WA-based Ghosheh family.

NACC's new directors are listed as its previous general manager, Ashley James, along with with Abdelrazzaq and Mahmoud Ghosheh, the sons of LSS CEO Ahmad Ghosheh. With what is believed to be a majority stake in NACC, the Ghosheh family's interest now effectively include a second livestock export licence, alongside the licence used by LSS.

SEALS operates today as a subsidiary of Yarra Corp, a Singapore based trading company with strong Chinese links.

One major structural change since 2011 has involved the withdrawal of large publicly listed companies from direct investment in livestock export trading businesses. Elders, Nutrien (formerly RuralCo and Landmark) and Wellard no longer have the active participation in the sector that they did 10 years ago.

Frontier International, which was formed in 2013 by Ruralco was bought earlier this year by senior management including Will McEwin and Tony Gooden. It is today one of Australia's largest exporters of cattle to Vietnam, in addition to Indonesia.

Nutrien also sold its southern cattle exporting business, Landmark International, last year to the NSW based Winten Property Group, with the company now operating as Southern Australian International Livestock Services (SAILS) under the continued management of experience exporter Andy Ingle.

A number of specialist owner-operators have also launched their own exporting businesses in recent years, including Patrick Underwood's Australian Cattle Exports, which has a large Vietnamese lot feeder as a shareholder, and former Wellard Rural Export alumni Richard Bond and Collin Webb who now operate Bondstock Rural Export, with former Wellard marketing and operations manager Scot Braithwaite overseeing Asian operations.

While the above list is not exhaustive it encompasses most of the prominent operators handling the majority of exporting activity today.

As larger corporate owned entities have moved out and new ownership structures involving foreign interests have flowed and ebbed, the enduring business model in the ESCAS-dominated operating environment has been the specialist owner-operators with deep connections throughout the Australian cattle industry and strong relationships in customer markets.

"Something that is now quite different"

One industry stakeholder said the age of ESCAS has effectively turned livestock exporters from a group of traders into "something that is now quite different", led by specialist exporters who "are essentially privately owned and robust and agile enough to live and breathe on their strong relationships with the market".

While the June 2011 suspension remains front of mind for the industry 10 years on, often overlooked is the arguably even heavier blow dealt to livestock exporters by the Asian financial crisis in the 1990s, which nearly tipped many businesses over. Some argue that was indeed even bigger and harder to recover from: "No law suits, no assistance, just raw commercial pain," was one veteran's recent take.

'No law suits, no assistance, just raw commercial pain'

Discussing structural industry changes over the past 10 years, another exporter pointed out that all operators have had to lock their supply chains down to operate to the letter of ESCAS law, now the common denominator, which has largely put all on the same playing field.

"There has been a rationalisation of abattoirs since 2011, and all the small abattoirs have gone," he said.





## **CONSORCIO DE EXPORTADORES DE CARNES ARGENTINAS**

“Exporters pay the ESCAS audit fees so it has given them the ability to pick and choose which facilities the importers can use and operate and the audit fees demand a sizable facility be used to justify the costs.”

A professional young generation

Another visible trend in recent years has been the emergence of a professional and highly qualified new generation of young operators who are now making their presence felt in the industry.

In discussions with younger company representatives what stands out is their universally held belief in the role the Australian livestock export sector plays in exporting high standards of animal welfare knowledge and handling practices to customer markets, and how that in turn lifts standards and benefits domestic animals in those countries.

Inaugural Young Livestock Exporters Network directors Patrick Coole, Kari Moffat and John Cunnington, recipients of the Young Livestock Exporter of the Year awards for 2020, 2021 and 2019 respectively, are among a new generation of highly qualified, professional young leaders making their presence felt in the livestock export industry.

Through highly visible, proactive networks such as the Young Livestock Exporters Network and the Livestock Collective the pride they take in their work and their industry is actively and assertively communicated to the world via social media and communication campaigns.

The 2011-2021 decade will also be remembered for a couple of other reasons – the rise and rise of cattle prices which has reset the market landscape, and the COVID era which has created major additional new challenges for the trade in recent years.

While the industry managed to work well with Government to minimise logistical disruptions caused by COVID quarantine rules, the experience has also underscored another major issue – that is the industry's heavy reliance upon a small number of qualified shipboard veterinarians, stockmen and women and crew, who have all been forced to make extraordinary sacrifices including months and even years away from family and loved ones due to inflexible quarantine arrangements – a subject for another deeper analysis that we will follow up with soon.

### **Frigoríficos obtienen ganancias en América del Norte, pero grandes pérdidas en las plantas radcadas en Australia**

Steve Kay, 16/12/2021

A monthly column written for Beef Central by US meat and livestock industry commentator Steve Kay, publisher of US Cattle Buyers Weekly

BEEF processing giants JBS and Cargill must be extremely thankful at present that they have extensive North American operations. Those businesses saw all-time record profit margins this year, while their operations in Australia had their biggest losses in a generation.

As Beef Central's Jon Condon reported earlier this month, a processor margin model showed that average monthly processor margins in Australia slid from a loss per head of \$357 in September to a loss of nearly \$433 in October, the worst monthly margin on record since early 2000. The October result brought the annual average margin loss for 2021 to \$321 per head of cattle processed.

In stark contrast, US grainfed beef processors made profits of US\$562 per head (the equivalent of \$780 Australian) through the first nine months of the year, according to data from HedgersEdge.com. The first quarter saw margins average US\$301 per head, the second quarter US\$698 per head and the third quarter US\$688 per head. October saw profits of US\$580 per head and November saw profits of US\$452 per head.

As if these profits weren't large enough, the amount of money that Tyson Foods' beef business made was stunning. Tyson is the world's largest producer of high quality, grainfed beef, so is in an excellent position to take advantage of the growing global demand for that kind of beef.

Its results reflected this. The segment in Tyson's fiscal fourth quarter ended October 2 had operating income of US\$1.147 billion, beating its previous record of US\$1.120 billion set in the prior quarter. Operating income for the year was a record US\$3.24 billion, twice the previous record of \$1.58 billion set in fiscal 2020.

The results meant Tyson Beef has had four consecutive years with operating income in excess of US\$1 billion. The beef results significantly boosted Tyson's overall results for the year. Tyson Beef contributed 74 percent to Tyson's overall operating income of US\$4.396b. Beef's operating margin (sales versus income) for the year was 18pc. Tyson expects that margin to be 9pc to 11pc in fiscal 2022, which began October 3. Tyson Beef's remarkable results reflected how much beef demand at home and abroad has outstripped available supplies of beef since the COVID pandemic began.

Tyson in fiscal 2021 operated its beef plants at only 78pc of capacity, it reported in a securities filing. This meant its slaughter total was 6.287 million head, which meant its operating income was US\$515 per head.



## CONSORCIO DE EXPORTADORES DE CARNES ARGENTINAS

### Labour challenges

The utilisation rate reflected the ongoing labour shortage at Tyson plants and those of most other large companies in the US meat and poultry industry – as well as overseas in countries like Australia. Tyson's chicken and prepared foods plants ran at 79pc in the fiscal year. But its pork plants ran at 88pc.

Tyson's poultry plants are now fully staffed for the first time in two years, president and CEO Donnie King told me last month during a media call. Overall absenteeism is better than it was a month ago and 96pc of its US workforce is now vaccinated, which is an advantage for Tyson, he said.

To attract workers, Tyson has to be the most sought-after place to work in the industry. It has significantly increased wages, has experimented with childcare facilities and put more flexibility into working hours and shifts, he said.

A deeper look at Tyson's beef results showed that its volume in its fourth quarter was down 15.4pc on the same quarter last year. But its operating income improved dramatically because its average sale price was 32.7pc higher than last year.

For the year, volume was up 0.3pc and the average sale price was up 14pc. For the year, sales totaled US\$18b, versus US\$15.74b in fiscal 2020. Tyson in 2021 sold beef products in 140 countries and those export sales totaled almost US\$5b, up from US\$4b in 2020.

### Big grainfed cattle rally

Meanwhile, the US grainfed cattle market has enjoyed a big rally in prices which began in mid-October. The rally undermines calls by federal lawmakers for legislation to "fix the broken" live cattle market.

Some recently introduced measures that would upend the way in which the majority of live cattle are purchased by packers. They argue that the measures they propose would put more money in producers' pockets.

How then, would they explain that cash live cattle prices from mid-October increased US\$19 per cwt live in eight weeks, with nearly US\$16 of that coming in five weeks to early December? In other words, the much-maligned market has hit its highest level in more than four-and-a-half years. It finally has the traction that US cattle feeders have been waiting all year for.

Why has this occurred? Certainly not because of any new federal laws or regulations but because of the simple rules of supply and demand. The market had laboured for 18 months under the weight of a front-end supply of cattle that on June 1 last year was one million head larger than the total on the same date the previous year.

That it took all this time to clear the backlog was of intense frustration to cattle feeders.

But there was no nefarious plot by packers to keep prices depressed. Put simply, there were too many cattle for packers to harvest (given their current labour-constrained capacity) until recently.

Beef demand at home and abroad was stellar all during the 18 months. But US packers did not have enough workers to run their plants anywhere close to capacity. Lack of labour hurt cattle prices far more than any other factor.

But try telling that to lawmakers.

## EMPRESARIAS

### **Marfrig se consolida como uno de los principales productores de carne vacuna en Argentina**

06/12/2021 Cuenta con marcas reconocidas como Paty o Vienissima además de dar empleo a más de 3.000 argentinos

Con motivo de la celebración del Día de la Amistad entre Brasil y Argentina, Marfrig ha emitido una nota de prensa en la que muestra su papel dentro de la cadena cárnica argentina ya que cuenta con cinco mataderos en el país sudamericano que dan empleo a 3.000 argentinos.

Marfrig es propietaria de dos de las marcas más tradicionales y consolidadas del mercado argentino: Paty, sinónimo de hamburguesa en el país, y Vienissima, de salchichas y chorizos. Otras líneas de Marfrig en el país son Quick Food, La Morocha, Gaucho's Beef, Good Mark, Green Life, Paty Viena, ICB, Barfy, Tres Cruces y Good Beef. Entre los clientes del servicio de comida local se encuentra la cadena de comida rápida McDonald's.

Marfrig ingresó a Argentina a mediados de 2005 y hoy es uno de los mayores productores y exportadores de carne vacuna del país, especialmente hamburguesas y embutidos. Entre los destinos de exportación se encuentran China, Hong Kong, la Unión Europea, Oriente Medio y Estados Unidos.

Las unidades de la empresa en el país tienen capacidad para sacrificar 1.200 cabezas de ganado por día y producir 72.000 toneladas de productos procesados por año, de las cuales 39.000 toneladas son solo hamburguesas. Las operaciones se ubican en los municipios de Baradero (producción de embutidos y



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jamón), Campo Del Tesoro (hamburguesa), San Jorge (hamburguesería y matadero) y Villa Mercedes (faena), además de la unidad Arroyo Seco, que produce verduras congeladas.

"Argentina es un mercado reconocido a nivel mundial por la alta calidad de su carne y nuestro equipo en el país trabaja para mantener y apalancar esta posición, seleccionando los mejores animales, abastecidos por más de 800 productores acreditados. La empresa también se preocupa por generar y mantener vínculos con los productores, a través de soporte técnico, visitas y capacitaciones", dice Miguel Gularte, director general de las operaciones de Marfrig en América del Sur.

### **Subsidiaria de Minerva coloca crédito de carbono**

17/12/2021 EMPRESAS Minerva Foods informó que su subsidiaria My Carbon, creada este año con un enfoque en el desarrollo y venta de créditos de carbono, cerró su primer contrato para la reducción certificada de emisiones de gases de efecto invernadero. "My Carbon es parte de los esfuerzos que venimos realizando para implementar iniciativas que promuevan una ganadería más sostenible y baja en carbono. La conclusión de la primera venta de créditos de carbono de la empresa muestra que esta es una posibilidad real y que hace aún más tangible el concepto de producción sostenible", dijo Fernando Queiroz, CEO de Minerva Foods y My Carbon, en una nota enviada a Valor. En la nota, Minerva también recuerda que, según un informe difundido por la consultora financiera Refinitiv, el mercado de créditos de carbono creció 20% en el último año en el mundo y generó US\$ 227 mil millones.

### **Tyson Foods planea invertir UE \$1.300 millones para automatizar sus establecimientos**

CHICAGO, Dec 9 (Reuters) - Tyson Foods Inc (TSN.N) plans to spend more than \$1.3 billion to increase automation in meat plants over the next three years, Chief Executive Donnie King said on Thursday, as a U.S. labor shortage has limited production while demand is booming.

Meat processors have been unable to find enough workers for the past two years due to the tight labor market and health concerns during the COVID-19 pandemic. Tyson expects to boost production and reduce labor costs by expanding automation, with cumulative savings of more than \$450 million projected by fiscal year 2024, King said on a webcast for investors.

The company will increasingly use machines, instead of people, to debone chicken, one of its most labor-intensive jobs and a position with high turnover, said David Bray, group president of Tyson's poultry division. A capital investment of \$500 million in the area through fiscal year 2024 will generate labor savings equal to more than 2,000 jobs, he said.

Profitability in Tyson's chicken unit has declined partly due to the labor shortage and because processing plants are operating below full capacity, Bray said.

"We are not servicing our customers to the degree that they expect us to," Bray said.

Tyson slaughtered about 37 million chickens a week on average in fiscal year 2021, accounting for 80% capacity utilization, and will increase processing to 40 million birds weekly in fiscal year 2022, or 85% capacity, Bray said.

The company aims to slaughter 47 million birds a week over time, reaching about 98% capacity utilization, to meet strong demand, he said.

"Demand is outpacing supply," he said.

Tyson shifted production during the pandemic to adapt to soaring demand at grocery stores and reduced sales at restaurants.

### **McDonald's y Beyond Meat con plan expansivo de ventas**

15 December 2021 The restaurant has seen boosted sales in its new veggie option

McDonald's Corp is planning a major expansion of its plant-based burger with Beyond Meat Inc in the United States in 2022, according to two Wall Street analysts.

The companies began testing the "McPlant" patty in eight McDonald's US locations in November. Those restaurants have been selling enough of the sandwiches - as many as 70 per day - to warrant an expansion of the trial, the analysts said.

McDonald's said when it announced the tests that customers would have to wait for more updates, reported Reuters. The company declined to provide new details to Reuters on Tuesday. Beyond did not reply to a request for comment.

Any move by McDonald's to sell a plant-based burger widely across its more than 13,500 US locations could be a boon to plant-based meat makers generally and Beyond specifically.

Rivals have been vying for partnerships with restaurant chains as they add vegan and vegetarian menu options. Beyond is working with Taco Bell owner Yum Brands Inc, while Impossible Foods partnered with Burger King, a unit of Restaurant Brands International Inc.



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BTIG analyst Peter Saleh said in a research note on Monday that he expects the product to be in about 700 restaurants across several regions as a limited-time offer in February and March, with a national rollout possible in 2023.

Unlike the current test, the expansion would come with local and regional advertising funded by McDonald's franchisees and possibly Beyond, Saleh said.

Separately, Piper Sandler analyst Michael Lavery said in a note that McDonald's could launch McPlant burgers nationwide late in the first quarter of 2022, earlier than previously anticipated.

That could pressure margins for Beyond. While it will sell more patties, it may do so at a lower price - closer to \$4.00 per pound than the \$5.25 Lavery initially forecast - as it seeks to undercut the price of animal protein by 2024, he said.

### **Paraguay: Marfrig empezaría la construcción del frigorífico a mediados del 2022**

14/12/2021 GANADERÍA

La multinacional brasileña de alimentos, Marfrig Global Foods, empezaría la construcción del frigorífico en Yby Yaú en Concepción a mediados del año 2022, confirmó a Valor Agro una alta fuente de la compañía. En junio, cuando llegaron autoridades de la empresa a Paraguay, se informó que preveían empezar a levantar la planta en octubre del 2022. Sin embargo, el comienzo de la construcción sería a mediados de año "o un poco antes", se apuntó "Es un hecho que se va a construir el frigorífico", dijo el Ejecutivo y aseguró que ya se aprobó el presupuesto (CAPEX) para la realización de la obra, que implicaría una inversión cercana a los US\$ 100 millones. La planta será una de las más modernas de Sudamérica con una capacidad máxima de faena al día de 800 a 1.200 animales a doble turno. La fuente señaló a Valor Agro que el periodo de la construcción sería de 12 a 16 meses. Fuente: Valor Agro.

### **JBS: cuatro empresas europeas dejarán de comprarle por su rol en la deforestación del Amazonas**

16 de dezembro de 2021

Quatro varejistas europeias decidiram parar de comprar beef jerky – um snack de carne bovina defumada – que a JBS produz com a americana Jack Link's no Brasil após receberem uma denúncia de que o negócio teria utilizado carne de gado criado em áreas desmatadas ilegalmente. Além disso, outras três varejistas decidiram mudar suas estratégias sobre o fornecimento de carne do Brasil e vizinhos da América do Sul para evitar "problemas".

As decisões foram tomadas após as ONGs Repórter Brasil e Mighty Earth divulgarem às empresas de varejo denúncia de que o gado comprado pela JBS passou por fornecedores indiretos que teriam desmatado ilegalmente. As organizações também relataram casos similares nas cadeias da Minerva e da Mafrig, mas nenhuma varejista tomou medidas específicas quanto a elas.

As redes de varejo da Europa que decidiram tirar o beef jerky da JBS e da Jack Link's das prateleiras foram o Carrefour da Bélgica, a rede Delhaize da Bélgica, a Albert Heijn, da Holanda, e a Auchan da França. A Albert Heijn também decidiu deixar de vender outras duas marcas, incluindo uma de carne dos pampas brasileiro e uruguaio. O beef jerky da JBS e da Jack Link's é produzido nas plantas paulistas de Santo Antônio de Posse e Lins.

Além disso, a Lidl da Holanda decidiu que, a partir de janeiro, vai parar de vender carnes de fornecedores da América do Sul. A britânica Sainsbury's, por sua vez, comprometeu-se a retirar sua marca própria de carne enlatada do mercado brasileiro para garantir que a origem da carne que recebe seja avaliada como livre de desmatamento. Já o também britânico Princes, que deixou de comprar carne enlatada da JBS há um ano, disse que está revisando sua política para produtos brasileiros para levar em conta o desmatamento zero na cadeia de fornecimento.

O relatório das ONGs aponta, no caso da JBS, três casos de fornecedores indiretos que têm áreas embargadas pelo Ibama e dois fornecedores indiretos com déficit de reserva legal e de área de proteção permanente. O gado de alguns deles pode ter ido para a planta da JBS em Lins, e pode ter sido utilizada na produção de beef jerky.

As decisões contra o produto da JBS ocorrem num momento em que a gigante brasileira vem ampliando sua presença no mercado europeu. Nesta semana, a empresa avançou em charcutaria na Itália com a compra do Grupo King's e, em setembro comprou a Kerry Consumer Foods, do Reino Unido e Irlanda.

A reportagem questionou as varejistas sobre qual fornecedor substituirá o produto que deixarão de comprar. O Carrefour disse que ainda não tem substituto, e o Princes disse não comentar relações comerciais. As demais não responderam.

Procurada, a JBS afirmou que o rastreamento dos fornecedores indiretos é um desafio não só seu, "como da cadeia produtiva da pecuária", e que por isso está investindo em uma nova plataforma, com tecnologia blockchain, prevista para ser concluída até 2025.





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A companhia disse que os fornecedores diretos citados no relatório estavam de acordo com sua política de compra e com o acordo com o Ministério Público Federal “no momento da compra”. A companhia afirmou que possui 77 mil fornecedores diretos e que já bloqueou mais de 14 mil por desacordo com suas políticas.

A JBS não comentou a decisão das varejistas europeias citadas nem comentou sobre a comunicação com seus clientes sobre a origem do gado que abate