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GLOBAL

FAO/OECD Proyección 2022 - 2031

Producción mundial creció en 2021 - Producción porcina aumento 34% en CHINA

13 July 2022 FAO China increased pork production by 34%

FAO & OECD released its Agricultural Outlook 2022-2031 report, which looked back at the previous year in terms of meat production. According to the report, world meat production rose 5% in 2021 to an estimated 339 Mt, led by a large 34% increase in pig meat production in China following two years of precipitous decline induced by an outbreak of African swine fever.

Supplies of poultry, bovine and sheep meat rose only marginally as high feed prices reduced profitability. Bovine meat output in some countries was restrained by a variety of factors such as COVID-19 related disruptions, labour shortages, the on-going shrinkage of the dairy herd in the European Union, and the implementation of an export tax in Argentina. On the other hand, beef output increased 12% in India as slaughter numbers increased following the gradual reopening from the COVID-19 pandemic lockdown and in response to improving demand from overseas markets in the Middle East and Southeast Asia.

World meat imports in 2021 are estimated to have reached 40 MT, led by poultry imports. Leading meat exporters – including Brazil, the European Union and the United States – supplied much of this higher import demand.

International meat prices quoted in the Outlook trended upward in 2021, reflecting higher demand from economic recovery and higher marketing and transport costs. However, meat to feed price ratios fell significantly, putting pressure on sectoral profitability in intensive feed-grain livestock operations. This will cause markets to tighten further inducing higher prices early in the Outlook period.

Consumo per capita de carne bovina caerá 2% hacia 2031

11 July 2022

FAO & OECD released its Agricultural Outlook 2022-2031 report, highlighting the forecast for consumption for the coming decade.

In terms of consumption, FAO/OECD said the shift in meat consumption from foodservice to home cooking that occurred during the COVID pandemic is expected to be short term and will revert back as restrictions are lifted. Drivers of growth in consumption include economic and population growth. Both are expected to continue to increase, particularly in lower-income countries. In high-income countries, FAO/OECD said it expects demand to level off or trend down as ageing populations and consumer concerns over diet and environment influence behaviour.

Poultry meat consumption has risen in virtually all countries and regions. Consumers are attracted to poultry due to lower prices, product consistency and adaptability, and higher protein/lower fat content. Consumption of poultry meat is projected to increase globally to 154 Mt over the projection period, accounting for nearly half of the additional meat consumed. On a per capita basis, these robust growth rates in poultry consumption reflect the significant role it plays in the national diets of several populous developing countries, including China, India, Indonesia, Malaysia, Pakistan, Peru, the Philippines and Viet Nam.

Global pig meat consumption is projected to increase to 129 Mt over the next ten years. However, on a per capita consumption is expected to stagnate. Pork will remain the meat most eaten in the EU, even though it will remain stable in per capita terms, as changes in diets will favour poultry as a cheaper and perceived better food choice. In most of Latin America prices have positioned pork and poultry as the favoured meats for rising demand from the middle class. Several Asian countries which traditionally consume pork such as Korea and Viet Nam, are also projected to increase consumption on a per capita basis.

Global beef consumption is projected to increase to 76 Mt over the next 10 years. However, per capita consumption is projected to fall 2% by 2031. Asia and the Pacific is the only region where per capita beef consumption is projected to increase. China is the world's second largest consumer of beef and per capita consumption is projected to rise 10% by 2031. Most countries with high beef consumption will see a decline in favour of poultry meat especially in the Americas and Oceania, where preference for beef is among the highest in the world (per capita consumption will fall in Argentina -5%, Brazil -2%, the US -4%, and Oceania -15%).

As incomes and population increase, more dairy products are expected to be consumed over the medium term. Overall, per capita consumption is expected to increase 0.4% p.a. to 21.9 kg (milk solids equivalent) by 2031 in high-income countries compared to 2.0% p.a. (21.2 kg) and 1.5% p.a. (5.4 kg) in low-middle income and low-income countries, respectively. Most dairy production is consumed in the form of fresh dairy products,¹ which are unprocessed or only slightly processed (i.e. pasteurised or fermented) and their



share in world consumption is expected to increase over the next decade. The key drivers for this are strong demand growth in India, Pakistan and Africa. In low and middle-income countries, fresh dairy products comprise over two-thirds of the average per capita dairy consumption (milk solids), while consumers in high income countries tend toward processed products.

BRASIL

Caen los precios en principales plazas ganaderas

15 de julho de 2022

O mercado físico de boi gordo registrou preços mais baixos na maioria das regiões de produção e comercialização nesta quinta-feira (14).

Segundo o analista de Safras & Mercado, Fernando Henrique Iglesias, a pressão de queda nos preços da arroba é generalizada.

Mesmo em Mato Grosso, estado em que as escalas de abate estavam mais apertadas, o cenário de pressão predominou, com muitas tentativas de compra abaixo da referência média.

“Os frigoríficos indicam para o recebimento de animais a termo, o que facilitou a composição das escalas de abate. Mesmo com preços em queda, há relatos de aderência do pecuarista neste momento. Por se tratar de terminação em regime de confinamento é natural que isso ocorra. Ao menos no curto prazo a expectativa é de continuidade do movimento de pressão”, disse Iglesias.

Dessa maneira, em São Paulo (SP), a referência para a arroba do boi caiu em R\$6 chegando a R\$ 316. Já em Dourados (MS), os preços também foram para R\$291.

Ao mesmo tempo, em Cuiabá (MT) a arroba de boi gordo caiu R\$8 ficando em R\$ 293. Por outro lado, em Uberaba (MG), os preços continuam a R\$ 300.

Finalmente, em Goiânia (GO), os preços também permaneceram a R\$ 295 a arroba.

Boi: mercado atacadista

Já o mercado atacadista também voltou a operar com preços em queda.

Segundo Iglesias, o ambiente de negócios volta a sugerir pela continuidade deste movimento no curto prazo, em linha com a reposição mais lenta entre atacado e varejo durante a segunda quinzena do mês. O período conta com menor apelo ao consumo de carne bovina.

Além disso, o especialista ainda diz que a demanda na primeira quinzena de agosto terá capacidade para promover uma recuperação dos preços da carne bovina.

Por conta disso, o quarto dianteiro do boi caiu para R\$ 17,50, assim como a ponta de agulha caiu a R\$ 17,25.

Por fim, o quarto traseiro do boi teve queda e fechou em R\$ 22,35 por quilo.

CEPEA: prevén nuevo récord de exportaciones en la segunda mitad de 2022

14 de julho de 2022

As vendas externas de carne bovina somaram volume recorde no primeiro semestre e esse resultado foi ancorado pelos envios da proteína à China e aos Estados Unidos.

Segundo pesquisadores do Cepea, considerando-se o comportamento das exportações verificado nos últimos anos – em que os envios da proteína brasileira tanto ao país asiático quanto ao norte-americano se intensificam no segundo semestre –, os embarques nacionais podem se manter aquecidos nos próximos meses e renovar, portanto, o recorde anual.

E, para reforçar estes envios externos, o dólar está operando em elevado patamar, ao passo que as vendas no mercado doméstico seguem enfraquecidas, contexto que deve manter frigoríficos exportadores focados neste canal de escoamento.

Como evolucionarán los precios de la carne bovina?

por Alcides Torres e Amanda Skokoff Segunda-feira, 11 de julho de 2022 - 09h30

A participação da carne bovina no prato dos brasileiros caiu, em grande parte pela queda no poder de compra da população e também pelos aumentos dos preços dos cortes.

A crise sanitária e econômica vividas nos últimos anos desestimularam o consumo e, em 2021, assistiu-se o pior nível de consumo dos últimos 25 anos.

Apesar da demanda comedida, desde o final de 2021, a carne bovina tem registrado consecutivos incrementos de preços.

Preços da carne bovina

Neste ano, no acumulado até junho, nota-se que os preços médios dos cortes de carne no mercado atacadista caíram 7,3%, enquanto no varejo, no mesmo período, os preços subiram 2,0%. Veja na figura Com preços de venda mais firmes, o varejo aliviou sua margem de comercialização.



Margem do varejo

O mercado varejista de carne bovina teve suas margens apertadas com a crise econômica vivida no período pandêmico, trabalhando abaixo da média histórica.

Aproveitando dos períodos de queda de preço nas indústrias, açougues e supermercados tiveram suas margens recuperadas em 2022 trabalhando com preços de venda mais firmes (figura 2).

Expectativas

Analisando os preços dos cortes no varejo, nota-se que aumentos mais significativos se dão no segundo semestre, com os movimentos mais fortes em meados de outubro

Outro fator a ser ponderado é de que o ano vigente está marcado pelo período eleitoral, cenário que contribui para geração de empregos temporários e aquece a economia. Como consequência, nesses períodos a demanda pela carne bovina tende a melhorar.

Com crescimento, ainda que tímido, projetado para o PIB brasileiro em 2022 e os dados apontando um incremento na geração de empregos formais no acumulado até maio/22, somado aos fatores citados, podemos esperar por preços firmes para a carne bovina.

Além disso, o bom desempenho das exportações e as projeções de abate de bovinos ainda reduzidos para este ano devem corroborar com esse cenário de preços.

Com isso, para o segundo semestre não são esperados ajustes negativos para a carne bovina, ao contrário, os preços devem subir.

Consumo de carne bovina poderia melhorar

Por Denis Cardoso

A expectativa otimista leva em conta basicamente três fatores: redução na taxa de desemprego, eleições e Copa do Mundo.

Mesmo com a inflação corroendo a renda dos brasileiros, analistas do setor pecuário acreditam que, a partir desta metade final do ano, a demanda doméstica pela carne bovina finalmente sairá do estado de dormência verificado nos últimos anos.

A expectativa otimista leva em conta basicamente três fatores que podem fazer com que as bandejas de carne vermelha retornem mais corriqueiramente aos carrinhos de compra da população brasileira, que sabidamente tem larga preferência pelas receitas que envolvem a proteína bovina, mas, nos últimos anos, especialmente em 2022, tem optado por alimentos mais baratos, como ovos, frango e cortes do suíno.

Os fatores de um possível aumento na demanda são: redução na taxa de desemprego, eleições e Copa do Mundo. Sobre o primeiro item, dados mais recentes divulgados pelo IBGE (Instituto Brasileiro de Geografia e Estatística) mostram que o indicador recuou para 9,8% no trimestre até maio de 2022, o menor nível para esse intervalo desde 2015 (quando a taxa no período foi de 8,3% e a economia brasileira amargava forte recessão).

O segundo fator, talvez mais preponderante dentre os citados pelos analistas, é a injeção gigantesca de dinheiro na economia por conta das eleições, em outubro próximo. O fundo eleitoral aprovado é de R\$ 4,9 bilhões, o que significa avanço de 188% em relação ao total de verbas disponíveis para a campanha de 2018.

De alguma maneira, parte desse dinheiro do “fundão” chegará aos bolsos de trabalhadores envolvidos com as campanhas dos candidatos. “No caso das classes com rendas mais baixa, qualquer ‘graninha’ extra, mesmo em ano de inflação forte, pode ser um estímulo para ele voltar a comer carne bovina”, afirma a analista Lygia Pimentel, CEO da consultoria Agrifatto (SP), que acrescenta: “O brasileiro está com saudade da carne vermelha”.

Productores rurales solicitan modificar la normativa del dressing

Por Carolina Rodrigues

Entidades representativas de pecuaristas pressionam o Mapa por ajustes na portaria SDA nº 515, para melhor definição do procedimento gerador de discórdia.

Em junho de 2020, a DBO noticiou, com exclusividade, que produtores haviam reivindicado, junto ao Ministério da Agricultura, Pecuária e Abastecimento (Mapa), a publicação de uma instrução normativa padronizando o conceito de carcaça, o que permitiria definir claramente o que é toalete, ou seja, quais partes podem ser retiradas durante o processo de limpeza que antecede à pesagem para pagamento ao produtor.

O pleito, cujo objetivo era conferir maior transparência à relação comercial entre frigoríficos e pecuaristas, foi respaldado, à época, por um parecer técnico da Universidade Federal do Tocantins (UFT) que solicitava tal medida após quantificar, em estudo, os prejuízos decorrentes da “despadronização” da toalete, estimados em até 1@ por bovino.

Exatos dois anos após a publicação da reportagem, constata-se que a reivindicação não somente foi ignorada, como há risco de retrocesso ainda maior, conforme dirigentes do setor. A Portaria nº 515 (1/2



/2022), que dispõe sobre procedimentos de abate e inspeção post mortem, sob consulta pública nos meses de abril e maio, manteve o conceito anterior de carcaças e ainda simplificou o de toalete, gerando intensos debates em junho.

Segundo os produtores, se aprovada, a portaria pode acarretar prejuízos ainda maiores aos pecuaristas, porque carece de clareza. “Quando o produtor vende seu gado, não sabe exatamente o que vai receber, porque as operações anteriores à pesagem da carcaça não são padronizadas, nem especificadas em detalhes, ficando a critério dos frigoríficos, que podem tirar pedaços de músculos e gorduras indevidamente”, diz Lauro Sagrilo, vice-presidente do Sindicato Rural de Santiago, Unistalda e Capão do Cipó, no Rio Grande do Sul.

O Mapa define carcaça como um animal abatido, sangrado, esfolado (sem o couro), eviscerado (sem vísceras), desprovido de cabeça, patas, rabo, glândulas mamárias ou vergalho e testículos. A principal queixa é que essa definição é muito sumária, não correspondendo à prática.

URUGUAY

Sigue distante el precio que ofrece la industria y lo que pretenden los productores

por Javier Lyonnet julio 13, 2022

La industria sigue proponiendo precios que no conforman a los productores, la hacienda bien terminada sigue sin aparecer y el panorama de precios del ganado gordo dependerá del volumen de actividad de faena, que cayó por debajo de las 30 mil cabezas la semana anterior, en la tercera semana consecutiva de baja.

En plantas que volverán a la actividad la semana próxima comenzarán a ser faenados animales ya comprados y en la primera quincena de agosto ganados de corral propios o acordados.

El ganado de la ventana de cuota 481 va a estabilizar el volumen de faena pero luego vendrá otro pozo de ganado gordo, anticipó Alberto Gallinal, directivo de la Asociación de Consignatarios de Ganado.

Hay industrias que siguen operando y están pasando precios, cuando se concreta operativa es con entradas cortas y valores que están entre US\$ 5 y US\$ 5,20 para novillos bien terminados y US\$ 4,70 para vacas no tan gordas y US\$ 4,90 para las vacas pesadas de carcasa, dijo Christopher Brown, director de Agro Oriental, en Tiempo de Cambio de radio Rural.

Otros operadores indicaron que el miércoles se hicieron negocios de hasta US\$ 5,30.

“Hoy la realidad del mercado es esa; bajo volumen de faena y precios que han venido fuertemente hacia la baja”, dijo Gallinal.

Facundo Schauricht, directivo de la ACG e integrante de Zambrano & Cía, dijo en 100% Mercados de radio Rural que hace semanas que no hay una referencia estable en valores y que hay una distorsión por los ganados comprados y cuya carga fue postergada por el parate de los frigoríficos que adelantaron licencias.

Los niveles de faena bajos se van a mantener hasta que no empiecen a aparecer los ganados de corral, señala Christopher Brown. Los ganados de pasto no forman una oferta abultada y les falta terminación y “hasta setiembre no se espera una oferta significativa de ganados de campo”, apuntó el director de Agro Oriental.

El mercado ganadero está en un proceso en formación que es muy reciente y con pocas operaciones, dijeron actores del sector. Los productores con mayor disponibilidad de forraje para terminar ganados tienen expectativas de un mercado con precios formados en algunas semanas.

Los valores se estabilizarán en las próximas semanas indicaron consignatarios.

El mercado de reposición se ha mostrado más estable, ya con menor oferta y preferencia por negocios cortos. La demanda ha sido muy buena en un invierno frío –el junio más frío desde 1981-, seco y con muchas heladas que han retrasado los campos. Las últimas lluvias caídas y las previstas para jueves a sábado van a empujar verdeos y avenas

Expectativa por baja a 0 de aranceles a la carne de Corea del Sur

por Eduardo Blasina julio 13, 2022

El sitio australiano Beef Central informa de una baja de aranceles por parte de Corea del Sur para la carne vacuna para hacer frente a la inflación que podría ser una oportunidad para Uruguay que compite allí en fuerte desventaja con EEUU y Australia en términos arancelarios.

En tanto la carne de EEUU paga 10% de arancel y la de Australia 16% y en baja gradual en base a acuerdos de libre comercio, Uruguay paga 40%. «Si no hay cambios en tres años será muy difícil vender a Japón y Corea del Sur» dijo una fuente de INAC, tenemos que insistir para que Uruguay ingrese al CPTPP (el acuerdo de comercio del Pacífico) al mismo tiempo que a China, dijo esta fuente.



El informe de Beef Central indica que Corea del Sur está eliminando los aranceles sobre la carne de res importada y una variedad de otros productos alimenticios importados, en un intento por controlar un fuerte aumento de la inflación.

Con la inflación del país actualmente en un 6%, su nivel más alto en dos décadas, la moneda, el won coreano cayendo en valor y el mercado de valores del país cayendo drásticamente, el presidente coreano, Yoon Suk Yeol, está tomando medidas estridentes, entregadas a través de reuniones económicas de emergencia que se llevan a cabo semanalmente.

Desde el 22 de junio, el gobierno eliminó el impuesto sobre 50.000 toneladas de carne de cerdo importada y ahora se han agregado más productos a la lista. Desde el 20 de julio hasta al menos el último trimestre de este año, se eliminarán los aranceles sobre unas 100.000t de carne vacuna importada.

La carne de res importada a Corea normalmente tiene un arancel del 40%, pero tanto Australia como EE. UU. tienen un arancel más bajo debido a los acuerdos de libre comercio. La tasa de Corea del Sur para la carne vacuna de EE. UU. es actualmente del 10,6 %, mientras que la de Australia es del 16 %.

El año pasado, Corea importó 250.000 toneladas de carne vacuna de EE. UU. y 179.000 toneladas de Australia. Uruguay exportó 3.595 toneladas. Con la baja de aranceles, Corea espera que los precios minoristas locales de la carne de vacuno disminuyan entre un 5% y un 8%.

Otros productos importados donde se eliminarán los aranceles incluyen pollo, granos de café, cebollas verdes y leche en polvo, informaron fuentes de los medios coreanos durante la noche.

“El gobierno coreano está recortando los aranceles sobre los artículos en un esfuerzo por ayudar a aliviar la inflación que actualmente afecta al país”, informó el JoongAng Daily de Corea.

Algunos medios también sugirieron que también se eliminará el impuesto al valor agregado de 10 por ciento del país sobre todas las importaciones.

Meat & Livestock Australia dijo que aún era pronto desde que se hizo el anuncio y que se necesitaba claridad sobre cómo funcionaría la reducción de aranceles.

«En este punto, es solo para 100.000 toneladas, mientras que las exportaciones anuales típicas de EE. UU. y Australia son mucho más altas», dijo.

“Todavía no ha habido ninguna indicación sobre cómo se administraría la asignación. ¿Será por orden de llegada? Simplemente no lo sabemos todavía”, dijo.

La estrategia de eliminar los aranceles sobre bienes importados seleccionados como una forma de frenar la inflación aún no estaba generalizada, pero se había visto durante los últimos dos años en países como México, dijo el vocero.

“En esta etapa, el movimiento de Corea debe verse como algo positivo para la carne australiana, pero el problema está en los detalles”, dijo.

“Pero dado que los exportadores australianos actualmente pagan un arancel 6% más alto sobre la carne de res en Corea que sus competidores estadounidenses, esto podría beneficiarnos más que a Estados Unidos”.

Fuentes de INAC también se mostraron cautelosas hasta tener claro como se adjudicaría ese cupo de 100 mil toneladas sin arancel.

Los precios en la montaña rusa

Nicolás Lussich Por Nicolás Lussich, 10/07/2022

Se está dando una corrección en varios precios de exportación y el escenario económico está cambiando: mientras la economía local está en plena recuperación, en el exterior hay síntomas de enfriamiento que pueden impactar en Uruguay

Ha sido una semana no apta para cardíacos en el mercado internacional de granos y otros productos agropecuarios y energéticos. Las perspectivas de que las principales economías del mundo ingresen en un período de dificultades en cuanto a su crecimiento -sin descartarse una recesión-, han puesto a la defensiva a los inversores en los mercados globales, lo que generó una fuerte caída en el precio de las materias primas, en entre ellas el petróleo y los granos. En cierta medida, parecería que lo que aconteció hace pocos días atrás en los mercados de acciones ahora se está extendiendo a los mercados de productos físicos.

Los factores de incertidumbre son conocidos. Por un lado, China - principal destino de productos de exportación de Uruguay- sigue lidiando con el Covid en base a una política de cero casos, que genera muchos costos e incertidumbres. Por otra parte, a la UE se le viene el invierno en pocos meses, con la incertidumbre acerca del suministro energético. La preocupación es bastante lógica en la medida que ha entrado en un conflicto directo con su principal proveedor de energía: Rusia. El enfrentamiento no ha hecho otra cosa que escalar en las últimas semanas: mientras Rusia sigue avanzando en el Donbas (la zona Este de Ucrania que ya tiene prácticamente toda bajo su control) Finlandia y Suecia ya están en proceso formal de ingreso a la OTAN. La tensión es creciente.



Por último, EEUU ha iniciado el camino hacia la normalización monetaria con el aumento de la tasa de interés y el consiguiente fortalecimiento del dólar, que se hace aún más claro ante la debilidad del escenario europeo. El Euro ha caído de 1,18 a casi 1 U\$\$/Euro, un descenso anual de 14%. Si el dólar se fortalece, es lógico pensar que los precios en dólares tenderían a bajar. La gran pregunta es cuánto: algunos analistas y bancos de inversión globales estiman que la caída reciente del petróleo, por ejemplo, es exagerada dado que la demanda se está recuperando y la oferta es limitada.

El mismo razonamiento puede valer para los granos, que han vuelto a sus niveles pre en guerra. La caída más aguda la ha tenido el trigo, que es el grano con una mayor relación stock consumo a nivel global. Esto puede justificar parte de la caída, junto con los elementos financieros globales mencionados, pero también parece exagerada. En realidad con el trigo el gran cambio en el mercado global es que Rusia ha puesto su pie firme en el Mar Negro y seguramente controlará mucho más la oferta de trigo de esa zona, una de las principales productoras del mundo si se suman las cosechas rusas y ucranianas. Occidente cuestiona a Rusia por usar los alimentos como arma y a Putin parece no molestarle.

Es un buen ejemplo de que el crecimiento mundial vigoroso basado en la asociación comercial y económica implícita entre China y Estados Unidos, que impulsó a la economía global por casi dos décadas, ya quedó claramente atrás (a pesar de que ahora el gobierno estadounidense está negociando para bajar los aranceles que Trump le elevó a China). De ahora en adelante los análisis en los mercados globales tienen que incorporar mucho más la geopolítica, cuyos cambios son bastante más difíciles de prever que en los clásicos análisis de oferta y demanda.

Negocios en suba... negocios en baja

Para la cosecha de soja uruguaya la baja en el precio -por suerte- llega tarde. Ya se ha comercializado más del 90% de la producción estimada a precios excelentes. Según datos de aduana de esta semana, ya se han acumulado registros de soja vendida por casi dos millones de toneladas, a un precio promedio de unos 620 U\$\$/ton, lo que equivaldría a cerca de 600 U\$\$/ton puesta en Nueva Palmira. Si se confirma este promedio para la zafra, será un récord histórico. El desempeño de la soja este año ha sido excelente al coincidir precios récord con muy buenos rindes.

Para el trigo y los granos de invierno el panorama es diferente: los cultivos recién se han implantado y con costos altos, pero los precios de venta pueden no ser los esperados, justamente por la reciente caída en los mercados globales. El factor alcista podría llegar desde el escenario regional, pues Argentina restringe las exportaciones trigueras y desestimula la producción.

Son buenos ejemplos de que cuando se hacen negocios en suba, las ganancias pueden ser excepcionalmente altas, por bajos costos y altos precios de venta. Pero cuando se hacen en baja, los números quedan apretados entre altos costos y precio de lo vendido menores a lo esperado, con el riesgo de pérdidas excepcionales. Se puede trabajar y rentar en ambos contextos, pero hay que hacer bien los números.

Más allá de los precios externos, todo el componente de costos locales - combustibles, salarios, servicios, tasas e impuestos- depende también de la cotización del dólar. Al respecto, esta semana el Banco Central volvió a subir la tasa de interés, aunque de manera más moderada que en la ocasión previa (la subió medio punto porcentual a 9,75%). Las tasas a 1 año de las Letras del BCU pagan ya casi 11%. Se mantiene el rumbo hacia una política monetaria más restrictiva para bajar la inflación. Ésta por ahora no cede, aunque ya es el cuarto mes consecutivo en que no sube (en el dato anual a junio bajó de 9,4 a 9,3%). Mientras, el dólar sigue bajo presión por esa misma política monetaria.

Si los precios externos caen porque el dólar se fortalece ante un escenario económico más adverso, el dólar también debería fortalecerse en el mercado cambiario uruguayo, pero eso -por ahora- está lejos de suceder y la competitividad cruje. Los productores tienen que manejar todo este escenario complejo. A la larga lo que importa es la producción y la productividad.

Exportaciones

El desempeño de los sectores agroexportadores sigue siendo auspicioso, en especial cuando se miran los montos en dólares. En junio las ventas al exterior sumaron U\$S 1.374 millones, 30% arriba de lo registrado en el mismo mes de 2021. En el acumulado anual el aumento es de casi 40%. Sin embargo, en el cálculo que hacemos habitualmente, en pesos constantes el aumento es menor: 23% (cuadro).

La evolución de los precios externos nos viene dada y la macroeconomía puede hacer variar la cotización del dólar más allá de su tendencia global, por medidas del gobierno u otros factores locales. Por eso es importante observar el desempeño exportador en términos de volumen físico, que es lo que verdaderamente impacta en el PBI.

En este plano, las exportaciones muestran también un gran desempeño, aunque con aumentos más moderados y diferencias importantes entre sectores. Según las cifras de la Unión de Exportadores, las oleaginosas (soja y colza) muestran los mayores avances, acompañadas de cereales y molinos (cuadro), con subas de entre 18 y 26% en el último año móvil. Las carnes también muestran un interesante avance



de 22%. Pero las exportaciones de maderas casi ni avanzan y los volúmenes de exportaciones de lácteos caen 3,5%.

El estímulo de precios ha puesto a la agricultura en una nueva dinámica, acompañada por el buen clima. Para que el crecimiento en las exportaciones perdure hay que aumentar la productividad y la inversión. En este punto, el Plan Nacional de Infraestructura Vial, que presentó el MTOP esta semana es una buena noticia y permitirá promover más producción en zonas donde -hasta ahora- había dificultades logísticas y -por tanto- más costos. Se invertirán U\$S 905 millones este año y U\$S 3.500 millones en todo el período. También valen los logros sanitarios para acceder con ciertos productos a nuevos mercados, como el caso de la apertura del mercado de carnes de Corea del Sur a los trimmings uruguayos. Hemos gozado en los últimos 10 años o más la bonanza económica de la gran demanda china, cuyo crecimiento será más moderado en los próximos años. Por eso, estos nuevos mercados suman y pueden ser opciones valiosas, pese a que Corea cobra un arancel elevadísimo (39%). Es que en lo sanitario se ha avanzado bastante más que en lo comercial.

Carniceros esperan una suba en cortes vacunos

15/07/2022

Siguiendo la tendencia del dólar se prevé el aumento

Con estabilidad en las ventas de carne bovina y carnes alternativas, la Unión Vendedores de Carne (UVC) festejó ayer el Día Nacional del Carnicero. El mercado espera una suba de los cortes bovino, siguiendo tendencia del dólar.

El 14 de julio de 1965 los carniceros hicieron una huelga de un mes impulsando una serie de reivindicaciones ante el gobierno de la época, donde lograron que el margen de ganancia del sector pasara de 8% a 12%, cambio que fue considerada un gran logro. También se avanzó en disminuir la carga impositiva.

El presidente de la gremial, Alfonso Fontenla, afirmó a El País que “las ventas se encuentran estables y los precios ayudaron a esa estabilidad, dándole cierta tranquilidad al consumidor. En carnes alternativas también hay buenos precios y eso ayuda”.

Entre las metas de la gremial, además de impulsar la capacitación y certificación en el sector, se busca incentivar las ventas de carne, especialmente de cortes bovinos.

“No está fácil conseguir y negociar ante la industria ofertas de cortes para volcarlos a precios promocionales en el abasto, como lo hicimos meses atrás. Lo hemos intentado cuando el Día de la Carne se lanzó la bola de lomo a valores por debajo de los habituales y tuvimos de oferta bife angosto algunas semanas atrás”, reconoció Fontenla.

Curso. El próximo jueves la UVC y UTU entregarán los títulos a los carniceros con mayor experiencia, que serán los futuros capacitadores del Plan Piloto que se pretende poner en marcha en el segundo semestre del año en curso.

“Hemos logrado que una buena cantidad de carniceros muy experimentados se pusieran a la orden de la gremial para recibir a los alumnos”, recordó Fontenla. El Plan Piloto durará dos años, con módulos semestrales donde las materias todavía no están todas definidas. “Hay un plan semi elaborado que se está ajustando para someterlo a una aprobación final. En las próximas semanas se comenzará con las inscripciones de alumnos”, adelantó el titular de la UVC.

Uruguay y China inician negociaciones formales para un TLC

por Javier Lyonnet julio 13, 2022

Uruguay es un país productor de materias primas y productos de calidad que quiere tener acceso a mercados con mejores condiciones y menores aranceles para competir con países que producen lo mismo, dijo el presidente Luis Lacalle Pou al anunciar en la noche del miércoles que concluyó «positivamente» el estudio de factibilidad de un Tratado de Libre Comercio con China y comienzan las negociaciones.

«Hemos llegado a un acuerdo que es beneficioso para ambos países, y ahora sí empezar formalmente las negociaciones para un TLC», dijo Lacalle.

China es el principal cliente exterior de Uruguay. En el primer semestre de 2022 suma el 30% del total exportado, unos US\$ 2.070 millones, con un crecimiento de 29% frente al primer semestre de 2021.

Las ventas de carne bovina representaron el 60% de lo exportado hacia China, tras crecer 68% en la comparación interanual en el primer semestre. Las ventas de soja crecieron 38% en el mismo lapso y representaron el 15% del total, según el informe semestral de Uruguay XXI.

Las ventas de subproductos cárnicos, tercer producto exportado hacia China, crecieron 40% interanual en enero-junio. Le siguen madera y productos lácteos, que registraron una disminución de las ventas, de 51% y 15% respectivamente.

El canciller Francisco Bustillo le transmitió la noticia a los países miembros del Mercosur.



“Todos sabemos el peso que tiene el Mercosur para avanzar en conjunto. Pero Uruguay no estaba dispuesto a quedarse quieto. Tomamos este paso, lo fuimos anunciando, e informamos a los distintos gobiernos del Mercosur. Seguramente esto sea motivo de conversaciones en la cumbre de Asunción en los próximos días”, dijo el presidente.

“China es nuestro principal socio comercial. En algunos productos competimos con otros países que entran sin aranceles porque tiene un TLC con China. La materia prima, bienes industrializados y ciencia y tecnología, en eso se abre un camino para poder negociar. Lo que uno desea es que algunas materias con valor agregado sean las que puedan ingresar a raíz de una baja en los aranceles”.

Tratado podría quedar cerrado para 2024

14/07/2022 El especialista Gonzalo Oleggini analizó el tema en Valor Agregado de radio Carve Uruguay arribó a un acuerdo de factibilidad beneficioso con China y ahora inicia formalmente el diálogo técnico en la búsqueda de un Tratado de Libre Comercio. El consultor en temas internacionales, Mag. Gonzalo Oleggini, hizo referencia a que es un anuncio “muy importante” para Uruguay, porque es uno de los hitos importantes luego de la firma del Mercosur, hace 30 años.

“Es muy importante para Uruguay conseguir otros acuerdos comerciales con potencias como China. El Mercosur ha logrado algún acuerdo, pero con países no tan relevantes desde el punto comercial. China es el país que más exporta e importa del planeta”, dijo.

En Valor Agregado de radio Carve, el especialista señaló que hubo discusión respecto al posicionamiento político, dado que el mundo está en un proceso claro de guerra con invasión de Rusia a Ucrania.

“Todos sabemos de qué lado está China y de qué lado estamos nosotros. El mundo está partido en dos, con países de un lado y países del otro”, comentó.

No obstante, aclaró que “no deberíamos”, por muchas razones, mezclar estas cosas dado que Uruguay necesita acuerdos: un TLC con China, con Europa, con Estados Unidos.

“Desde el punto de vista político, Uruguay debe dar el paso porque necesitamos comercio. Esto no implica directamente una solución política, lo más importante del Tratado es la apertura comercial”, indicó.

En el mundo hay más de 400 acuerdos comerciales y el promedio de negociación a nivel global es de un año y medio. Algunos duran más, como es el caso de la Unión Europea-Mercosur (23 años), pero lo normal es un año y medio o dos.

“Seguramente en 2024 cerramos el acuerdo. El TLC luego de firmarse debe ser ratificado, ir al Parlamento y que sea ley”, aclaró.

Por otro lado, Oleggini explicó que los acuerdos tienen un plazo y de ahí depende la negociación. Es decir, cuánto tiempo vamos a demorar para que los productos uruguayos ingresen a China con arancel 0, dependerá de la negociación que hagamos con China.

“Es difícil anticipar el final de la película”, señaló.

Confidencialidad. La mayor parte de las negociaciones son confidenciales hasta no arribar al primer producto de negociación. “Es muy difícil acceder a información de la negociación hasta que no esté avanzada”, contó.

Exportamos más a China de lo que le importamos. Es decir, hay más oportunidades que amenazas. “Es un acuerdo asimétrico entre un país de 3,5 millones de habitantes frente a uno de 1400 millones. El potencial de Uruguay es casi infinito, pero para China es más limitado. Ahí tenemos más para ganar”, aseguró.

También sostuvo que hay sectores más impactados y en los que habrá que tomar medidas -como el plástico y el químico-, pero en el resto de los sectores se pueden ver beneficiados con mayores ventas.

Finalmente, Oleggini recordó que las exportaciones de 2022 terminarán en 14 mil millones a 15 mil millones de dólares, un año récord. De ese total, entre 5000 y 6000 millones de dólares irán a China, más del 40% de las exportaciones uruguayas. Duplica lejos a Brasil y es seis u ocho veces más de lo que le vendemos a Argentina. “China es nuestro principal cliente y puede seguir creyendo”, concluyó.

Mercosur y Singapur avanzan hacia la conclusión de un acuerdo de libre comercio

12/07/2022

Ec. Alvaro Pereira, Jefe de Acceso e Inteligencia de Mercado en INAC, habló sobre el alcance que tendrá para nuestro país

Mercosur y Singapur avanzan hacia la conclusión de un acuerdo de libre comercio entre ambas partes. La conclusión de este acuerdo constituye una prioridad para el Mercosur, dado que Singapur es un importante socio comercial y de inversiones para el bloque.

En 2021 las exportaciones del Mercosur totalizaron 5.929 millones de dólares mientras que las importaciones alcanzaron 1.252 millones de dólares.

Este acuerdo no sólo implica la diversificación de los flujos comerciales y la mejora de condiciones para la radicación de inversiones entre ambas partes, y en particular con Singapur que es un importante



proveedor de capitales en el mundo, sino también una actualización de las disciplinas a los más altos estándares a nivel global.

El Ec. Alvaro Pereira, Jefe de Acceso e Inteligencia de Mercado en INAC, hizo referencia a que un acuerdo entre el Mercosur y Singapur podría dejar en desventaja a empresas de terceros países como Corea del Sur, generando incentivos para que también cierren acuerdos con nosotros.

En Valor Agregado de radio Carve, Pereira explicó que Singapur es un país muy liberal comercialmente y, por ejemplo, no cobra arancel a ningún producto importado de ningún país desde hace varias décadas. Entonces, en capítulo arancelario Uruguay puede exportar sin pagar aranceles y no significa una mejora arancelaria, porque ya estamos en el mejor de los mundos.

“En materia indirecta o más bien estratégica, es una muy buena noticia porque el Mercosur firma un acuerdo con un país extrazona por primera vez desde 2010. Es una dinámica positiva la dirección de un Mercosur que concreta acuerdos. El Mercosur se abre y rebaja sus aranceles con Singapur”, indicó.

Singapur es una nación relativamente pequeña en el sudeste asiático que tiene una vocación muy comercial y tejedora de acuerdos. Es un país del Asean y del Transpacífico. Entonces, pensar en incorporarse al transpacífico queda más cerca.

Transpacífico y China. El gerente de INAC hizo referencia a que el Transpacífico formalmente es un tema que no ha comenzado en materia diplomática, sino que está en negociación.

Sobre China, dijo que “estamos en el punto de la prefactibilidad” aguardando novedades. “Del lado uruguayo estamos esperando la luz verde de China”, agregó.

Finalmente, Pereira expresó que, en materia de acceso a mercados, observa una agenda activa en el sudeste asiático, con objetivos claros en Indonesia, Malasia, Filipinas y Vietnam en el corto plazo.

Por otro lado está la agenda Mercosur y la agenda que puede impulsar Uruguay de forma bilateral: China, Turquía y Transpacífico.

PARAGUAY

Se fortalecen los precios para machos y vaquillas gordas

11/07/2022GANADERÍA

El mercado de haciendas gordas de exportación comenzó la semana con un leve fortalecimiento en los valores de los machos y vaquillas, con cotizaciones promedio de US\$ 3,70 por kilo carcasa, una valorización de 5 centavos de dólar. Mientras tanto, las vacas se mantienen estables en US\$ 3,15 a la carne, de acuerdo al relevamiento de Valor Agro. Un industrial confirmó a Valor Agro que la oferta de animales continúa estable, aunque es inferior al volumen de hacienda disponible en mayo y junio. De todas maneras, comentó que las entradas a planta se están previendo entre 7 a 10 días.

Técnicos continuarán inspecciones para la apertura del mercado de EE.UU. a la carne paraguaya

8 de julio de 2022 11:54 AM Imprimir

El Servicio de Calidad y Salud Animal (Senacsa) informó que la próxima semana llegará al país una comitiva de técnicos norteamericanos en el marco del proceso para la apertura de la carne paraguaya al mercado de Estados Unidos. «El 10 de julio estarán viniendo los técnicos para comenzar a inspeccionar, el lunes de la próxima semana [...]

El Servicio de Calidad y Salud Animal (Senacsa) informó que la próxima semana llegará al país una comitiva de técnicos norteamericanos en el marco del proceso para la apertura de la carne paraguaya al mercado de Estados Unidos.

«El 10 de julio estarán viniendo los técnicos para comenzar a inspeccionar, el lunes de la próxima semana ya comienzan las visitas a los laboratorios y el martes ya vamos a comenzar a recorrer las distintas plantas frigoríficas del país», informó este jueves el presidente del Senacsa, José Carlos Martín.

La visita se realizará con el fin de verificar algunos cambios que los técnicos estadounidenses sugirieron para las instalaciones frigoríficas. «Así también estarán en el país la semana que se desarrolla la Expo de Mariano Roque Alonso» la mayor exposición ganadera, industrial y de servicios del país, destacó Martín.

El presidente del Senacsa indicó que el trabajo con los técnicos estadounidenses es constante, para avanzar en la apertura de ese mercado. «Nosotros estamos trabajando casi de manera mensual con ellos enviando documentos, realmente es un proceso bastante complicado. Estamos cerca, ellos llegan al país el próximo lunes y se quedan por ocho días», informó.

«Hay que entender que los procesos llevan sus tiempos. Paraguay tiene un expertise de exportación muy importante, lo venimos haciendo desde hace 20 años y queremos llegar a ese mercado, se ha hecho un gran trabajo tanto del sector público como privado, y hay que destacar el liderazgo que tuvo el señor presidente de la República para llevar esto a las más altas partes de la negociación de la carne.

Todavía hay exámenes que pasar y nos estamos preparando para el día lunes», añadió Martín.



UNIÓN EUROPEA

Economía afectada por la guerra entre Rusia y Ucrania

La guerra d'agresion de la Russie contre l'Ukraine continue à avoir des répercussions négatives sur l'économie de l'UE, en la plaçant sur la voie d'une croissance plus faible et d'une inflation plus élevée par rapport aux prévisions du printemps. Selon les prévisions économiques (provisoires) de l'été 2022, l'économie de l'UE connaîtra une croissance de 2,7 % en 2022 et de 1,5 % en 2023. La croissance dans la zone euro devrait s'établir à 2,6 % en 2022, puis à 1,4 % en 2023. L'inflation annuelle moyenne devrait culminer à des niveaux historiquement élevés en 2022, à 7,6 % dans la zone euro et 8,3 % dans l'UE, avant de retomber respectivement à 4,0 % et 4,6 % en 2023. Les risques qui pèsent sur les prévisions relatives à l'activité économique et à l'inflation dépendent fortement de l'évolution de la guerre, notamment de ses répercussions sur l'approvisionnement en gaz de l'Europe. On ne peut exclure que la résurgence de la pandémie dans l'UE entraînera de nouvelles perturbations de l'économie. Dans le même temps, les récentes tendances à la baisse des prix du pétrole et d'autres matières premières pourraient s'intensifier, entraînant ainsi une baisse de l'inflation plus rapidement que prévu actuellement. En outre, grâce à un marché du travail solide, la consommation privée pourrait s'avérer plus résistante à la hausse des prix, dans le cas où les ménages utilisaient davantage leur épargne accumulée

FRANCIA: se plantea reducir el uso de nitritos

13 July 2022

Processed meat makers can still use it in cured meats

France said on Tuesday it intends to cut the use of nitrites in food after the national health agency confirmed they raise the risk of cancer, falling short of a full ban feared by processed meat makers who use it in products such as ham and sausages, reported Reuters.

The move follows a French parliament bill in February aiming to gradually reduce the use of nitrites in cured meats, calling on the government to act based on the outcome of a review and recommendations by health agency Anses.

Anses' review, published earlier on Tuesday, confirmed a World Health Organization report in 2018 linking nitrates and nitrites ingested through processed meat to colorectal cancer.

The two substances are also suspected to be linked to other cancers such as ovarian, kidney, pancreas, and breast, Anses said, also referring to other scientific findings, as it advised cutting nitrates and nitrites to a minimum.

Nitrate is used as a fertilizer in farming while nitrite is widely used in processed meats to extend their shelf life and gives boiled ham its pink colour.

The government said a ban was not justified after Anses said that, based on French people's consumption habits, 99% of the population did not exceed the permissible daily doses for all exposures to nitrites or nitrates.

However, it would present a plan to parliament in the autumn aimed at cutting or eliminating them when possible, it said.

Processed meat consumption should be limited to an average of 150 grams (5.3 oz) per week, Anses said, or about half the 280 grams consumed by French adults.

French processed meat producers group FICT stressed that the industry had already significantly reduced nitrite use and echoed Anses' warning of counter-effects of reducing nitrite use without alternatives.

A lower use of nitrite reduces ham's expiry date and increases the risk of salmonella in cured sausages.

"If we caused microbial accidents because there are no more nitrites it would be even worse than the hypothetical risk mentioned," FICT Chairman Bernard Vallat said.

REINO UNIDO

Aumento del precio de la carne incide en costo de vida

11 July 2022 AHDB

Cost now on par with health as reason for cutting back

In recent years the UK has seen the growth of "flexitarians", or people trying to reduce their meat consumption and eat a more plant rich diet, accounting for around 1 in 5 consumers, according to Agriculture and Horticulture Development Board consumer insight manager Susie Stannard. Typically, people reduced their consumption of meat due to beliefs around meat and its impact on health, the environment and animal welfare. Now consumers have a new reason to cut back on meat: inflation. According to Stannard, increased cost has surfaced as a strong reason for cutting back on meat. In fact, it is now neck and neck with health as the top driver of meat reduction.



Those thinking that beef and red meat currently have good prices and offers has now reduced to only 10% and 6% respectively. High prices are particularly damaging for cuts such as roasting joints and steaks where higher prices are a barrier for many consumers. Consumers may choose to opt for cheaper cuts such as mince that are easy to bulk out with cheaper vegetables or carbs, but AHDB's consumer tracker is showing larger proportions of consumers now perceiving mince as expensive (rising from 11% to 19% over the last 12 months).

Demand for hind quarter cuts is likely to drop further as inflationary pressures are also likely to put a brake on food service recovery. According to an AHDB/You Gov consumer tracker, 36% are planning to eat out less than pre-pandemic; 77% of those say it is to save money.

Year on year retail sales are now being compared to 2021 which saw a period of pandemic restrictions where in-home eating was above the average. Stannard said AHDB expects to see a downturn in retail sales of meat and other products since last year. However, there are signs that high prices are also taking their toll, particularly on more premium proteins such as lamb which is down by 12% compared to pre-pandemic levels, according to statistics from Kantar.

Retailers will need to look for ways to support consumers through this crisis, Stannard suggested. Meat is widely regarded by consumers as an important part of the weekly shop and provides essential nutrients such as B12 that plant-based foods alone cannot. Consumers may need to revisit some of the more old-fashioned ways of making meat stretch further via creative use of leftovers and ensure they minimise food waste. Promotional strategies will need to be carefully thought out as well to manage volumes passing through the supply chain at key periods such as Christmas and other key events and to maintain carcass balance, she concluded.

Estudio analizar la demanda de la carne de origen neocelandés

11 July 2022 AHDB Price has a significant impact on buying behaviour

Since the UK exited the EU, new and potential trade deals have been highlighted in the news, including Free Trade Agreement (FTA) negotiations with New Zealand. But are UK consumers likely to buy New Zealand produce in our supermarkets and restaurants? The UK's Agriculture and Horticulture Development Board (AHDB) highlights the results of a study that looked at just that.

According to the study, which was conducted by the Department for International Trade (DIT), 64% of UK consumers support the trade agreement with New Zealand. However, consumers said the UK government should protect UK farmers, and maintain environmental and UK food standards when negotiating.

AHDB commissioned consumer research with YouGov to identify UK consumers' willingness to buy imported foods from New Zealand. Their research found that if meat produced in New Zealand was sold in the supermarket or in a restaurant, and was labelled as produced overseas, but cost the same as British produced meat, 42% of Brits would likely purchase it. A similar proportion (40%) said it was not likely. This highlights the spilt nature of purchase decision making based on country of origin.

When asked specifically about a type of protein and prompting them on a particular product, the majority of consumers claim they would purchase British beef (82%) and British lamb (70%), even if beef or lamb produced in New Zealand was priced the same in-store.

It's worth noting that price has a significant impact on consumer buying behaviour, said AHDB, and in the current climate with inflation at a record high, household budgets are likely to experience some pressure, which may see consumers turn to cheaper goods.

In the AHDB/YouGov study, UK consumers were asked to rate their impression of New Zealand meat and dairy production standards compared to the UKs. Approximately half of consumers surveyed did not know. Although consumers aren't necessarily aware of New Zealand's red meat production standards, it is understandable that UK consumers place trust in New Zealand products with notable pockets of consumers feeling production standards are around the same as the UK. Consumers are, after all, already used to seeing New Zealand beef and lamb on the supermarket shelves.

The study also found that 15% of consumers believe New Zealand's meat and dairy production has a better impact on the environment than domestic.

Around the topic of quality, most didn't know (40%) or thought the quality was the same (39%). Of those who did differentiate, 15% of consumers believed meat and dairy produced in New Zealand is of better quality than domestic with only 6% feeling the quality would be worse than the UK.

In conclusion, AHDB noted that consumers currently face significant economic pressure, and their decisions in the supermarket will likely centre around price.



ESTADOS UNIDOS

USMEF: Nuevo incremento en las exportaciones de carnes bovinas en mayo

TheCattleSite News Desk 12 July 2022

According to a press release from the US Meat Export Federation (USMEF), US beef exports set new volume and value records in May, topping \$1 billion for the fourth time this year, according to data released by USDA and compiled by USMEF. While pork exports were well below last year's large totals, shipments were the largest of 2022 in both volume and value.

May beef exports reached 135,006 metric tons (mt), up 1% from the previous high posted in May 2021. Export value climbed 20% to \$1.09 billion, breaking the March 2022 record. For January through May, beef exports increased 4% from a year ago to 613,266 mt, valued at \$5.14 billion (up 34%). Exports to leading markets South Korea, Japan and China/Hong Kong already topped \$1 billion each through May, while shipments also trended significantly higher to Taiwan, the Caribbean, the ASEAN region, the Middle East and Central America.

"For US beef exports to maintain a \$1 billion-per-month pace is tremendous under any circumstances, but it is especially remarkable given the strong US dollar, continued shipping and logistical challenges and the economic uncertainty our industry and international customers face today," said USMEF president and CEO Dan Halstrom. "Across a wide range of markets, the momentum for retail beef sales achieved during the pandemic continues, and it's now complemented by a strong rebound in the foodservice sector. May volume was actually down slightly to both Japan and South Korea, and yet exports still set a new record. That's a great indication of soaring, broad-based demand for US beef."

May pork exports were 224,677 mt, down 21% from the large year-ago total but the highest monthly volume since November. Export value was \$655.1 million, down 24% but also the highest since November. Through May, pork exports were down 20% from a year ago to 1.07 million mt, valued at just under \$3 billion (down 18%). Exports to Mexico and the Dominican Republic are on a record pace in 2022, while May exports were also very strong for Colombia. Despite logistical challenges, chilled pork exports increased to Japan and South Korea.

"On the pork side, exports are still trailing the enormous totals from the first half of last year, but we're seeing upward momentum in several markets," Halstrom explained. "Shipments to Mexico are on a record pace and demand is strong across most of the Western Hemisphere. China's hog prices have increased about 40% since mid-June, which supports our forecast for some rebound in China's demand for imported pork toward the end of the year. Even when China pulls larger volumes from other suppliers, this has a positive impact for US pork in a number of international markets."

Precios minorista de carnes se mantienen altos

13 July 2022 Texas A&M

Retail meat prices remain higher than last year as consumers plan for summer gatherings, according to a Texas A&M AgriLife Extension Service expert.

Wholesale beef prices for many cuts are lower than this time last year, but retail prices have not declined yet in turn, said David Anderson, Ph.D., AgriLife Extension economist, Bryan-College Station. Beef and pork production continues to exceed last year's level despite high feed costs, but demand has kept up with high supplies.

"I suspect part of the retail prices is consumer demand is still there, and there are higher logistical and labor costs being passed along," he said. "But I would argue a lot of it is timing, and lower wholesale prices have not yet reached consumers at the retail side. In that case, some lower prices might show up over the coming weeks."

Beef prices higher for consumers

National weekly averages for wholesale beef cuts ranging from boneless rib-eyes to shoulder roasts and brisket were much lower than the week leading into Memorial Day 2021, Anderson said.

Wholesale choice rib-eye steaks were \$8.56 per pound compared to \$12.63 per pound in 2021, or 32% lower, according to the wholesale report. Choice roasts were \$2.62 per pound compared to \$3.19 per pound last year, and choice briskets were \$2.97 per pound compared to \$4.40 per pound last year.

Anderson said beef supplies are as high as this time last year, though he noted grade qualities were above last year with more choice cuts available.

Retail choice rib-eye steaks are one of the exceptions with lower prices at \$10.97 per pound compared to \$12.37 per pound last year, Anderson said. Brisket retail prices are \$4 per pound compared to \$3.13 per pound; and flank steaks, which are used in fajitas, were \$10.17 per pound compared to \$9.77 per pound last year.

More grocery stores are featuring beef cuts compared to last year, according to a U.S. Department of Agriculture retail survey. Grocery store features include products with advertised prices, and around 69%



of retail stores were featuring various beef cuts. Around 19% were offering beef cuts on special, which is defined as a “no-price” promotion, including “buy one, get one free” or get one free with the purchase of other items.

“It’s interesting that average monthly retail beef prices have not come down in response to the falling wholesale prices,” Anderson said. “It could be that lower wholesale prices are allowing them to run specials leading into Memorial Day, or that we could be heading toward lower retail prices in the near future.”

Pork, chicken prices

Higher retail prices could direct some consumers to lower-cost products like ground beef or to other meats like pork or chicken, Anderson said. However, both pork and chicken are experiencing a similar pricing trend to beef with generally higher prices.

Retail pork cut prices had a wide range with some higher and lower than last year, with spareribs priced \$4.82 per pound compared to \$3.82 per pound last year, or 21% higher. Retail poultry prices were similarly higher with boneless/skinless breasts coming in \$3.25 per pound compared to \$2.69 per pound, or 17% higher per pound than last year and boneless thighs being 24% higher at \$1.26 per pound compared to 98 cents per pound last year.

“We’re seeing higher costs on most everything, but overall, I think the lower wholesale beef prices give us some hope for lower prices this summer,” he said.

Ciclo ganadero ayudaría a prever tendencias del mercado

GREG HENDERSON July 14, 2022

Cattle and beef market forecasts remain as positive at mid-summer as economists had projected at the beginning of the year. In fact, feeder cattle and calf markets have exceeded many expectations which is good news for ranchers.

Unfortunately, the expanding drought has forced an unprecedented culling of beef cows throughout most of America’s large cow-calf producing states. The U.S. Drought Monitor the first week of July reported 70% of the contiguous U.S. was experiencing moderate to severe drought conditions.

That level of drought is driving beef cows to market in historic numbers. Through the end of June, total cow slaughter was 6.1% higher than during the same period of last year even as dairy cow slaughter decreased by 3.1%. The total spiked higher due to beef cow slaughter that was 14.6% higher than in 2021.

“Consistently high beef cow slaughter levels for the first half of 2022 ensure that the January 2023 U.S. beef cow inventory will decline for the fourth consecutive year,” says University of Missouri livestock economist Scott Brown.

Economists believe the rapid beef cow liquidation that has already occurred in 2022 may put the industry on track to reduce the nation’s cowherd back near 2014 levels, which – at 29.0 million head – was the smallest beef cowherd since 1952.

USDA’s annual cattle inventory report found 30.13 million beef cows on Jan. 1, 2022, a decline of 2.3% from the previous year. Already the numbers suggest the beef cow inventory will contract, possibly by another 1 million, leaving next January’s total about equal to that of 2014.

“We saw a 9% increase in beef cow slaughter last year, and a net herd culling of 11.6%,” says Derrell Peel, Oklahoma State University livestock economist. “Drought expanded and accelerated herd liquidation in 2021, leading to a 2.33% decrease in the beef cow herd.”

Beef cow culling during the first half of 2022 guarantees an overall decline for the year.

“Just holding cow slaughter for the remainder of the year equal to last year would result in an annual increase in cow slaughter of 5.9%,” which Peel said was unlikely due to the expanding drought. He suggests the current level of cow culling would result in a culling rate in excess of 13% for 2022 and a potential beef cow herd decline of one million head or more.

How might that decline in beef cows affect your prices for feeder cattle and fed steers? At Missouri, Brown examined the price behavior of similar points in the cattle inventory cycle going back to the mid-1970s. Since then, there have been four other instances in which beef cow inventory numbers declined for four or more consecutive years: 1976-79; 1983-86; 1997-2004 and 2007-2014.

“In every case during the previous four cattle cycles, both national indicator fed steer prices and 600 to 650-pound Oklahoma City feeder steer prices posted higher average levels in the four years following the position in the cycle that we will see at the beginning of 2023,” Brown said. “That average price increase in these cycles was 24.4% for fed steers and 34.7% for feeder steers.”

Taking the smallest and largest percentage changes over the previous four cycles yields a range of \$129.14 to \$181.95 for fed steers and \$188.72 to \$264.14 for feeders.

Retaining ownership

Late summer offers an opportunity to review your calf marketing plan and make necessary adjustments. Often, retaining ownership of your calves through a background phase or through the finishing phase offers the potential for additional revenue. This is unlikely to be one of those years.



“The risk/reward is not in a rancher’s favor for retaining ownership this year,” says Sterling Marketing president John Nalivka. “Yes, fed cattle prices are higher and they look to gain even more in the months ahead. But the cost of feeding cattle is significantly higher.”

Sterling Marketing estimates that feed costs for cattle placed the first week of July were 28% higher than the previous year and totaled \$570 per head. For cattle placed on feed in October, Sterling projects the total feed cost at roughly \$540 per head with the cattle marketed in March of 2023.

The greatest risk to retained ownership, however, is the price of feeder cattle. Sterling projects 750 to 800-pound feeder steers will sell in October for \$171 per cwt., or \$1,325 per head. That’s roughly \$150 per head more than those same feeder steers sold for in October 2021.

“The cost of feeder cattle is the primary driver of breakeven prices for feedlots and represent 60% to 70% of the cost to the feedlot,” Nalivka says. “The total costs for feeding a steer is going to be 15% to 20% higher this year, which means the breakeven will be that much higher. That will make it difficult to increase any profits a rancher already has in his calves or feeder cattle.”

AUSTRALIA

Ejercicio 2021–22: saldo desfavorable en exportaciones

14 July 2022

Key points:

Overall red meat exports in 2021–22 fell by 11% year-on-year.

Sheepmeat exports to the US grew by 5%, demonstrating growing demand from American consumers for Australian sheepmeat.

Overall goatmeat exports grew by 24% year-on-year, with the US dominating overall export volumes.

With the 2021–22 financial year in the rear-view mirror, we’re starting to see emerging trends in red meat exports that bode well for the industry. As the herd and flock rebuilds begin to mature, exports are rising despite ongoing challenges from an unsettled global landscape.

Australia exported 1.3 million tonnes of red meat in FY2022, 11% lower than FY2021. This drop was broadly consistent across our major markets – exports to Japan fell by 11%, China by 13%, South Korea by 9% and the US by 13%. This was primarily driven by falls in beef; FY2022 beef exports were 13% lower than FY2021, at 786,688 tonnes.

Grainfed vs grassfed beef exports

Grainfed exports held up more strongly, falling by only 5% to 282,979 tonnes, while grassfed beef exports fell by 17% to 503,709 tonnes. Moreover, grainfed beef made up 36% of exports over the financial year, up 3% from FY2021 and a new record high. The emergence of grainfed beef as a mainstay of Australian exports has helped to ensure supply to key markets, even in an environment with relatively limited production.

Beef exports to the US were especially soft, falling by 24% to 123,426 tonnes. American production has been at near record highs for the past year, as drought conditions in the south and southwest of the country cause a huge destocking event.

Sheepmeat

Exports of lamb fell by 7% to 245,772 tonnes, while mutton exports fell by 2% to 129,076 tonnes. Exports to China fell by 18% for lamb and 21% for mutton, to 49,383 tonnes and 48,581 tonnes respectively. Despite this, China remained our largest export market for sheepmeat, importing 97,639 tonnes overall.

Sheepmeat exports to the USA grew by 5%; lamb exports rose by 2% to 67,104 tonnes and mutton exports grew by 19% to 17,580 tonnes. This rise in volume, alongside high prices paid by American importers, made the US the most valuable market in FY2022, despite lower volumes than China.

Sheepmeat exports were strong in South-East Asia, and relatively weaker in the Middle East and North Africa (MENA) region. Lamb exports rose by 20% in South-East Asia, as increased demand from Papua New Guinea and Malaysia offset smaller drops in other parts of the region – while lamb exports to MENA fell by 26%, as the end of subsidies for Australian lamb from Qatar caused a large drop in volume from what was Australia’s third-largest lamb market. Mutton exports to South-East Asia stayed flat, while they grew by 24% in MENA to 17,525 tonnes, partially offsetting the decline in lamb exports.

Goatmeat

Goat exports had a remarkable year, growing by 24% to 19,474 tonnes. The US remained the largest market, receiving 64% of export volume, while South Korea saw the largest market growth, with exports rising by 51% to 2,503 tonnes.

Exports have long been expected to rise over 2022. Supply chain issues, extreme weather events along the east coast and labour shortages delayed that uplift, as processors were unable to operate at full capacity and exporters struggled to send exports to market.



Despite this, there's a positive trend beginning to develop; after a rough start to the year, exports in May and June have been up 3% year-on-year, with beef exports growing by 5% in May and 8% in June. This means the industry goes into the new financial year in a strong position. Prices remain at elevated levels globally, and production from the United States is projected to fall over the next two years – giving us a strong position in Japan and Korea, two markets where we compete with the US for market share.

Fuerte baja de las exportaciones de animales en pie durante junio

Beef Central, 15/07/2022

The Port of Darwin shipped 231,552 cattle in 2021-22, back from a five year average of 333,692.

AUSTRALIAN cattle shipments fell to 43,474 head in June, a 53 percent decline on the five-year-average for the month, according to shipping data released earlier today.

Exports to Indonesia, which is experiencing a fast spreading outbreak of foot and mouth disease, totalled 25,730 head for the month, 48 percent below the five year average.

Shipments to Vietnam remained subdued at just 7828 head for the month, 64 percent below the five year average, while monthly trade of breeding and dairy cattle to China also slowed to 8662 head, 31pc down on the June five year average.

A total of 19,986 cattle were exported from Darwin, 9668 from Portland, 5746 from Broome and 3224 from Townsville for the month.

2021-22 volumes

Australia exported 603,586 cattle for the 2021-2022 financial year, well below the five year average of 997,667 head.

Shipments to Indonesia totalled 339,264 head for 2021-22, which compared to a five year average of 518,400, and Vietnam shipments slumped to 88,103, down from a five year average of 205,100.

Exports to China total 102,603 in 2021-22, down on a five year average of 125,803.

Darwin shipped 231,552 cattle for the financial year, followed by Portland (100,019), Broome (91,400), Townsville (60,664) and Fremantle (55,516).

AFTOSA EN INDONESIA

Experto estima que no podrá controlarse la enfermedad en el corto-mediano plazo

Terry Sim, 15/07/2022

INDONESIA won't get rid of Foot and Mouth Disease in the short or medium term, Australian farmers were told in a Victorian Farmers Federation webinar tonight.

More than 700 farmers attended the webinar moderated by VFF president Emma Germano.

Head of the Department of Agriculture, Forestry and Fisheries National Animal Disease Taskforce Dr Chris Parker said the worry with FMD in Indonesia is that there is active infection in environments that have had no infection before.

"They've been free since 1986, there are lots of animals that have never been exposed and they're not vaccinated or anything like that.

"So large numbers of animals are being infected and there is probably close to 400,000 reported at the moment," he said.

"So what we are seeing is rapid spread and that's not unexpected in a population of what we would call naïve animals or animals that are susceptible."

Dr Parker said the government is investigating a lot of other measures to provide assistance at Australia's borders to boost current biosecurity, awareness, education and border declaration, but he considered there was "defence in depth at the border."

He said Australia is assisting Indonesia to be able to get FMD under control.

"I believe the Minister announced \$1.5 million towards vaccine today which the Indonesians will use.

"We also have some work that we've done MLA and we've provided some money for a joint biosecurity program that will help improve biosecurity, particularly in the feedlot industry, but also in small holder farms," Dr Parker said.

"We've also provided expert advice in line with Indonesia's request around both the vaccine program, but also whether they will produce vaccine locally as well, and there will be a range of other things that will be announced that I'm not in a position to talk about yet."

"So what we are in the process of doing is stopping it getting in and that's what I think myself and all my colleagues and all the people working for us at the border are highly focused on," he said.

"And then we are focused on assisting Indonesia in getting this under control.

"They won't get rid of it in the short or medium term, we know that."

Indonesia is a large archipelago with thousands of islands, although there were advantages in that movement between islands could be controlled, Dr Parker said.



“But I suppose the endgame for all of us is where we should be aiming, is assisting Indonesia to get this under control.

“Because once it’s under control they’re probably no greater risk than a lot of the other countries where we’ve been trading with for years and that we’ve had passengers coming and going,” he said.

“But it is the uncontrolled nature that causes us serious concern it’s that that we need to be prepared for and work our way through.”

Dr Parker said there was “no way in the world” that Australia would voluntarily start vaccinating with a killed FMD vaccine, “because it would significantly change our trading status and those countries we could trade with.”

A million FMD vaccine doses available within a week

Dr Parker said Australia had a “vaccine bank which we own.”

“It’s held in the United Kingdom.

“At the moment it has five different serotypes in it,” he said.

“We have the serotype or the type of FMD that is in Indonesia in that vaccine bank and a million doses can be produced in seven days,” Dr Parker said.

“That’s the contractual arrangement that we have with the company who holds it for us and then if we required more vaccine than that, we would have to wait a period of time while they replenished the stock or we would be buying it on the open market and there are a range of companies that produce that serotype amongst others.

“But we have a million doses available to us within a week.”

Vaccine unlikely to be available on ‘day one’ of an FMD outbreak

Agriculture Victoria’s principal officer – emergency animal disease with the Chief Veterinary Officer’s Unit, Dr Megan Scott, said under the right conditions the FMD virus can survive for weeks in the environment.

Dr Scott showed a map illustrating the thousands of sheep movements across Victoria in a day from properties to saleyards to abattoirs and urged farmers to think of two borders – their boundary fence and the national border. Farmers were best placed to monitor the health and behaviour of their stock.

She said vaccine is only one tool, it may or not be used and would be used strategically depending on the type of outbreak.

“It’s important to understand that vaccine is unlikely to be available on day one of an outbreak ... and as Chris pointed out we’ve got a million doses ready to roll, but we have a lot more than a million stock.”

Quarantine for a week if returning from Bali

Dr Parker said if farmers were coming back from a holiday in Bali they should be thinking about quarantining for 5-7 days before returning to their property.

“If you don’t take any clothing back and you’ve got no contact with animals that will be a slightly different thing won’t it?

“I think an abundance of caution given the activity that we see in Indonesia is not an unreasonable thing.”

Australian Government to give Indonesia \$1.5m for 1 million FMD vaccinations

A statement from Minister for Foreign Affairs Penny Wong and Minister for Agriculture, Fisheries and Forestry Murray Watt today said the Australian Government will provide \$1.5 million to provide at least 1 million FMD doses for Indonesia’s vaccination program, following a formal request for assistance from the Indonesian Government.

Indonesia’s vaccination program is focused on support for the small-holder farming sector, which makes up around 90pc of Indonesia’s cattle industry.

This support is in addition to Australia’s existing commitment of 435,000 Lumpy Skin Disease (LSD) vaccine doses that are currently being distributed to affected Indonesia provinces.

Mr Watt discussed Australia’s support with Indonesian Minister for Agriculture Syahrul Yasin Limpo in Jakarta today. The minister also met with Indonesian National Disaster Management Authority head and chief of the Indonesian Task Force for Foot and Mouth Disease, Lieutenant General Suharyanto.

The Australian Government has also committed an initial \$500,000 to Meat and Livestock Australia, responsible for coordinating support from Australian industry for the Indonesian feedlot sector’s emergency response to these diseases.

Ms Wong said safeguarding the biosecurity of our region is a shared concern for Australia and Indonesia.

“This was something confirmed during the recent Indonesia-Australia Annual Leaders’ Meeting.

“The provision of 1 million vaccine doses to combat Foot and Mouth disease underscores Australia’s commitment to supporting Indonesia’s response to the outbreak.”

Mr Watt said during his meeting with Lieutenant General Suharyanto he offered to share Australian expertise on emergency disease management and biosecurity.

“The Albanese Government is taking a two-pronged approach to preventing the incursion of Foot and Mouth disease, first by strengthening biosecurity measures at the Australian border, and also by supporting efforts to curb the spread overseas.”



Sugieren prohibir el turismo a BALI para impedir el ingreso de la enfermedad

James Nason, 14/07/2022

Calls for Australia to consider halting travel to Bali to prevent foot and mouth disease entering Australia are being met with resistance from livestock representatives concerned about how such a move would impact Australia's critical relationship with Indonesia.

A number of livestock industry leaders have told Beef Central today that a tourism ban would undermine Australia's cooperative efforts to control FMD in Indonesia.

Shadow Minister for Northern Australia, Senator Susan McDonald has become the latest person to raise the suggestion that suspending flights from Bali should be considered, saying in a media release on Wednesday that an outbreak of FMD in Australia would unleash a crisis of "biblical proportions".

Senator McDonald said a FMD incursion would cost billions of dollars in management and eradication, including the destruction of cattle, sheep, goats and pigs, and a loss of access to premium markets.

"We saw a swift closing of borders with Covid, and I believe similar measures should be discussed for foot-and-mouth, and if not flight suspensions, then quarantine for returning passengers," she said.

"Some people will say this is an overreaction and will adversely affect the Indonesian economy, but the devastation of a foot-and-mouth outbreak in Australia would be widespread to not just producers but consumers and taxpayers as well.

"It is truly difficult to comprehend how bad this would be which is why it is critical that we do not allow FMD into Australia.

"Australian tourists in Bali are walking through cow dung and bringing soiled shoes and suitcase wheels back home but anyone who flew back in the past week could already have brought the disease into Australia," she said.

She said the Federal Government should have made an emergency declaration the moment Indonesian authorities raised the alarm, adding that "more sniffer dogs won't find the disease on people's shoes".

The impact on Australia's \$80 billion protein and dairy herds would be indescribable, she said, including mass burials of euthanised animals and years of virtually no domestically available meat, cheese and milk.

"This is beyond politics, this is about doing absolutely everything possible to protect a crucial industry that feeds us and the world.

"Grazing families would be forced off the land and we would all be paying exorbitant prices for sub-standard imported meat in our supermarkets and butchers.

"After talking to meat industry figures and hearing how worried they are, I believe the Federal Government should immediately canvas suspending Bali flights and consider sending biosecurity and veterinary staff to Bali to administer vaccines, help the Indonesian authorities address the outbreak and ensure the disease does not enter Australia."

More at stake, industry leaders say

Not all in the livestock sector agree with the strategy.

One livestock leader pointed out that Australia's relationship with Indonesia has still never recovered from the last time an Australian Federal Government suddenly stopped an important trade to Indonesia.

The damage done from the 2011 suspension of live cattle exports to Indonesia is still playing out over a decade later, with the Federal Government facing a \$1 billion compensation payout.

Australia should be focusing on working with Indonesia, a number of industry representatives have told Beef Central today.

"At this point in time the biggest thing is to try to help Indonesia get a handle on these outbreaks," Central Queensland producer and AgForce cattle board member David Hill said.

"If we are trying to impose measures that would have a detrimental affect on their tourism industry and telling people not to go there, it is not going to augur well with us trying to help them to handle this incursion.

"The big thing is improving that relationship, it is vitally important, we're understanding of the offers of help that the Department and Australia have made and we want to ensure that Indonesia is likely to take up help that is being offered."

Others have also stressed the importance of Australia continuing to work closely with Indonesia.

"Indonesia's offence against these diseases is our best defence," NTCA CEO Will Evans said.

"The second layer and most important for us in Australia is to make sure our airports are fortresses against any disease arriving on our shores.

"This needs to capture human error as well – including those who are dishonest or may not even be aware they have come into contact with disease vectors whilst overseas.

"Our position is that the Australian Government must take all necessary precautions in airports and foot baths put the importance of Australia's biosecurity front and centre for all travellers coming through our airports.



“If FMD, LSD, BSE or any other emergency animal disease were detected in Australia, we would look to our trading partners to treat us fairly and may even ask them for support, assistance and understanding as we worked to get an outbreak under control.

“With the situation being what it is in Indonesia today – we need to consider this. Does shutting Indonesia off completely today, ultimately hurt us in the long run?”

“No one in Australia is more concerned about disease incursion from South East Asia than our members. But cool, clear thinking and considered actions will win the day.”

Australian Livestock Exporters’ Council CEO Mark Harvey-Sutton agreed that Australia needed to be working with Indonesia.

“At the moment Indonesia needs our support as they are facing a situation that can seriously impact their food security and thousands of livelihoods involved in livestock production. It’s not all about us, and providing assistance is the right thing to do,” he said.

“Of course providing this assistance will contribute to keeping our industry safe. For this assistance to be effective we need cooperation from Indonesia – banning travel does not send a co-operative message and actually has the potential to undermine our efforts.

“I understand why people are concerned as an outbreak in Australia would be devastating. People are worried. I’m worried – this issue keeps me up at night. We need bipartisan cooperation from our political leaders given its magnitude.

“But our efforts best lie in helping our friends in Indonesia at this point in time. Increased and thorough screening of passengers and getting as much vaccine as possible on the ground are practical and effective things we need to be doing right now.”

‘Our biosecurity system has stood up to FMD for 120 years’

Livestock representatives are calling for calm heads and evidence-based science to underpin dialogue and decisions.

One livestock biosecurity expert with significant experience in the field, but who asked to remain anonymous to be able to share their thoughts more freely, called for calm heads to prevail.

Some producers were so concerned by reports of an impending FMD catastrophe they were contacting their representative organisations expressing fear about the future and asking whether they should be selling their property and all of their livestock.

“The only increase in the risk is the fact that it is now closer (with FMD in Bali).

“Obviously close proximity always increases risk, but at the same time we are an island, we have a geographical advantage, and our biosecurity system has stood up to FMD for 120 years, and we have had plenty of travellers that have come from FMD infected countries.

“Banning flights and putting a foot bath out in an airport won’t prevent FMD, our risk pathway is and still remains the illegal importation of infected meat.

“The pathway from someone’s thongs walking from Bali to Australia, if they’re having no contact with livestock on either end, the pathway of transmission is negligible.

“What we want passengers to do is declare.

“We don’t want them bringing in illegal products, and we want to make sure that they’re taking biosecurity measures so if they have contact with livestock, we want them to do something to bring that risk down.”

Fallas en el paquete de medidas para compensar el impacto de la AFTOSA

Jon Condon, 15/07/2022 Major flaws exist in the AusVetPlan’s approach to compensation for stock losses associated with any outbreak of Foot & Mouth Disease in Australia, independent analyst Simon Quilty told an industry gathering on the Gold Coast yesterday.

Speaking during the Rural Marketing Agents (RMA Network) annual conference, Mr Quilty painted an alarming picture about the financial impact on livestock producers of an FMD incursion from Indonesia. He exposed what he sees as serious flaws in the size of the available compensation package for stock liquidated in the disease response, and the methodology used to compensate producers for lost stock.

Simon Quilty, addressing yesterday’s RMA Network conference on the Gold Coast

As background, the current AusVetPlan document ([Click here to access](#)) sets out circumstances that would unfold in the event of an FMD outbreak*. All animals would be slaughtered on premises where an infection had been detected, and any animals in ‘suspected’ herds would be observed closely for 14 days.

There were effectively three parts to the government’s compensation process, Mr Quilty said.

The first was animals lost immediately in the eradication process. The second was response costs including decontamination (ie a shed where infected animals had been found, being burned down). The third was compensation for those producers who had been forced to destock, who then had to go into the market re-stock. Effectively, the government would pay the difference if the cost of the new stock was higher than at the time of destocking. (36.30)



Compensation is determined by the states and territories, but under the Australian Emergency Animal Disease Response Agreement, the state and federal governments would share 80pc of response costs, with the industry paying the remaining 20pc.

Mr Quilty firstly set out a series of major concerns about how the compensation process would unfold.

In a herd or flock where the disease was found, under the agreement, the value of animals would be determined by the prices at the two most recent sales that had taken place at the closest saleyards to the affected property.

“But under an FMD crisis, the impact is a rolling problem. In a week’s time, the livestock sales continue, but the market is shut off, and prices plummet. In a herd that contracts FMD a week later, their compensation is determined by the local saleyards prices that week.”

“If in three weeks’ time the market has crashed 50pc, the same happens again – it’s a rolling compensation. Effectively, producers are going to wear the cost of market closures, so you do not want to be the last to contract FMD in your herd – you’d better be the first, because only the first will get pre-FMD prices for compensation. At the other end, the last guy whose suffers a herd infection gets the worst prices ever,” Mr Quilty said.

“It’s wrong. It should not be that way, and represents policy poorly written. In my opinion compensation should be based on a set time period prior to any FMD outbreak – not some ‘rolling average’ of prices once the disease strikes.

Mr Quilty urged RMA members attending yesterday’s conference to take the messages home to their local politicians, and seek to ‘get it set right.’

“It’s a major flaw in the AusVetPlan. And who’s going to suffer? Livestock producers and others along the red meat supply chain.”

Void in data collection

Concerns also arose over categories of cattle and sheep – grainfed animals, grassfed animals, different stages on feed, and the markets for which they were destined.

“The problem is, MLA stopped reporting months ago on some of these categories,” Mr Quilty said.

“For example the Eastern States paddock feeder steer indicator has not been reported since March 19, 2021. Similarly, grainfed cattle indicators for 70 and 100 day cattle ceased on 13 December last year*.” (*editor’s note: Beef Central inquired about some of MLA’s paddock market indicator cancellations when they occurred. We were told it was driven by a lack of cooperation from stakeholder participants in routinely delivering prices, making quotes unreliable).

“MLA has pulled back dramatically on a lot of its price reporting – and most of it is at the quality end of the market,” Mr Quilty said. “How can you determine the value of a high-end grainfed animal, for example, when the data does not exist?”

He said for the purposes of compensation, ‘beef cattle’ were divided into three categories: regular livestock, grainfed, and stud cattle. Sheep also had separate categories.

Non-insured stud cattle (ie breed society registered), would receive a 25pc premium for heifer calves in the event of liquidation and compensation, cows 50pc, bull calves 200pc and bulls at a 400pc premium.

“But for a lot of people, this may still be truly undervalued, even based on pre-FMD pricing, and the same holds for stud sheep,” Mr Quilty said.

Simon Quilty speaks to one of his slides during yesterday’s RMA conference presentation

Stop all sales

“Everything is concerning to me. If I was in a beef or sheep producers’ shoes, under these arrangements, I would want to simply stop all sales everywhere, in the event of an FMD outbreak.

“You may as well stop all livestock sales as soon as FMD hits Australia – that way everyone in the room is guaranteed a pre-FMD livestock price compensation package.”

Mr Quilty said the quality end of the cattle market would hurt the most under an FMD outbreak, and subsequent export market closures.

“Take Wagyu and Angus fed cattle and feeder cattle for example. I think we would be in all sorts of trouble trying to put a value on those animals in the event of a disease incursion. Now is the time to get it right.”

Is the livestock compensation fund a bottomless pit?

Mr Quilty also explored the compensation fund’s (financial) ability to cope with mass liquidation of cattle and sheep in the event of an outbreak.

“Is the compensation fund a bottomless pit?” he asked.

He said under Commonwealth legislation, there was an ‘agreed limit’ on compensation of 2pc of the gross value of production of the industries involved, before both states and federal governments would consider committing any more resources.

ABARES’ recent estimate of Australia’s meat and livestock sectors’ gross production value was A\$36 billion. It means that the agreed limit given to the industry under these terms would be \$700 million.



Over the past 30 years, a sliding scale had been devised by government when estimating the cost of livestock compensation and control costs. This was based on the size of the outbreak and the time period to bring it under control.

Based on this data from AusVetPlan, Mr Quilty provided some estimates, as a guide, of how the disease management costs would be distributed (

“Effectively, anywhere from 9.5pc to 15pc (depending on the duration of the problem) goes towards compensation for cattle losses. The other 85-90pc goes towards disease control measures,” he said.

“You would think it would be the reverse, but it’s not – the cost of control, of setting up zones, disposing of animals and everything else involved in the response, is anywhere from 85pc to 90pc of the total cost.”

Mr Quilty said this meant that there was somewhere between \$66 million and \$105 million to pay for cattle compensation to producers, and for broader disease control costs, around \$595m to \$635m.

Based on a commercial beef animal worth \$2500, that meant there was enough money to provide compensation for only 26,000 to 42,000 head of liquidated cattle.

“To put it into sheep terms, the compensation fund would cover only 373,000 to 600,000 head. But that’s not for both sheep and cattle. It’s one, or the other, in terms of that compensation example.

“That’s it. That’s the number. Remember that in the UK’s FMD episode, they killed seven million head.”

“I think they are sobering numbers. It’s not to say that the money stops there, but it shows us just how much is in the till – and it ain’t much. In reality, at \$700 million (total compensation package), the government would have to coming back and dishing out more money, as need be. So the point of the review is the clear message.”

Domestic market impact

If it took three months to get to ‘stage four’(eg outbreak stabilised and under control) in the AusVetPlan’s post FMD outbreak management plan, it would mean the domestic market would stop for three months, because no animals would be slaughtered, due to the poor policy surrounding compensation.

“That would cause enormous problems, because 50pc of the Australian domestic beef market relies on fresh (chilled) beef trade, not frozen,” Mr Quilty said.

“We could not use the frozen beef that could be in the pipeline, coming back from export customers who had rejected it due to the outbreak, because the industry simply is not geared up to handle it. It creates a big problem – the domestic meat market cannot function, and suddenly the shelves are bare.”

Mr Quilty said as part of his meat trading business, he had spoken to a New Zealand processor this week who had told him he had started to get calls from large Australian red meat end-users over possible supply, in the event of an FMD outbreak in Australia.

“Everyone in the food industry is now getting truly concerned about the wheels of business stopping, because of poor policy,” he said.

“To think that under an FMD detection, we’d have a glut of cattle that can’t go export, and yet we’re going to slow down our domestic market so much that they are already exploring prospects for NZ beef to come in here. Go figure.”

“Are you understanding the magnitude of the problem here?” Mr Quilty asked the audience. “It’s enormous.”

Worth noting, the AusVetPlan is currently undergoing a review ([click here to view earlier story](#)), but until that is completed and activated, these are the circumstances that would apply.

CANADA

Productores solicitan se investigue el Mercado ganadero

12 July 2022

Packers and retailers continue to profit while producers struggle to make ends meet

Saskatchewan Stock Growers Association (SSGA) is calling on the provincial and federal governments to conduct a pricing investigation to address the significant imbalance in cattle and beef pricing markets.

“Though each industry sector has its own frustrations, we agree that price transparency and discovery, packer capacity and pricing spread are our biggest joint concerns,” said SSGA president Garner Deobald.

The severe drought across the Canadian Prairies has greatly impacted the beef industry. Grass continues to be scarce in several regions, and feed grain and forage prices have doubled from two years ago. The situation has caused a wider availability for cattle ready for slaughter with higher placements in feedlots.

According to an SSGA press release, ranchers and feedlots are operating at a loss, forcing many agricultural businesses to make the difficult decision to reduce cattle numbers or even exit the business, which is affecting cattle prices through the supply chain as well as domestic and export beef prices.



"The reduction in herd numbers could result in more grassland being converted to farmland," said Deobald. "Removing the grass cover also eliminates the habitat that species at risk call home and releases carbon sequestered in the soil into the atmosphere as carbon emissions."

"Many producers and feedlots are feeling challenged by increased costs due to inflation, fuel and record-high feed costs," he continued. "Our members are sharing their frustrations with us. There is a disconnect between what producers are receiving for their animals and the high prices consumers are paying for beef products. Producers are feeling exploited."

"Though packer margins have tightened, both packers and retailers are reporting strong profits as consumer demand and willingness to pay higher prices for beef products remains strong," Deobald said. "Producers are tired of working so hard for little or no return on investment."

Though the pandemic imposed restrictions on packers to optimise worker safety through work spacing requirements, packers were running at near capacity within months after lockdown was announced. More recently, packers have stopped running extra shifts because they have eliminated the backlog. However, industry members are questioning packers' strategy, which seems to be limiting the amount of product available at the retail level — keeping boxed beef prices high while allowing fed cattle supplies to build in the countryside, which keeps cattle prices low.

"Limiting supply to drive up prices is changing the face of Canadian agriculture. The packers and retailers know there's no one else to take their place or profits, so they have control right now," Deobald explained.

Beef is considered a protein-rich food staple in many homes. When beef prices rise, many consumers are willing to pay more while some cannot. When food prices for staple items exceeds what consumers are able to pay, producers and consumers are negatively impacted.

"Our goal is to produce safe and nutritious beef for Canadians while maintaining our ranching livelihoods," Deobald affirmed. "If producers continue to operate at a loss, many will go out of business, which could drive Canada to rely on imported meat. We believe a pricing investigation is the best way to ensure all livestock value chain members remain profitable and all Canadian consumers have economic access to our products. We look forward to working with all stakeholders to make this happen."

Canadian Cattlemen's Association lanzó una marca identificatoria

12 July CCA was formerly Canadian Cattlemen's Association

The Canadian Cattle Association (CCA) launched a new brand identity, highlighting the strong and diverse group invested in raising Canadian beef.

Formerly the Canadian Cattlemen's Association, the brand refresh includes a new CCA logo created with inspiration by key elements of importance to the organisation: country, cattle, and the environment.

CCA said the refreshed logo, visual identity and positioning reaffirms its commitment to supporting communities, embracing innovation and contributing to the overall sustainability of Canada's food system.

"For 90 years, CCA has been the voice of beef farmers and ranchers across the country," said Reg Schellenberg, CCA president. "Our organization has grown to include the 60,000 members we represent today. It is important that our name, logo and brand also grow and be reflective of how our organization has evolved."

While Canadians continue to take action on sustainability, CCA builds on generations of industry-wide ecological practices, which include preserving biodiversity, sequestering carbon, restoring Canada's wetlands, upcycling resources, protecting endangered species and providing the majority of wildlife habitat on food-producing lands.

"We will continue to do what we do best – raise world-class beef for Canadians and international consumers," continued Schellenberg. "As an association, we want to further emphasize the importance of cattle to Canada's environment, heritage, food security and economy. Our actions reflect the desire for greater sustainability and improved food production because we want to produce beef that makes every Canadian proud."

EMPRESARIAS

Cadena china de comida rápida lanza hamburguesa vegetal de Beyond Meat

por Javier Lyonnet julio 13, 2022 Beyond Meat anunció una asociación en China con la cadena local Dicos de restaurantes de comida rápida occidental. Lanzaron la hamburguesa de imitación de carne en base a plantas Beyond Burger en algunos locales de la cadena.

Dicos es la competencia local de la cadena estadounidense KFC que ya cuenta con productos de Beyond Meat en su menú. Dicos se ha propuesto alcanzar el mercado de consumidores veganos y vegetarianos, sumando productos de carne sintética como símil pollo desde 2020.



El nuevo acuerdo fue anunciado en momentos en que las acciones de Beyond Meat siguen perdiendo pie en Wall Street, cotizándose actualmente en el entorno de los US\$ 30 cuando en enero de este año estuvo a US\$ 70.

Cui Kaijun, gerente general de Dicos, declaró que el acuerdo con Beyond Meat apunta a “brindar a los consumidores una proteína de origen vegetal de alta calidad y ayudar a que la carne de origen vegetal forme parte de la cultura gastronómica local», dijo Cui.

JBS expande sus operaciones para producir biodiesel

15 de julho de 2022 A JBS Biodiesel está expandindo as suas operações com uma nova fábrica de biodiesel, na cidade de Mafra, em Santa Catarina. Com um investimento de R\$ 180 milhões, a nova planta duplicou a capacidade de produção de biocombustível da companhia, uma unidade da JBS Novos Negócios. O novo investimento reforça o conceito de economia circular da JBS e está em linha com o compromisso de se tornar Net Zero em 2040.

A nova fábrica, a terceira em operação da JBS Biodiesel, tem uma área total de 76 mil metros quadrados e capacidade de produção de aproximadamente 370 milhões de litros por ano. Com a nova fábrica em operação, a capacidade de produção total de biodiesel da JBS saltou de 350 milhões para cerca de 720 milhões de litros por ano, montante que equivale a pouco mais de 10% do volume de 6,76 bilhões litros produzidos do biocombustível em 2021, segundo dados da Agência Nacional de Petróleo, Gás Natural e Biocombustíveis (ANP).

A cidade de Mafra foi escolhida por ter fácil acesso aos modais ferroviários e rodoviários, pela proximidade à Refinaria Presidente Getúlio Vargas (Repar), uma das principais unidades de mistura e distribuição de diesel do País, e acesso rápido ao porto de Paranaguá, no Paraná, terceiro maior do Brasil. A operação da fábrica irá gerar até 400 empregos diretos e indiretos, beneficiando a economia da região oeste catarinense.

Para produzir o biodiesel em Mafra, a JBS Biodiesel vai usar como matérias-primas o óleo de fritura recuperado e o óleo de soja proveniente do esmagamento de grão para a produção de farelo que alimenta aves e suínos. Com isso, a companhia fortalece a diversificação das fontes de matéria-prima, uma vez que, hoje, é a maior produtora mundial verticalizada de biodiesel a partir de sebo bovino.

A escolha da JBS Biodiesel em ampliar a sua presença mercado de biodiesel está em linha com o compromisso Net Zero da JBS, que tem como meta zerar o balanço de emissões relacionadas a sua cadeia de valor até 2040. Além de Mafra, a companhia possui uma unidade de biocombustível em Lins (SP) e outra fábrica em Campo Verde (MT).

Minerva cerró acuerdo de exclusividad con Hilton Food

Fonte: Valor Econômico. 15 de julho de 2022

A Minerva, maior exportadora de carne bovina da América do Sul, fechou um acordo de fornecimento mutuamente exclusivo com a britânica Hilton Food Solutions, trading de proteínas da Hilton Food PLC.

Segundo a nota divulgada pela companhia brasileira, o acordo permitirá ampliar a atuação em food service, indústria de alimentos processados e varejo no Reino Unido.

“É uma grande oportunidade para entender melhor a dinâmica do mercado, o perfil dos clientes locais, e ampliarmos a presença naquele país”, disse Fernando Queiroz, CEO da Minerva Foods, na nota.