



NOTICIAS INTERNACIONALES AL 18/02/2022

BRASIL	2
Mercado firme y estable en las principales plazas ganaderas	2
Buena demanda internacional y poca oferta inciden en el mercado	3
Exportaciones en febrero firmes pese a la valorización del Real	3
Consumo en Brasil es el tercero más elevado del mundo	4
Abiec y ApexBrasil promoción en mercados árabes	4
Deforestación en el Amazonas	5
URUGUAY	6
Precios extraordinarios del gordo hacen aparecer más oferta	6
Ya se venden novillos de pasto a US\$ 5 por kilo de carcasa	6
Feedloteros miran de reojo el precio de la reposición	6
Carniceros muestran preocupación por ajuste de valores	7
Faena de novillos de corral dio un salto y más que duplica a la de un año atrás	7
Se espera una muy buena zafra de terneros y un índice flaco/gordo a 1.10	8
PARAGUAY	8
Más oferta en el mercado, competencia por hacienda gorda y precios al alza	8
Ferias de consumo con “alta demanda”, “ventas ágiles” y “precios muy firmes”	8
ESTADOS UNIDOS	9
Exportaciones de carnes bovinas superaron récord anterior	9
<i>Acuerdos internacionales favorecieron este incremento</i>	10
USDA redujo la proyección para la producción de carnes bovinas de 2022	10
Ciclo Ganadero: el impacto de la Sequía	11
USDA instrumenta programa de ayuda a partir de marzo	11
NCBA testimonió sobre producción sustentable en Congreso	12
Informe oficial reporta escaso cumplimiento de CHINA en la Primera Fase de Acuerdo Bilateral	12
AUSTRALIA	13
Exportaciones de hacienda en pie siguen en tendencia descendente	13
Costo de transporte creció por alza del precio del Diesel	13
Mercado coreano con acceso mejorado por acuerdo bilateral	14
Peso de faena aumentó y se redujo la proporción de hembras en la faena total	16
EMPRESARIAS	17
Tyson Foods flexibilizan normas de seguridad por menor número de casos de COVID	17
BNDES recaudó R\$ 1,900 millones con venta de acciones de JBS	17



BRASIL

Mercado firme y estable en las principales plazas ganaderas

Por: Denis Cardoso 17/02/2022

Na maioria das praças pecuárias, as cotações seguem estáveis, como é o caso de São Paulo, onde o animal macho terminado é negociado a R\$ 338, no prazo, segundo apuração da Scot Consultoria. Embora o mercado brasileiro do boi gordo continue com preços firmes na maioria das regiões pecuárias, em algumas praças do País os preços da arroba recuaram nesta quinta-feira (17 de fevereiro), refletindo a forte pressão de baixa exercida pelos frigoríficos locais.

É o caso do Mato Grosso, responsável pelo maior rebanho de bovinos de corte do País, onde as cotações do boi gordo registraram desvalorização entre R\$ 5/@ e R\$ 10/@ ao longo desta quinta-feira, segundo levantamento da IHS Markit.

Em Cáceres, o valor do boi gordo caiu de R\$ 310/@ para R\$ 305/@. Em Barra do Garças o preço do macho terminado foi de R\$ 315/@ para 305/@. Nas praças de Tangará da Serra e Cuiabá, as cotações oscilaram de R\$ 315/@ para R\$ 305/@ e de R\$ 313/@ para R\$ 307/@, respectivamente.

Porém, nas praças do interior de São Paulo, Estado que é referência para o mercado do boi nas demais regiões pecuária, os preços dos animais terminados seguem estáveis.

Segundo dados da Scot Consultoria, o boi, a vaca e a novilha prontos para abate são negociados por R\$ 338/@, R\$ 303/@ e R\$ 330/@ (preços brutos e a prazo), respectivamente.

De acordo com os analistas da IHS Markit, o mercado físico do boi gordo tem se mostrado resistente entre as pontas (indústrias e pecuaristas), fato que mantém a liquidez muito baixa, tornando o ambiente de negócios moroso em grande parte do País.

De modo geral, continua a consultoria, as indústrias seguem adaptando as suas escalas de abate em menores volumes diários, de modo a não alongar de sobremaneira as suas programações.

Essa posição de cautela dos frigoríficos reflete o baixo consumo de carne bovina no mercado doméstico, prejudicado pela queda de renda da população brasileira, afetada pelo avanço da inflação, entre outros problemas na economia do País.

“O consumo interno fragilizado segue pressionando a margem da indústria no mercado interno e, por outro lado, a oferta compassada de animais terminados nos últimos dias não deu espaço para alterações nas referências de preços da arroba do boi gordo”, observa a zootecnista Thayná Drugowick, analista de mercado da Scot Consultoria.

Do lado de dentro das porteiras, os pecuaristas seguem prejudicados pelo avanço nos custos de produção, impulsionados pelas valorizações da ração bovina, dos fertilizantes, entre outros insumos da pecuária.

Dessa maneira, ressaltam os analistas da IHS Markit, o ambiente truncado entre pecuaristas e indústria ganha mais força, limitando novos negócios e as também grandes oscilações nos valores da arroba, sejam elas positivas ou negativas.

Na avaliação da analista Thayná, da Scot, o dólar em patamares baixos frente ao real pode prejudicar o desempenho dos embarques brasileiros de carne bovina, abrindo espaço para ajustes negativos nas cotações do boi gordo.

Tal fato, continua a analista, pode acabar aliviando a disparidade de preços entre os bovinos direcionados ao mercado interno e os animais com padrão para exportação (abatidos mais jovens, geralmente com idade inferior a 30 meses).

No momento, o boi-China recebe prêmios de até R\$ 20/@ em São Paulo, em relação ao valor do boi comum.

Segundo a analista da Scot, em médio prazo, a expectativa é de melhora na oferta de animais, impulsionada pelo avanço da safra e, com isso, quedas pontuais não estão descartadas.

Além disso, continua Thayná, o mercado tem dado sinais de desinvestimento na cria, o que pode resultar em um maior volume de fêmeas indo ao gancho nos próximos meses.

No mercado atacadista, os preços da carne bovina continuam estáveis, refletindo a inconsistência da demanda doméstica, bem como a redução de oferta por parte dos frigoríficos.

Mercado firme sustentado por las ventas al exterior

Por: Denis Cardoso 16/02/2022 As plantas frigoríficas de São Paulo já pagam prêmios para o “boi-China” de até R\$ 20/@ em relação aos preços do boi comum, que é direcionado ao mercado doméstico, informam as consultorias do setor pecuário

Nesta quarta-feira, 16 de fevereiro, o mercado brasileiro do boi gordo segue consolidando o ambiente de negócios cadenciados entre pecuaristas e frigoríficos, informa a IHS Markit.

“Na data de hoje, os referenciais de preços no interior de São Paulo alcançam a marca de seis semanas sem grandes alterações, refletindo a morosidade nas relações comerciais”, destaca a consultoria.



Segundo dados apurados pela Scot Consultoria, nesta quarta-feira, a dificuldade de compra de bovinos terminados no mercado paulista resultou na alta de R\$ 1/@ para o boi gordo direcionado ao mercado interno, agora negociado a R\$ 338/@ (preço bruto e a prazo).

A cotação da novilha gorda, dirigida ao mercado externo registrou valorização de R\$ 3/@ nesta quarta-feira, e está apregoada em R\$ 330/@ (preço bruto e a prazo), informa a Scot.

Na avaliação dos analistas da IHS, os frigoríficos continuam, com pouco sucesso, exercendo pressão de baixa sobre os preços da arroba de animais direcionados ao mercado interno de carne bovina, que segue estagnado, devido ao enfraquecimento do poder de renda da população.

Paralelamente, algumas indústrias continuam pagando prêmios pela arroba de boiadas que apresentem padrões que atendam ao mercado internacional, sobretudo a China, que compra somente carne de bovinos abatidos mais jovens, geralmente com idade inferior a 30 meses.

Segundo informa a IHS Markit, as plantas frigoríficas de São Paulo pagam prêmios para o “boi-China” de até R\$ 20/@ em relação aos preços do boi comum.

Os dados levantados pela Scot Consultoria mostram que os negócios envolvendo boiada destinada para o mercado chinês giram hoje entre R\$340/@ e R\$ 345/@, nas regiões pecuárias de São Paulo.

Quedas pontuais na região Norte – Na data de hoje, a IHS Markit registrou recuos diários nos preços do boi gordo nas praças de Araguaína e Gurupi, ambas no Tocantins, recuando de R\$ 291/@ para R\$ 287/@ e de R\$ 290/@ para R\$ 286/@, respectivamente.

Nessas mesmas praças, os preços da vaca também registraram oscilações negativas, caindo de R\$ 281/@ para R\$ 278/@ e de R\$ 280/@ para R\$ 276/@.

Essas quedas devem-se ao aumento de oferta de animais e, conseqüentemente, nos avanços das escalas de abate das indústrias, já programadas para o início de março, segundo a IHS.

No mercado atacado de carne bovina, a demanda segue bastante fraca por parte das distribuidoras, informa a IHS.

O consumo doméstico de carne bovina, sobretudo de cortes nobres, deve permanecer em seus menores patamares, registrando apenas repiques de demanda pontual, observa a consultoria.

Buena demanda internacional y poca oferta inciden en el mercado

Por: Cepea/Esalq 17/02/2022

A manutenção dos elevados patamares de preços da arroba bovina se deve à demanda internacional aquecida e à baixa oferta de animais para abate, destacam os pesquisadores do Cepea

Desde o início deste ano, os valores da arroba do boi gordo vêm operando acima da casa dos R\$ 330 no estado de São Paulo.

Segundo pesquisadores do Cepea, a manutenção dos elevados patamares de preços da arroba bovina se deve à demanda internacional aquecida e à baixa oferta de animais para abate.

De fato, dados divulgados neste mês pelo IBGE (Instituto Brasileiro de Geografia e Estatística) indicam que o volume de animais abatido em 2021 foi o mais baixo em 17 anos.

Por outro lado, o IBGE também indica que a produtividade por animal (quantidade de carne produzida por cabeça) vem crescendo nos últimos anos, atingindo recorde em 2021, resultado de investimentos em tecnologia (nutrição, sanidade, manejo de pasto e genética) realizados pelo setor pecuário nacional.

Carne suína atinge competitividade recorde frente à bovina – Mesmo com os preços de todo o setor suínico apresentando forte reação nesta semana, a média da parcial deste mês da carne ainda está bem inferior à de janeiro e à de fevereiro/21.

Segundo pesquisadores do Cepea, essa diminuição no valor médio mensal da proteína suína, por sua vez, é mais intensa que as desvalorizações registradas para as concorrentes, a bovina e a de frango.

Esse contexto levou o preço da carne suína a registrar competitividade recorde frente à bovina e uma das maiores da série na comparação com a carne de frango.

Vale lembrar que a competitividade da carne suína é beneficiada quando o valor desta se distancia do da bovina e se aproxima do de frango.

Exportaciones en febrero firmes pese a la valorización del Real

Por: Denis Cardoso 15/02/2022

Analista da Agrifatto diz que a forte demanda da China explica o avanço dos embarques da proteína, que neste mês deve alcançar um recorde histórico para o período, superando a casa das 145 mil toneladas

As exportações brasileiras de carne bovina in natura totalizam 73,45 mil toneladas no acumulado dos nove dias úteis de fevereiro/22, um acréscimo de 63% sobre o volume registrado em igual período de 2021, de 44,98 mil toneladas, informa a Agrifatto, com base nos dados divulgados pela Secretaria de Comércio Exterior (Secex).

“Com os embarques acelerados, estimamos que o total em fevereiro/22 deva superar as 145 mil toneladas, o que representaria um novo recorde para o mês”, prevê Yago Travagini, analista da Agrifatto.



O recorde atual para o mês de fevereiro é de 2019, com 115,43 mil toneladas embarcadas no período. Em janeiro último, as exportações de carne bovina in natura também atingiram patamar histórico para o mês, fechando o período em 140,54 mil toneladas.

Considerando apenas a segunda semana deste mês, as exportações de carne bovina in natura ficaram em 33,79 mil toneladas (média diária de 6,76 mil toneladas), um recuo de 14,79% no comparativo com a primeira semana do mês.

No entanto, mesmo com a valorização do real sobre o dólar (hoje abaixo dos R\$ 5,20), o Brasil continua agressivo nas suas vendas de carne bovina ao mercado externo, destaca Travagini.

“Estamos tendo que subir o preço da tonelada de carne bovina brasileira em dólares, o que nos torna menos competitivos em comparação ao que tínhamos há algumas semanas atrás”, relata o analista, que acrescenta: “porém, o apetite internacional pela carne bovina brasileira não está reduzindo porque a China segue recompondo os seus estoques, para atender o visível avanço de sua demanda interna”.

Na avaliação de Travagini, os chineses continuarão comprando até recompor estoques, mesmo diante da valorização da carne brasileira, que “hoje apresenta preços em linha com as cotações da proteína exportada pelos principais concorrentes na América do Sul (Argentina e Uruguai).

O preço médio mensal da tonelada ficou em US\$ 5,50 mil na segunda semana de fevereiro/22, com valorização de 21% sobre a cotação registrada em igual período de 2021, de US\$ 4,55 mil/tonelada, de acordo com os dados da Secex.

“Estimamos também um preço recorde para carne bovina in natura para um mês de fevereiro”, diz Travagini, acrescentando que o valor do produto brasileiro ainda tem capacidade para evoluir mais, “já que em 2021 o valor médio rompeu a barreira do US\$ 5.800/toneladas”.

Consumo en Brasil es el tercero más elevado del mundo

15 de fevereiro de 2022

Com a alta recente da inflação, o preço da grande maioria dos produtos aumentou significativamente. A carne foi um dos itens que tiveram um dos maiores aumentos, só nos últimos 12 meses teve um aumento de 22%.

Porém, mesmo com os preços mais altos, o Brasil ainda é um dos principais consumidores de carne do mundo, em média são consumidos 24,6kg per capita num período de um ano.

É que revela um estudo realizado pela plataforma CupomValido.com.br com a OCDE sobre o consumo de carne nos principais países.

Foram considerados 2 tipos de proteínas: carne bovina e vitelo.

Ao considerar todos os países, o Brasil fica somente atrás dos Estados Unidos e Argentina, com 26,1kg/capita e 36,9/capita, respectivamente.

Mais riqueza, mais carne

Nos últimos 50 anos o consumo de carne aumentou mais de cinco vezes. E segundo a projeção realizada pelo estudo, a expectativa é que na média o consumo de carne aumente ano após ano, atingindo a marca de 43,7 kg/capita em 2030.

O aumento do consumo de carne está relacionado à melhora no padrão de vida e a urbanização da população – que faz com que haja uma mudança no estilo de dieta, e favoreça o aumento do consumo de proteína de origem animal.

O aumento populacional, também é uma razão para o aumento do consumo de carne – em 1960 havia 3 bilhões, e hoje 7,9 bilhões de pessoas no mundo.

No caso da Argentina, é um dos poucos países que o consumo tem caído significativamente ano após ano. Apesar de ainda ser o país que mais consome carne no mundo, em 1990 o país já chegou a consumir 40% a mais que os valores atuais. A crise econômica que o país tem enfrentado nos últimos anos é um dos fatores pela diminuição do consumo.

Na ponta oposta, a Índia é o país que menos consome carne no mundo – apenas 0,5 kg/capita no ano. Neste caso, a tradição e a religião do país são algumas das explicações pelo baixo consumo de carne.

Abiec y ApexBrasil promoción en mercados árabes

Por: Portal DBO 15/02/2022

Durante a Gulfood, em Dubai, a Abiec pretende apresentar diversos dados e informações sobre a sustentabilidade e eficiência do sistema produtivo nacional

Visando novas oportunidades de negócios e expansão de um mercado estratégico para a carne brasileira, a Associação Brasileira das Indústrias Exportadoras de Carnes (Abiec) participa novamente da Gulfood, uma das principais feiras de alimento do mundo.

O evento de 2022 será realizado em Dubai, nos Emirados Árabes, entre os dias 13 e 17 de fevereiro, no moderno centro de convenções e reuniões do Dubai World Center.



A ação é realizada em conjunto com a Agência Brasileira de Promoção de Exportações e Investimentos (ApexBrasil), parceira da Abiec no projeto Brazilian Beef e contará com a presença de 22 empresas associadas – Agra, Barra Mansa, Boi Brasil, Boibras, Cooperfrigu, Frigol, Frigosul, Frigon, Frivasa, Iguatemi, JBS, Marfrig, Masterboi, Mercúrio, Minerva, Naturafriq, Prima Foods, Plena, Prisa, Rio Maria, Supremo e Zanchetta.

Com a missão de promover a carne brasileira e divulgar ações de inovação e sustentabilidade da pecuária local, a Abiec irá realizar o tradicional churrasco para os visitantes, de olho no mercado árabe.

Em 2021 as exportações brasileiras para os países de maioria mulçumana somaram 344,1 mil toneladas. Em faturamento, as vendas foram de US\$ 1,4 bilhão. Esse mercado respondeu por 19% do volume exportado pelo Brasil em 2021 e 16% da receita total.

No estande de 168 metros quadrados e um mezanino 199,5 metros quadrados, a Abiec pretende apresentar diversos dados e informações sobre a sustentabilidade e eficiência do sistema produtivo da carne brasileira.

“É uma ótima oportunidade de reforçar para o mercado internacional que o produz uma carne que é segura do ponto de vista sanitário, produtiva do ponto de vista econômico e amplamente sustentável do ponto de vista ambiental”, analisa o presidente da Abiec, Antônio Jorge Camardelli.

Iniciado em 2001, o projeto setorial Brazilian Beef, uma parceria entre Apex-Brasil e Abiec, tem o objetivo de fortalecer a imagem da carne bovina brasileira, melhorando a percepção de sua qualidade nos países importadores e ampliando, assim, a participação brasileira no mercado mundial de carnes.

Em 18 anos, já foram firmados nove projetos, com investimentos de mais de R\$ 60 milhões e crescimento das exportações em mais de 500%.

Deforestación en el Amazonas

11 February 2022

High prices for beef, soy and other commodities are boosting demand for cheap land

Brazil recorded the most deforestation ever in the Amazon rainforest for the month of January, according to government data on Friday, as destruction continues to worsen despite the government's recent pledges to bring it under control, reported Reuters.

Deforestation in Brazil's Amazon totalled 430 square kilometers (166 square miles) last month, 5 times higher than January 2021, according to preliminary satellite data from government space research agency Inpe.

That's the highest since the current data series began in 2015/2016, equal to an area more than seven times the size of Manhattan.

Environmental researchers said they were not surprised to see destruction still rising, given right-wing President Jair Bolsonaro's weakening of environmental protections.

With little fear of punishment, speculators are increasingly clearing forest for ranches in illegal land grabs, said Britaldo Soares Filho, an environmental modeling researcher at the Federal University of Minas Gerais. High prices for beef, soy and other commodities are also boosting the demand for cheap land.

"People might be surprised that it didn't increase even more," Soares Filho said.

"There is a race to deforest the Amazon."

Bolsonaro's office and the Environment Ministry did not immediately respond to request for comment on the deforestation figures or the government's environmental policies.

The preservation of the Amazon, the world's largest rainforest, is vital to curbing climate change because of the vast amount of greenhouse gas absorbed in its trees.

Bolsonaro has long argued for more commercial farming and mining in the Amazon to help lift the region out of poverty.

Facing international pressure from the United States and Europe, Brazil last year pledged to end illegal deforestation by 2028 and signed a global pact to stop all forest destruction by 2030.

Soon after those commitments, Inpe released data showing that deforestation in 2021 in the Brazilian Amazon hit the highest point in 15 years. The preliminary data for January shows the destruction is continuing to mount.

Ana Karine Pereira, a political scientist at the University of Brasilia, said while Bolsonaro and his government changed their tone last year, their policies remain the same.

Soares Filho and Pereira said deforestation will only stop rising if Bolsonaro loses the presidential election in October.

"Changing the political profile of the president and federal government leadership is crucial in this moment to see a break in this trend of high levels of deforestation," Pereira said.

High deforestation is unusual in the current rainy season, when the rainforest is harder for loggers to access. The January data showed that new clearing was still less than half of what is common during the peak months from June to September.



A deforestation monitoring researcher at Inpe told Reuters the surge last month could be partially due to higher levels of cloud cover in November and December than the previous year. Those clouds might have hidden destruction from satellites in those months that was subsequently revealed in January, said the person, who was not authorized to speak publicly. Still, cloud cover remained relatively high in January, declining to 43% from 54% in December.

URUGUAY

Precios extraordinarios del gordo hacen aparecer más oferta

por Javier Lyonnet febrero 16, 2022

Los precios extraordinarios que alcanzó el gordo hicieron aparecer un poco más de oferta de ganado de campo y las entradas se acortaron.

“Los valores atraeron a quien no tenía pensado vender en este momento, apurando un poquito la extracción”, afirmó el consignatario Joaquín Abelenda.

Más allá de los lotes de novillos de excepción que alcanzan los US\$ 5 por kilo en cuarta balanza, hoy los novillos buenos se venden a entre US\$ 4,80 y US\$ 4,90, dejando atrás el ya altísimo promedio de la grilla de ACG que marcaba US\$ 4,73 para todos los novillos.

En la vaca gorda es más amplio el espectro, de US\$ 4,60 a US\$ 4,65 con algún negocio en el entorno de US\$ 4,70 para los animales de punta que dan más de 240 kilos, la vaca buena de US\$ 4,50 a US\$ 4,60, y US\$ 4,30 a US\$ 4,35 los ganados generales.

Con la faena más cerca de las 55.000 que de las 50.000 cabezas, sigue existiendo gran demanda por todos los ganados y el interés principal es acceder a ganados de buena terminación y pesados, que son los que escasean y pusieron la vara en US\$ 5 dólares.

Ya se venden novillos de pasto a US\$ 5 por kilo de carcasa

por Cecilia Ferreira febrero 14, 2022

Los precios se logran “negocio a negocio”. Esa es la frase más repetida en los últimos días en un mercado ganadero en llamas. Se superó el máximo histórico alcanzado en octubre del año pasado de US\$ 4,74 y hay negocios puntuales que ya alcanzaron los US\$ 5 para lotes voluminosos de novillos especiales.

El pedido de la industria es “no dejar pasar ningún ganado”, en un contexto de poca oferta y mercado muy demandado. El productor en suba, no vende. Asimismo, el mercado está ágil, con mayor participación en la faena de ganado de corral.

Para los mejores novillos, “por cantidad, si tenés dos o tres camiones, tenés los US\$ 5 sin problema”, dijo a Conexión Agropecuaria Pablo Sánchez, de escritorio Walter Hugo Abelenda.

Otro operador contó que hizo un negocio excepcional de 120 novillos especiales y pesados por ese valor. En los últimos días se han concretado negocios claramente arriba de US\$ 4,90. El novillo gordo de campo logra ese precio. Y Para el abasto entre US\$ 4,70 – US\$ 4,80.

Las vacas bien pesada completa de carcasa pesada cotiza entre US\$ 4,50 y US\$ 4,55. Por vaquillonas abasto US\$ 4,60 hasta US\$ 4,65. “Hoy hay mercado para todo”, dijo Sánchez. La vaca holando gorda buena va entre US\$ 4,15-4,20.

La disparada de precios vino después de las lluvias de mediados de enero. El año arrancó con los mejores novillos sobre US\$ 4,40. Ganó más de 50 centavos en poco más de un mes.

“Los US\$ 5, para lo que son los precios de exportación, están fuera de equilibrio para la industria”, dijo al programa Tiempo de Cambio el broker Juan Lema. Los US\$ 4 como piso, si no pasa nada extraño en el mercado, debería ser un precio razonable como piso para este año, consideró.

Las faenas en el eje de las 50.000 cabezas, con una industria operando a todo trapo y con expectativas de que en 2022 pueda superarse el récord de faena del año pasado, dan una señal de confianza a la producción y eso se refleja en el salto de la reposición.

Los mercados externos traccionan. El mundo tiene apetito de carne vacuna. En China, post Año Nuevo lunar, se mantuvo una demanda firme y negocios fluidos, con alguna suba menor de precios (US\$ 100/150 en algunos cortes). Europa y EEUU siguen firmes.

Feedloteros miran de reajo el precio de la reposición

16/02/2022

Hay mucha disparidad de precios y diferentes requerimientos entre las industrias, en donde se logran negocios de US\$ 5,20 y otros que están por debajo

Para los feedloteros el 2022 arrancó con un “panorama interesante” en los valores del ganado gordo y su demanda; incertidumbre con el valor de la comida; una proteína que, si la atamos a la soja, viene en incremento y mirando de reajo los valores de la reposición.



Daniel Miranda, presidente de la Mesa de Feedlot, informó que hay varios precios para lo que se está cargando ahora. Aseguró que hay mucha disparidad de precios y diferentes requerimientos entre las industrias, en donde se logran negocios de US\$ 5,20 y otros que están por debajo.

En diálogo con Valor Agregado de radio Carve, Miranda aseguró que la reposición está un 25% por arriba del valor del año pasado y eso hace que se le preste mucha atención al costo. Por otro lado, está el valor del gordo que aparenta poder hacer negocios por algunos centavos por arriba de hoy.

Gracias a la buena demanda, la perspectiva es lograr, al menos, lo de 2021 que cerró con 350 mil cabezas. Sin embargo, el aumento de precios de la reposición muestra una escasez y mayor dificultad de conseguir ganado para encerrarlo.

“No sabemos si vamos a conseguir de forma uniforme la reposición necesaria”, explicó.

Por otro lado, Miranda indicó que el mercado opera de forma similar para lo que no es cuota y cuota. Sin embargo, la cuota pre pandemia era “interesante” porque se podía fijar precio futuro. La pandemia trajo consigo incertidumbre y eso hizo que la fijación de precios cambiara. Hoy se trabaja en porcentajes o por “x” cantidad de centavos al momento de embarcar.

“Ahora el productor tiene una forma de fijar precio atractiva, fija “x” centavos por encima de lo que va a estar el precio más adelante y, en un mercado al alza, podría recoger algún más. Hay algunas industrias que fijan techo y piso para tener certezas. Ese es el tipo de negocio que se está armando”, comentó.

Carniceros muestran preocupación por ajuste de valores

Pablo Antúnez Por Pablo Antúnez, 18/02/2022

La carne con hueso subió otros \$ 5 por kilo, incluida la media res que los frigoríficos entregan en las carnicerías y no se descarta un posible ajuste al alza de las pulpas desosadas que se importan desde Brasil que se destinan al mercado interno.

El ajuste se produjo ayer y preocupa a los carniceros, porque los precios históricos que está logrando el ganado gordo, en momentos en que las pasturas se recuperaron y el productor aprovecha el buen momento poniéndole más kilos a sus haciendas, están repercutiendo mucho en el mercado interno.

“Se viene dando una suba de precios histórica para el ganado gordo y eso lleva a que los precios de la carne bovina en el mercado interno sigan subiendo. No vemos que pueda parar la suba de precios en el corto plazo”, aseguró a El País Alfonso Fontenla, presidente de la Unión Vendedores de Carne (UVC).

A principios de mes ya hubo una suba del precio de la carne en el mercado interno que había llegado a \$ 20 por kilo, dependiendo de los cortes, pero los abastecedores aseguraban que ese incremento no reflejaba por completo la suba del precio del ganado gordo, principal materia prima de la industria frigorífica.

Hay una demanda mundial de carnes que es lo que está llevando a que los precios del ganado sigan subiendo. En Uruguay los negocios a US\$ 5,05 y US\$ 5,07 son corrientes. Incluso por animales especiales, aquellos con una terminación excelente, se está pidiendo entre US\$ 5,12 y US\$ 5,15 por kilo.

Por otro lado, en Brasil no hay ganado gordo debido a la sequía y el dólar está a 5,15 reales, pero también la industria enfrenta una demanda internacional fortalecida. La prioridad continúa siendo China que no bajó los precios tras el Año Nuevo Lunar, como lo hacía años atrás, sino que los mantuvo, con una demanda de carne muy firme. Por eso las pulpas importadas sin hueso, que llegan envasadas al vacío y se vuelcan al abasto, será difícil que bajen el precio y puedan volver a marcar en el abasto aquella diferencia de entre \$ 20 y \$ 30 por kilo que tuvieron en años anteriores frente a las uruguayas, ayudando a amortiguar los incrementos de la carne bovina producida localmente.

“No se ve tanta carne bovina importada en el abasto. Los importadores están muy cautos con las importaciones porque a ellos también le siguen subiendo los precios”, reconoció el presidente de la Unión Vendedores de Carne.

Desde comienzos del 2022, la gremial tiene dificultades para acordar con la industria frigorífica la promoción de algún corte específico, como lo vino haciendo en los últimos dos años, porque la industria no quiere comprometerse y luego no poder cumplir.

Esos acuerdos le permitía a la UVC vender cortes al 40% de su valor real, pero la situación en el mercado internacional de carnes era otra, con un consumo castigado por la pandemia de Covid-19, que reducía la movilidad de los consumidores en los principales mercados de las carnes uruguayas. A su vez, la carne aviar y suina no se han quedado sin modificar los precios debido a la suba de los granos y otros insumos que pegan fuerte en la producción.

Faena de novillos de corral dio un salto y más que duplica a la de un año atrás

por Cecilia Ferreirafebrero 14, 2022

La faena de novillos de corral escaló en el comienzo del año y dejó lejos atrás el volumen registrado a principios de 2021.



Entre el 1 y el 29 de enero se faenaron 14.673 novillos provenientes de encierros frente a 7.003 en mismo periodo del año pasado, un salto interanual de 109%, de acuerdo a datos a los que accedió Conexión Agropecuaria.

Un factor de incidencia fue el adelanto de la faena con destino a cuota 481, que comenzó en la última semana de enero.

“La demanda existe (...) 450.000 cabezas parece un número razonable” para la salida de ganado de corral este año, dijo a principios de febrero el gerente de proyectos ganaderos de Marfrig, Valentín Aznárez, entrevistado por el programa Tiempo de Cambio.

Se espera una muy buena zafra de terneros y un índice flaco/gordo a 1.10

por Javier Lyonnet febrero 16, 2022

La próxima zafra de terneros va a ser muy buena, con negocios cortos, y una apreciación respecto al año anterior, anticipó José Aicardi, director de Mega Agro, en Tiempo de Cambio de radio Rural.

“La incógnita siempre es el clima, pero si en el mediano plazo el mercado sigue con las tendencias actuales vemos que la zafra va a ser muy positiva, con una demanda interna muy buena”, dijo Aicardi.

Señaló que se anticipa una preferencia por los negocios cortos, porque es muy diferente la relación entre insumo y producto respecto al año pasado, considerando los costos para hacer un verdeo o una pradera.

La tendencia de recuperación de precios para los terneros y novillos chicos comenzó con los remates por pantalla de enero y febrero, con precios récord y colocaciones totales. La puja por los lotes llevó al ternero a un récord de US\$ 2,74 en Plaza Rural, y puso un nuevo techo a los valores de todas las categorías de novillos y la vaca de invernada.

La relación flaco/gordo mostró cierta recuperación y en las últimas semanas estuvo entre 1.05 y 1.10, un indicador que no se alcanzaba desde mediados del año 2021, y que llegó a estar en 0.95 en octubre 2021 y 0.96 en enero 2022, cuando la relación histórica es de alrededor de 1.20.

“Ha recuperado terreno pero estamos en valores históricos del ganado gordo, no sé si la recuperación para el ternero va a ser tan estable con estos niveles de valores del gordo; una relación de 1.10 sigue siendo muy buena para retener y todavía no entramos en la zafra; si el gordo sigue firme va a ser bueno”, consideró el director de Mega Agro.

También consideró que la ganadería está en condiciones de competir por la tierra con sectores del agro, por su carácter de refugio, si bien “todos los sectores del agro están muy bien”.

PARAGUAY

Más oferta en el mercado, competencia por hacienda gorda y precios al alza

15/02/2022 GANADERÍA

El mercado del ganado gordo para la exportación de carne continúa demandado y con precios alcistas, en un momento que la oferta de animales empieza a ser levemente mayor en la medida que los establecimientos están terminando la vacunación. Un industrial dijo a Valor Agro que la competencia entre los frigoríficos por hacienda “sigue siendo importante”, con entradas a las plantas que están marcadas para un máximo de 7 días. La fuente informó que están comprando machos Chile a US\$ 3,85 por kilo carcasa. Además están ofreciendo US\$ 3,90 por machos trazados, US\$ 3,80 por vaquillas y US\$ 3,65 por vacas. Por otro lado, un operador del mercado confirmó las referencias, pero señaló que también “se consiguen valores superiores por hacienda de campo y confinamiento, siempre y cuando sea en volumen y con posibilidad de rápida entrega”.

Ferias de consumo con “alta demanda”, “ventas ágiles” y “precios muy firmes”

17/02/2022 El mercado de consumo experimenta una semana con menos entrada de animales a los recintos feriales de Asunción, pero con “alta demanda” de compradores, “ventas ágiles” y “precios muy firmes”, explicó a Valor Agro Mauro Fernández, director de MF Negocios Rurales. Señaló que “a partir de la segunda y tercera semana de febrero el volumen de ingreso de hacienda bajó a raíz de los altos precios que están pagando los frigoríficos, entre US\$ 3,85 a US\$ 3,90 por kilo carcasa, dado que los vendedores prefieren no especular en las ferias y asegurar en las plantas”. Además, dijo que la falta de oferta también se explica por el periodo de vacunación contra la fiebre aftosa. Con respecto a los precios de venta, Mauro Fernández comentó que en las distintas ferias las vacas se están negociando entre 11.500 y 12.500 guaraníes por kilo vivo, mientras que los machos entre 13.000 y 14.000 guaraníes. Finalmente, el operador de mercados dijo que “está ingresando mucha oferta variada de animales, especialmente productos livianos que no califican en la industria y se castiga el precio”.



ESTADOS UNIDOS

Exportaciones de carnes bovinas superaron récord anterior

14 February 2022 Beef exports surpassed \$10 billion for the first time

US beef exports greatly exceeded previous volume and value records in 2021, surpassing \$10 billion for the first time, according to year-end data released by USDA and compiled by the US Meat Export Federation (USMEF).

December beef exports totaled 121,429 metric tons (mt), up 1% from a year ago, while value climbed 33% to \$991.8 million – the third largest month on record. These results pushed 2021 volume to 1.44 million mt, up 15% from a year ago and 7% above the previous record set in 2018. Export value soared to \$10.58 billion, up 38% from 2020 and shattering the previous record (also from 2018) by 27%.

“The beef export results are truly remarkable, especially considering the COVID-related obstacles in the global foodservice sector and all the supply-side and logistical challenges faced by the US industry,” said USMEF President and CEO Dan Halstrom. “Obviously our large Asian markets accounted for much of the growth, but it really takes broad-based global demand to reach these impressive levels. So this success story is not just about Korea, Japan and China – but also a strong performance in Taiwan, excellent growth in Central and South America and a rebound in Mexico and Southeast Asia.”

Beef exports to Korea, Japan and China/Hong Kong each top \$2 billion

Japan remained the leading volume destination for US beef exports in 2021 at 320,737 mt, up 5% from 2020 and the second largest of the post-BSE era. Export value climbed 22% to a record \$2.376 billion, but finished a close second to South Korea. The US industry remains concerned about Japan’s import safeguard, which resulted in a higher tariff rate being imposed on US beef in late March and early April of last year. Without an adjustment to the safeguard threshold, a similar scenario is possible in 2022 and highly likely in years to come.

Beef exports to Korea totaled 280,143 mt, up 14% and eclipsing the previous record set in 2019. Export value soared 38% to \$2.382 billion – not only a record for Korea, but the highest value achieved in any destination. Korea’s surging demand for US beef has been driven largely by growth in the retail sector, both in traditional retail venues and e-commerce platforms. US beef also continues to benefit from the phase-out of Korea’s import duties as the tariff rate under the Korea-U.S. Free Trade Agreement (KORUS) dropped to 10.7% for 2022, down from 40% prior to implementation of the FTA.

Capitalizing on the market access gains included in the US-China Phase One Economic and Trade Agreement, beef exports to China/Hong Kong also broke the \$2 billion mark at \$2.09 billion, up 114% from 2020, while volume climbed 87% to 240,827 mt. Direct exports to China, which started to gain significant traction in mid-2020, jumped 346% in volume (190,803 mt) and 413% in value (\$1.59 billion). US beef accounted for 6% of China’s total imports on a volume basis and 11% by value. Grain-fed beef now accounts for an estimated 11% of China’s imports with the U.S. as the largest supplier, providing approximately 68% of China’s grain-fed imports.

Other 2021 highlights for U.S. beef exports include:

Though beef exports to Taiwan dipped slightly in volume (63,095 mt, down 1% from 2020), export value climbed to \$668 million – up 21% from 2020 and breaking the previous (2019) record by more than \$100 million. The U.S. continues to dominate Taiwan’s chilled beef imports, capturing 81% market share in 2021.

Beef exports to Mexico partially rebounded in 2021, through shipments remained below pre-COVID levels. Exports increased 4% from a year ago to 200,628 mt and climbed 24% in value to \$1.06 billion. Mexico is the largest volume destination for beef variety meat exports, which increased 9% to 97,642 mt and jumped 16% in value to \$264.1 million.

Fueled by excellent growth in a range of markets, beef exports to Central America set new records for both volume (20,991 mt, up 52% from a year ago) and value (\$137.3 million, up 81%). US beef has a growing presence in the region’s rapidly expanding retail sector and has capitalized on the gradual easing of COVID-related foodservice restrictions. Beef exports to Central America have also benefited greatly from the phase-out of import duties through the Central America-Dominican Republic Free Trade Agreement (CAFTA-DR).

Beef exports to Colombia surged in 2021, more than doubling year-over-year in both volume (9,359 mt, up 106%) and value (\$40.7 million, up 105%) and easily surpassing 2019 records. With shipments also trending higher to Chile and Peru, exports to South America reached 31,802 mt (up 32%) valued at \$177.6 million (up 82%). U.S. beef also faces zero duties in these FTA partner countries.

Led by a sharp rebound in the Dominican Republic, beef exports to the Caribbean increased 31% from a year ago to 25,098 mt, while value climbed 69% to \$191.5 million. Exports also increased year-over-year to Jamaica and the Bahamas.



Exports to Indonesia set new records in 2021, reaching 27,010 mt (up 42%) valued at \$118.4 million (up 65%). Indonesia is a key destination for beef variety meat, which accounted for 45% of the total export volume.

Rebounding from a down year in 2020, global exports of US beef variety meat increased 8% to 300,297 mt and set a new value record, topping \$1 billion for the first time (\$1.09 billion, up 24%).

Beef export value per head of fed slaughter equated to a record \$407.22 in 2021, up 35% from a year ago. Exports accounted for 15% of total beef production and 12.8% for muscle cuts only, up significantly from the respective 2020 ratios of 13.5% and 11.3%.

Acuerdos internacionales favorecieron este incremento

By PAIGE CARLSON February 15, 2022 U.S. red meat exports in 2021 were valued at \$18.7 billion, the highest in history, according to USMEF report.

U.S. red meat exports in 2021 were valued at \$18.7 billion, the highest in history. Multiple trade agreements aided in reaching those unprecedented levels. U.S. Meat Export Federation (USMEF) Economist Erin Borrer weighed in on the recent report during the Weekly USMEF Audio Report.

BEEF

The reduction of tariff rates from 40% to 10.7% in the Korea-U.S. Free Trade Agreement (KORUS) boosted U.S. beef exports in 2021. Korea's consumption per capita increased 40% compared to 2012, Borrer said.

The largest tonnage of growth for U.S. beef demand spurred from the U.S. and China Phase One Economic and Trade Agreement. This increased competition resulted in an elevated value of the product.

The U.S.-Japan Trade Agreement, though tariffs remain relatively high, also helped level the market playing field for U.S. beef.

In addition, beef exports saw tremendous growth into duty-free free trade agreement (FTA) partners such as Central America, the Dominican Republic, Colombia, Peru and Chile.

PORK

"Duty-free access into these Western Hemisphere markets was really critical in moving such a huge increase in volume at higher prices," Borrer said.

U.S. pork saw another record year of exports to Mexico, capitalizing on the U.S.-Mexico-Canada Agreement's duty-free access.

Central America, specifically Colombia, rebounded in pork export demand, resulting in a 41% increase, despite pork cuts' increased prices.

The U.S. rose as the top supplier for chilled pork in Korea and has further growth potential as tariffs have been eliminated, she added.

As seen in beef, the U.S.-Japan Trade Agreement boosted the position of U.S. pork in the highly competitive market. This agreement has also been essential in lowering tariffs of pork, formerly steady at 20% and set to decline to zero by 2025.

USDA redujo la proyección para la producción de carnes bovinas de 2022

USDA 14 February 2022 Fed-cattle prices raised, milk production forecast lowered

According to the US Department of Agriculture's (USDA) most recent World Agricultural Supply and Demand Estimates (WASDE) report, estimates of 2021 red meat, poultry, and egg production have been adjusted to reflect December production data.

The 2022 forecast for total red meat and poultry production is lowered slightly from last month, as higher forecast beef production is more than offset by lower pork, broiler, and turkey production. The beef production forecast is raised from the previous month as larger expected placements during first-half 2022 are marketed in the latter half of the year. However, the increase in fed cattle slaughter is partly offset by lower non-fed cattle slaughter. Pork production is lowered on a slower pace of slaughter. Broiler and turkey production forecasts are reduced on current hatchery data and higher expected feed costs. The egg production forecast is reduced from last month as higher feed costs are expected to temper production growth.

Livestock, poultry, and egg trade estimates for 2021 are adjusted to reflect December trade data. For 2022, the beef import forecast is raised on strong demand for processing beef; the export forecast is unchanged.

Pork exports are reduced on continued weakness in demand from China and increased competition in other markets. The broiler export forecast is lowered on weaker demand from a number of Asian markets. The turkey export forecast is reduced from last month on slower demand.

Fed-cattle prices are raised for the second half of the year on firm packer demand. Hog, broiler, turkey, and egg price forecasts are raised on current prices and slower growth of production expected during the year. Egg prices are also raised on current prices and slower production growth.



The 2021 milk production, trade, and stock estimates are adjusted to reflect December data. For 2022, the milk production forecast is lowered from last month, on lower dairy cow numbers. The Cattle report estimated the dairy cow inventory on 1 January almost one percent below 2021, and the number of heifers held for dairy cow replacement was 3% lower. The 2022 fat basis import forecast is raised on higher expected imports of butter, while exports are reduced on lower expected shipments of butter and cheese. On a skim-solids basis, the import forecast is raised, reflecting higher imports of milk proteins and several other dairy-containing products while the export forecast is reduced on weaker expected sales of whey products and skim milk powder.

Annual product price forecasts for cheese, butter, nonfat dry milk, and whey are raised from the previous month on current prices, lower expected milk production, and tightening stocks. With higher product prices, both the Class III and the Class IV prices are raised. The 2022 all milk price forecast is increased to \$23.55 per cwt.

Ciclo Ganadero: el impacto de la Sequía

By DERRELL PEEL - OKLAHOMA STATE UNIVERSITY February 14, 2022

The list of factors that will shape cattle markets in 2022 is lengthy and leads to multiple scenarios for cattle and beef industry outcomes for the coming year. The recently released USDA Cattle report confirms the cattle inventory situation at the beginning of the year and provides some indications of what the cattle industry would like to do in the coming year...or at least what might be possible in the coming year.

Beyond cattle inventories, current drought measurements and data on hay stocks indicate the general forage situation in various regions and high costs for feed and other inputs must be balanced against higher and rising cattle prices.

Drought will be the principal determinant of the general cattle industry scenario in 2022. The current Climate Prediction Center drought outlook suggests that drought may persist in regions of the west and northern plains that have been in drought (with some improvement in the Pacific Northwest), and where drought has recently developed in southern plains and perhaps expand even further into the central plains region.

Drought has impacted some regions since 2020. Widespread drought in 2022 could result in much more pronounced cow herd liquidation and relocation than previously and the scenario will be all about what we have to do. There will be little flexibility in regions that were in drought in 2020 and 2021. For example, December 1 hay stocks in the four-state region of Montana, Wyoming, North and South Dakota were down 40.2 percent year over year. By April or May this predominantly spring-born calving region could be faced with significant additional liquidation of cows or cow-calf pairs this year on top of the 8.0 percent herd liquidation in this region since 2020. This region represents 15.1 percent of the national beef cow herd. The four-state region of Colorado, New Mexico, Arizona and Utah has suffered in drought conditions since 2020 and has seen an 11.6 percent beef cow herd liquidation in the past two years. Persistent drought will result in additional liquidation this year. This region represents 5.3 percent of the total beef cow herd.

Drought has expanded sharply in Texas and Oklahoma over the winter; a region that has seen just 1.1 percent herd liquidation since 2020. Much of that was general cyclical liquidation rather than drought induced. December 1 hay stocks in these two states were up 18.7 percent year over year.

The southern plains regions should emerge from winter with a bit more flexibility and, with more fall calving, might not face critical herd liquidation and destocking decisions as quickly as some other regions. Nevertheless, cow culling could accelerate sharply in the region by mid-summer. These two states represent 21.9 percent of the total beef cow herd.

The central plains region including Kansas and Nebraska has been marginally impacted by drought the past two years with the beef cow herd in these two states down 3.3 percent since 2020. The December 1 hay stocks in the region were up 4.9 percent year over year. Should drought develop significantly in the central plains, additional significant cow herd liquidation would follow by summer. These two states represent 10.8 percent of the beef cow herd.

Drought in all of the above regions could impact over 53 percent of the total beef cow herd... roughly 16 million cows. Significant drought in 2022 will have more noticeable impacts on cow markets, will change the timing of feeder cattle and ultimately feedlot production, and will have more implications for the industry in subsequent years. There is potential for the drought to push cattle inventories significantly lower than planned and set up a market reaction similar to 2014-2015 in the next couple of years.

USDA instrumenta programa de ayuda a partir de marzo

USDA is expected to begin providing the initial phase of \$750 million in livestock disaster assistance payments by March, Sen. John Hoeven (R-N.D.) announced. According to USDA, Phase 1 will: Use existing Livestock Forage Program (LFP) data. Require no or minimal additional paperwork from producers. Distribute at least half of the \$750 million by the end of March.



"Our livestock producers have been hit by drought and other natural disasters over the last year, which has really taken a toll on their operations," said Hoeven. "That's why we worked to set-aside \$750 million in disaster assistance specifically to help our ranchers weather the challenges of 2021. We've been pressing USDA to get these funds out as soon as possible, and USDA now expects this aid to begin flowing to producers by March. This is good news, and we'll continue working to ensure the assistance is provided as effectively and efficiently as possible."

More aid ahead. The \$750 million for livestock producers is part of \$10 billion in disaster aid, with an additional \$9.25 billion in disaster funding to extend WHIP+ to aid producers who suffered losses due to droughts, hurricanes, wildfires, floods and other qualifying disasters in calendar years 2020 and 2021. USDA announced it will provide that assistance in a two-phase approach as well, beginning this spring.

NCBA testimonió sobre producción sustentable en Congreso

By INDUSTRY PRESS RELEASE February 11, 2022

NCBA member and rancher Kim Brackett testified before the U.S. House Agriculture Subcommittee on Livestock and Foreign Agriculture on the cattle industry's leadership in sustainability and conservation practices on Feb. 3, 2022.

"Cattle producers are America's original conservationists, and we work hard every day to ensure that we can pass our operations on to the next generation," Brackett said. "Our family, along with cattlemen and women from across the country, are committed to remaining environmentally, economically and socially sustainable for generations to come."

Specifically, Brackett pointed to the biodiversity benefits that come from ranchers' land management practices, wildfire prevention and upcycling of nutrients provided by cattle grazing, and cattle producers' continued focus on being good stewards of the land. Brackett's testimony follows the August 2021 release of the producer-developed cattle industry sustainability goals. The goals include:

Demonstrate the climate neutrality of U.S. cattle production by 2040.

Create and enhance opportunities that increase producer profitability and economic sustainability by 2025.

Enhance trust in cattle producers as responsible stewards of their animals and resources by expanding educational opportunities in animal care and handling programs to further improve animal well-being.

Continuously improve the cattle industry's workforce safety and well-being.

Brackett is a rancher based in southern Idaho. Currently, she is the chair of the National Beef Quality Assurance Advisory Board and president-elect of the Idaho Cattlemen's Association. Previously, she served as chair of the Cattle Industry's 2025 Long Range Plan Task Force.

Informe oficial reporta escaso cumplimiento de CHINA en la Primera Fase de Acuerdo Bilateral

16 February 2022 China has failed to make good on its Phase 1 commitments

The United States needs to pursue new strategies and update its domestic trade tools to deal with China's "state-led, non-market policies and practices", the US Trade Representative's (USTR) office said on Wednesday in a new assessment report.

USTR said in its annual report on China's compliance with World Trade Organization rules that the "Phase 1" trade agreement signed by the Trump administration two years ago failed to address fundamental US concerns with China's industrial policies and supporting policies, including "massive financial resources."

It said such support, which includes favourable regulatory support to Chinese industry and limited market access for imported goods and services, is often aimed at specific targets for capacity, production and market share.

The report, issued annually to Congress since China joined the WTO in 2001, is the first issued under US Trade Representative Katherine Tai and reflects her China trade strategy, reported Reuters.

It follows final 2021 trade data showing Beijing's failure to meet promised two-year targets for purchasing US goods, services and energy under the Phase 1 deal, which eased a tariff war between the world's two largest economies.

"China has not moved to embrace the market-oriented principles on which the WTO and its rules are based, despite the representations that it made when it joined 20 years ago," Tai said in a statement.

"China has instead retained and expanded its state-led, non-market approach to the economy and trade."

The USTR report said the United States needs to update its domestic trade law tools to reflect the current realities of China's trade policies "to secure a more level playing field for US workers and businesses."

A sweeping China competition bill passed by the US House of Representatives and under consideration in the Senate would expand the use of anti-subsidy tariffs to target cross-border subsidies for Chinese companies that invest in offshore production to skirt US duties.

"It is also apparent that existing trade tools need to be strengthened, and new trade tools need to be forged," USTR said in the report. "China pursues unfair policies and practices that were not contemplated



when many of the US trade statutes were drafted decades ago, and we are therefore exploring ways in which to update our trade tools to counter them."

The report said the United States was still pursuing bilateral engagement "to hold China accountable for its existing commitments", including under the Phase 1 agreement.

It also said China had failed to make good on other Phase 1 commitments. These include regulatory approvals for American agricultural biotechnology and a risk assessment on the use of ractopamine, a feed additive used to produce leaner pork and beef in the United States.

AUSTRALIA

Exportaciones de hacienda en pie siguen en tendencia descendente

James Nason, 15/02/2022

Cattle shipments to Australia's largest export markets in January remained well below five-year-averages for the month, according to Department of Agriculture data released this week.

Ganado ExpressA total of 40,648 cattle were shipped in January, 48 percent below the five-year-average for the month.

In a rare occurrence China became the largest individual export destination for Australian cattle for the month, importing 17,879 cattle, primarily dairy breeders, from the Victorian port of Portland.

Feeder and slaughter cattle exports remained at subdued levels compared to previous years.

After exports to Indonesia rose in December to meet a shipping deadline for the Ramadan/Lebaran period commencing early April 2022, shipments to the major market fell to just 14,745 head in January, 61 percent below the five-year January average.

That was the lowest monthly volume of cattle shipments from Australia to Indonesia for more than five years, going back to a low of 3734 cattle in September 2016. That sudden slump resulted from the introduction of a new mandatory breeding cattle import policy imposed by the Indonesian Government and the associated delays to the issue of import permits.

Exports to Vietnam totalled just 2129 head in January, 91pc below the five-year monthly average for January, and the fifth consecutive month in which exports to Indonesia have been less than 10,000 head.

The reduced volumes of Australian cattle exports to Indonesia and Vietnam over the past five months in particular have been attributed largely to disruptions to demand caused by the Delta wave of COVID-19 in the second half of last year and the continued record high prices of Australia export cattle.

The increase in shipments to China meant that Portland was the largest cattle export port for the month with 17,879 head shipped, followed by Fremantle (10,138), Darwin (8917) and Townsville (2129).

Costo de transporte creció por alza del precio del Diesel

Eric Barker, 15/02/2022

THE livestock transport industry says an increase in rates is inevitable as the price of diesel reaches its highest point since 2008.

According to the Australian Institute of Petroleum, the national average terminal gate price is 167c/litre – the highest since July 2008 when it reached 182c/litre. That price has translated to 175c at the bowser.

Transporters have already warned of increased rates this year, as the price of diesel was combined with a national shortage of urea-based exhaust fluid AdBlue at the end of last year.

Martins Stock Haulage national operations manager Adam Ross said the sustained increase in diesel prices has triggered discussions about increasing rates.

"Our fuel costs have risen 38 percent in the past six months, so we will have to pass that on," Mr Ross said.

"Along with the diesel prices, steel prices have increased about 60pc and the price of trucks has increased about 20pc – so the entire industry will need to increase rates."

Mr Ross said while domestic production of Adblue had ramped up, transporters were still paying record prices for the emissions reducing fluid.

"We're paying 200c/litre for Adblue now and that's increased from 90c in August. Adblue makes up about 5pc of fuel burn costs," he said.

"I really hope I'm wrong but it seems the like the price of Adblue at the moment is going to be the new normal."

Oil producing nations fail to reach supply targets

As can be seen on the Thomas Elder Markets graph above, diesel prices directly correlate with the global oil price, which is currently seeing a substantial shortage of supply.



The shortage of fuel has been put down to the Organisation of Oil Producing Nations (OPEC), mostly Middle Eastern and African countries, and Russian-led OPEC+ not reaching a target to increase oil production in-line with increasing demand.

Many of them had cut production at the start of the pandemic as lockdowns decreased demand for fuel. But many that demand has recovered and stayed strong during the Omicron wave of COVID.

News company Reuters said many OPEC countries were struggling to ramp up output following years of under-investment.

The International Energy Agency is predicting the high oil prices to keep increasing in the coming months as the world waits for new projects to come online and take pressure off the supply.

Mr Ross said the uncertainty in the oil market was making it tough for livestock transporters trying to adjust rates.

“The hardest part of deciding the rate is trying to work out when the market will top out,” he said.

“We have to work out what our running costs are and that is hard to do if the price goes up again next week”

Monthly diesel report notes:

Diesel fuel Australian Institute of Petroleum’s reported prices are calculated as a weighted average of retail diesel fuel for non-metro regions in each state/territory. All values include GST.

Variation in fuel prices can have a considerable impact of cost of production across the Australian beef industry, impacting on livestock transport, cost of shipping in live cattle and boxed beef exports, pumping stock water and providing station electricity in remote locations.

Crude oil, diesel and petrol prices are closely linked, as the price of crude oil accounts for the majority of the cost of producing a litre of petrol or diesel. Crude oil is purchased in US\$, meaning that changes in the value of the A\$ against the US have a direct impact on the relative price of crude oil in A\$ terms.

Mercado coreano con acceso mejorado por acuerdo bilateral

Jon Condon, 16/02/2022

WITH the Korea-Australia Free Trade Agreement implemented in 2014, Australian exporters now enjoy improved market access, and with our clean and green image, the Korean market is rife with opportunity.

While there was huge scope for Australian food exporters to leverage off our clean and green image, it was important to understand some of the key trends driving Korean consumer demand.

These were some of the key messages delivered earlier today in a webinar marking the launch of the Australia-Korea Business Council’s ‘Food for Thought’ Food & Beverage report.

The report identifies four key trends that Australian food exporters need to know before entering the Korean market.

Key trends identified in the report included demographic changes in the Korean population, the rapid emergence of e-commerce distribution channels for food items, and the importance of origin.

As the graph from the report published below shows, beef currently dominates Australia’s agricultural exports to Korea.

While volumes to all export markets – not just Korea – were particularly low last year, annual trade to Korea in 2021 reached 165,000 tonnes, marginally up on the year before, and ranking second only to Japan in volume and value of Australia’s exports.

One beef exporter – the Australian Agricultural Co, which runs 340,000 head of cattle in Queensland and the Northern Territory – has seen its beef trade in Korea grow by 30 times over the past 18 years. AA Co began with an initial supply of less than 100 tonnes of beef in 2003, now it supplying more than 3000t to Korean customers each year.

New marketing channels

Executive director of the Australia-Korea Business Council, Liz Griffin said the report aimed to prepare the next generation of Australian exporters, so they can take advantage of the Korean market’s enormous potential and develop long-term, mutually-beneficial business relationships with importers, distributors and customers.

“Koreans want Australia to pay close attention to the potential of the market. Prospective exporters should do their research carefully and seek to understand Korean customers. Premium gift packaging, product reviews, e-commerce distribution channels, social media and many other aspects can all be vital and, ultimately, impact on eventual profitability. E-commerce, which has boomed since COVID-19, offers new distribution avenues,” she said.

As an example, she said one online retailer was selling Australian mangoes to Korean customers for \$A23 each.

Few Australian products were currently listed on Korean online grocery platforms such as G-Market, Market Kurley and Coupang, but there was great scope for Australian exporters to feature on these online platforms in future, Ms Griffin said.



There was a large amount of Australian government funding now available for the food sector, largely driven by the Agricultural Trade and Market Access Cooperation Program (ATMAC) which sought to develop strategic partnerships with trade-disrupted industries to support their expansion and diversification, she said.

In January, \$500,000 was awarded to the Australian Food and Wine Collaboration Group – comprising Meat & Livestock Australia, Dairy Australia, Hort Innovation, Wine Australia and Seafood Industry Australia – to promote premium Australian food and wine in South Korea.

Clean and Green

“The KAFTA free trade agreement has levelled the international playing field vying for the Korean market – its benefits are clear and the opportunity to enhance cooperation in agriculture through the CSP are promising,” Ms Griffin said.

“Yet, while Korea may be Australia’s fourth largest overall trading partner, we have traditionally not been active (with notable exceptions, like beef) in the food and beverage market. This opens opportunities for Australian exporters to leverage and expand upon Australia’s strong reputation as a high-quality producer of clean, green and premium products.”

In particular, combined with a tailored and targeted market entry and promotional strategy, Australian exporters of premium packaged and premium fresh food and beverages have a strong growth opportunity in the Korean market.”

Offal growth

Specialist Melbourne-based offal meat exporter Buddhika Ariyagama from BASP Trading said his company’s business into Korea had grown since the commencement of trade in 2009.

BASP deals in a range of products including animal feed, pulses and grains, animal protein and industrial commodities.

He said the company had specialised in offals, because the muscle meat export market into Korea was extremely competitive, not only out of Australia, but also from South America and the US.

The company started trade into Korea in chicken feet, but in 2019 moved into beef, pork and chicken offals, at the suggestion of customers.

“Offal business has been consistently going well for us,” he told the webinar.

“We aim to keep our customers happy in terms of quality, regular shipping and keeping them updated about what they are buying. Competition is very tough when it comes to beef offals, but the KAFTA agreement has helped us to an extent, in terms of the duties applied on Australian products.”

“What we have learned in the Korean market is the need to carry out due diligence, and research, as well as establish the financial capacity and reputation of our customers. Larger companies tend to have high levels of integrity, but with smaller-scale importers, we always have to be quite careful, in establishing their motives and reputation.”

“Critically important is keeping close contact with our customers, because Koreans really value communication. Regular communication is vital in understanding what the customers need, and how we can supply it.

“We have also sponsored visits to Australia by some key customers, so they can better understand our supply side. Explaining exactly what the specifications, quality and parameters are is important to overcome potential issues and problems that might arise later, once the product is in customers’ hands.”

Mr Ariyagama urged the Australian federal and state governments to give some animal protein industries more support in terms of international trade promotion. He said lamb and beef had been promoted by the government well already in Korea, hence some timely action was needed for the poultry and pork product sector now. Extra marketing would increase trade, he said.

Mango industry experience

Australian mango exporter Marie Piccone from Manbulloo Road, has partnered in trade into Korea through Seoul-based distributor Jinwon Trading Co.

“The most important key to establishing and growing the market in Korea was finding a great partner in Korea and focusing really hard on communication and information flow,” she said.

“Be consistent, open and honest. If there is a glitch, be upfront about the reason for this and work through solutions with your local partner. Being a reliable supplier is also key, as well as staying in the market for the long haul. You can’t dip in and out. That is destabilising for partners, customers and the market as a whole.”

Questions at the end of the webinar included future directions for plant-based meat items in a market like Korea.

Health and wellbeing was a growing consumer trend in Korea, the audience was told, suggesting some consumers might consider plant-based meat options.

“I think it has potential for growth,” a Korean trade representative said.



Australia-Korea Business Council's Liz Griffin said apart from Korean barbecue, most Koreans typically ate a small amount of meat, included in each meal.

"Compared with Australia, there are not many vegetarians in Korea. However with plant based meat and other similar products, if marketed the right way, they might appeal, especially to the younger generation, which are prioritising health and pushing back a little against the traditional Korean culture – particularly the drinking culture after work with colleagues, several times a week," Ms Griffin said.

"It's that younger generation which is pushing back saying, no thank you, we'd prefer to spend some time with our family, or go and do yoga or something else."

"This is a big trend, and in the next 10-20 years, we may see quite a big shift in terms of Korean culture and working culture, prioritising your own time, your wellbeing and your health over the traditional long-working and drinking culture."

Peso de faena aumentó y se redujo la proporción de hembras en la faena total

17 February 2022

Key points:

Cattle in Queensland averaged a record 326.5kg/head in the December 2021 quarter.

Female slaughter rate hit 43.2% in quarter four of 2021, demonstrating the national herd rebuild is well underway.

Lamb carcass weights for 2021 were 24.4/kg a head.

Cattle

The Australian Bureau of Statistics (ABS) has released its livestock slaughter and production figures for the fourth quarter of 2021. These results reinforce the strength of both the Australian cattle and sheep industries.

Record quarterly cattle carcass weights were reported in the fourth quarter of 2021, with adult cattle weighing in at 315.6kg/head on average in the three months to December. These weights can be attributed to the abundance of feed, coupled with the high proportion of steers being slaughtered and current high prices which incentivize additional weight gain. For the full year of 2021, cattle carcass weights averaged 312.6kg/head.

Meanwhile, at a state level, Queensland led the way with cattle weights. In the December quarter of 2021, cattle in Queensland weighed in at an average of 326.5kg/head – an all-time record. WA had the lightest cattle in the fourth quarter of 2021, with cattle averaging 288kg/head in the state.

These heavier weights are allowing the Australian cattle industry to produce more from less and is resulting in bigger meat cuts. However, it remains to be seen if these record carcass weights will continue through to the end of 2022, if the current La Niña weather pattern ends as predicted in May 2022.

Female slaughter rate

The female slaughter rate (FSR) measures the proportion of adult cattle being processed that are females. A FSR below 47% indicates that the herd is in a technical rebuild phase.

In the December quarter of 2021, the national FSR was 43.4% – indicating that the national herd is well and truly in a rebuild phase. The FSR for the whole year was 45.2% – higher than the December quarter, but still below the 47% needed to confirm rebuilding status. Victoria, WA and Tasmania still have FSRs above 50%.

Matt Dalglish, Thomas Elder Markets, 16/02/2022

The female slaughter ratio (FSR) has come in at 43.4% for the final quarter of the year.

The steady decline in the FSR since quarter two puts the annual average FSR at 45.3% for the 2021 season. A FSR under 47% signals a herd rebuild is underway.

The Detail

Australian Bureau of Statistics (ABS) have released their quarterly cattle slaughter data for the end of 2021 and we're able to use this to determine where the female slaughter ratio (FSR) is sitting, so we can get a good picture on how the herd rebuild is progressing. During 2021 the FSR was slow to move lower, despite saleyard data, restocker behaviour and anecdotal evidence suggesting a firm rebuild was underway.

In February 2021, TEM released a predictive tool that was suggesting the FSR should be nearer 42%, but included the caveat that the modelling would sometimes lead the actual figure by 3-6 months. By August 2021 we were still perplexed by the reluctance of the FSR to move toward the 42%-43% region, as much of the data and internal modelling was telling us that's where it should be.

ABS data as at December 2021 shows the FSR has come in at 43.4% for the final quarter of the year, bringing it in line with our modelling. The seasonal chart of quarterly FSR calculations (ABS only report this slaughter data quarterly now, not monthly as they used to do – so the monthly calculations are no longer available) demonstrates that the FSR has eased from 47.5% in Q2 to 44.4% in Q3 and then to 43.4% in Q4.



The steady decline in the FSR since quarter two puts the annual average FSR at 45.3% for the 2021 season.

Analysis of the annual average FSR to the annual change in the herd demonstrates the importance of the 47% threshold over the last two decades as a signal of herd rebuild or liquidation. A FSR above 47% is usually consistent with seasons when the herd is in decline, meanwhile a FSR under 47% signals a herd rebuild is underway.

Meat and Livestock Australia are anticipating a 6.1% increase to the herd over the 2021 season. Back in 2017 the FSR annual average came in at 45.5% and the herd grew by 5.6% that year and we are shaping up for a similar outcome for the 2021 season. In the coming week we will run the numbers on the FSR predictive model again to get an idea of what may be in store for 2022.

EMPRESARIAS

Tyson Foods flexibilizan normas de seguridad por menor número de casos de COVID

Source: Reuters 16 February 2022 Mask mandates are being eased due to low infection rates

Tyson Foods lifted a mask mandate for fully vaccinated employees at some US facilities on Tuesday, but those at meatpacking plants must continue wearing masks for now, reported Reuters.

The meat processor joins major employers like Amazon.com and Walmart in relaxing mask requirements.

Tyson said its policy applies to employees at facilities not inspected by the US Department of Agriculture's (USDA) Food Safety and Inspection Service (FSIS). The agency inspects meatpacking plants, a hot spot for COVID-19 outbreaks early in the pandemic.

Employees at corporate offices, distribution centres, feed mills and some production facilities inspected by the US Food and Drug Administration can go maskless if state and local laws allow it, Tyson spokesman Derek Burleson said.

The company will work with the USDA to potentially extend the policy to workers in meatpacking plants who are not in contact with government inspectors, Burleson said. He added that the policy does not yet impact most Tyson employees.

"We're definitely working with USDA on what this might look like at each of our FSIS-inspected facilities," Burleson said. "We're working to try to expand this to more facilities."

The USDA requires plant workers to wear masks when federal inspectors are present at facilities in geographic areas with "substantial" or "high" community COVID-19 transmission. An agency spokesman had no immediate comment on Tyson.

Tyson said it is easing mask mandates because of lower infection rates and "extremely low rates of serious illness" among employees. The company last year required workers to be vaccinated.

COVID-19 hit the US meatpacking industry hard at the start of the pandemic, when thousands of worker infections temporarily shut slaughterhouses. In January, rising cases of the Omicron coronavirus variant again forced plants to slow production.

Tyson said it will continue to provide masks for employees who choose to wear them and watch for new coronavirus variants. The company has said it spent \$810 million on preventive COVID-19 measures.

BNDES recaudó R\$ 1,900 millones con venta de acciones de JBS

Fonte: Valor Econômico. 16 de fevereiro de 2022 O BNDES embolsou nesta manhã quase R\$ 1,9 bilhão com a venda de mais uma fatia de suas ações da JBS. Em um block trade coordenado pelo BTG Pactual, o banco estatal se desfez de 50 milhões de papéis. Desde dezembro, a BNDESPar levantou mais de R\$ 4,5 bilhões com a venda de ações da JBS.

O block trade de hoje saiu a R\$ 37,52, no preço da garantia firme dada pelo BTG. De acordo uma fonte que acompanhou a operação, a tesouraria da JBS voltou a comprar os papéis, o que sinaliza que a gigante das carnes ainda vê um desconto grande sobre seu valor de mercado.

Com a venda desta quarta-feira, o BNDES reduz a posição da JBS para menos de 20%. A aposta do banco na companhia foi bastante lucrativa. Desde 2007, a BNDESPar colocou R\$ 8,1 bilhões na JBS, com um retorno que bateu Ibovespa, CDI e a meta atuarial do fundo de pensão do BNDES.

À medida em que o BNDES continue reduzindo sua posição na companhia ao longo dos próximos meses, a JBS poderá se livrar do overhang que pesa sobre os papéis.

Na leitura de analistas, a JBS está descontada quando se considera o momento positivo, especialmente nos Estados Unidos. Na semana passada, os analistas do Thiago Duarte e Henrique Brustolin, do BTG Pactual, revisaram o preço-alvo para o papel, de R\$ 50 para R\$ 55, o que embute um potencial de valorização de mais de 45% sobre as atuais cotações.

Pelas contas dos dois analistas, as ações da JBS negociam a um múltiplo de 3,7 vezes para o Ebitda projetado para 2022 e 4,6 vezes para 2023, o que está 20% abaixo do nível histórico.



Atualmente, a JBS está avaliada em R\$ 88 bilhões na bolsa. A posição do BNDES vale R\$ 17 bilhões.